

PeopleSoft®

**PeopleSoft Data Transformer for
PeopleSoft Enterprise Financial
Management Solutions, Enterprise
Service Automation, Asset Lifecycle
Management, and Supply Chain
Management 8.9 PeopleBook**

July 2005

PeopleSoft Data Transformer for PeopleSoft Enterprise Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management 8.9 PeopleBook
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About This PeopleBook Preface

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

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 Data Transformer Preface

This preface discusses PeopleSoft Data Transformer.

PeopleSoft Data Transformer

PeopleSoft Data Transformer enables you to extract, transform, and load data from remote or local data sources to a data source of your choice. PeopleSoft Data Transformer handles high volume data transfers and transformation processing and is configured to provide maximum performance between PeopleSoft applications.

Some of the page elements and colors that your product uses may differ slightly from the screen shots presented in this PeopleBook. This book uses a generic style sheet for the purposes of illustration only.

CHAPTER 1

Getting Started with PeopleSoft Data Transformer

This chapter provides an overview of PeopleSoft Data Transformer and discusses:

- PeopleSoft Data Transformer business processes.
- PeopleSoft Data Transformer implementation.

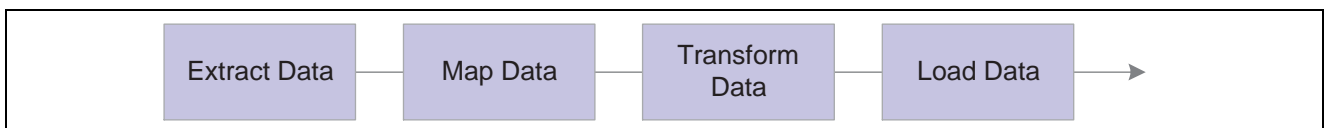
PeopleSoft Data Transformer Overview

PeopleSoft Data Transformer enables organizations to extract, transform, and load data from remote or local data sources to a target data source. Tasks that you perform in PeopleSoft Data Transformer, to prepare the data for transfer, include:

- Setting up default target fields.
- Defining transformation and filtering rules to convert data.
- Creating map rules.
- Creating map definitions.

PeopleSoft Data Transformer Business Processes

The following process flow illustrates the PeopleSoft Data Transformer business processes:



PeopleSoft Data Transformer business process flow

PeopleSoft Data Transformer Implementation

The PeopleSoft Data Transformer implementation can be divided into two phases:

- Setting up core PeopleSoft Data Transformer features.
- Creating source data objects.

Complete these phases to support PeopleSoft Data Transformer features.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of implementation, including the installation guides and business process maps.

Setting Up Core PeopleSoft Data Transformer Features

To set up core PeopleSoft Data Transformer features, perform the following steps:

Step	Reference
1. Define remote database connections.	Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Remote Database Connections, page 3
2. Define installation options.	Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Installation Options, page 6
3. Define subject areas.	Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Subject Areas, page 7

Creating Source Data Objects

To set up source data objects, perform the following steps:

Step	Reference
1. Create basic source data objects.	Chapter 3, “Creating Source Data Objects,” Creating Basic Source Data Objects, page 11
2. (Optional) Create expressions.	Chapter 3, “Creating Source Data Objects,” (Optional) Creating Expressions, page 15
3. (Optional) Create filters.	Chapter 3, “Creating Source Data Objects,” (Optional) Creating Filters, page 22
4. (Optional) Join records.	Chapter 3, “Creating Source Data Objects,” (Optional) Joining Records, page 24

CHAPTER 2

Setting Up Core PeopleSoft Data Transformer Features

This chapter discusses how to:

- Define remote database connections.
- Define installation options.
- Define subject areas.

Note. These activities are typically one-time events and require minimal maintenance.

Defining Remote Database Connections

This section provides an overview of remote database connections and discusses how to define remote database connections.

Understanding Remote Database Connections

Data sources represent the location of the source data that is extracted, transformed, and loaded to the target. Remote data source data is extracted from a separate (remote) database and migrated into the local database. You must define remote database connections to source data from a database other than your local PeopleSoft database instance.

The Remote Database Access Management page enables you to define connectivity information for relational databases to be used for sourcing data for PeopleSoft Data Transformer. You can define connectivity information only for databases of the same type as the Target PeopleSoft database instance. For example, if the PeopleSoft database instance is Oracle, then you can define only Oracle remote connections. Remote database connections are established once for a local connect and once for each database that will be sourced. You must define one local connection for the current PeopleSoft instance. This connection is used during remote database access to retrieve information for the target database.

Note. If you are accessing data from a local database, then you do not need to set up remote database connections.

Page Used to Define Remote Database Connections

Page Name	Object Name	Navigation	Usage
Remote Database Access Management	REMOTEDB	Enterprise Components, Data Transformation, Data Transformation Home, Setup Remote Database Connection, Remote Database Access Management.	Define remote database connections.

Defining Remote Database Connections

Access the Remote Database Access Management page.

Remote Database Access Management

Name: CW881DVL

DB Type: Microsoft **Local Connect?**

***Description:**

***Server:** ***DB Server Port:**

***Database:**

***User ID:** ***Password:**

Remote Database Access Management page

Important! Different fields may appear on the page based on the database DB type. The preceding page shows fields for *Microsoft, DB2 (OS/390), DB2/UNIX, and Sybase.*

This table illustrates the page variance by database type:

Database Type	Required Information
Microsoft, DB2 (OS/390), DB2/UNIX, and Sybase	Enter a description, server, database, userID, and password.

Database Type	Required Information
Informix	Enter a description, server, user ID, password, and Inf Svr (Informix Server) name.
Oracle	<p>For Oracle and a Connection Type of <i>TNSNames</i>, enter a description, TNS Entry, user ID and password.</p> <p>Note. TNS Names is a preconfigured file (tnsnames.ora) with previously defined database connection information.</p> <p>Select a connection type of <i>Specific</i> if you want to set up a database that does not already have a TNS Entry defined, or when you don't want to use the TNS entry.</p>

Name Displays the remote DB name entered on the Search page for your database.

DB Type Displays the database type of your PeopleSoft database.

Note. Since your remote database must be of the same type, this field is defaulted to your current local database type.

Local Connect Select if you are defining the remote connection information for your local database. All others must be specified as remote databases. An error displays if you save a page with a connection checked as a Local Connect and there is already one identified as such (in the PSREMOTEDBDEFN table).

Important! One connection must be defined as the Local Connect, the connection information for the current PeopleSoft instance (the local database). This connection is used during remote database access to retrieve connection information for the source and as the target database for the sourced data.

Server Enter the name of the server where the database resides.

Note. This field is platform specific.

DB Server Port The DB Server Port number is automatically populated with a default value based on the database type. It may need to be changed depending upon your database server configuration.

User ID and Password Enter the user ID and password that are required to access the database. The password is not displayed.

Note. This field is platform specific.

Test Connect Click to access the remote database by using the information that you have entered. This will verify that all of the connection information is correct.

See Also

PeopleSoft Hardware and Software Guide

Defining Installation Options

This section discusses how to define installation options.

Page Used to Define Installation Options

Page Name	Object Name	Navigation	Usage
Data Transformation Installation Options	EOEW_OPTIONS	Enterprise Components, Data Transformation, Data Transformation Home, Data Transformation Installation Options	Define installation options.

Defining Installation Options

Access the Data Transformation Installation Options page.

Data Transformation Installation Options

Data Transformation Defaults

*Maximum Rows To Preview:

*Tablespace Name:

Create Temporary Table Select to dynamically create the temporary table associated with a map definition. Unselect to specify the table manually.

*Message Set Number: The Message Set default can be used for Transformations.

Go To: [Data Transformation Home](#)

Data Transformation Installation Options page

System administrators may use PeopleSoft Data Transformers' installation options to set certain high-level Data Transformer defaults such as the maximum number of rows to return on a preview of sourced or transformed data, a table space name to be used to dynamically build temporary tables, and the default message set number assignment for transformation error correction.

Maximum Rows to Preview Enter the maximum number of rows of sourced or transformed data to preview. Keep this value relatively low, for example 100 rows, as larger values significantly increase the amount of time it takes to retrieve data and render the preview pages.

Tablespace Name	Enter the tablespace name for the temporary table that is built dynamically at runtime. This tablespace name is applied to all of the temporary tables unless overridden at a lower level.
	<hr/> Note. This name can be overridden at the subject area and map option levels. <hr/>
Create Temporary Table	Select to create temporary tables dynamically. A temporary table is created at runtime—it's needed by the engine during processing only, then it's deleted at completion. It is not available in PeopleSoft metadata. If the checkbox is cleared, you must specify a temporary table record name on the map for use at runtime. This temporary table will be available in PeopleSoft metadata and remain after the engine processing.
	<hr/> Note. Determining which of these options to use needs to be considered carefully. A dynamic temporary table will automatically change when the map changes, conversely, a non-dynamic temporary table will not change and may require more maintenance. <hr/>
Message Set Number	Select a message set number that corresponds to a text error message set. When adding a new transformation and associating a specific error message with an error, this default message set number is used as a starting point.

See Also

[Chapter 5, “Creating Maps,” Previewing Map Results, page 47](#)

[Chapter 5, “Creating Maps,” Updating Map Processing Options, page 48](#)

[Chapter 4, “Preparing to Create Maps,” Creating Message Definitions, page 35](#)

Defining Subject Areas

This section provides an overview of subject areas and discusses how to define subject areas.

Understanding Subject Areas

Use subject areas as a grouping mechanism on translation sets, transformations, map rules and map definitions. These objects can only be shared within a subject area. An enterprise subject area can be used for objects that are to be shared by all subject areas.

You need to carefully plan subject areas when you implement PeopleSoft Data Transformer. For example, you need to consider how the Data Transformer objects (translation sets, transformations, map rules, map definitions, and so on) can be grouped most efficiently. Some objects need to be available to all users, while some only to a specific user or functional group.

Note. Subject areas affect only prompting and object selection and do not reflect object security.

You can set up default tablespaces, or you can dynamically create temporary tables by subject area. If an implementation requires that only groups of maps dynamically generate temporary tables, or are built within different tablespaces, you can specify this at the subject area level.

See Also

Chapter 4, “Preparing to Create Maps,” page 25

Page Used to Define Subject Areas

Page Name	Object Name	Navigation	Usage
Subject Areas	EOEW_OBJ_OWNER	Enterprise Components, Data Transformation, Data Transformation Home, Setup Subject Areas	Define subject areas to group translation sets, transformations, map rules, and map definitions.

Defining Subject Areas

Access the Subject Areas page.

Subject Areas

Subject Area is used as a grouping mechanism on translation sets, transformations, map rules and map definitions.

Subject Area: CEW CM

***Description:** **Default Subject Area**

***More Information:**

Tablespace Name:

Create Temporary Table

Select to dynamically create the temporary table associated with a map definition. Unselect to specify the table manually.

Go To: [Data Transformation Home](#)

Subject Areas page

Default Subject Area

Select to use this subject area as your default subject area.

Note. Only one subject area can be selected as the default, which becomes available to all users—it is your enterprise subject area.

