PeopleTools 8.4: PeopleSoft
Internet Architecture Administration
Contents

PeopleSoft Internet Architecture Administration Preface
About This PeopleBook................................................................. xi
Before You Begin................................................................................. xi
PeopleSoft Application Fundamentals ........................................... xii
Related Documentation .................................................................... xii
    Hard-copy Documentation........................................................... xii
PeopleBooks Standard Field Definitions......................................... xiii
Typographical Conventions and Visual Cues................................. xiv
Page and Panel Introductory Table.................................................. xvi
Comments and Suggestions............................................................ xvi

Chapter 1
PeopleSoft Architecture
Understanding PeopleSoft Architecture ........................................... 1-1
Component Overview....................................................................... 1-1
    Web Browser............................................................................. 1-2
    Web Server............................................................................... 1-3
    Application Server................................................................. 1-3
    Database Server..................................................................... 1-3
    Batch Server.......................................................................... 1-3
The Physical Architecture............................................................... 1-4
    Web Browser............................................................................. 1-4
    Web Server............................................................................... 1-4
    Application Server................................................................. 1-6
    Batch Server Environment..................................................... 1-12
    Database Server..................................................................... 1-13
Configuration and Deployment Options......................................... 1-13
    Configuration Options........................................................... 1-14
    Deployment Options ............................................................... 1-15

Chapter 2
Working with PSADMIN
Understanding PSADMIN............................................................... 2-1
Starting PSADMIN......................................................................... 2-2
## Using PSADMIN
- **Menu Interface**
  - Page: 2-3
- **Menu Structure**
  - Page: 2-5

## Configuration Templates
- **Command Line Options**
  - **Syntax**
    - Page: 2-9
  - **General Administrative Commands**
    - Page: 2-9
  - **Command Line Create and Configure**
    - Page: 2-10

## Quick Configure
- Page: 2-16

## Executables and Configuration Files
- **Configuring a Domain**
  - Page: 2-18
- **Loading a Configuration**
  - Page: 2-20
- **Booting a Domain**
  - Page: 2-21
- **Stopping a Domain**
  - Page: 2-22

## Chapter 3
### Understanding PSADMIN Menus
- **Working with the Application Server Menu**
  - **Accessing the Application Server Options**
    - Page: 3-1
  - **Administering a Domain**
    - Page: 3-2
  - **Booting a Domain**
    - Page: 3-3
  - **Shutting Down a Domain**
    - **Normal shutdown**
      - Page: 3-4
    - **Forced shutdown**
      - Page: 3-4
  - **Checking Domain Status**
    - Page: 3-4
  - **Configuring a Domain**
    - Page: 3-6
  - **Edit configuration/log files Menu**
    - Page: 3-7
  - **Creating a Domain**
    - Page: 3-10
  - **Deleting a Domain**
    - Page: 3-11

- **Understanding the Process Scheduler Menu**
  - **Starting a Process Scheduler Server**
    - Page: 3-14
  - **Stopping a Process Scheduler Server**
    - Page: 3-14
  - **Configuring a Process Scheduler Server**
    - Page: 3-15
  - **Creating a Process Scheduler Server Configuration**
    - Page: 3-16
  - **Deleting a Process Scheduler Server**
    - Page: 3-17
  - **Editing the Process Scheduler Configuration File**
    - Page: 3-18
  - **Process Scheduler Options**
    - Page: 3-19
  - **Process Scheduler Command Line Options**
    - Page: 3-19

- **Setting up the PeopleSoft NT Service**
  - Page: 3-19
- **Understanding NT Services**
  - Page: 3-20
Chapter 4

Understanding Application Server Domain Parameters

Startup............................................................... 4-1
Database Options................................................ 4-3
Security.............................................................. 4-4
Workstation Listener........................................... 4-4
JOLT Listener....................................................... 4-6
JOLT Relay Adapter............................................. 4-9
Domain Settings .................................................. 4-10
PeopleCode Debugger ........................................ 4-12
Trace................................................................. 4-13
Cache Settings ..................................................... 4-19
Remote Call......................................................... 4-21
PSAPPSRV.......................................................... 4-21
PSOPTENG.......................................................... 4-23
PSSAMSRV........................................................ 4-24
PSQCKSRV.......................................................... 4-25
PSQRYSRV.......................................................... 4-26
Messaging Server Processes ............................. 4-28
SMTP Settings.................................................... 4-28
Interface Driver .................................................. 4-31
PSTOOLS............................................................. 4-31
Integration Broker .............................................. 4-33
Select Server Process Options (Final Prompts) ......... 4-34

Chapter 5

Administering Web Servers

Understanding the PeopleSoft Web Server .................. 5-1
Supported Web Servers ........................................ 5-1
Server Components............................................. 5-2
PeopleSoft Servlets ............................................. 5-2
Transmitting Requests to the Web Server ............... 5-4
Multiple Servlets................................................ 5-5
Web Server Configuration Files ............................. 5-6
WebLogic Configuration File Locations .................. 5-7
WebSphere Configuration Files ............................. 5-8
Chapter 6
Working with BEA WebLogic
Understanding Web Applications......................................................... 6-1
Understanding the PeopleSoft Domain.................................................. 6-1
PIA Server............................................................................................. 6-2
WebLogicAdmin Server........................................................................... 6-2
PeopleSoft Web Applications................................................................. 6-2
Accessing the WebLogic Server Console............................................... 6-3
Starting WebLogic .................................................................................. 6-4
Starting WebLogic on Windows NT ......................................................... 6-4
Starting WebLogic on UNIX ................................................................. 6-4
Stopping WebLogic .................................................................................. 6-5
Windows NT.......................................................................................... 6-5
UNIX........................................................................................................ 6-6
Working with the PeopleSoft Domain...................................................... 6-6
Installing Additional Sites ...................................................................... 6-6
Running Different PeopleSoft Versions.................................................. 6-7
Setting up a Reverse Proxy Server (RPS). ............................................... 6-9
IIS ........................................................................................................... 6-9
WebLogic............................................................................................... 6-11
Setting up SSL ...................................................................................... 6-13
Generating a Certificate ......................................................................... 6-13
Submitting a Certificate to Verisign......................................................... 6-15
Adjusting the JVM Heap Size ................................................................. 6-17
Windows .............................................................................................. 6-17
UNIX..................................................................................................... 6-17
Understanding the CLASSPATH Setting................................................. 6-18
Enabling Logging on the Web Server ..................................................... 6-18
WebLogic Tuning .................................................................................. 6-19
JVM Heap Size..................................................................................... 6-19
Available Execution Thread ................................................................. 6-20
Size of weblogic.log.............................................................................. 6-20
Chapter 7

Working with IBM WebSphere

Understanding WebSphere AEs ................................................................. 7-1
WebSphere Administration ........................................................................... 7-2
    Starting WebSphere .............................................................................. 7-2
    Stopping WebSphere ........................................................................... 7-3
    Working with Default Web Server Settings ......................................... 7-3
    Uninstalling WebSphere ................................................................. 7-5
    Modifying the Java Heap Size ............................................................. 7-6
    Running WebSphere and WebLogic on One Server............................. 7-6
    Understanding Servlet registrations .................................................... 7-7
    Understanding CLASSPATH Settings .................................................. 7-7
Working with the PeopleSoft Site ............................................................... 7-8
    Installing Additional Sites with MP Installer ......................................... 7-8
    Running Different PeopleTools Versions ............................................ 7-9
Working with Proxy Servers .................................................................... 7-15
    Setting up a Proxy Server ..................................................................... 7-15
    Changing Default Ports for a Proxy Server ........................................ 7-16
Configuring SSL ....................................................................................... 7-17
    Setting up SSL on Microsoft IIS ......................................................... 7-18
    Setting up SSL on IBM HTTP Server ................................................ 7-19
    Setting up SSL on WebSphere Application Server ............................. 7-26

Chapter 8

Building and Maintaining Search Indexes

Understanding the Search Architecture .................................................. 8-1
    PeopleSoft Portal Technologies ......................................................... 8-3
    Verity Technologies ............................................................................. 8-3
    Search Technology in Action ............................................................. 8-4
    Understanding PeopleSoft Search Utilities ........................................ 8-5
Working with Indexes ............................................................................. 8-5
    Search Designer Changes ................................................................... 8-6
    Opening Existing Collections ............................................................ 8-6
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating New Indexes</td>
<td>8-6</td>
</tr>
<tr>
<td>Understanding Common Controls</td>
<td>8-7</td>
</tr>
<tr>
<td>Supported Mime Types</td>
<td>8-7</td>
</tr>
<tr>
<td>Building Record-Based Indexes</td>
<td>8-9</td>
</tr>
<tr>
<td>Understanding Record-Based Indexes</td>
<td>8-9</td>
</tr>
<tr>
<td>Modifying Record-Based Index Properties</td>
<td>8-9</td>
</tr>
<tr>
<td>Adding Subrecords to Search Indexes</td>
<td>8-12</td>
</tr>
<tr>
<td>Building File System (Spider) Indexes</td>
<td>8-13</td>
</tr>
<tr>
<td>File System Options Page</td>
<td>8-13</td>
</tr>
<tr>
<td>What to Index Page</td>
<td>8-14</td>
</tr>
<tr>
<td>Building HTTP Spider Indexes</td>
<td>8-16</td>
</tr>
<tr>
<td>HTTP Gateway Page</td>
<td>8-16</td>
</tr>
<tr>
<td>What to Index Page</td>
<td>8-18</td>
</tr>
<tr>
<td>Administering Search Indexes</td>
<td>8-19</td>
</tr>
<tr>
<td>Specifying the Index Location</td>
<td>8-20</td>
</tr>
<tr>
<td>Search Index Administration Page</td>
<td>8-21</td>
</tr>
<tr>
<td>Edit Properties Page</td>
<td>8-21</td>
</tr>
<tr>
<td>Schedule Page</td>
<td>8-22</td>
</tr>
<tr>
<td>Building Portal Registry Search Indexes</td>
<td>8-23</td>
</tr>
<tr>
<td>Building a Search Index for a Portal Application</td>
<td>8-23</td>
</tr>
<tr>
<td>Modifying the VdkVgwKey Key</td>
<td>8-25</td>
</tr>
<tr>
<td>Understanding Search Index Limitations</td>
<td>8-25</td>
</tr>
<tr>
<td>Understanding How Users Search</td>
<td>8-25</td>
</tr>
<tr>
<td>Chapter 9</td>
<td></td>
</tr>
<tr>
<td>Administration Considerations</td>
<td></td>
</tr>
<tr>
<td>Setting up the PeopleCode Debugger</td>
<td>9-1</td>
</tr>
<tr>
<td>Setting up PeopleCode Debugging for a Two-Tier Connection</td>
<td>9-1</td>
</tr>
<tr>
<td>Setting up Debugging for a Three-Tier Connection</td>
<td>9-2</td>
</tr>
<tr>
<td>Using the PeopleCode Debugger</td>
<td>9-4</td>
</tr>
<tr>
<td>System Information Page</td>
<td>9-4</td>
</tr>
<tr>
<td>Overview</td>
<td>9-5</td>
</tr>
<tr>
<td>Viewing the System Information Page</td>
<td>9-5</td>
</tr>
<tr>
<td>Setting Up Jolt Internet Relay</td>
<td>9-7</td>
</tr>
<tr>
<td>Overview</td>
<td>9-7</td>
</tr>
<tr>
<td>Installing Jolt Internet Relay (JRLY)</td>
<td>9-7</td>
</tr>
<tr>
<td>Configuring Jolt Relay (Front-End) on UNIX or Windows NT</td>
<td>9-9</td>
</tr>
<tr>
<td>Configuring Jolt Relay Adapter (JRAD)</td>
<td>9-13</td>
</tr>
<tr>
<td>Starting Jolt Relay</td>
<td>9-15</td>
</tr>
<tr>
<td></td>
<td>9-16</td>
</tr>
</tbody>
</table>
PeopleSoft Internet Architecture
Administration Preface