Tablespace Name

Select the tablespace name to use if you want to override the Data Transformation installation options selection for this subject area.

Note. This is needed only when an implementation shares dynamically generated temporary tables over multiple tablespaces.

For example, the CEW EO temporary tables may be assigned to a special tablespace because the table size in this area is expected to be larger than other tables. For that subject area, an override tablespace name would be entered. The CEW CM subject area contains unique tables that also need special segmentation. For that subject area, an override tablespace name would be entered. All other subject areas would have a blank tablespace name therefore defaulting to the Data Transformation installation options tablespace name.

Create Temporary Table

Select if you want to override the Data Transformation installation options selection for this subject area.

This is needed only when an implementation allows or disallows the dynamic temporary table creation per subject area.

CHAPTER 3

Creating Source Data Objects

This chapter provides an overview of source data objects and discusses how to:

- Create basic source data objects.
- Create expressions.
- Create filters.
- Join records.

Understanding Source Data Objects

A source data object is the input to every map definition and defines the data to be extracted from the source. The business requirement of the map definition dictates the appropriate structure of the source data object, which can be as basic as requiring only an object definition and the fields to be used in the extract SQL specified, or quite complex containing expressions, multiple table joins, and filtering criteria.

Common Elements Used to Create Source Data Objects

Data Source

One or more record definitions joined by common fields.

Source Data Object

Enter a unique value of up to 30 characters, with no spaces or special characters. The system automatically converts the value to uppercase.

This value, along with the description from the definition page, appears at the top of each page of the Source Data Object component.

Creating Basic Source Data Objects

This section discusses how to:

- Define source data objects.
- Specify source data object fields.
- Preview results.
- Preview SQL.

Note. All remote source databases must be of the same database type as the local PeopleSoft database instance. For example, if your PeopleSoft application is running on DB2/UNIX then you may only define DB2/UNIX source databases.

Pages Used to Create Basic Source Data Objects

Page Name	Object Name	Navigation	Usage
Source Data Object	EOEW_SRCDO	Enterprise Components, Data Transformation, Data Transformation Home, Define Source Data Objects, Source Data Object	Create source data object definitions.
Fields	EOEW_SRCFIELD	Enterprise Components, Data Transformation, Data Transformation Home, Define Source Data Objects, Source Data Object, Fields	Specify the fields to include in the source data object.
Preview	EOEW_SRCPREVIEW	Enterprise Components, Data Transformation, Data Transformation Home, Define Source Data Objects, Source Data Object, Preview	Review the results and check the validity of the source data object.
View Query	EOEW_SRCQUERY	Enterprise Components, Data Transformation, Data Transformation Home, Define Source Data Objects, Source Data Object, View Query	Generate and view the SQL based on the source data object definition.

Defining Source Data Objects

Access the Source Data Object page.

Source Data Object

Source Data Object: 1004TRAIN SDO *Subject Area: CM

*Description: 1004TRAIN SDO

Data Source

Data Source Type: Local

Source Record Find | View All First 1 of 1 Last

EOCM_TMP0000102	1004TRAIN	+ -
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Go To: [Data Transformation Home](#)

Source Data Object page

Subject Area

Select a subject area.

For new source data objects, the subject area will be set to the default as defined on the Subject Area page.

Data Source Type

Local: Select to use PeopleSoft-defined records from the current database.

Remote: Select to access the remote database connection information and use records from a remote database. Select the desired data source for remote.

Note. The Data Source Type can only be selected in Add mode. If you want to change this value, you will need to create a new Source Data Object.

Source Record

Select the source records from which to extract data. This record is placed in the From clause in the extract SQL.

If multiple records are selected, join conditions are required.

Note. To change a record that is associated with a source data object, you must delete the existing record and then add the new record.

Save As

Click to save an existing source data object under a new name.

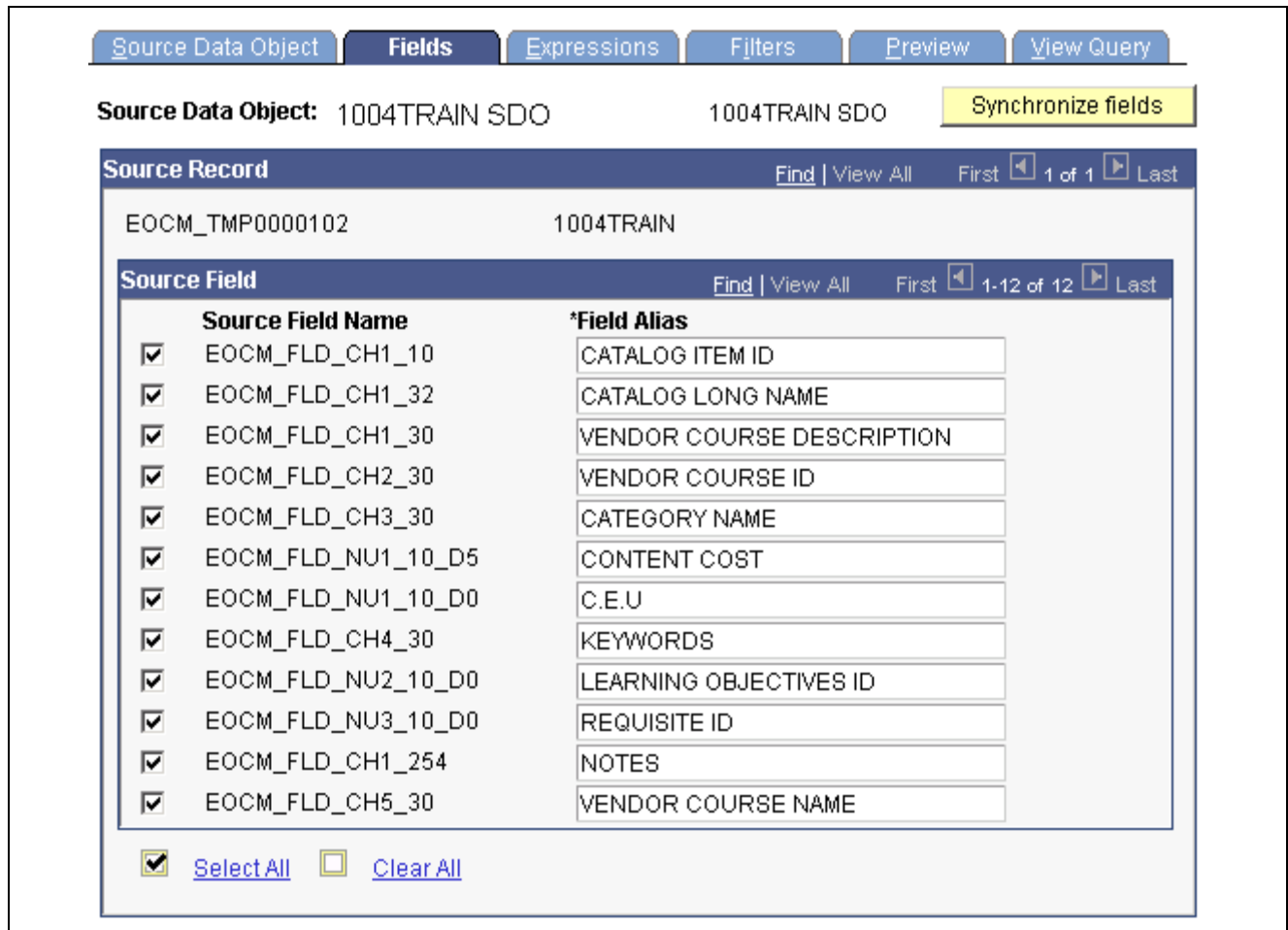
Use this function to create a new source data object that will only slightly differ from the original object. Once saved, you can make the necessary changes to the new object. The new object is maintained separately.

See Also

[Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Subject Areas, page 7](#)

Specifying Source Data Object Fields

Access the Fields page.



Fields page

The source field information is populated from the source records that you selected on the Source Data Object page. The selected fields become the select list in the extract SQL.

Source Field Name

Select the fields to include in the source data object.

Note. At least one field must be selected. Use the Select All and Deselect all icons to make the field selection more efficient.

Field Alias

Change the field alias of any of the selected field names, if needed.

The field alias is displayed when defining the map, so descriptive names are important.

Note. All fields in the source data object must have an alias, and each alias must be unique within the source data object.

Synchronize Fields

Click to synchronize fields with the database record. It is possible over the life span of a source data object that customizations are made. If a field is added or removed from the physical table, the field list must be synchronized.

Select All Click to select all of the fields that are listed.

Clear All Click to clear all field selections.

See Also

[Chapter 5, “Creating Maps,” Creating Map Definitions, page 41](#)

Previewing Results

Access the Preview page.

Click the Preview button to view a subset of the source data object based on the record and fields that are selected.

Use this feature to check the validity of the defined source data object. It is especially helpful in determining if your expressions are defined correctly.

Note. Attempting to preview complex data sources can quickly consume processing and memory resources on your application server.

The preview maximum row count is set using the Data Transformer Installation Options page. Large row counts take more time and resources to preview. Consider setting your preview row count relatively low.

If no data is returned, verify the SQL that it being used to extract the data is accurate.

See Also

[Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Installation Options, page 6](#)

Previewing SQL

Access the View Query page.

Click the Generate SQL button to generate SQL text in the Query text box.

Use this to preview the SQL generated by the defined source data object.

Note. The enterprise administrator can verify if the extract SQL is correct and adjust the source data object definition as necessary.

(Optional) Creating Expressions

This section provides an overview of expressions and discusses how to create expression statements.

Understanding Expressions

Expressions enable you to create virtual columns that are made up of mathematical calculations based on actual fields in a record. Expressions are resolved at runtime so that duplicate information is not stored in the database. Expressions can be numeric, string, date, time, or datetime. Numeric expressions can combine any number of fields, constant values, and math operators, and results are rounded based on the decimal position that is selected. String expressions can be concatenations of any number of character fields and constant values.

Built-in Functions

PeopleSoft delivers built-in functions that you can use to make expressions powerful and flexible. You can also nest built-in functions and expressions; for example:

- Concatenate two fields, separate them with a comma, drop trailing blanks, and limit this field to 40 characters:
`Substring(RTRIM(FirstName) | , | RTRIM(LastName),1,40)`
- Sum the multiplication of two fields:
`SUM(PROD_COST * PROD_RATE)`

This table lists all of the delivered built-in functions with supported meta-SQL and aggregate functions:

Function	Explanation	Use
ABS(Number)	Returns the absolute value of the specified number.	ABS(-5) returns 5.
AddMonth(Date, Number)	Adds a number of months to the specified date and returns the calculated date.	AddMonth("2002-01-10",2) returns 2002-03-10.
Average (Number)	Returns the average value of the specified number (typically a numeric column name).	Average(PRICE) returns the average price of your source data set.
Beginning of Month (Date)	Returns a date representing the first day of the month for the specified date.	Beginning of Month("2002-10-05") returns 2002-10-01.
Beginning of Year (Date)	Returns a date representing the first day of the year for the specified date.	Beginning of Month("2002-10-05") returns 2002-01-01.
Count (col)	Returns the number of rows that are found.	Count(PRODUCT_ID) returns the number of rows on your source data set.
DateAdd(Date, Days)	Adds a number of days to the specified date and returns the calculated date.	DateAdd("2002-02-02",5) returns 2002-02-07.
DateDiff(Date, Date)	Returns the number of days that have elapsed between the first and second specified dates.	DateDiff ("2002-02-02","2002-02-10") returns 8.
DtTmDiff(Datetime,Datetime)	Returns the number of minutes that have elapsed between the first and second specified datetimes.	DtTmDiff("2002-01-01 00:00:00.000","2002-01-01 10:00:00.000") returns 600 (10 hours in minutes).