This book contains information related to the PeopleSoft Internet Architecture (PIA). Although the Installation and Administration book provides procedures for installing and configuring the components, this book offers reference information that you'll use over time, not just at installation.

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

See PeopleSoft Glossary.

About This PeopleBook

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

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

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

Before You Begin

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

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

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

**PeopleSoft Application Fundamentals**

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

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

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

**Related Documentation**


You can find updates and additional documentation for this release, as well as previous releases, on PeopleSoft Customer Connection ([http://www.peoplesoft.com/corp/en/login.asp](http://www.peoplesoft.com/corp/en/login.asp)). Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

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

**Hard-copy Documentation**

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press website from the Documentation section of
Peoplesoft Customer Connection. The Peoplesoft Press website is a joint venture between Peoplesoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed Peoplesoft documentation by using any of the following methods:

**Internet**
From the main Peoplesoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.


**Telephone**
Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.

**Email**
Send email to CPI at callcenter@conpub.com.

### PeopleBooks Standard Field Definitions

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

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

For more information about effective dates, see [Understanding Effective Dates in Using Peoplesoft Applications](http://www.peoplesoft.com/).

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

**Typographical Conventions and Visual Cues**

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

The following list contains our typographical conventions and visual cues:
(monospace font) Indicates a PeopleCode program or other program example.

**Bold** Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).

We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).

*Italics* Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: *field value.*

We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter O.

**KEY+KEY** Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.

**Cross-references** The phrase **For more information** indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in *italics* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Here's an example:

---

**For more information**, see **Documentation on CD-ROM** in *About These PeopleBooks: Additional Resources*.

---

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

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

**Warning!** Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.
Page and Panel Introductory Table

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

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

Comments and Suggestions

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

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

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOF.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.
CHAPTER 1

PeopleSoft Architecture

This chapter provides an overview of PeopleSoft Internet Architecture (PIA) and discuss the following topics:

- Component overview.
- The physical architecture.
- Configuration and deployment options.

Understanding PeopleSoft Architecture

The topics contained in this chapter provide an overview of the individual components of the PeopleSoft Internet Architecture. It’s important to understand the role of each component before you begin configuring your implementation. With this information you can decide which configuration will work best at your site.

Configuring PIA is not just about enabling Internet application deployment through a browser. PIA enables you to take advantage of all of the PeopleSoft intranet and internet solutions, as well as the PeopleSoft integration technologies, such as Application Messaging (publish/subscribe).

Note. The PeopleSoft Internet Architecture is also referred to by the acronym, PIA. In most cases within this PeopleBook the term PIA appears.

With PIA, PeopleSoft introduces an entirely new architecture. Because our technology continually evolves, PeopleSoft provides an additional document called PIA Answer Book. This is where you go to find late-breaking information from the field, tips, and, most important of all, clarification to some of the more subtle aspects of implementing PIA. You download PIA Answer Book from the Continuous Documentation site in Customer Connection.

Component Overview

The PeopleSoft Internet Architecture is comprised of a variety of components ranging from the browser to the database server, including the following:

- Web browser
- Web server
- Application server
- Batch server
- Database server

The following example illustrates, at a high level, the physical relationship between the PeopleSoft components.

High-level PeopleSoft Architecture

Each component fulfills a unique niche within the system. The following topics briefly introduce you to the components. The following section provides more details for each component.

**Web Browser**

The web browser is the primary means by which end users and even administrators access PeopleSoft applications and administrative tools.

You must make sure that on each workstation a currently supported browser is installed. Other than that, you don't need to install anything else, such as applets or connectivity software, on the workstation running the browser.

**Note.** There is no "traditional" client involved in PIA. The system sends pure HTML to a supported browser interface. All processing occurs on the server level. PeopleSoft does support the Development Environment, which is intended for applications developers and system administrators who need access to PeopleTools. These users need machines running Windows.
Web Server

A Java-enabled web server is required to support browser transaction requests and the application messaging technology. You install on the web server a collection of PeopleSoft Java servlets designed to handle a wide range of PeopleSoft transactions.

Application Server

The application server is the core of the PeopleSoft Internet Architecture; it executes business logic and issues SQL to the database server. The application server consists of numerous PeopleSoft services and server processes that handle transaction requests.

The application server is responsible for maintaining the SQL connection to the database for the browser requests and the Windows Development Environment.

PeopleSoft uses TUXEDO to manage database transactions, and Jolt, TUXEDO's counterpart, to facilitate transaction requests issued from the Internet. Both TUXEDO and Jolt are products of BEA Systems.

Database Server

The database server houses your database engine and your PeopleSoft database, which includes all of your object definitions, system tables, application tables, and data. The database server must be running one of the supported RDBMS/operating system combinations.

The relationship between a database server and an application server is a one-to-many model. That is, a single database server can have multiple application servers connecting to it. The database server simultaneously handles the application server connections, Development Environment connections, and batch programs running against it.

Note. Using the Windows Development Environment, you can connect directly to the database or indirectly through an application server.

Batch Server

The batch server, or batch environment, is where you have PeopleSoft Process Scheduler installed and configured, and it is the location where many of your batch programs run, such as Application Engine programs. In most situations this is also where you have your COBOL and SQR executables installed.
The Physical Architecture

Now that you have been introduced to the main components of PIA, let's look at some important details to consider regarding each component.

Web Browser

The browser uses the HTTP protocol. The browser sends requests to the web server, which forwards the request to the application server. A servlet installed on the web server facilities all browser connections.

The browser does not download any applets to complete a transaction. The application server sends only the following to the browser:

- HTML
- Javascript
- Cookies

With the browser processing only the items in the previous list, the result is a lightweight deployment of PeopleSoft applications that does not burden the client workstation with unnecessary processing responsibility. PIA is a server-centric architecture.

PIA leverages web browser cookies to store a unique access token for each user when they are initially authenticated. When the user connects to another PeopleSoft system, the token in the browser cookie is used to re-authenticate the user so they don’t have to go through the signon process again. Note that the browser cookie is an in-memory cookie and is never written to disk. The cookie is also encrypted to prevent snooping and check-summed to prevent tampering.

Web Server

The following topics explain the software that must be installed on the web server, the PeopleSoft Servlets, and how the servlets relay transaction requests to the application server.

Server Components

The web server must be Java-enabled so that it can run servlets. During the PeopleSoft installation, a variety of PeopleSoft Java servlets are installed on the web server. So, in addition to the web server software, you also must have a supported servlet engine installed.

The following list presents the software that runs on the PIA web server:

Web services

The program installed on the host system that manages the web server, such as WebLogic or WebSphere.
Servlet Engine
The environment in which servlets run. This component is tied to the web services software, but in some cases you install it separately.

Java Servlets
A platform-independent programming language used widely for web-based programs. Servlets are Java programs that run on the web server. The Java executables are required for the servlet engine to operate.

PeopleSoft Servlets
The following list contains the PeopleSoft servlets that reside on the web server.

Portal Servlet
The Portal servlet handles all of the requests and formatting for the users accessing PeopleSoft through the PeopleSoft Portal. It also manages all aspects of the PeopleSoft Portal such as search, content management, and home page personalization.

Integration Gateway Servlet
The Messaging Gateway servlet transmits publish/subscribe messages between message nodes. The gateway handles PeopleSoft-to-PeopleSoft messages, PeopleSoft-to-third party messages, and third party-to-PeopleSoft messages.

Report Repository Servlet
The Report Manager servlet enables users to easily access and distribute the output of batch reports, such as Crystal and SQR, run through PeopleSoft Process Scheduler over the Internet. This servlet retrieves the report output in the Report Repository and serves it to the browser.

Jolt
The PeopleSoft servlets on the web server transmit requests and data through a connection to Jolt, which runs on the application server. Jolt extends Tuxedo’s capabilities to the Internet; it is the communication layer between the web-based environment and the C++ environments. You configure the servlets to direct requests from the web server to a pre-defined Jolt port on the application server.

Jolt is a companion product that must coexist with Tuxedo on the same application server machine. Jolt is not a standalone product; it can’t function without Tuxedo.
BEA Jolt

The browsers do not connect directly to the application server. Instead they send HTTP requests to the Page Servlet running on the web server that translates the HTTP request into a Jolt request that is sent to a specified Jolt port. Then the application server, leveraging Tuxedo, runs the appropriate SQL against the database.

Application Server

Just as there are different components that comprise the physical environment in which the application server operates, such as database servers and web servers, there are a variety of components that operate on the application server enabling it to respond effectively to a multitude of transaction requests.

You should have a general knowledge of how the application server operates “under the covers” before you spend too much time configuring and tuning it. PeopleSoft also recommends as you read further that you refer to the Glossary for brief descriptions of the terminology related to the application server.

The following topics describe the major components that run on the application server to enable transaction processing, system scaling, browser requests, and so on. After reading this section you will have an understanding of an application server domain, server processes, listeners, handlers, and queues.

Domains

An application server domain is the collection of Server Processes, supporting processes, and resource managers that enable connections to the database. You manage each domain with a separate configuration file, and you configure each application server domain to connect to a single database. A single application server machine can support multiple application server domains running on it. You configure an application server domain using the PSADMIN utility located in the PS_HOME\appserv directory on the application server.
There can be a one-to-one or a many-to-one relationship between application server domains and a database. In the simplest case, you configure a single, application server domain to connect to a single PeopleSoft database. In a more sophisticated environment, you may configure multiple application server domains, with each domain connecting to the same PeopleSoft database. The opposite is not valid; a single, application server domain cannot be used to connect to multiple PeopleSoft database.

For example, suppose you have installed three databases, HRDMO1, HRDMO2 and HRDMO3, and you want to enable browser requests to each database. In this case, you must configure at least three application server domains—one for each database. Keep in mind that as demand increases you may need to configure multiple application server domains per database for redundancy/failover and to maintain a certain level of performance.

You can configure multiple application server domains under a single PeopleSoft home directory, or PS_HOME. In this context, PS_HOME refers to the PeopleSoft high-level directory on the application server, not the file server. Your PS_HOME is the directory to which you installed the PeopleSoft application server files during the Server Transfer process.

PSADMIN creates a directory beneath PS_HOME/appserv for each application server domain you configure. Using the previous HRDMO example, suppose you decided to name the application server domains the same name as the database to which they connect. In this case, PSADMIN creates sub-directories \HRDMO1, \HRDMO2, and \HRDMO3 beneath the PS_HOME directory on the application server. In this scenario, the directory structure should look similar to the following:

```
\PS_HOME
 \APPSERV
   ...
   \HRDMO1
   \HRDMO2
   \HRDMO3
   ...
```

When you boot an application server domain it starts the set of Server Processes associated with that domain, such as PSAPPSRV, PSQCKSRV, PSSAMSRV and so on. Each Server Process establishes a persistent connection to a PeopleSoft database, and this connection acts as generic, SQL pipeline that the Server Process uses to send and receive SQL.

Each Server Process uses the same SQL connection to facilitate requests from multiple sources. From the RDBMS perspective, each Server Process within a domain represents a connected user. Server Processes are discussed in more detail in the following sections.

**Listeners, Handlers, and Queues**

This section reveals the different services that comprise the basis of the application server functionality. Understanding the “big picture” and the role of each sub-component within is essential when you configure and tune your application server. For instance, although it is important to know how to configure multiple Java Server Handlers; it is equally important, if not more important, to know why and when to perform this task to address your site’s needs.

The following example illustrates all of the processes that comprise the application server.
Note. The previous example does not depict every server process that runs on the application server for the sake of simplicity. For example, there is also the optimization server process, PSOPTENG, and there is also the integration server processes.

When discussing the mechanics of the PeopleSoft architecture the term *server*, unavoidably, becomes overused. Although this is described later in this document, the following statement may help to illustrate the relationship between the components discussed in this chapter. An application *server* domain calls *Server Processes*, such as PSAPPSRV, which in turn invoke *Services*, such as MgrGetObject, on the database.

The following table provides a brief description of each component depicted in the previous example.
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workstation Listener (WSL)</td>
<td>The WSL monitors the Tuxedo ports for initial connection requests sent from the Windows Workstation/Development Environment. After the Workstation Listener accepts a connection from a workstation, it directs the request to a Workstation Handler. From that point, the Windows workstation interacts with the Workstation Handler to which it is assigned.</td>
</tr>
<tr>
<td>Workstation Handler (WSH)</td>
<td>The Workstation Handler processes the requests it receives from the WSL. A unique port number identifies a WSH. The port numbers for WSH are selected (internally by Tuxedo) from a given range of numbers. You can configure multiple WSHs to handle demand increases; new processes &quot;spawn&quot; as other processes become overloaded.</td>
</tr>
<tr>
<td>Jolt Server Listener (JSL)</td>
<td>Applies only to browser requests. The JSL monitors the Jolt port for connection requests sent from the browser through the web server. After the Jolt Server Listener accepts a connection, it directs the request to a Jolt Server Handler. From that point the browser interacts with the Jolt Server Handler. This is analogous to the relationship between the WSL and the WSH discussed previously.</td>
</tr>
<tr>
<td>Jolt Server Handler (JSH)</td>
<td>Applies only to browser requests. Processes the requests it receives from the JSL. The port numbers for the Jolt Server Handler are selected internally by Tuxedo in sequential order.</td>
</tr>
<tr>
<td>Request Queues</td>
<td>Each type of Server Process has a service request queue that it shares with other servers of the same type (as in PSAPPSRV on APPQ, PSQCKSRV on QCKQ). The WSL and JSL insert requests into the appropriate queue, then the individual Server Processes complete each request in the order it appears in the queue.</td>
</tr>
<tr>
<td>Server Processes</td>
<td>The Server Processes act as the heart of the application server domain. They maintain the SQL connection and make sure that each transaction request gets processed on the database and that the results are returned to the appropriate origin. The following section explores the numerous PeopleSoft server processes that run on the application server.</td>
</tr>
</tbody>
</table>


**PeopleSoft Server Processes**

Multiple, individual server processes run in an application server domain. A *Server Process* is executable code that receives incoming transaction requests. The Server Process carries out a request by making calls to a *service* (such as MgrGetObject).

Server Processes invoke *Services* to perform application logic and issue SQL to the RDBMS. Each application server process, as in PSAPPSRV, PSQCKSRV, PSQRYSRV, PSSAMSrv, or PSOPTENG establishes and maintains its own connection to the database.

The Server Process waits for the service to complete, then returns information to the device that initiated the request, such as a browser. While a Server Process waits for a service to complete, other transaction requests wait in a queue until the current Service completes. A Service may take a fraction of a second to complete or several seconds depending on the type and complexity of the Service. When the Service completes, the server process is then available to process yet another transaction request, as in the next request in the corresponding queue.

Some of the server processes are optional, so you must configure only those server processes that your implementation requires per domain. The minimum server processes that a domain requires are PSAPPSRV and PSSAMSrv. Each server process, its function and configuration parameters, is discussed in detail later in this document.

You can configure multiple instances of the same server processes to start when you boot the application server domain. This helps you to handle predicted workloads. Furthermore, Tuxedo is able to dynamically spawn incremental server processes to handle increasing numbers of transaction requests. The capability to configure multiple server processes and spawn incremental server processes contributes to the application server’s scalability.

The following is a complete list of all the possible server processes included in an application server domain. Keep in mind that depending on the configuration options you choose, not all of the server processes will necessarily be a part of every domain.

The basic PeopleSoft Server Processes are:

- **PSAPPSRV**
  Performs the functional requests, such as building and loading components (which are also known as panel groups in previous releases). It also provides the memory and disk-caching feature for PeopleTools objects on the application server. The PSAPPSRV is required to be running in any domain.

- **PSQCKSRV**
  It performs quick, read-only SQL requests. This is an optional process designed to improve performance by reducing the workload of PSAPPSRV.

- **PSQRYSRV**
  Designed to handle any query executed by PeopleSoft Query. This is an optional process designed to improve performance by reducing the workload of PSAPPSRV.

- **PSSAMSrv**
  The SQL Access Manager: this process handles the conversational SQL that is mainly associated with PeopleSoft Application Designer. This process is required to be running on any domain.
The Optimization Engine process: this process provides optimization services in the PeopleSoft Optimization Framework. You need to configure this process in a server domain only if you want to use the Optimization Plug-in delivered with PeopleSoft applications.

For application messaging, there is a separate set of server processes dedicated to that functionality. Keep in mind that that your messaging domain must also contain PSAPPSRV and PSSAMSRV, the required server processes.

- PSMSGDSP (Required for application messaging only).
- PSMSGHND (Required for application messaging only).
- PSPUBDSP (Required for application messaging only).
- PSPUBHND (Required for application messaging only).
- PSSUBDSP (Required for application messaging only).
- PSSUBHND (Required for application messaging only).

Note. You can examine servers by using the `ps -ef` command in UNIX or the Task Manager in Windows NT. The PeopleSoft configuration utility, PSADMIN, also offers a monitoring utility.

Each of the server processes is discussed in detail in subsequent chapters in the appropriate context.

**Services**

When a PeopleSoft application sends a request to the application server, it sends a service name and a set of parameters, such as “MgrGetObject + parameters”. Tuxedo then queues the transaction request to a specific Server Process that is designed to handle certain services.

When a server process boots it "advertises" to the system the predefined services it handles. You can see the association between the many services and server processes by reviewing the PSAPPSRV.UBB file.

**See Also**

Executables and Configuration Files

**BEA Products**

The PeopleSoft application server uses the BEA Systems transaction monitor, Tuxedo, to handle the PeopleSoft transaction processing. The other BEA software we use, Jolt, is the communication layer between the PeopleSoft servlets on the web server and the application server. Both Tuxedo and Jolt are required for PIA.
Although we document the BEA components with respect to their function within the context of a PeopleSoft environment, we do not duplicate the documentation provided by BEA. As such, PeopleSoft strongly encourages all system administrators involved with application server-related projects to become familiar with the BEA documentation that we ship along with our product. The BEA documentation provides an extensive error catalog that serves as an invaluable source of information when troubleshooting.

Tuxedo doesn’t actually perform the processing on the application server; it schedules PeopleSoft Server Processes to perform the transactions.

**See Also**

*PeopleSoft Installation Guide for your platform*

**Database Connectivity**

Application servers require database connectivity software installed locally to maintain the SQL connection with the RDBMS. You must install the required connectivity software and associated utilities for your RDBMS.

After the application server establishes a connection to the database, any device that initiates a transaction request through the application server takes advantage of the application server’s direct connection to the database and therefore requires no connectivity software.

---

**Batch Server Environment**

In a multi server environment, you have options regarding the decision as to where your site’s batch server environment resides. In PeopleSoft, the batch server, or batch environment, refers to your Process Scheduler environment. Typically, this is the server on which your Application Engine and other batch programs run. This section contains topics to help clarify the relationship between the application server and the batch server. In short, you have the option to install the batch server on a separate server, or it can run on either the application server or the database server.