Function	Explanation	Use
DIFF_H(Datetime, Datetime)	Returns the number of hours that have elapsed between the first and second specified datetimes.	DIFF_H(“”2002-01-01 00:00:00.000”,”2002-01-01 10:00:00.000”) returns 10.
DIFF_S(Datetime, Datetime)	Returns the number of seconds that have elapsed between the first and second specified datetimes.	DIFF_S(“”2002-01-01 00:00:00.000”,”2002-01-01 10:00:00.000”) returns 36000 (10 hours in seconds).
End of Month (Date)	Returns a date representing the last day of the month for the specified date.	End of Month(“2002-10-05”) returns 2002-10-31.
End of Year (Date)	Returns a date representing the last day of the year for the specified date.	End of Year(“2002-10-05”) returns 2002-12-31.
GetDay(Date)	Returns the day of the month for the specified date.	GetDay(“2002-10-05”) returns 5.
GetMonth(Date)	Returns the month of the specified date.	GetMonth(“2002-10-05”) returns 10.
GetYear(Date)	Returns the year of the specified date.	GetYear(“2002-10-05”) returns 2002.
MOD(Number, Number)	Returns the modulus (or remainder) of the first number when it is divided by the second number.	MOD(14,3) returns 2 (14 divides into 3 four times with a remainder of 2).
Max (Number)	Returns the maximum value of the specified number (typically a numeric column name).	Max(PRICE) returns the largest price of your source data set.
Min (Number)	Returns the minimum value of the specified number (typically a numeric column name).	Min(PRICE) returns the smallest price of your source data set.
Sum (Number)	Returns the sum of the specified number (typically a numeric column name).	Sum(PRICE) returns the sum of all prices of your source data set.

Function	Explanation	Use
RTRIM(String)	Returns the specified string, and trims trailing blank characters.	RTRIM("Hello ") returns Hello.
Round (Number, Factor)	Returns a number representing the specified number after being rounded to the given factor or precision.	Round(5.582, 1) returns 5.6 Round(5.512, 0) returns 6
Substring(String, StartPos, Length)	Returns a section of the specified string starting at the specified position and continuing for the specified length.	Substring("My String Expression", 4,6) returns String.
TO_CHAR(Number)	Returns a string representation of the specified numeric expression.	TO_CHAR(59) returns 59.
TO_NUM(String)	Returns a numeric representation of the specified string expression.	TO_NUM("59") returns 59. Note. Trying to apply a TO_NUM built-in function on a character that does not translate to a numeric value aborts the processing of your map.
TrimSubStr (String, Start, Length)	Returns a section of the specified string starting at the specified position and continuing for the specified length, and trims trailing blank characters.	Substring("My String Expression", 4,7) returns String.
Truncate(Number, Factor)	Returns a number representing the specified number after being truncated to the given factor or precision.	Truncate(5.582, 1) returns 5.5. Truncate(5.512, 0) returns 5.
UPPER(String)	Returns the specified string in uppercase characters.	UPPER("My String Expression", 4,7) returns MY STRING EXPRESSION.
YYMMDD(Date)	Returns the string representation of a specified date in YYMMDD format.	YYMMDD("2002-10-01") returns 021001.

Page Used to Create Expressions

Page Name	Object Name	Navigation	Usage
Expressions	EOEW_SRCFIELDEXPR	Enterprise Components, Data Transformation, Data Transformation Home, Define Source Data Objects, Source Data Object, Expressions	Create expression statements by selecting operators, fields, and constant values.

Creating Expression Statements

Access the Expressions page.

Source Data Object: 1004TRAIN SDO 1004TRAIN SDO

Expression Definition Find | View All First 1 of 1 Last

*Name: FULL NAME

Details

*Description: Name *Expression Field Type: Char Length: 240

Expression Statement: SUBSTRING (RTRIM (FIRST_NAME) | , | RTRIM (LAST_NAME) 1 , 40) Clear

Operators: () * / + - |

Data Source: Data Object Column Built-In Function Constant Value

Constant Value: Date Value Numeric Value Character Value 40

Current Element: << < End of Expression > >> Replace Insert Delete

Go To: [Data Transformation Home](#)

Expressions page

- Name** Enter a unique name for this expression.
- Expression Field Type** Select to control the set of operators, record fields, and value objects that can be selected when building the expression.
 - Numeric:* Select to combine any number of record fields, value objects, and math operators.
 - String:* Select to concatenate any number of character record fields and value objects.
 - Date:* Select to define a constant value or to create a date field from the source data object or built-in functions.

Expression Statement

Displays your expression as you build it. You cannot type directly into this edit box. Use operators, data source options, and the constant values to create your expressions.

You can see what element is being specified by the arrows surrounding it; the selection is also displayed in the Current Element group box.

Clear

Click to delete all entries in the Expression Statement edit box.

Operators

Select from the operator buttons to add operators to the expression.

Data Source

Data Object Column

Select this option to display a list of data object fields. Select a field and click Insert to have the selected data object appear in the expression statement.

Built-in Function

Select this option to display a list of built-in functions. Select a function and click Insert to have the selected built-in function appear in the expression statement.

Built-in functions let you define numeric calculations like Sum, Average, or End of Month, and Minimum/Maximum values.

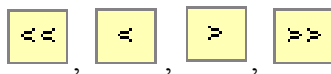
Note. All parameters of the selected built-in function must be defined.

Constant Value

Select this option to enter your own character, numeric, or date value. Click Insert to have the value appear in the expression statement.

Note. Consider how an expression will be used when you want to specify date related value objects. If the expression will be in a WHERE clause, then use the %CurrentDateIn value object. If the expression will be in a SELECT clause, then use the %CurrentDateOut value object.

Current Element



Click to move through the expression statement and identify the text you want to replace or delete or to move to the position in the statement where you want to insert text.

Click the Previous or Next button to move one element forward or backward. Click the First or Last button to move to the beginning or end of the expression statement.

Note. The element name will be shown in the Current Element group box as well as surrounded by arrows in the Expression Statement edit box.

Replace

Click to replace the current element item in the expression statement with the selected data source.

Insert

Click to insert the selected data source into the expression statement before the current element item.

Delete

Click to delete the current element item in the expression statement.

Example: Creating Expressions by Using Data Object Column

This section provides an example of creating an expression by using a data object column.

The company wants to award its employees with a bonus of \$1000 for each year that they have been employed by the company. To calculate the bonus:

1. Enter *BONUS* for the expression name, and then enter a description.
2. Select the *Number* expression type.
3. Select integer and decimal positions.
4. Select Data Object Column in the Data Source group box.
5. Select the *YEARS_OF_EMP* data object column, and click Insert.

The field appears in the Expression Statement edit box.

6. Click the Multiplication (*) operator to insert it at the end of the expression statement.
7. Select Constant Value in the Data Source group box.
8. Enter a numeric value of *1000*, and click Insert.

This creates the following expression statement:

```
YEARS_OF_EMP * 1000
```

9. Click Save.

Example: Creating Expressions Using Built-in Functions

This section provides an example of creating an expression by using a built-in function.

You want to define a field called *SHORT_DESCR* that uses the first 10 characters of the *DESCR* field.

To define the *SHORT_DESCR* field:

1. Enter *SHORT_DESCR* for the expression name, and then enter a description.
2. Select the *Char* expression type.
3. Enter the length.
4. Select Built-in Function in the Data Source group box.
5. Select the *Substring (String,Start,Length)* built-in function, and click Insert.

The function appears as *SUBSTRING (PARAM1 , PARAM2 , PARAM3)* in the Expression Statement edit box.

6. Use the arrow buttons to navigate through the expression statement and identify the *PARAM1* element.
7. Select Data Object Column in the Data Source group box.
8. Select *DESCR*, and click Replace.

The *DESCR* field appears in place of *PARAM1* in the expression statement.

9. Navigate to *PARAM2*.
10. Select Constant Value in the Data Source group box, and enter a numeric value of *1*.
11. Click Replace.
12. Navigate to *PARAM3*, and replace it with a numeric value of *10*.

This creates the following expression statement:

SUBSTRING (DESCR , 1 , 10)

13. Click Save.

(Optional) Creating Filters

This section provides an overview of filters and discusses how to create filters.

Understanding Filters

Filters serves as criteria that the system applies to each row of data in the data source. If the row passes the criteria, the system uses the data as an input to the data transformer map; if the row doesn't pass, the system doesn't use the data. A filter compares the value in one of the row's fields to a reference value. For example, suppose that you need only products whose selling price is greater than \$10.00. You would compare the value in the Price field to the constant value of \$10.00. The filter criteria is placed in the WHERE clause in the extract SQL.

The following table describes the operators that you can use to compare values:

Operator	Description
Like	<p>The value in the selected field matches a specified string pattern. The comparison value may be a string that contains wild card characters. The wild card characters that PeopleSoft Data Transformer recognizes are percent (%) and underscore (_).</p> <p>The % matches any string of zero or more characters. For example, <i>C%</i> matches any string starting with <i>C</i>, including <i>C</i> alone.</p> <p>The _ matches any single character. For example, <i>_ones</i> matches any 5-character string ending with <i>ones</i>, such as <i>Jones</i> or <i>bones</i>.</p> <p>Note. To use one of the wild card characters as a literal character, (that is, to include % in your string), precede the character with a backslash (\). For example, <i>percent\%</i>.</p>
=	The value in the selected record field exactly matches the comparison value.
<>	The value in the selected record field is not equal to the comparison value.
>	The value in the record field is greater than the comparison value.
<=	The value in the record field is less than or equal to the comparison value.

Operator	Description
<	The value in the record field is less than the comparison value.
>=	The value in the record field is greater than or equal to the comparison value.

When you include multiple filters, link them using AND or OR. When you link two filters with AND, a row must meet the first *and* second filter to pass the test. When you link with OR, a row must meet the first *or* second filter, but not necessarily both.

Page Used to Create Filters

Page Name	Object Name	Navigation	Usage
Filters	EOEW_SRCFILTER	Enterprise Components, Data Transformation, Data Transformation Home, Define Source Data Objects, Source Data Object, Filters	Create filters.

Creating Filters

Access the Filters page.

Filters page

To define a filter:

1. Select the record that you want to filter against from the list of records that are defined in the source data object.
2. Select the field on which to base your filter.
3. Select an operator.
4. Enter a comparison value.
5. Click Save.
6. Click Refresh Filter to save any changes that you made to existing filters and reflect those changes in the source data object. Refresh Filter also captures changes made for Save and updates dropdown lists to show your selections on the page.