**See Also**

*PeopleTools PeopleBooks: Process Scheduler*

**Batch Server Support**

You can install your batch server (also known as the PeopleSoft Process Scheduler) on any supported application server, on any supported database server, or on any supported batch server. Where you choose to run your batch environment is entirely up to you, but it is very important that you choose a location that’s supported in the PeopleSoft environment. For all database platforms you will have at least two options for your batch environment location.

In cases where you install PeopleSoft Process Scheduler on a machine that is a supported database machine, but not a supported application server machine, you are able to configure and administer Process Scheduler using PSADMIN.
Unfortunately, we can’t remove PSADMIN’s application server menu options based on the operating system upon which it runs. So, keep in mind that just because particular options may appear on the screen, as in the Application Server menu, it does not necessarily indicate that you can configure an application server on that machine.

**Process Scheduler and the Application Server**

PeopleSoft uses PSADMIN, the PeopleSoft Server Administration menu interface, to configure and administer both the application server and Process Scheduler Server (also known as Batch Server). The Process Scheduler setup procedure exists in PSADMIN to provide a menu-driven interface to configure Process Scheduler parameters and administer the Process Scheduler Server Agent.

Even though the application server and Process Scheduler (batch server) have PSADMIN as a common interface and share the directories under the `<PS_HOME>` on the application server, they are separate entities. For instance, you boot, configure, and shut down the application server and the Process Scheduler server separately.

The application server uses Tuxedo to schedule transaction requests and send transaction results, and it issues SQL requests to the database server using the persistent connections of a collection of PeopleSoft application server processes.

In contrast, PeopleSoft Process Scheduler is a separate facility that is designed to poll the PeopleSoft database table, PSPRCSRQST, for inserted requests and initiate Application Engine, COBOL, SQR, and other batch processes.

**Database Server**

The PeopleSoft database is the repository for all information managed by PeopleSoft applications. Not only is application data stored in the database, but the PeopleSoft metadata is also maintained in the database. PeopleSoft Application Designer enables you to define and maintain this metadata that the system uses to drive the runtime architecture. The application server executes business logic based on the PeopleSoft metadata.

You use PeopleSoft Application Designer to define and configure PeopleSoft applications. You can create dozens of different types of application objects, such as Fields, Records, Pages, Messages, and so on. When an application developer saves an application object, PeopleSoft Application Designer saves this definition to the metadata repository in the PeopleSoft database.

At execution time, the application server fetches the most recent application object definitions from the metadata repository, compiles and caches the application object into memory, and executes the business rules based on the definition.

**Configuration and Deployment Options**

The following topics present your options for deploying PeopleSoft across your enterprise. Because the PeopleSoft Internet Architecture is flexible, this means you have many options to consider.
In this section we discuss the following topics:

- Configuration options.
- Deployment options.

**Configuration Options**

You can configure your environment to support either a “physical” or a “logical” application server configuration. Although both configurations are viable options, in some cases, the PeopleSoft standard installation procedure recommends one or the other depending on the combination of database and operating system combination at your site.

Generally, PeopleSoft recommends that you have your application server on the same physical machine as the database server. This would be a logical separation between the application server and database server. If the application server and database server do not reside on the same machine, then we recommend that the application server and the database server are connected to the same, high-performance, backbone network. This ensures optimum performance.

The following sections provide additional details regarding these configuration options.

**Physical Application Server Configuration**

A physical application server configuration means that each component resides on a separate machine. In this configuration the application server and the database server are physically separated. The following example depicts a physical application server configuration.

Physical application server configuration

**Logical Application Server Configuration**

A logical application server environment means that only two, server machines exist in the configuration. In this configuration, the application server and database server are not physically, but logically split.

For example, you could have the following:

- Web server
- Server on which both the application server and the database server reside
The following example depicts a logical configuration.

The solid line surrounding the application server and the database server represents one physical machine. In the case of the application server and database server, a logical application server configuration is possible only in situations where both the database server and the application server are supported on a particular operating system. Ultimately, this example illustrates that certain components can share the same machine.

The previous example depicts the application server and the database server sharing the same machine, but theoretically the web server could also reside on the same machine with both the application server and the database server. The only requirement is that each component must be supported by the underlying operating system. With this approach (all servers on the same machine), there are some items to consider, one item being security. If you are deploying PeopleSoft applications to the internet, you will most likely want your web server outside of your network firewall and not residing on the database server.

How you set up your configuration (logical or physical) depends entirely on your site’s requirements.

**Note.** For demonstration purposes, you can have all components on the same Windows NT or UNIX machine. This configuration can be useful for development, testing, and training.

**Deployment Options**

There are a variety of end-user deployment options and some third-party integration solutions that you should consider implementing.
**PeopleSoft Portal**

The PeopleSoft Portal is another option that you have for deploying PeopleSoft applications to a browser. The portal enables you to integrate PeopleSoft content with the content from other data sources. The PeopleSoft portal can stand on its own or you can integrate it with any enterprise portal you may already be using.

The PeopleSoft Portal technology consists of the Portal Servlet and an application server. These two components work together to provide common portal processing such as page assembly, search ability, content management, navigation, and homepage personalization.

The portal technology is an important integration technology because with it you combine content from a wide variety of data sources and deliver the result to end users in a unified, simple-to-use interface.

**See Also**

*PeopleTools PeopleBooks: Portal Technology*

**Connecting From the Development Environment**

Although the majority of your end users connect using their browser, your applications developers and system administrators, who require access to PeopleTools, must use Windows workstations. PeopleSoft Application Designer and various other PeopleTools are not accessible through a browser.

With the Development Environment you can connect directly to the database (two-tier), or you can connect through an application server (three-tier).

**Integration Technologies**

Although the PeopleSoft integration solutions don't exactly deploy an interface to an end user, they do enable you to share information with third-party systems and other PeopleSoft databases. To take advantage of these integration solutions, you must configure PIA.

- **Integration Broker**: Publish/subscribe messaging architecture for asynchronous integration and data synchronization. The messaging technology handles inbound and outbound messages. It is the evolution of the Application Messaging technology used in previous releases.

- **Component Interfaces**: Object-oriented, request/reply, component architecture that enable third-party applications to synchronously invoke PeopleSoft business logic.

- **Business Interlinks**: Plug-in framework that enables PeopleSoft applications to easily invoke third-party, Application Program Interface (API) over the internet.

Developing for and implementing the integration solutions is beyond the scope of this administration document.
See Also

*PeopleTools PeopleBooks*: “Understanding Integration Broker”
CHAPTER 2

Working with PSADMIN

This chapter provides an overview of PSADMIN and discusses the following topics:

• Starting PSADMIN.
• Using PSADMIN.
• Configuration templates.
• Command line options.
• Quick configure.
• Executables and configuration files.

Understanding PSADMIN

The term “PSADMIN” is an abbreviation for PeopleSoft Server Administration. PeopleSoft developed PSADMIN to simplify the process of configuring and administering all the servers and features available on the application server. For example, to configure your application server domains, Process Scheduler Servers, or Windows NT Services, you use PSADMIN. The PSADMIN provides a easier-to-you interface to Tuxedo’s native configuration and administration command line interface.

PSADMIN enables you to perform a variety of tasks, including:

• Acts as a front-end to BEA/Tuxedo’s native configuration process and provides a friendly interface to create and build application server domains and Process Scheduler servers.
• Provides the same interface on Windows NT and UNIX.
• Simplifies the execution of Tuxedo operations such as boot, shutdown, and checking status for application servers and Process Scheduler servers.
• Review log files.
• Edit configuration files.
• View tracing information.
Starting PSADMIN

This section assumes that you already have your PeopleSoft Application Server installed and configured as described in the *PeopleSoft Installation and Administration* book for your RDBMS platform.

**To start the PSADMIN utility:**

1. Start your command interface on Windows NT or UNIX.
2. Change directory to the `\appserv` directory beneath the high-level PeopleSoft directory on the application server.

   For example, if your application server runs on Windows NT, enter:

   ```
   cd ps_home\appserv
   psadmin
   ```

   And, if your application server runs on UNIX, enter:

   ```
   CD $PS_HOME/APPSERV
   psadmin
   ```

3. Select the server that you want to configure, administer, or monitor from the PeopleSoft Server Administration menu.

   ![PeopleSoft Server Administration Menu]

   ```
   PeopleSoft Server Administration
   --------------------------------
   1) Application Server
   2) Process Scheduler
   3) Service Setup
   q) Quit
   ```

   Command to execute (1-4, q):

Using PSADMIN

Using the PSADMIN involves selecting the number of the menu item that reflects the action that you want to take place, entering the correct number on the command line, and pressing ENTER. However, in some cases, you may want to take advantage of the command line options that PSADMIN offers. After reading this section you will be familiar with PSADMIN’s menu options, where to find them, and how to select them.
This section discusses the:

- Menu interface
- Menu structure

## Menu Interface

Each PSADMIN menu presents the same look and feel. The menus all contain the following components:

- **Menu Title.** In the following example, PeopleSoft Server Administration.
- **Menu Item.** These are the numbered items beneath the menu title that you select to invoke a particular action or menu.
- **Command Prompt.** This is where you enter your menu option selection. (This is the **Command to execute** prompt).

```
--------------------------------
PeopleSoft Server Administration
--------------------------------
  1) Application Server
  2) Process Scheduler
  3) Service Setup
  q) Quit

Command to execute (1-3, q):
```

### Selecting Menu Options

To select a menu item, enter the corresponding number at the prompt and press ENTER. For example, if you wanted to view the menus associated with the application server, you would enter `1` on the command prompt, and press ENTER.

For example,

```
--------------------------------
PeopleSoft Server Administration
--------------------------------
  1) Application Server
  2) Process Scheduler
  3) Service Setup
  q) Quit

Command to execute (1-3, q): 1
```
Entering 1 invokes the following menu:

---------------------------------------------
PeopleSoft Application Server Administration
---------------------------------------------

1) Administer a domain
2) Create a domain
3) Delete a domain
q) Quit

Command to execute (1-3, q) :

Navigating to Previous Menu
To return to the previous menu enter q, for Quit, at the prompt, as shown, and press ENTER:

Command to execute (1-3, q) : q

Throughout all the menus in this administrative utility, selecting q and pressing ENTER returns you to the previous menu (or the previous layer of menus depending on how you look at it). So, if you’ve entered the wrong number and find yourself at the wrong menu, you can backtrack to your previous decision point.

The PeopleSoft Server Administration menu is the “main” menu in the PSADMIN, and it is also the first menu you see upon starting the PSADMIN utility from the command line. In that sense it is the first layer of menu options. When you select q and press ENTER from this menu, you exit PSADMIN entirely.

In some situations, if you accidentally enter the wrong number at the prompt and press ENTER, you can return to the previous menu by entering q and pressing ENTER or by just pressing ENTER. For example, if you accidentally select 3 from the PeopleSoft Application Server Administration menu, you can enter q or just press enter without entering anything on the Select domain number to delete command, as shown in the following example. By doing so, you arrive at the previous menu.

For example,

---------------------------------------------
PeopleSoft Application Server Administration
---------------------------------------------

1) Administer a domain
2) Create a domain
3) Delete a domain
q) Quit

Command to execute (1-3, q) : 3

The following appears:
Tuxedo domain list:

1) ps800dmo

Select domain number to delete:

Press ENTER, or enter q then press ENTER.

---------------------------------------------
PeopleSoft Application Server Administration
---------------------------------------------

1) Administer a domain
2) Create a domain
3) Delete a domain
q) Quit

Command to execute (1-3, q):

---

Menu Structure

Some of the menu items that you select in the PSADMIN utility lead to multiple sets, or layers, of additional menu items. Rather than searching through the structure on your own using a trial-and-error technique, use the following diagrams to become familiar with the menu structure within the PSADMIN utility.

This will save you time as you become acquainted with PSADMIN. After you’ve used the PSADMIN for a short time, you’ll refer to these charts less often.

The following sections are divided according to menu items that appear on the PeopleSoft Server Administration menu—the PSADMIN “home” menu.

---

PeopleSoft Server Administration
---

1) Application Server
2) Process Scheduler
3) Service Setup
q) Quit

Command to execute (1-3, q):

---

Application Server

The following diagram illustrates all the menu items that stem from the Application Server menu item on the PeopleSoft Server Administration menu.
PSADMIN Application Server menu structure

**Process Scheduler**

The following diagram illustrates all the menu items that stem from the *Process Scheduler* menu item on the PeopleSoft Server Administration menu.
**Process Scheduler**

- Start a Process Scheduler Server
- Stop a Process Scheduler Server
- Configure a Process Scheduler Server Configuration
- Create a Process Scheduler Server Configuration
- Delete a Process Scheduler Server Configuration
- Edit a Process Scheduler Server Configuration File
- Show Status of a Process Scheduler Server

**PSADMIN Process Scheduler menu structure**

**Service Setup**

The following diagram illustrates all the menu items that stem from the Service Setup menu item on the PeopleSoft Server Administration menu.
Configuration Templates

The initial values that you see in PSADMIN are derived from the configuration template that you select when you create your domain. The templates provide a starting point for your further configurations. The delivered templates provide a range of possible implementations. The delivered templates are as follows:

- **Small.** This template is designed for a number of users in the range of 1-100.
- **Medium.** This template is designed for a number of users in the range of 100-500.
- **Large.** This template is designed for a number of users in the range of 500-1000.
- **Developer.** The developer template is intended for development and demonstration environments only.

**Note.** As mentioned previously, these templates provide a starting point for configuring domains. Performance may vary due to increased transaction volume and various other factors. It’s important for your application server administrator to monitor the performance of the domains and make the appropriate adjustments as necessary.

Each configuration template includes a number of server processes, such as PSAPPSRV, that is sufficient for its intended load. Keep in mind that you can easily modify and create your own configuration templates to fully include your site’s needs. The configuration templates are .CFX files that you can locate in the PS_HOME\appserv directory on the application server. To create your own CFX files, just save the CFX file to a new name after modifying the template values. The next time PSADMIN prompts you for a configuration template to create a domain, your custom CFX file will appear in the configuration templates list.

You can modify the CFX files using any text editor, such as Notepad on Windows or vi on UNIX. Use the Save As option to create your own template.

Command Line Options

In some cases you may want to use the PSADMIN command line options rather than starting the PSADMIN interface and navigating to a particular menu. The command line options offer a direct method of executing select tasks on the application server. It also enables you to include PSADMIN commands in scripts.

Before you begin using the PSADMIN commands, PeopleSoft recommends that you become generally familiar with PSADMIN and the components it controls.

In this section, we discuss the following topics:

- Syntax
- General administrative commands
- Command line create and configure
Syntax

The syntax to which you must adhere is as follows:

```
psadmin -c <command> -d <domain/database> -t <template if applicable>
```

For example, to boot a domain, enter the following:

```
psadmin -c boot -d ps800dmo
```

General Administrative Commands

The following table contains the commands that you can submit on the command line and bypass the PSADMIN utility.

<table>
<thead>
<tr>
<th>Command</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Application Server</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>boot</td>
<td>psadmin -c boot -d ps800dmo</td>
<td>Boots an application server domain named ps800dmo.</td>
</tr>
<tr>
<td>shutdown</td>
<td>psadmin -c shutdown -d ps800dmo</td>
<td>Shuts down an application server domain, ps800dmo, using a “normal” shutdown method. In a normal shutdown, the domain waits for users to complete their tasks and turns away new requests before terminating all the processes in the domain.</td>
</tr>
<tr>
<td>shutdown!</td>
<td>psadmin -c shutdown! -d ps800dmo</td>
<td>Shuts down an application server domain using a “forced” shutdown method. In a forced shutdown, the domain immediately terminates all the processes in the domain.</td>
</tr>
<tr>
<td>create</td>
<td>psadmin -c create -d ps800dmo -t small -s &lt;startup_string&gt; -p &lt;port_string&gt;</td>
<td>Creates an application server configuration file with specified template. Where -t specifies the template to use: small, medium, or large. Note. The –s and –p parameters are discussed in the following section.</td>
</tr>
<tr>
<td>configure</td>
<td>psadmin -c configure -d ps800dmo</td>
<td>Invokes the configuration editor.</td>
</tr>
</tbody>
</table>
### Command Line Create and Configure

You can create and configure an application server domain directly from the command line. PeopleSoft added this functionality to simplify the task of creating numerous domains that use default server settings.

**Overview**

PSADMIN enables you to create and configure a simple application server domain from the command line. By “simple” we mean a domain that, generally, reflects the default settings packaged in the domain Configuration templates, as in small or medium.

Recall that submitting the following command to PSADMIN created a domain referencing the selected template.

```
psadmin -c create -d <domain_name> -t <template>
```

PSADMIN created the PSAPPSRV.CFG file using the template specified. To configure the domain to be functional, you must specify the Startup and Port string values using –s and –p option. PSADMIN reflects the specified values in the parameters stored in the PSAPPSRV.CFG file.

---

<table>
<thead>
<tr>
<th>Command</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Process Scheduler</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>create</td>
<td>psadmin -p create -d hrdmo -t nt -ps &lt;port_string&gt;</td>
<td>Creates a new Process Scheduler Server. Where -d specifies the database, -t specifies the template to use, as in nt, unix, or vms, and –ps specifies the set up string entered from the command line</td>
</tr>
<tr>
<td>start</td>
<td>psadmin -p start -d hrdmo</td>
<td>Starts a Process Scheduler.</td>
</tr>
<tr>
<td>stop</td>
<td>psadmin -p stop -d hrdmo</td>
<td>Stops a Process Scheduler.</td>
</tr>
<tr>
<td>configure</td>
<td>psadmin -p configure -d hrdmo</td>
<td>Configures a Process Scheduler.</td>
</tr>
<tr>
<td>status</td>
<td>psadmin -p status -d hrdmo</td>
<td>Shows the status of a Process Scheduler.</td>
</tr>
<tr>
<td><strong>General</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>help</td>
<td>psadmin -h</td>
<td>Displays command help and syntax.</td>
</tr>
<tr>
<td>version #</td>
<td>psadmin -v</td>
<td>Displays version number, as in Version 8.40.</td>
</tr>
<tr>
<td>environment</td>
<td>psadmin -env</td>
<td>Displays your environment variables.</td>
</tr>
</tbody>
</table>
The syntax when including the Startup string and the Port string on the command line is

```bash
psadmin -c create -d <domain_name> -t <template> -s <startup_string> -p <port_string>
```

**Note.** Keep in mind, you can always enter `psadmin -h` on the command line for syntax help.

**Including Unique Values**

You must separate the values that you include in the Startup and Port strings with a forward slash (/). The values may not contain spaces, nor can a previous value be left blank while providing a value intended for a following parameter.

For example, the Startup string includes the following values:

- Database name (DBNAME)
- Database type (DBTYPE)
- User ID (UserId)
- User Password (UserPswd)
- Domain Name (DOMAIN_ID)
- Add to Path (ADD_TO_PATH)
- Connect ID (CNCT_ID)
- Connect Password (CNCT_PSWD)
- Server Name (SERV_NAME)

On the command line, it must appear in the following order:

```bash
psadmin -c create -d domain -t template -s DBNAME/OBTYPE/
User/Password/DOMAIN/ADD_TO/PATH/CNCT_ID/CNCT_PSWD/SERV_NAME
```

The Domain Name and Add to Path values reside in the Domain Settings section of the PSAPPSSRV.CFG, and the rest of the Startup values reside in the Startup section of the PSAPPSSRV.CFG.

Similarly, the Port string (-p) contains the following values:

- Workstation Listener Port (WSL_PORT)
- Jolt Port (JSL_PORT)
- Jolt Internet Relay Adapter Port (JRAD_PORT)

If you chose to include the Port string on the command line, it would appear as:
psadmin -c create -d domain -t template -s DBNAME/DBTYPE/
OPR_ID/OPR_PSWD/DOMAIN_ID/ ADD_TO_PATH/CNCT_ID/CNCT_PSWD/SERV_NAME
-p WSL_PORT/JSL_PORT/JRAD_PORT

The values in the Port string control the Port parameter in the Workstation Listener, Jolt Listener, and Jolt Relay Adapter sections of the PSAPPSRV.CFG.

The defaults are:

- WSL_PORT (7000)
- JSL_PORT (9000)
  - JRAD_PORT (9100)

**Default Values**

The only "required" value is DBNAME. After that, the individual values in the strings may be truncated from right-to-left. If you do not specify a value, PSADMIN uses a default value.