Note. If the filter begins to get complicated, use the arrow keys to indent subconditions. Subconditions will be surrounded by parentheses and fully resolved before comparing results with other level results.

(Optional) Joining Records

This section provides an overview of joins and discusses how to define join conditions.

Understanding Joins

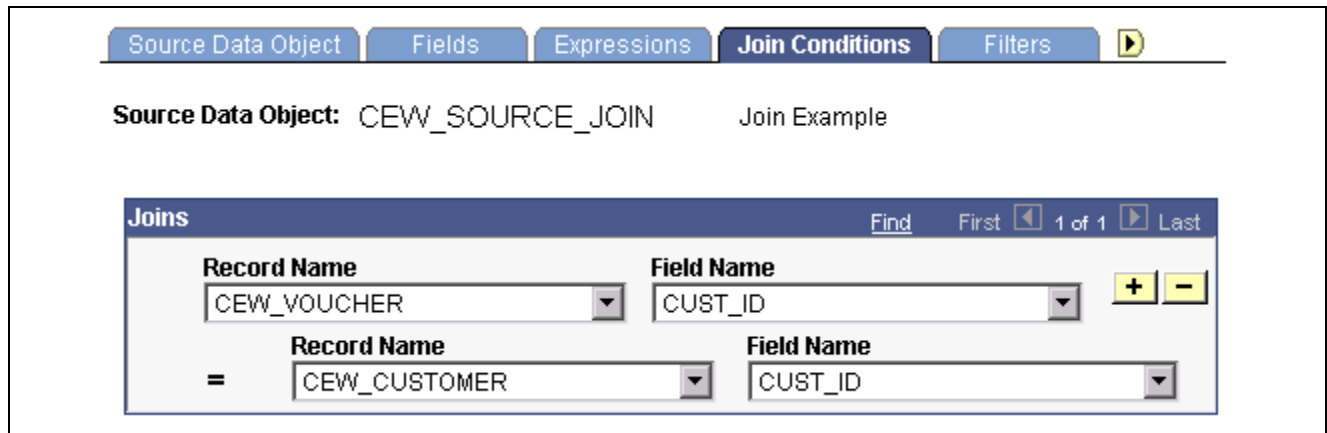
PeopleSoft Data Transformer enables you to create source data objects that include multiple-table joins. Joins retrieve data from more than one table, presenting the data as if it came from one table. PeopleSoft Data Transformer links the tables, based on common record fields, and links the rows on the two tables by common values in the shared record fields.

Page Used to Join Records

Page Name	Object Name	Navigation	Usage
Join Conditions	EOEW_SRCJOIN	Enterprise Components, Data Transformation, Data Transformation Home, Define Source Data Objects, Source Data Object, Join Conditions	Define join conditions.

Defining Join Conditions

Access the Join Conditions page.



Join Conditions page

Note. This page appears only when two or more records are defined in the source data object.

Enter the record name and associated field name for the left and right sides of the join.

The content of the field name dropdown list box is filtered to exclude some fields with data types that cannot be qualified (for example, image columns). You need to fully qualify the join criteria of the selected records; otherwise, processing may return unexpected results. The join criteria will become part of the WHERE clause in the extract SQL.

CHAPTER 4

Preparing to Create Maps

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

- Set up target field default values.
- Set up translation sets.
- Create transformations by using the Transformation Wizard.
- Use transformation PeopleCode.
- Create map rules.

Understanding the Mapping Process

Mapping translates values from the source data to the format of the target source by using default target values, transformations, translation sets, and map rules to facilitate the process.

This section discusses:

- Target field default value setup.
- Translation set setup.
- Transformation creation.
- Map rule setup.

Target Field Default Value Setup

Target field default values allow you to set up values, which can be reused across multiple maps, to map to the target field. This allows having a central location for updating a target field value. For example, the target field default value for EFF_STATUS is set to *A*, and is used in 100 maps. At runtime, *A* is inserted into the target field for all those maps. If the value for EFF_STATUS is changed to *Active*, the value is updated once and when the 100 maps are run again, the new value will be inserted into the target field. No changes are necessary at the map level.

A default with no value is initialized to a blank, a zero, or the appropriate PeopleSoft null value.

When setting default values, consider the target field data type format:

- Character fields are used for names, codes, and letter values.
Uppercase converts the field value to uppercase and signifies that no other formatting options apply to the field. Mixed case stores uppercase and lowercase characters as entered.
- Number fields and signed number fields are fixed in field length and allow the entry of positive numbers.
Only signed numbers allow the entry of negative numbers.

- Date fields contain calendar dates.

A date field has a field length of 10 characters and is maintained by the system.

The default format of a date field is defined by the database and can be overridden by your browser settings.

The following table discusses data type format considerations:

Source Field	Target Field	Required Considerations	User Warning
Date	Date		
Date	DateTime		
Char	Char	Truncation occurs as needed.	
Char	Number	Data must be numeric in the character source field.	Appears when the character field is greater than the number in bytes.
Number	Number		Appears when the numeric field is smaller in integer positions, decimals, or if the source is signed and the target is not.
Number	Char	Character must be big enough.	
DateTime	Date		
DateTime	DateTime		
Time	Time		
Long	Long		

Note. The default value assigned must match the target field format or an error occurs at runtime. For example, you cannot assign a value of *7A* to a numeric field. Specific error messages display during the save if a datatype conversion error occurs.

Translation Set Setup

Use translation sets to define equivalent values or a code set for data conversion. For example: *EA* equals *Each*, *GAL* equals *Gallon*, and *IN* equals *Inch*. Translation sets make the data values consistent.

Transformation Creation

When data is copied from the source to the target, the data can be transformed by using edits, look ups, or PeopleCode. Transformations enable you to change a column's value. The Transformation Wizard guides you through the process of creating transformations.

Map Rule Setup

You can create rules to be used by the AutoMapper feature in the map field detail definition where it attempts to match source fields with target fields. Use rules to assign correct default values to target fields when creating maps. By using map rules, you can assign a literal default, transformation, source field, or a translation set to a target field. If the map rule is required, you cannot override the rule when you define map field details.

See Also

[Chapter 5, "Creating Maps," Defining Map Field Details, page 44](#)

Setting Up Target Field Default Values

This section discusses how to set up target field default values.

Page Used to Set Up Target Field Default Values

Page Name	Object Name	Navigation	Usage
Set Target Field Defaults	EOEW_SET_DFLT_RUL	<ul style="list-style-type: none"> Enterprise Components, Data Transformation, Data Transformation Home, Setup Target Field Defaults, Set Target Field Defaults Enterprise Components, Data Transformation, Data Transformation Home, Define Maps, Map Field Detail <p>Click the Default link on the Map Field Detail page.</p>	Set target field default values that are used in the map field detail definition.

Setting Up Target Field Default Values

Access the Set Target Field Defaults page.

Set Target Field Defaults

Enter target field default value used in the Data Transformer map field detail definition. AutoMapper will populate the map field details with the field value based on the target field. If the default value is required, you will be unable to override the field value at the map level. A default with no value will be initialized to a blank, zero or the appropriate PeopleSoft null value.

Set Target Field Default Values				Customize Find View All		First	1-9 of 9	Last
	*Target Field	Source Input Value	Allow Map Override					
1	ACCOUNT	12345	<input checked="" type="checkbox"/>					
2	ACCOUNTING_OWNER	Joe Jones	<input checked="" type="checkbox"/>					
3	ACCOUNTING_PERIOD	00	<input type="checkbox"/>					
4	BUSINESS_UNIT	CORP1	<input type="checkbox"/>					
5	DEFAULT_LOC	HQ	<input type="checkbox"/>					
6	EFFDT	%CURRENTDATEIN	<input type="checkbox"/>					
7	EFF_STATUS	A	<input type="checkbox"/>					
8	ERROR_FLAG	N	<input type="checkbox"/>					
9	SETID	SHARE	<input type="checkbox"/>					

Set Target Field Default page

- Target Field** Select the target field for which you want to define defaults.
- Source Input Value** Enter the default value for the associated target field.

Note. This field is free text, so you must consider the target field data type format.
- Allow Map Override** Select to allow the field value to be overridden at the map level, otherwise the row will be protected.

Setting Up Translation Sets

This section discusses how to set up translation sets.

Page Used to Set Up Translation Sets

Page Name	Object Name	Navigation	Usage
Translation Sets	EOEW_CODE_TBL	<ul style="list-style-type: none"> • Enterprise Components, Data Transformation, Data Transformation Home, Setup Translation Set, Translation Sets • Enterprise Components, Data Transformation, Data Transformation Home, Define Maps, Map Field Detail. Click the Translation link on the Map Field Detail page. • Enterprise Components, Data Transformation, Data Transformation Home, Define Maps, Map Field Detail. Click the Add link on the Map Field Detail page. 	Enter translation set values for map definition details.

Setting Up Translation Sets

Access the Translation Sets page.

Translation Sets

Enter translation set values for map definition details, used as equivalent values for data transformation.

Translation Set: GENDER_CODES ***Subject Area:**

***Description:**

***Undefined Value Options:** ▼

Translation Set Values		Customize Find View All			First	1-6 of 6	Last
	*From Value	*To Value	More Information				
1	<input type="text" value="Boy"/>	<input type="text" value="Male"/>	<input type="text"/>	+	-		
2	<input type="text" value="F"/>	<input type="text" value="Female"/>	<input type="text"/>	+	-		
3	<input type="text" value="Girl"/>	<input type="text" value="Female"/>	<input type="text"/>	+	-		
4	<input type="text" value="M"/>	<input type="text" value="Male"/>	<input type="text"/>	+	-		
5	<input type="text" value="Man"/>	<input type="text" value="Male"/>	<input type="text"/>	+	-		
6	<input type="text" value="Woman"/>	<input type="text" value="Female"/>	<input type="text"/>	+	-		

Go To: [Data Transformation Home](#)

Translation Set page

Subject Area

Select a subject area.

For new translation sets, the subject area will be set to the default as defined on the Subject Area page.

Undefined Value Options

Select how to handle undefined values:

- *Default for undefined values:* Rows that contain undefined source values have the defined default value inserted into the target field and then loaded in the target.
- *Do not load undefined values:* Rows that contain undefined source values will not be loaded into the target. Error handling options determine actions on these invalid rows.
- *Retain undefined data values:* Rows that contain undefined source values are retained and loaded in the target.

Translation Set Values

Enter the from and to values for each value that you want translated. If needed, enter the rationale for your selections in the More Information field.

See Also

[Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Subject Areas, page 7](#)

Creating Transformations by Using the Transformation Wizard

This section provides an overview of the Transformation Wizard, lists common elements, and discuss how to:

- Create transformation definitions.
- Define edit, look ups or PeopleCode transformations.
- Create message definitions.
- (Optional) Set up source conditions.
- (Optional) Define look up conditions.

Understanding the Transformation Wizard

Transformations are created differently based on the transformation type that you select on the definition page. The Transformation Wizard is a tool that guides you step-by-step through the process of creating transformations based on transformation type. The wizard enables you to navigate back and forth through only those pages that are necessary to create the transformation type that you select.