The defaults are in parentheses:

- DBTYPE (MICROSFT)
- UserId (QEDMO)
- UserPswd (QEDMO)
- DOMAIN_ID (same as DBNAME)
- ADD_TO_PATH (c:\apps\db\mssql7\binn)
- CONNECT_ID (blank)
- CONNECT_PSWD (blank)
- SERVER_NAME (blank)

---

**Note.** If the default values contained in the delivered CFX files are not acceptable, you can modify the CFX files in the <PS_HOME>\apppserv directory to reflect your environment.

**Values**

The following table provides more information regarding the parameters and string values associated with the create and configure command line option.

<table>
<thead>
<tr>
<th>Parameter/Option</th>
<th>String Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-c create</td>
<td></td>
<td>As with the other command line parameters you must enter the initial command. In this case, use create.</td>
</tr>
<tr>
<td>Parameter/Option</td>
<td>String Values</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>-d &lt;domain&gt;</td>
<td></td>
<td>Enter the name of the new domain that you want to create. For example, HR800DMO</td>
</tr>
<tr>
<td>-t &lt;template&gt;</td>
<td></td>
<td>Enter the template for your new domain: small, medium, or large.</td>
</tr>
<tr>
<td>-s &lt;startup string&gt;</td>
<td></td>
<td>For the –s flag, you must enter the following values in the exact order and include the forward slash (/) between each value. After you enter all of the values required by your RDBMS, this will comprise the startup string.</td>
</tr>
<tr>
<td>/DBNAME</td>
<td></td>
<td>Enter the name of the database name to which the application server will connect. (From the Startup section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td>/DBTYPE</td>
<td></td>
<td>Enter your database type, as in MICROSOFT or INFORMIX. (From the Startup section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td>/USER_ID</td>
<td></td>
<td>Add the User ID, such as QEDMO, for the domain to use to connect to the database. (From the Startup section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td>/USR_PSWD</td>
<td></td>
<td>Add the user password that is associated with the specified User ID. (From the Startup section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td>/DOMAIN_ID</td>
<td></td>
<td>Enter a Domain ID, such as TESTSRV1, TESTSRV2, and so on. This does not need to match the domain name. This name is important only in that the Tuxedo Web Monitor uses it to identify application server domains on each machine. (From the Domain Settings section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td>/ADD_TO_PATH</td>
<td></td>
<td>Add the directory that contains your connectivity software, or database drivers. (From the Domain Settings section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td>/CNCT_ID</td>
<td></td>
<td>Connect IDs are required for all platforms. (From the Startup section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>See the PeopleTools Security PeopleBook for information on the Connect ID.</td>
</tr>
<tr>
<td>/CNCT_PSWD</td>
<td></td>
<td>Specify the password associated with the Connect ID. (From the Startup section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td>/SERV_NAME</td>
<td></td>
<td>If your RDBMS requires that you specify the Server Name on which the database resides, enter the appropriate Server Name. (From the Startup section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td><strong>Parameter/Option</strong></td>
<td><strong>String Values</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>-p &lt;port string&gt;</td>
<td></td>
<td>The –p command line parameter supports an optional set of values that you can specify for your domain. These values comprise the port string. Typically, you only specify values here if you have more than one domain on the same application server machine, or you need to specify a specific value due to your environment or testing needs. Otherwise, PeopleSoft recommends accepting the defaults for ease of configuration.</td>
</tr>
<tr>
<td>/WSL_PORT</td>
<td></td>
<td>This controls the Workstation Listener port setting. If you need to change the Workstation Listener port to reflect a unique value, enter that value. For example, enter 7100. (From the Workstation Listener section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td>/JSL_PORT</td>
<td></td>
<td>This controls the Java Station Listener port setting. If you do not intend for a domain to support browser deployment, you do not need to specify a value for the JSL_PORT. (From the Jolt Listener section in PSAPPSRV.CFG).</td>
</tr>
<tr>
<td>/JRAD_PORT</td>
<td></td>
<td>This controls the Jolt Relay Adapter port setting. You need to specify a value here only if you intend to support browser deployment and your web server resides on a separate machine than the application server. (From the Jolt Relay Adapter section in PSAPPSRV.CFG).</td>
</tr>
</tbody>
</table>

Whether you use these command line options depends on why you’re creating and configuring a domain. If you are creating a domain that requires tuned variables based on the needs of your site, then you would want to use the PSADMIN menu interface to enter the tuned variables for each configuration section.

However, there are occasions where a systems administrator or a developer must set up a simple application server domain for which the defaults contained in the packaged templates are sufficient. The extended command line options provide a convenient alternative to stepping through each PSADMIN configuration prompt.

**To create and configure an application server domain from the command line:**

1. Change directories to the PS_HOME\appserv directory on the application server.
   
   For example,
   
   `C:\cd hr800\appserv`

2. Enter `psadmin` on the command line and submit the command line parameters for `-c <command> -d <domain>, -t <template>, -s <startup>, and –p <port>`.
The following example shows the basic syntax you must use when you configure a domain using this command line option on Windows.

```bash
C:\hr800\appserv\psadmin -c create -d <domain> -t <template> [-s <startup_string>] [-p <port_string>]
```

The following example shows the syntax for the startup string, which you enter after `-s`.

```
DBNAME/DBTYPE/USER_ID/USER_PSW/DOMAIN_ID/ADD_TO_PATH/CNCT_ID/CNCT_PSWD/SERV_NAME
```

The following example shows the syntax for the optional port string, which you enter after `-p`.

```
WSL_PORT/JSL_PORT/JRAD_PORT
```

Your final command line may look similar to the following:

```bash
C:\hr800\appserv\psadmin -c create -d HR800DMO -t small -s HR800DB1/MICROSFT/PS/PS/TESTSRV2/c:\apps\db\mssql7\binn -p 7100/9010
```

You need to include only the parameters that apply to your RDBMS.

3. Press ENTER.

In your command screen, you should see messages that resemble the following.

```
Copying application server configuration files...
copying [small.cfx] to [HR800DMO]\psappsrv.cfg
Copying Jolt repository file...
Domain created.
Loading UBBGEN configuration utility with "-s HR800DB1/MICROSFT/PS/PS/TESTSRV2/c:\apps\db\mssql7\binn -p 7100/9010"
    setting DBName=HR800DB1
    setting DBType=MICROSFT
    setting OprId=PS
    setting OprPswd=PS
    setting ConnectId=
    setting ConnectPswd=
    setting ServerName=
    setting Port=7100
    setting Port=9010
    setting Listener Port=9100
    setting Domain ID=TESTSRV2
    setting Add to PATH=c:\apps\db\mssql7\binn
New CFG file written with modified Startup parameters

Log Directory entry not found in configuration file.
Setting Log Directory to the default... [PS_SERVDIR\LOGS]
PSAUTH Spawning disabled because Max Instances <= Min Instances.
```
Configuration file successfully created.
CFG setting changes completed, loading configuration...

**Quick Configure**

Immediately after you create a domain, you are prompted to configure it using the Quick configure menu.

Would you like to configure this domain now? (y/n) [y]:

If you enter `y`, then the Quick-configure menu appears.

```
Quick-configure menu -- domain: PT840
```

```
Features          Settings
==========        =========
1) Pub/Sub Servers: No 10) DBNAME : [PT8]
2) Quick Servers : No 11) DBTYPE : [MICROSFT]
3) Query Servers : No 12) UserId : [QEDMO]
4) Jolt : Yes 13) UserPswd : [QEDMO]
5) Jolt Relay : No 14) DomainID : [PT8]
6) PC Debugger : No 15) AddToPATH : [C:\Apps\Db\Mssql7\Binn]
7) Opt Engines : No 16) ConnectID : [psft]
                    17) ConnectPswd : [psft8]
                    18) ServerName :[]

Actions          19) WSL Port : [7000]
                   20) JSL Port : [9000]
8) Load config as shown
9) Custom configuration
   h) Help for this menu
   q) Return to previous menu
```

HINT: Enter 10 to edit DBNAME, then 8 to load

Enter selection (1-19, h, or q):

The Quick-configure menu is not intended to replace the series of configuration sections in the PSADMIN interface. In most cases, your site will require the custom parameters and tuning options that are available only through the full PSADMIN menu. For this reason, the Quick-configure menu is provided for situations where you are setting up a demonstration domain for testing or for development needs.

This Quick-configure menu shows which features are currently set for the newly created domain. The menu contains the values most commonly changed when setting up a demonstration or test domain. If you happen to be responsible for setting up numerous domains on your site for testing or demonstration, the Quick-configure menu could save you a significant amount of time.
To change the value of a parameter under Features, just enter the number corresponding to the feature and that will toggle the feature on or off.

To change the value of a parameter under Settings, enter the number corresponding to the setting and enter the new value at the prompt. For example, if you wanted to change the name of the database, just enter 10 for DBNAME. Then on the following prompt, enter the name of the database to which the application server should connect.

```
Enter new setting for DBNAME [PT8]: NEWDB```

To perform any of the items under the Actions menu, just enter the number corresponding to the action. To leave the Quick-configure interface and perform a “traditional” domain configuration using the PSADMIN interface, just enter 9 and respond positively when prompted by the following:

```
Do you want to change any config values (y/n)? [n]:```

If you need help while using Quick-configure, enter h to invoke online descriptions of the interface.

### Executables and Configuration Files

You can create, configure, and boot an application server domain all from the PSADMIN interface or through its command line options. In fact, you can use PSADMIN to control or configure just about any aspect of an application server domain. Because of this, it is not essential to become familiar with the executables and configuration files that comprise the operation of the application server domain.

However, for troubleshooting and general knowledge PeopleSoft recommends that you read the following section to gain an appreciation of the main files and executables associated with an application server domain.

In this section we’ll discuss the main executables and configuration files that enable you to configure and boot a PeopleSoft Application Server domain. We discuss how to:

- Configure a domain
- Load a configuration
- Boot a domain
- Stop a domain

The executables that we discuss are:

- **PSADMIN.EXE**. This PeopleSoft executable resides in PS_HOME\appserv.
- **UBBGEN.EXE**. This PeopleSoft executable resides in PS_HOME\bin\server\winx86.
- **TMLOADCF.EXE**. This BEA Tuxedo executable resides in TUXDIR\bin.
- **TMBOOT.EXE**. This BEA Tuxedo executable resides in TUXDIR\bin.
• **TMSHUTDOWN.EXE.** This BEA Tuxedo executable resides in TUXDIR\bin.