Note. Transformations occur after data has been extracted from your source.

The Transformation Wizard is comprised of up to six steps. The following table lists the steps that are necessary to complete look up, edit, and PeopleCode transformations:

	Look Up	Edit	PeopleCode
Create a transformation definition.	Yes	Yes	Yes
Define look ups.	Yes	No	No
Create a message definition.	Yes	Yes	No
Enter comments.	Yes	Yes	Yes
(Optional) Set up source conditions.	Yes	Yes	No
(Optional) Define look up conditions.	Yes	No	No

Common Element Used in This Section



The Transformation Wizard navigation tool displays the number of pages that are necessary to create the transformation, and it highlights the current page.

Click a page number to navigate to that page or click the Next and Previous buttons to navigate between pages.

Pages Used to Navigate Transformation Wizard

Page Name	Object Name	Navigation	Usage
Transformation Wizard - Transformation Definition	EOEW_TRN_DFN_INFO	Enterprise Components, Data Transformation, Data Transformation Home, Define Transformation Definition	Enter transformation definition information
Transformation Wizard - Look Up	EOEW_TRN_DFN_LU	<ul style="list-style-type: none"> Click the Next button on the Transformation Wizard - Transformation Definition page. Click the Transformation Wizard - Look Up page number on the Transformation Wizard navigation tool. 	Enter a join condition to establish a relationship between this transformation and the look up definition.
Transformation Wizard - Edit	EOEW_TRN_DFN_EDIT	<ul style="list-style-type: none"> Click the Next button on the Transformation Wizard - Look Up page. Click the Transformation Wizard - Edit page number on the Transformation Wizard navigation tool. 	Select the message definition to use for edit processing.
Transformation Wizard - Comments	EOEW_TRN_DFN_COM	<ul style="list-style-type: none"> Click the Next button on the Transformation Wizard - Edit page. Click the Transformation Wizard - Comments page number on the Transformation Wizard navigation tool. 	Enter addition information about this transformation.
Transformation Wizard - Source Condition	EOEW_TRN_DFN_SRC	<ul style="list-style-type: none"> Click the Next button on the Transformation Wizard - Comments page. Click the Transformation Wizard - Source Condition page number on the Transformation Wizard navigation tool. 	Define the source input values for this transformation condition.
Transformation Wizard - Lookup Condition	EOEW_TRN_DFN_LUC	<ul style="list-style-type: none"> Click the Next button on the Transformation Wizard - Source Condition page. Click the Transformation Wizard - Lookup Condition page number on the Transformation Wizard navigation tool. 	Enter look up transformation definition properties.

Creating Transformation Definitions

Access the Transformation Wizard - Transformation Definition page.

Transformation Wizard 1 2 3 4 5 6 <<Previous Next>>

Transformation Definition

Enter transformation definition information regarding description or purpose of transformation, subject area and transformation type.

Transformation Object:

***Description:**

***Subject Area:**

***Transformation Type:**

Go To: [Data Transformation Home](#)

Transformation Wizard - Transformation Definition page

Transformation Object

Enter a unique object name for the transformation. The system automatically converts the input to uppercase.

For transformation type of PeopleCode, the name of the transformation object is used to reference the proper method in the PeopleCode transformation class. If the transformation object name does not contain a period (.) in its name, the corresponding method must be in the default class called EOEW_ETL_PUB:PeopleCodeTransformation.

To call a class in a proprietary package, use the name of the method in addition to the name of the package and class. For example, if you have created a package called MY_APP_PKG, with a class called MYPC and a method called SET_UNIT_PRICE, the transformation object name is specified as MY_APP_PKG:MYPC.SET_UNIT_PRICE.

Note. For PeopleCode transformations, the transformation object name must match the name of the Application Class method.

For any custom built PeopleCode transformations, use your own Application package and class name. By not putting the PeopleCode in EOEW_ETL_PUB:PeopleCodeTransformation, the code will not be affected during an upgrade.

Subject Area

Select a subject area.

For new transformations, the default subject is defined on the Subject Area page.

- Transformation Type**
 - Look up.* Performs a look up against an intermediate table and returns a value. If the value does not exist, an error can be logged. An option is also available to default a value into the target field on error conditions.
 - Edit.* Performs edits against the entire source dataset. An edit is applied at a map level, not at a target field level.
 - PeopleCode.* Allows for a PeopleCode object reference. A PeopleCode Application Class method can be created to execute code for transformations that cannot be built with the available interfaces.

See Also

[Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Subject Areas, page 7](#)

Defining Look Ups

Access the Transformation Wizard - Look Up page.

Transformation Wizard - Look Up page

Record (Table) Name Select a record for the intermediary look up table.

Note. This table must exist in the local PeopleSoft database.

Field Name Select the value to be returned from the transformation and inserted into the target field. The available values are based on the record name that you selected.

Join Transformation to Look Up

Source Input Value Select the source fields that are required for the join.

Look Up Field Name Associate a look up field name value with a source input value to complete the join condition.

Creating Message Definitions

Access the Transformation Wizard - Edit page.

Transformation Wizard 1 2 3 4 5 6 <<Previous Next>>

Edit

Select message definition that will be used for edit processing. The selected message number will be logged with the error.

Check If Edit Required

Message Definition

Message Set Number: 🔍

Message Number: 🔍

Go To: [Data Transformation Home](#)

Transformation Wizard - Edit page

Check If Edit Required Select if you require an edit to be performed with transformation errors. If this checkbox is cleared, the edit will still execute at run-time but the results will not be available.

Message Set Number and Message Number Select a message set number and a message number to be logged with any transformation errors.

Entering Comments

Access the Transformation Wizard - Comments page.

Transformation Wizard 1 2 3 4 5 6 <<Previous Next>>

Comments

Transformation Object: JOBCODES

Description: Verify Jobcodes

Subject Area: HOME

Comments: Verify the jobcodes are converted properly.

Go To: [Data Transformation Home](#)

Transformation Wizard - Comments page

Use the Comments field to enter commentary specific to this transformation. Try to thoroughly describe this edit to help others reuse it.

(Optional) Setting Up Source Conditions

Access the Transformation Wizard - Source Condition page.

Transformation Wizard 1 2 3 4 **5** 6 <<Previous Next>>

Source Condition

Define the source input value(s) for your transformation condition. You may choose to select single or multiple source input values depending on the specific business rule that you are trying to resolve.

Source input values		Operator	Field Value		
1	<input style="width: 150px;" type="text"/>	▼	<input style="width: 150px;" type="text"/>	+	-

Go To: [Data Transformation Home](#)

Transformation Wizard - Source Condition page

Use source conditions to further qualify the source data that is used for this transformation. You can enter additional criteria to restrict the rows of the source data that are used in the join to the look up table.

(Optional) Defining Lookup Conditions

Access the Transformation Wizard - Look Up Condition page.

- `GetSourceFieldList()` method returns a HashTable object containing a name-value pair for accessing your Source Data Object fields.
- `GetTransformFieldList()` method returns a HashTable object containing a name-value pair for accessing target fields that have transformations associated with them.
- `GetTempTableName()` returns the name of the temporary table that is used by PeopleSoft Data Transformer.

Sample PeopleCode Transformation

The following example updates the `EOEC_CCI_UNITPRICE` field on the target with a value of the source data object `PROD_PRICE` field plus a constant of 100, by issuing an `UPDATE` statement on the PeopleSoft Data Transformer temporary table.

Because the target field, `EOEC_CCI_UNITPRICE`, has an associated transformation, the actual name on the temporary table is resolved with a `GetValue(EOEC_CCI_UNIT_PRICE)` call on the transformation field's hash table. Similarly, the `PROD_PRICE` source data object field is resolved by making a `GetValue(PROD_PRICE)` call on the source field's hash table.

```
import EOEW_ETLAPI:COMMON:FUNCLIB;
import EOEW_ETLAPI:COMMON:HashTable;

class PeopleCodeTransformation
    method SET_UNIT_PRICE(&COMM As FUNCLIB);
    method MY_OTHER_PCODE_TRANS(&COMM As FUNCLIB);
end-class;

method SET_UNIT_PRICE
    /* &COMM as EOEW_ETLAPI:COMMON:FUNCLIB */
    Local HashTable &SDOFields, &TranFields;
    Local string &SQLStatement;

    /* Retrieve the hashtable containing ALIASNAME->TEMPFIELDNAME
    value pair */
    &SDOFields = &COMM.GetSourceFieldList();
    &TranFields = &COMM.GetTransformFieldList();

    /* Update the EOEW_CCI_UNITPRICE to: SDO.PROD_PRICE + SomeNumber
    This would resolve into something like:
    UPDATE ETL_TEMP_TBL SET ETL_TEMP_1 = EOEW_FP_N3_0 + 100
    */
    &SQLStatement = "UPDATE " | &COMM.GetTempTableName() | " SET " |
    &TranFields.GetValue("EOEC_CCI_UNITPRICE") | " = " |
    &SDOFields.GetValue("PROD_PRICE") | " + 100";

    SQLExec(&SQLStatement);
end-method;

method MY_OTHER_PCODE_TRANS
    .
    .
    .
end-method;
```

Creating Map Rules

This section provides an overview of map rules and discusses how to define map rules.

Understanding Map Rules

AutoMapper uses the rules that you create in the map field detail definition. Rules may be based on the subject area, the source, the target, or any combination, depending on the business rule being applied. AutoMapper considers only map rules that are defined with a subject area matching the map's subject area or those that are assigned the default enterprise subject area. The rules are made up of transformations, constant default values, translation sets, and field map hints. If the map rule is required, you will not have access to override the rule on the Map Field Detail page.

This order of precedence and conditions applies when you assign different rules to a single target field:

- Source

The source field must exist on the source data object that is associated with the map. The source field type must be compatible with the target field type.

- Transformation

The fields that are defined as joins or constraints from the source data object must exist on the source data object that is associated with the map.

- Translation Set

The fields that are defined as the join to the from value of the translation set must exist on the source data object that is associated with the map.

If no rules were found to match a given target field, processing occurs in this order:

- Exact name match of target field.
- Default value for the target field.
- A zero or NULL is assigned to the field depending on its data type.

Page Used to Create Map Rules

Page Name	Object Name	Navigation	Usage
Map Rule Definitions	EOEW_RULE_DFN	Enterprise Components, Data Transformation, Data Transformation Home, Define Map Rules, Map Rule Definitions	Define map rules.

Defining Map Rules

Access the Map Rule Definitions page.

Map Rule Definitions

Create rules to assign a default for source field, translation set or transformation to your target field to be used by AutoMapper in the map field detail definition.