The configuration/data files on which the executables rely all reside in the following directory PS_HOME\appserv\<domain_name>. Each domain has its own set of these files. Namely, these files are:

• **PSAPPSRV.CFG.** This is the catchall configuration file that contains the entire collection configuration values for a given application server domain.

• **PSAPPSRV.UBX.** This is the template or model file for PSAPPSRV.UBB.

• **PSAPPSRV.UBB.** This is the file that stores and passes all of the domain values to the Tuxedo load configuration program (tmloadcf.exe).

• **PSAPPSRV.PSX.** This file is the template or model file specifically for the application messaging server configuration sections, such as PSBRKRSRV, PSSUBSRV, and so on.

• **PSAPPSRV.ENV.** This file contains environment information such as the PS_HOME on the application server machine.

• **PSAPPSRV.VAL.** The VAL file contains the format specification for the configuration parameters and for some parameters a set of valid values that can assigned. This helps to prevent administrators from entering invalid values.

• **PSTUXCFG.** This file contains PeopleSoft and Tuxedo information regarding the location of executables, files, and command lines for server processes. This file is required to boot a domain.

There are more files and executables associated with Tuxedo and a Peoplesoft Application Server Domain. This general discussion is limited to the mentioned files. After reading this section you will have an understanding of what occurs “under the covers” as you use PSADMIN to execute the basic application server functions.

---

**Configuring a Domain**

As you read further regarding PSADMIN, note that you are not required to use the PSADMIN interface to create and edit the configuration parameters for a domain. As stated in the previous section, you can use the command line option. You can also manually edit the PSAPPSRV.CFG instead of prompting through the PSADMIN menus.

Regardless of how you choose to specify domain values, ultimately you must run PSADMIN to generate some necessary files that will include your custom values. As you’ll see in the following example, PSADMIN invokes another PeopleSoft executable UBBGEN, which reads the values and format stored in the PSAPPSRV.CFG, VAL, and UBX files and generates the PSAPPSRV.UBB and.ENV files.
PeopleSoft Domain Administration

Domain Name: PSXXDEMO

1) Boot this domain
2) Domain shutdown menu
3) Domain status menu
4) Configure this domain
5) TUXEDO command line (tadmin)
6) Edit configuration/log files menu
7) Messaging Server Administration menu
q) Quit

Command to execute (1-7, q) : 4

Removing any existing configuration...
Generating new configuration...
Loading validation table...
Do you want to change any config values (y/n)? [n]:

Yes or No

UBBGEN calls UBBGEN.

UBBGEN

At the point where you see Do you want to change any config values? (y/n) regardless of what you enter, ultimately PSADMIN calls UBBGEN.

If you already entered values manually in the PSAPPSSRV.CFG file and enter n, UBBGEN will read those and write to the necessary files.

If you enter y, you’ll see the PSADMIN prompt interface, which is actually a wrapper to UBBGEN. UBBGEN reads the previous values stored in the PSAPPSSRV.CFG, and presents those values and allows you to change them. It presents the values in the format derived from reading the PSAPPSSRV.UBX file and it validates selected values based on criteria stored in the PSAPPSSRV.VAL file.
Note. In the previous example, it appears that UBBGEN both reads from and writes to the PSAPPSRV.CFG file. It reads the previous values or defaults and, if any values are modified, it writes the new values to the “new” PSAPPSRV.CFG.

So, here are the scenarios by which you can configure a domain:

- **PSADMIN.** Launch PSADMIN, and enter values at all the prompts. This generates all of the necessary files automatically.

- **EDIT PSAPPSRV.CFG.** If you decide not to use PSADMIN you must complete the following tasks in order:
  - From the command line create a domain based on a particular template.
  - Edit the PSAPPSRV.CFG in your favorite text editor.
  - Then, issue the `configure` command from the PSADMIN command line. This is the command that calls UBBGEN. In fact, you’ll see the following after issuing this command:

    ```
    C:\pt8apsrv\Appserv>psadmin -c configure -d 80manual
    Loading UBBGEN configuration utility ...
    ```

### Loading a Configuration

After you configure a domain and PSADMIN creates the new configuration file, PSADMIN loads the new configuration settings into PSTUXCFG so that your domain can properly boot. This occurs automatically after you have completed all of the prompts for values in PSADMIN. For example, as shown in the following example, you will see the text Loading new configuration on the command line.
Setting Log Directory to the default... [PS_SERVDIR\LOGS]
Spawning enabled for server PSAPPSRV.
Configuration file successfully created.
_CFG setting changes completed, loading configuration...
Domain configuration complete.

PSADMIN calls
TMLOADCF.EXE

PSAPPSRV.UBB ← READS TMLOADCF.EXE RIGHTS PSTUXCFG

Loading a new configuration

To load the new configuration, PSADMIN makes a call to the BEA executable, TMLOADCF.EXE, which populates the PSTUXCFG file. TMLOADCF.EXE reads the newly entered values that appear in the PSAPPSRV.UBB file and writes them to the PSTUXCFG file.

**Booting a Domain**

When you select **Boot this domain** PSADMIN calls the Tuxedo executable called TMBOOT.EXE, which uses the information that resides in both the PSAPPSRV.ENV and PSTUXCFG file to boot the appropriate domain.

The following example depicts this interaction.
Booting an Application Server domain

**Stopping a Domain**

When you select **Domain shutdown menu** and select one of the shutdown options PSADMIN calls the Tuxedo executable called TMSHUTDOWN.EXE, which also uses the information that resides in both the PSAPPSRV.ENV and PSTUXCFG files to shutdown the appropriate domain.

The following example depicts this interaction.
PeopleSoft Domain Administration

Domain Name: FSXXDEMO

1) Boot this domain
2) Domain shutdown menu
3) Domain status menu
4) Configure this domain
5) TUXEDO command line (tmadmin)
6) Edit configuration/log files menu
7) Messaging server administration menu
q) Quit

Command to execute (1-7, q) : 2

Stopping an Application Server domain
CHAPTER 3

Understanding PSADMIN Menus

This chapter discusses the purpose and options within the PSADMIN main menus:

- Application Server
- Process Scheduler
- Service Setup

Working with the Application Server Menu

This chapter discusses the menus associated with configuring and administering an application server domain. The following chapter contains parameter-by-parameter documentation for all of the configuration sections you encounter while setting up an application server domain.

Accessing the Application Server Options

To access the menu options available for configuring and administering your application server select / from the PeopleSoft Server Administration menu.

```
PeopleSoft Server Administration

1) Application Server
2) Process Scheduler
3) Service Setup
q) Quit

Command to execute (1-3, q): 1

The PeopleSoft Application Server Administration menu appears.
```

```
PeopleSoft Application Server Administration

1) Administer a domain
2) Create a domain
```
The menu options and parameters within the Create a domain and Delete a domain menus are straightforward, one-time tasks (per domain that is). On the other hand, the Administer a domain menu offers numerous configuration, administration, and logging parameters that you will likely access frequently.

Administering a Domain

To administer a domain, you must have already created a domain. After you have created a domain, you must specify environment-specific settings for the application server to function correctly with your system. The following sections describe all the menus and options within them that you will encounter as you administer and configure an application server domain.

To administer a domain:

1. Select 1 from the PeopleSoft Application Server Administration menu.

   PeopleSoft Application Server Administration

   1) Administer a domain
   2) Create a domain
   3) Delete a domain
   q) Quit

   Command to execute (1-3, q) : 1

2. In the Select domain number to administer command line, enter the number that corresponds to the previously created domain that you want to administer that appears in the Tuxedo domain list:

   Tuxedo domain list:

   1) ps800dmo

   Select domain number to administer: 1

   The PeopleSoft Domain Administration menu appears.

3. Select the option that you want to perform from the PeopleSoft Domain Administration menu.
PeopleSoft Domain Administration

Domain Name: ps800dmo

1) Boot this domain
2) Domain shutdown menu
3) Domain status menu
4) Configure this domain
5) TUXEDO command line (tmadmin)
6) Edit configuration/log files menu
7) Messaging Server Administration menu
q) Quit

Command to execute (1-7, q) :

The following sections describe each option that appears in the PeopleSoft Domain Administration menu.

Booting a Domain

The Boot this Domain option sets the following environment variable:

TUXCONFIG=PS_HOME/appserv/<domain-name>/pstuxcfg

And, then it boots the Tuxedo domain (the application server) using the tmboot command.

Shutting Down a Domain

The PeopleSoft Domain Shutdown Menu offers two options: a normal shutdown and a forced shutdown.

PeopleSoft Domain Shutdown Menu

Domain Name: ps800dmo

1) Normal shutdown
2) Forced shutdown
q) Quit

Command to execute (1-2, q) [q]: 
Normal shutdown

Sets environment variable TUXCONFIG=PS_HOME/appserv/<domain-name>/pstuxcfg, then shuts down the domain using the `tmshutdown` command. A normal shutdown is a quiescent shutdown that waits for users to complete their tasks and turns away new requests before terminating all the processes in the domain.

Forced shutdown

Sets environment variable TUXCONFIG=PS_HOME/appserv/<domain-name>/pstuxcfg, then shuts down the domain using the `tmshutdown -k TERM -c` command. A forced shutdown is a non-quiescent shutdown that immediately terminates all the processes in the domain. Normally, you would only use the Forced shutdown when a Bulletin Board Liaison (BBL) process is encountering errors and can not be shut down using a Normal shutdown.

Note. The BBL is a primary Tuxedo process that controls the domain.