Map Rule

Map Rule: EO_SETID **Subject Area:** HOME

Active **Allow Map Override**

***Target Field:** SETID

***Source Input Type:** Transformation

Source: JOBCODES

Go To: [Data Transformation Home](#)

Map Rule Definitions page

- Active** Select to make the rule active. Only active rules get used during an AutoMapper run.
- Allow Map Override** Select to allow the rule to be overridden on the Map Field Detail page.
- Target Field** Select the target field on which to base this rule.
- Subject Area** Select a subject area.
For new rules, the default subject area is defined on the Subject Area page.
- Source Input Type**
 - Source:* Select to enable the Source Field Alias field, where you enter an alias for your source field if one is defined. If not, leave this field blank. AutoMapper always maps the alias into the selected target field.
 - Transformation:* Select to enable the Source field, where you enter a transformation object. AutoMapper always maps this transformation into the selected target field.
 - Translation Set:* Select to enable the Source Field Alias and Source fields, where you enter an alias and translation set. When AutoMapper sees the alias on the source, it always maps this translation set into the selected target field.

CHAPTER 5

Creating Maps

This chapter discusses how to create map definitions.

Creating Map Definitions

This section discusses how to:

- Define map information
- Define map field details.
- Perform map edits.
- Preview map results.
- Updating map processing options.

Pages Used to Create Map Definitions

Page Name	Object Name	Navigation	Usage
Map Information	EOEW_MAP_DFN	Enterprise Components, Data Transformation, Data Transformation Home, Define Maps, Map Information	Enter general mapping information.
Map Field Detail	EOEW_MAP_FLD	Enterprise Components, Data Transformation, Data Transformation Home, Define Maps, Map Information, Map Field Detail	Enter field-level mapping details.
Map Edits	EOEW_MAP_EDIT	Enterprise Components, Data Transformation, Data Transformation Home, Define Maps, Map Information, Map Edits	Edit map source input values that are used in transformations.
Preview Map Results	EOEW_TARPREVIEW	Enterprise Components, Data Transformation, Data Transformation Home, Define Maps, Map Information, Preview Map Results	View a subset of your data based on the defined map.
Map Definition - Comments	EOEW_MAP_COMMENT	Enterprise Components, Data Transformation, Data Transformation Home, Define Maps, Map Information, Comments	Enter comments that are related to the map definition.
Map Options	EOEW_MAP_OPT	Enterprise Components, Data Transformation, Data Transformation Home, Define Maps, Map Information, Map Options	Override or select options at the map level.

Defining Map Information

Access the Map Information page.

Map Information | Map Field Detail | Map Edits | Preview Map Results

Map Object: CCM_000000102 ***Subject Area:** CEWEO

***Description:** 1004 Training Map, Outdoor Int

Data Object

***Source:** 1004TRAIN SDO 1004TRAIN SDO
[Add Source Data Object](#) [Update Source Data Object](#)

***Target:** EOCM_ELM_SCH Target Schema for ELM

Error Handling

No Error Handling Needed
 Identify Error Row
 Correct data error & reprocess

Go To: [Data Transformation Home](#)

Map Information page

Subject Area

Select a subject area.

For new maps, the subject area will be set to the default as defined on the Subject Area page.

Source

Enter the source data object for this map.

Note. The source data object prompt is restricted by subject area. You see only those objects that are in the map definition's current subject area and those in the default subject area.

Add Source Data Object

Click to navigate to the Source Data Object component and create a new source data object to use as the source.

Update Source Data Object

Click to navigate to the Source Data Object component and change the source data object that you selected as the source.

Target

Select the target data object.

This value controls the target fields that are available on the Map Field Details page.

Error Handling

No error handling needed: Select to have the system perform no data validation and insert all rows into the target table.

Identify error row: Select to have the system perform data validation and insert both valid and invalid rows into the target table. You must select a target field to contain the error flag on the Map Field Detail page.

Note. The error flag will not be available for any other type of mapping.

Correct data error & reprocess: Select to have the system perform data validation, insert valid rows into the target table, and insert invalid rows into a user-defined error table. You will be prompted to create an error record on the Map Field Detail page

Note. The system administrator must build the user-defined error table in PeopleSoft Application Designer before you load the defined map.

The create error record push button will create a record in PeopleSoft metadata that has all of the necessary columns needed at runtime. It must then be build using Application Designer. If your map changes (different transformations, translation sets, and so on), you will need to recreate the error table because it must match exactly.

See Also

[Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Subject Areas, page 7](#)

[Chapter 6, “Running the Data Transformation Process and Correcting Errors,” Understanding Extracting, Transforming, and Loading Source Data, page 54](#)

Defining Map Field Details

Access the Map Field Detail page.

Map Information
Map Field Detail
Map Edits
Preview Map Results
Map Options
Comments

Map Object: CCM_000000102 1004 Training Map, Outdoor Int Save Map As

Data Object

Source: 1004TRAIN SDO 1004TRAIN SDO

Target: EOCM_ELM_SCH Target Schema for ELM

Error Handling

No Error Handling Needed

Map Field Details Customize | Find | View All | First 1-5 of 28 Last

Source Input Type	Source Prompt	Description	Target Field	Detail
Constant		USD	CURRENCY_CD	
Default	EFFDT	EFFDT	EFFDT	Default
Default	EFF_STATUS	EFF_STATUS	EFF_STATUS	
Constant		1004	EOCM_ACCESS_ID	
Constant		ANNUALTRAINING	EOCM_CATALOG_ID	

Apply AutoMapper
Synchronize fields
Show/Hide Field Details

Go To: [Data Transformation Home](#)

Map Field Detail page

Source Input Type

Blank: If this field is left blank, the description field will default to a blank, zero, or the appropriate PeopleSoft null value. This null value will be inserted to the target field.

Source: Select if the value is from the source file. You are prompted to select a source prompt field from the source data object.

Constant: Select if the value is a constant value, and then enter that value. If a constant needs to be applied to more than one map, a default target field should be created.

Default: Select to use a default value, and then select a source prompt to select the appropriate target field default. Click the Default link to access the Set Target Field Default page to see the actual prompt value.

Transformation: Select to use a transformation, and then select a source prompt to select the appropriate transformation. Click the Transform link to view transformation definitions, or click the Add link to add a new definition by using the Transformation Wizard.

Translation Set: Select to use a translation set, and then select a source prompt to select the appropriate source data object field. Select a description which will be the appropriate translation set to apply to the source field. Click the Translation link to view translation set values, or click the Add link to add a new set.

Source Prompt

Select a source prompt based on your source input type. The prompt will change based on the source input type. Be aware of the mapping that you are setting up.

Note. Translation set and transformation source prompts are restricted by subject area and transformation type. Only objects that are in the map definition's current subject area and those in the default subject area appear on the page. Only Look Up and PeopleCode type transformations appear.

Description

The description will change based on the source input type and source prompt selected. Be aware of the mapping that you are setting up.

Enter a description if you selected *Constant* as the input type. The description is the value that you want mapped to the target field.

Enter a translation set if you selected *Translation Set* as the input type.

Target Field

Lists the name of all of the fields in your target file.

Detail

Displays the Transform, Default, or Translation link, based on the selected input type. This link transfers to the definition page of the selected item.

Add

Appears if the selected input type is *Transformation* or *Translation Set*. This link transfers to the definition page of the selected item in Add mode.

Save Map As

Click to save an existing map definition under a new map name.

Use this function to create a new map definition that will only slightly differ from the original map. Once saved, you can make the necessary changes to the new map. The new map is maintained separately.

Apply AutoMapper

Click to initially define map field details.

AutoMapper automatically attempts to match the source to the target field list. It also applies any required map rules, including target field defaults, translation set values, and transformations. AutoMapper then maps remaining target fields with constant values from the PSRECFIELD.DBFIELDNAME.SQL assembler and coordinates the transformation steps.

If you must modify the mapping that is defined by AutoMapper, you can make these changes using the fields on this page.

Warning! Rerunning the AutoMapper overrides any mappings that you have already done. Use caution before doing this-it is as if you are starting over with an Add function.

Synchronize fields

Click to realign the source and target fields on the map with any changes that may have occurred since its origination.

You can add new fields to the target with PeopleSoft Application designer once a map has been saved. Using Synchronize fields will insert these new fields in the map field detail grid. Additional synchronization is done on source fields (based on the current source data object definition) and prompts. Selecting this button will not override previously saved mappings.

Show/Hide Fields Details

Click to expand the grid to include field format and length information for both source and target fields. Click again to avoid the horizontal scroll.

See Also

[Chapter 4, "Preparing to Create Maps," page 25](#)

Performing Map Edits

Access the Map Edits.

Map Object: CCM_000000102 1004 Training Map, Outdoor Int

Data Object

Source: 1004TRAIN SDO 1004TRAIN SDO

Target: EOCM_ELM_SCH Target Schema for ELM

Map Edits Customize | Find | View All | First 1 of 1 Last

	*Source Input Value	Detail	Add		
1	<input type="text"/>	Detail	Add	+	-

Go To: [Data Transformation Home](#)

Map Edits page

Source Input Value

Select an Edit transformation.

Note. The source input value prompt is restricted by subject area and transformation type. You see only those objects that are in the map definition's current subject area and those in the default subject area. You also see only edit transformations.

Detail

Click to access the Transformation Definition page and edit transformation definition information.

Add

Click to access the Transformation Definition page and add a new transformation.

See Also

[Chapter 4, "Preparing to Create Maps," Creating Transformations by Using the Transformation Wizard, page 31](#)

Previewing Map Results

Click the Preview button to view a subset of your mapped data based on your map definitions.

Access the Preview Map Results page.

Click the Preview button to view a subset of the results based on your map definition.

Use this feature to check the validity of the map. By previewing what the results of running the map would be against a small set of data, you can determine if your mappings are defined correctly.

Note. Attempting to preview complex maps can quickly consume processing and memory resources on your application server.

The preview maximum row count is set using the Data Transformer Installation Options page. Large row counts take more time and resources to preview. Consider setting your preview row count relatively low.

See Also

Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Installation Options, page 6

Updating Map Processing Options

Access the Map Options page.

Map Options page

Note. Only system administrators may access this page.

Duplicate Row Handling

Copy Duplicates to Error Table: Select to have the system copy all duplicate rows to the error table.

Copy first row to Target: Select so that if the system finds a duplicate row in the error table, it inserts only the first row of the duplicates into the target.

Copy last row to Target: Select so that if the system finds a duplicate row in the error table, the system inserts only the last row of the duplicates into the target.

Reject all duplicate rows: Select to have the system reject all duplicate rows and not log them in the error table.

Note. Values are based on the error handling that is specified on the Map Information page. If you don't see all of the preceding values, adjust the error handling option.

(Optional) Create Temporary Table

Select if you want to override the Data Transformer installation options and Subject Area selections for this map to create a temporary table at runtime.

This is needed only when an implementation allows or disallows the dynamic temporary table creation per subject area.

This temporary table is only needed by the engine and will be deleted at engine completion. It is not available in PeopleSoft metadata.

Note. If you do not select this check box, you will be required to specify a temporary table record name on the map for use at runtime. This record will be available in PeopleSoft metadata and live permanently after the engine execution. Determining which of these options to use needs to be carefully considered. A dynamic temporary table will automatically change when the map changes, a non-dynamic temporary table requires maintenance.

Override Tablespace Name From Subject Area Default

Select to override the Data Transformer installation options and Subject Area options for specific maps. This is only necessary if the implementation chooses to spread the temporary tables that are generated at runtime over multiple tablespaces.

Select Date/Time Field Name To Be Used For Incremental Load Processing

Only datetime field types appear in the prompt. This field is used at run time to determine the next segment of data to incrementally load.

See Also

[Chapter 2, "Setting Up Core PeopleSoft Data Transformer Features," Defining Installation Options, page 6](#)

[Chapter 2, "Setting Up Core PeopleSoft Data Transformer Features," Defining Subject Areas, page 7](#)

Entering Map Definition Comments

Access the Map Definition - Comments page.

Map Definition - Comments page

Map Object: CCM_000000102 1004 Training Map, Outdoor Int

Comments: Demonstration map used to display all available options.

Go To: [Data Transformation Home](#)

Map Definition - Comments page

Use the Comments field to provide details about the purpose of the map definition.

CHAPTER 6

Running the Data Transformation Process and Correcting Errors

This chapter discusses how to:

- Define map groups and map group chunking criteria.
- Extract, transform, and load source data.
- Handle data transformation process errors.

Defining Map Groups and Map Group Chunking Criteria

This section discusses how to:

- Define map groups.
- Define chunking criteria.

You can configure the data transformation process to run on maps as a group. A map group may contain map groups within the main map group, as well as one or more individual maps. Map groups are submitted as a job unit and can run either in serial or parallel mode. To optimize performance by processing data more efficiently, you can define chunking criteria on the Map Group Filter page.

Pages Used to Define Map Groups and Chunking Criteria


Page Name	Object Name	Navigation	Usage
Map Groups	EOEW_GRP_DFN	Enterprise Components, Data Transformation, Data Transformation Home, Define Map Groups, Map Groups	Create map groups.
Map Group Filter	EOEW_GRP_FLTR	Click the Chunking link on the Map Groups page.	Define chunking criteria for maps.

Defining Map Groups










Access the Map Groups page.

Map Groups

Setup related data transformation maps into groups of maps to establish a run sequence.

Map Group: JOB_GRP ***Subject Area:** HOME 

***Description:** Employee Job Groups **Parallel Processing For Group**

Map Group Items		Customize Find View All 	First  1-3 of 3  Last
*Group Type	*Map Object	Chunking	
Map 	EO_JOB 	Chunking	+ -
Map 	EO_DEPT 	Chunking	+ -
Group 	EO_HCM 	Chunking	+ -

Go To: [Data Transformation Home](#)

Map Groups page

Subject Area

Select a subject area.

For new maps groups, the subject area will be set to the default as defined on the Subject Area page.

Parallel Processing For Group

Select to run the process in parallel mode, which runs the processes simultaneously. Clear to run it in serial mode, which runs each process in the map group sequentially.

Group Type and Map Object

Select the maps and/or map groups that you want in the order in which you want them to run.

Note. Map object prompts are restricted by subject area. Only objects that are in the map group’s current subject area and those in the default subject area appear.

(Optional) Chunking

Click to access the Map Group Filter page to define chunking criteria for the associated map.

See [Chapter 6, “Running the Data Transformation Process and Correcting Errors,” Defining Chunking Criteria, page 53.](#)

Note. The Chunking link is only available for Group Types of Map. If you want to chunk a group, you need to go to that group’s definition to define the criteria.

See Also

[Chapter 2, “Setting Up Core PeopleSoft Data Transformer Features,” Defining Subject Areas, page 7](#)

Defining Chunking Criteria

Access the Map Group Filter page.

Map Group Filter

Map Object: EO_JOB Parallel Processing

Chunking Criteria					
Chunk Number	Column Alias	Operator	Field Value	And/Or Switch	
1	JOBCODE	<	10000	Or	+ -
	JOBCODE	>=	10000		+ -

OK Cancel

Map Group Filter page

Chunking is a mechanism that makes large amounts of processing easier through the use of multiple small parallel processes. By enabling chunking, multiple jobs are spawned from one job stream. These jobs run in parallel or serial to process data efficiently. It is an optional mechanism to help with performance. The user is responsible to define chunks that include all of the source data without duplicating any rows. The system will not verify this. The map group is still the unit of work. The group job is not complete until all of the chunks are also complete.

Parallel Processing

Select to run the process in parallel mode, which runs the processes simultaneously. Clear to run it in serial mode, which runs each process in the chunk sequentially.

Column Alias

Select a column alias. Available values are derived from the source data object for the map you are currently chunking.

Operator

Select an operator to define the chunking condition

Field Value

Enter the field value that completes criteria for the chunk number.

And/Or Switch

Select *And* or *Or* to compound multiple sets of criteria.

Note. The chunks you define must be configured to capture all of the source data without duplicating rows.

Extracting, Transforming, and Loading Source Data

In this section, we discuss how to:

- Extract, transform, and load source data.
- View summaries of a data transformation process run control.

Understanding Extracting, Transforming, and Loading Source Data

The data transformation process can be run to extract, transform and load source data by a single map or by map groups. When a map or group is executed, it is compiled at runtime. No SQL or code, only metadata, is stored. This reduces the risk of encountering problems late in a multi-map process, guarantees that each parallel process is executing the same version, and insulates the current running job from any changes to the actual map definition.

The data transformation process is run using the Data Transformation Application Engine process (EOEW_ETL_EXE).

Pages Used to Extract, Transform, and Load Source Data

Page Name	Object Name	Navigation	Usage
Run Data Transformations	EOEW_RUN_ETL	Enterprise Components, Data Transformation, Data Transformation Home, Run Data Transformations, Run Data Transformations	Define run control criteria for and run the data transformation process.
Run Data Transformations - Run Summary	EOEW_RUN_ETL_SUM	Click the Run Summary link on the Run Data Transformations page.	View information about only the jobs related to a particular data transformation process run control.

Running the Data Transformation Process

Access the Run Data Transformations page.

Run Data Transformations

User ID: PS [Report Manager](#) [Process Monitor](#)

Run Control ID: EO_JOBS [Run Summary](#) Run

Run Data Transformation Parm

*Data Transformer Object Type:

*Map Object: 1004 Training Map, Outdoor Int

*Target Load Option:

Destructive Load Deletes all rows from the target record.

Parallel Processing [Chunking Criteria](#)

Go To: [Data Transformation Home](#)

Run Data Transformations page

Note. The data transformation process uses the Data Transformation Application Engine process (EOEW_ETL_EXE).

Data Transformer Object Type	<p>Select a Data Transformer object type. You can run either a <i>Map</i> or <i>Map Group</i>.</p> <hr/> <p>Note. PeopleSoft Catalog Management uses the run control ID <i>RUN_MAP</i> to load partner source data. When using this run control ID, the Data Transformer object type must be <i>Map</i>.</p> <hr/>
Map Object	Select a map object. The prompt for available field values is based on the Data Transformer object type.
Target Load Option	<p>Select a target load option.</p> <p><i>Full Load.</i> Extracts all data from the source as defined by the source data object and inserts into the target.</p> <p><i>Incremental Update.</i> Copies all rows from the source table that have been updated or modified since the last load, based on the date/time the row was updated or modified. The Map Options page must have a date/timestamp field defined in order to use incremental load.</p>
Destructive Load	<p>Select to delete all rows from the target table before the new rows are inserted.</p> <hr/> <p>Warning! Use this option with caution, as this will delete all rows in the target table.</p> <hr/>
Parallel Processing	<p>Select to run the process in parallel mode, which runs the processes simultaneously. Clear to run it in serial mode, which runs each process in the chunk sequentially.</p> <hr/> <p>Note. This option is only available if the Object Type is <i>Map</i>.</p> <hr/>
Chunking Criteria	<p>Click to access the Map Group Filter page to define chunking criteria for the associated map.</p> <p>See Chapter 6, “Running the Data Transformation Process and Correcting Errors,” Defining Chunking Criteria, page 53.</p> <hr/> <p>Note. This link is only available for Group Types of <i>Map</i>. If you want to chunk a group, you need to go to that group’s definition to define the criteria.</p> <hr/>
Run	<p>Click to run the data transformation process. A process request is submitted.</p> <p>Click the Process Monitor link to monitor the status of the request.</p>
Run Summary	Click to view information that is related to the status of the data transformation process.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Viewing the Run Summary

Access the Run Data Transformations - Run Summary page.

Run Summary
Run Data Transformations

User ID: PSADMIN Refresh

Run Control ID: CEW_PROD_SGRP_P

Run Data Transformer Parameters

Data Transformer Object Type: Map Group

Map Object: CEW_PROD_SGRP_P Product Sub_Group

Processes Customize | Find | First ◀ 1-12 of 12 ▶ Last

Main Information | Times | Chunking Criteria |

Process Instance	Map Group	Map Object	Run Status
	CEW_PROD12_PP	CEW_PROD_MAP	
	CEW_PROD12_PP	CEW_PROD_MAP	
	CEW_PROD12_PP	CEW_PROD2_MAP	
	CEW_PROD12_PP	CEW_PROD2_MAP	
126	CEW_PROD34_SP	CEW_PROD3_MAP	Success
	CEW_PROD34_SP	CEW_PROD3_MAP	
128	CEW_PROD34_SP	CEW_PROD4_MAP	Success
129	CEW_PROD34_SP	CEW_PROD4_MAP	Processing
130	CEW_PROD_SGRP_P	CEW_PROD6_MAP	Processing
131	CEW_PROD_SGRP_P	CEW_PROD6_MAP	Success
	CEW_PROD_SGRP_P	CEW_PROD7_MAP	
	CEW_PROD_SGRP_P	CEW_PROD7_MAP	

Run Data Transformations - Run Summary page

After running a data transformation process by clicking Run on the Run Data Transformations page, you can access the Run Summary page just as you would access Report Manager or Process Monitor.

Although the Process Monitor provides information regarding a process run, the Run Summary feature offers a more granular view of the individual subprocesses, such as chunks, that are not exposed in the Process Monitor. For example, a single map containing chunks or a group can spawn numerous jobs. If you use the Process Monitor to view these jobs, you find that the numerous jobs that are associated with a single map are mixed in with all of the other jobs that are currently running. Depending on the number of jobs that are running, this can make it difficult to view only those jobs that are associated with a particular Data Transformer process run control.

However, by using the Run Summary feature you can view all of the jobs that were spawned for the run control that is associated with a particular run on of the Data Transformer process. The Run Summary feature is especially useful when running parallel processes that are associated with multiple maps. By using the Run Summary feature, you can associate a process instance with each chunk as it runs.

The Run Summary feature enables you to see:

- Which subprocesses are involved within a particular data transformation process run control.
- When a particular subprocess (chunk or map) begins.
- When a particular subprocess (chunk or map) completes.
- Which subprocesses didn't complete successfully.
- Which process instance is associated with a particular chunk or map.

Main Information

Select the Main Information tab.

Process Instance

Displays the PeopleSoft Process Scheduler process instance that is assigned to the individual process. This value also appears on the Times and Chunking Criteria tabs for consistent identification.

Note. For parallel processes, you see different process instances; for serial processes, you see the same process instance.

Run Status

Reflects the same status that appears in the Process Monitor. If the run status displays an error, go to the Process Monitor to troubleshoot and restart the process.

Times

Select the Times tab.

Use these times to track the performance of the processes.

Chunking Criteria

Select the Chunking Criteria tab.

Chunking Where clause

Displays information about the chunking criteria that is specified for a particular map, including:

- Relational operators (=, <, >, and so on).
- Boolean operators (AND and OR).

Note. This page also displays information that is relevant only to the internal aspects of the PeopleSoft mapping functionality.

The field names that are used for chunking are converted to an internal format; therefore, the format of the Chunking Where clause may not necessarily be a true reflection. That is, it may contain an extra "AND ("), for example. However, determining the chunking criteria that is used can be very useful when you are troubleshooting.

Also, values that are similar to EOEW_FP_CHAR30_0 are used internally by the PeopleSoft system to store data in a temporary table while the data is being transformed and loaded.

Handling Data Transformation Process Errors

In this section, we discuss how to view and correct data transformation errors that arise from a run of the data transformation process.

Understanding Data Transformation Process Errors

After you run the data transformation process for a map with the *Correct data error & reprocess* option selected, use the Error Correction page to check for any errors that were logged during runtime. You can correct these errors online and rerun the data transformation process with the *Include Errors* option selected.

The Error Correction page sources its information from a PeopleSoft table specified on the Map Field Detail page. When the data transformation process runs and finds an error (such as a look-up or edit on an entry not found), it writes an entry into this error table.

The error table comprises:

- Two key fields, PROCESS_INSTANCE and EOEW_ETL_SEQNUM.
- Error message fields from the EOEW_ERRMSG_SBR subrecord (EOEW_ERR_MSG01..EOEW_ERR_MSG10).
- All the fields being sourced from the Source Data Object.

Whenever an error is encountered for a look-up or edit transformation, the data transformation process stores the associated error message set number and message number in the error fields (EOEW_ERRMSG_XX) that are found in the error table so that the user can then troubleshoot the rows with errors.

By default, PeopleSoft allocates 10 error messages on the EOEW_ERRMSG_SBR subrecord (each error message field includes the message set number and message number), but users can delete or add more error message fields on the subrecord, as needed.

If more errors are encountered during the data transformation process run than are allocated on the error table, those errors that are encountered after the limit was reached are not written to the error table. Every error record must include one or more EOEW_ERRMSG_XX fields. The errors that are encountered during the data transformation process appear on the Error Correction page. The Error Correction page displays error messages that are associated with each specific row of data that is found to be in error by the data transformation process.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleCode Language Reference.

Page Used to Handle Data Transformation Process Errors

Page Name	Object Name	Navigation	Usage
Error Correction	EOEW_CORRECTION	Enterprise Components, Data Transformation, Data Transformation Home, Correct Errors, Error Correction	View and correct data transformation process errors.

Viewing and Correcting Data Transformer Process Errors

Access the Error Correction page.

Map Object: CEW_PROD_MAP **Table Name:** CEW_PROD_ERR [Delete All Rows](#)

Error Messages [Customize](#) | [Find](#) | [View All](#) | [First](#) ◀ 1 of 1 ▶ [Last](#)

Message Text

[First](#) ◀ 1-1 of 1 ▶ [Last](#)

		Process Instance	Sequence	PRODUCT	PROD_BRAND	PROD_CATEGORY	PROD_COLOR	CONCAT_EXP	PROD_NAME	PROD_COST	TOTAL_PRI
Edit	Delete	133	7	PROD07	Home Depot	Office Supplies	Black	Home Depot Office Supplies	Pen	1	

Go To: [Warehouse Tools Home](#)

Error Correction page

After you use this page to correct all errors, rerun the map.

- Edit** Select for the row that you want to correct. The Field list appears at the top of the page with the associated error message for that row.
- Delete** Select to remove the current row. This will physically delete the error row from the error table.
- Delete All Rows** Select to remove all current rows. This will physically delete all error rows from the error table.
- Field** Select the field you want to edit. Enter the new, corrected value for the field.
- Update** Click to save the correction to the field.

APPENDIX A

Setting PeopleSoft Data Transformer Security

This appendix provides an overview of security and discusses how to implement security:

Understanding Security

This section discusses:

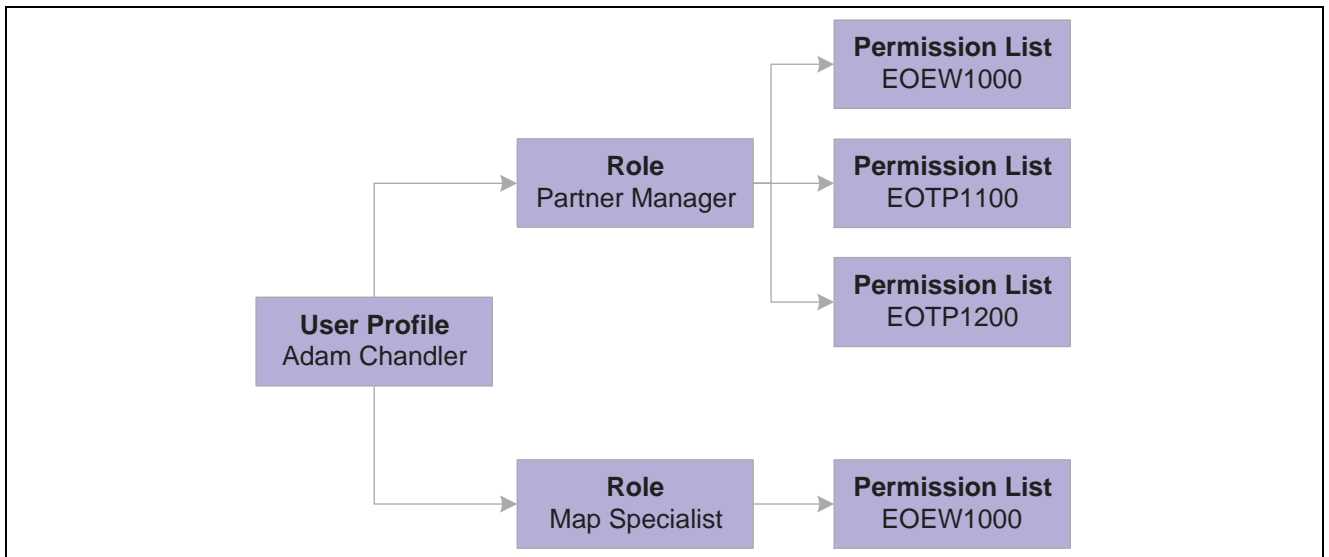
- User profiles, roles, and permission lists.
- Delivered roles and permission lists.

User Profiles, Roles, and Permission Lists

You assign roles to user profiles. Roles link user profiles to permission lists, which group authorizations.

Permission lists store sign-on times, page access, PeopleTools access, and so on. You can assign multiple roles to a user profile, and you can assign multiple permission lists to a role.

This diagram illustrates the interaction between user profile, roles, and permission lists:



Security definition hierarchy

Delivered Roles and Permission Lists

Access to PeopleSoft Data Transformer is based on roles and permission lists that are attached to user IDs.

PeopleSoft delivers the following roles that are configured to perform PeopleSoft Data Transformer functions:

Role	Permission List Access	Responsibilities
Enterprise Administrator	EOEW9000	Has access to all warehouse objects and performs all tasks that are related to PeopleSoft Data Transformer, including creating and maintaining source data objects, default target values, translation set values, and map definitions, and running Data Transformer maps.
Map Specialist	EOEW1000	Performs all tasks that are related to PeopleSoft Data Transformer, but typically does not set up complex source data objects or transformations.

Permission lists are delivered to support all PeopleSoft Data Transformer features. This table lists the components that are attached to each of the delivered permission lists.

Note. Both permission lists have access to all PeopleSoft Data Transformer-related components.

Permission List	Component	Component Name
EOEW1000	EOEW_TOOLS_HOME PG	Warehouse Tools Home Page.
EOEW9000	EOEW_OPTIONS	ETL Installation Options.
	EOEW_OBJ_OWNER	Subject Area.
	EOEW_SRCDO	Source Data Object.
	EOEW_SET_DFLT	Set Default Values.
	EOEW_CODE_SET	Translation Set Values.
	EOEW_LU_DFN_INFO	Look up Definition Info.
	EOEW_TRN_DFN_WIZ	Transformation Definition.
	EOEW_RULE_DFN	Map Rule Definition.
	EOEW_MAP_DFN	Map Definition.
	EOEW_GRP_DFN	Map Group.
	EOEW_CORRECTION	Error Correction.
	EOEW_RUN_ETL	Run Data Transformer.

Although both permission lists have access to all PeopleSoft Data Transformer-related components, the following pages are not accessible for permission list EOEW1000:

Component	Page
EOEW_OPTIONS	ETL Installation Options - Display Only.
EOEW_OBJ_OWNER	Subject Area Owner - Display Only.
EOEW_RULE_DFN	Map Rule Definition - No Access.
EOEW_MAP_DFN	Map Options - No Access.
EOEW_MAP_DFN	Publish Map Option - No Access.

Implementing Security

This section provides an overview of security tasks and discusses how to:

- Associate the EOEW1000 permission list with a role.
- Assign the Map Specialist role to a user profile.

See Also

Enterprise PeopleTools 8.46 PeopleBook: Security Administration, “Setting Up Permission Lists,” “Setting Up Roles,” and “Administering User Profiles.”

Understanding Security Tasks

To allow map specialists to perform data transformer activities you must:

- Associate the permission list EOEW1000 with *all* roles that are assigned to be map specialists.

Note. PeopleSoft delivers the Map Specialist role for this purpose.

- Assign the Map Specialist role to the necessary user profiles.

Associating the EOEW1000 Permission List with a Role

To associate the EOEW1000 permission list with a role:

1. Select PeopleTools, Security, Permissions & Roles, Roles.
2. Enter a role.
3. Access the Permission List page.
4. Add the EOEW1000 permission list to the list of permission lists that are currently attached to the role.
5. Click Save.

Assigning the Map Specialist Role to a User Profile

To assign the Map Specialist role to a user profile:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. Enter a user profile.

3. Access the Roles page.
4. Add the Map Specialist role to the list of roles that are currently attached to the user profile.
5. Click Save.

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

	PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
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 <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business 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 <i>detailed business process</i> .
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 <i>course</i> .
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 <i>sub-classification</i> .
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 <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
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 <i>population</i> and <i>division</i> .
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 <i>communication key</i> .
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 <i>comm keys</i> or <i>speed keys</i>) 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-plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
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 <i>class</i> .

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 <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	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 <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	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 <i>update access</i> .
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 <code>ADVANCED_SHIPPING_ORDER</code> 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 <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the 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 <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft 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 <i>event</i> .
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 <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	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 <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
rename	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing

	model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . 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	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .

SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch). When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft system.

For example, processes that import data from Microsoft Project into PeopleSoft applications create transaction rows with a source code of MSP (Microsoft Project).

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 <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.

workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML 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 <i>eXtended Process Integrator</i> . 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 <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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