Checking Domain Status

The PeopleSoft Domain Status Menu enables you to view the status of the server, queues, or clients connected through the domain.

```
-------------------------------
PeopleSoft Domain Status Menu
-------------------------------

   Domain Name: ps800dmo

1) Server status
2) Client status
3) Queue status
q) Quit

Command to execute (1-3, q) [q]:
```

Server Status

By entering 1 for Server status, you invoke Tuxedo’s tmadmin `psr` subcommand (print server processes), which displays the Tuxedo processes and PeopleSoft server processes currently running.

```
> Prog Name  Queue Name  Grp Name  ID  RqDone  Load  Done  Current Service
----------  ----------  --------  --  --------  -----  ------  ------------------------
JSL.exe     00095.00200 JSLGRP    200  0         0 ( IDLE )
PSSUBDSP.exe 00098.00300 PUBSUB 300  0         0 ( IDLE )
PSPUBDSP.exe 00098.00200 PUBSUB 200  0         0 ( IDLE )
PSBRKDSP.exe 00098.00100 PUBSUB 100  0         0 ( IDLE )
```
PSSAMSRV.exe   SAMQ        APPSRV       100      0         0 (  IDLE  )
BBL.exe        33969       GSAWYER+       0      0         0 (  IDLE  )
PSUBBHND.exe   SUBHQ_dflt PUBSUB       301      0         0 (  IDLE  )
PSUBBHND.exe   PUBHQ_dflt PUBSUB       201      0         0 (  IDLE  )
PSBRKHND.exe   BRKHQ_dflt PUBSUB       101      0         0 (  IDLE  )
PSAPPSRV.exe   APPQ        APPSRV         1      0         0 (  IDLE  )
PSAPPSRV.exe   APPQ        APPSRV         2      0         0 (  IDLE  )
PSAPPSRV.exe   APPQ        APPSRV         3      0         0 (  IDLE  )
PSAPPSRV.exe   APPQ        APPSRV         4     147       7350 (  IDLE  )
PSBRKHND.exe   BRKHQ_dflt PUBSUB       101      0         0 (  IDLE  )
PSAPPSRV.exe   APPQ        APPSRV         1      0         0 (  IDLE  )
PSAPPSRV.exe   APPQ        APPSRV         2      0         0 (  IDLE  )
PSAPPSRV.exe   APPQ        APPSRV         3      0         0 (  IDLE  )
WSL.exe        00001.00020 BASE          20      0         0 (  IDLE  )
JREPSVR.exe    00094.00250 JREPGRP      250      0         0 (  IDLE  )

The number of items appearing in the Prog Name list depend on the number of server processes you have configured.

**Client status**

By entering 2 for Client status, you invoke Tuxedo’s tmadmin **pclt** subcommand (print clients), which displays connected users.

```
> LMID User Name Client Name Time Status Bgn/Cmmt/Abrt
--------------- --------------- --------------- -------- ------- --------------
GSAWYER061199 NT WSH 0:10:06 IDLE 0/0/0
GSAWYER061199 NT JSH 0:10:04 IDLE 0/0/0
GSAWYER061199 NT JSH 0:10:03 IDLE 0/0/0
GSAWYER061199 NT JSH 0:10:03 IDLE 0/0/0
GSAWYER061199 NT JSH 0:10:02 IDLE 0/0/0
GSAWYER061199 NT JSH 0:10:02 IDLE 0/0/0
GSAWYER061199 PTDMO GSAWYER061199 0:05:45 IDLE/W 0/0/0
GSAWYER061199 PTDMO GSAWYER061199 0:06:25 IDLE/W 0/0/0
GSAWYER061199 NT tmadmin 0:00:00 IDLE 0/0/0
```

**Queue Status**

Examining the status of the individual queues for each server process provides valuable tuning information. You check the queues using the Queue status option. Notice in the following example that the results of the Queue status option show the individual server processes, the associated queue, the number of server processes currently running, and the number of requests waiting to be processed.

```
Prog Name Queue Name # Serve Wk Queued # Queued Ave. Len Machine
--------- ------------------- --------- -------- ------- ------- ------------ 
BBL.exe 33935 1 - 0 0 - GSAWYER06+
PSMSGDSP.exe 00098.00100 1 - 0 0 - GSAWYER06+
JSL.exe 000095.00200 1 - 0 0 - GSAWYER06+
PSAPPSRV.exe APPQ 2 - 0 0 - GSAWYER06+
PSAMSRV.exe SAMQ 1 - 0 0 - GSAWYER06+
WSL.exe 00001.00020 1 - 0 0 - GSAWYER06+
PSMGNDH.command MBHQ 1 - 0 0 - GSAWYER06+
PSQCKSRV.exe QCKQ 1 - 0 0 - GSAWYER06+
```
The results alert you to any bottlenecks that may be occurring on your application server. With this information, you can make more informed performance decisions. For instance, if the bottlenecks appear to be persistent, it may indicate that you need to add more instances of a particular server process, such as PSAPPSRV for example. Or the results may indicate that you need to start either a PSQCKSRV or a PSQRYSRV.

Configuring a Domain

The Configure this domain option sets the following environment variable:

TUXCONFIG=PS_HOME/appserv/<domain-name>/pstuxcfg

It also prompts users with a model configuration file to gather such parameters as port numbers, the number of various server processes desired, encryption enabling, and so forth. PSADMIN then invokes a PeopleSoft developed sub-program named UBBGEN, which takes the configuration parameters and builds the file, /PS_HOME/appserv/<domain-name>/psappsrv.ubb, and executes the `tmloadcf -y psappsrv.ubb` command to generate the following binary file:

PS_HOME/appserv/<domain-name>/pstuxcfg

The following topics describe all of the parameters you encounter while configuring an application server. PeopleSoft recommends that you either read this section before you fine tune the configuration of your application server or have it close by as you are doing so.

To configure a domain:

1. Select option 4 from the PeopleSoft Domain Administration menu.

   PeopleSoft Domain Administration

   Domain Name: ps800dmo

   1) Boot this domain
   2) Domain shutdown menu
   3) Domain status menu
   4) Configure this domain
   5) TUXEDO command line (tmadmin)
   6) Edit configuration/log files menu
   7) Messaging Server Administration menu
   q) Quit

   Command to execute (1-7, q) : 4
Enter \textit{n} for \textit{No}, if you do not want to continue. This returns the previous menu. Enter \textit{y} for \textit{Yes}, and you should see the following:

This option will shutdown the domain.
Do you want to continue? (y/n) [n] : \textit{y}

You should see the following:

Trying to shutdown any servers, ignore errors...
Removing any existing configuration...
Generating new configuration...
Loading validation table...

2. When prompted with \textbf{Do you want to change any config values}, enter \textit{y} for \textit{Yes}.

Do you want to change any config values (y/n)? [n]: \textit{y}

By entering \textit{y}, you are prompted with a collection of configuration values in a number of sections, such as Startup and Domain Settings, but you will encounter only one configuration section at a time. For instance, the first configuration section is the Startup section. As shown in the following example, you see the configuration parameters contained in the section. If you must change any of the values, just enter \textit{y} on the \textbf{Do you want to change any values} line.

If you don’t need to change any of the values, enter \textit{n}. By doing so you create a new configuration file with the same values previously specified. You will want to enter \textit{n}, or elect not to modify your PSADMIN parameters, in the following situations.

\begin{itemize}
\item You have changed only the location of TUXDIR.
\item If you would rather edit the PSAPPSRV.CFG configuration file manually.
\item You installed a new Tuxedo patch.
\end{itemize}

\textbf{Note.} All of the parameters and configuration sections related to setting up an application server domain are documented in the following chapter.

\textbf{Edit configuration/log files Menu}

From this menu you have the option to view the application server and Tuxedo log files. You can also manually edit the PSAPPSRV.CFG file if you do not want to use the PSADMIN interface.

\begin{itemize}
\item 1) Edit psappsrv.cfg (current configuration file)
\item 2) Edit APPSRV.LOG (current application server log file)
\end{itemize}
3) Edit TUXLOG (current Tuxedo log file)
4) Edit PSAPPSRV.tracesql (PSAPPSRV SQL trace file)
5) Edit PSSAMSRV.tracesql (PSSAMSRV SQL trace file)
q) Quit

Command to execute (1-5, q) [q]:

For PSADMIN to start your text editor, such as Notepad or KEDIT, so that you can manually edit or view application server configuration and log files, you must have your text editor specified in the Environment settings. For example, if you plan to use KEDIT, your editor environment setting should like the following:

set EDITOR=c:\apps\kedit\keditw32.exe

and if using Notepad:

set EDITOR=c:\Windows\Notepad.exe

Note. You can view and edit a domain’s PSAPPSRV.CFG file while the domain is up and running, but keep in mind that the changes you specify will not take effect until the next time you reconfigure the domain.

For the following options, you must enter your Operator ID to view and edit the files.

4) Edit PSAPPSRV.tracesql (PSAPPSRV SQL trace file)
5) Edit PSSAMSRV.tracesql (PSSAMSRV SQL trace file)

For example

Command to execute (1-7, q) [q]: 5
Enter the operator ID: PTXYZ

Note. PeopleSoft secures the SQL traces because in some instances the SQL traced may involve sensitive information.

Edit PSAPPSRV.CFG

The PSAPPSRV.CFG file contains all of the configuration settings for an application server domain. The PSADMIN interface provides prompts so that you can edit and modify this file within a structured format. In many cases and perhaps due to personal preference, you may opt to edit the PSAPPSRV.CFG file manually. When editing this configuration file manually, note that it is similar to editing an INI file in that all of the parameters are grouped in sections.
Edit APPSRV.LOG

Some of the items you might find in the APPSRV.LOG are a mismatch between the versions of PeopleTools on an application server or invalid passwords being used.

Edit TUXLOG

The TUXLOG enables you to trace the Tuxedo component for troubleshooting information.

Edit PSAPPSRV.tracesql

You can specifically trace the activity of the PSAPPSRV server process by setting the PSAPPSRV.tracesql.

Edit PSSAMSRV.tracesql

You can specifically trace the activity of the PSSAMSRV server process by setting the PSSAMSRV.tracesql.
Creating a Domain

The Create a domain option creates a subdirectory underneath /PS_HOME/appserv using the domain name specified by the user and copies “model” files to that directory.

**To create an application server domain:**

1. Select 2 from the PeopleSoft Application Server Administration menu.

   ---------------------------------------------
   PeopleSoft Application Server Administration
   ---------------------------------------------
   1) Administer a domain
   2) Create a domain
   3) Delete a domain
   q) Quit

   Command to execute (1-3, q) : 2

2. Enter the name of the domain that you want to create; the name must not exceed 8 characters.

   Please enter name of domain to create : ps800dmo

3. Select a configuration template from the Configuration templates: list.

   Configuration templates:
   
   1) developer
   2) large
   3) medium
   4) small

   Select config template number:

   The configuration templates are pre-configured sets of application server processes.

   After you have selected the appropriate configuration template and pressed ENTER, you should see the following on the screen.

   Creating domain...
   Copying application server configuration files...
   Copying Jolt repository file...
   Domain created.
Note. If you are responsible for routinely creating many domains, you may want to consider either modifying the CFX files to reflect your environment or creating your own. You can manually edit any CFX file in the PS_HOME\appserv directory with any text editor, such as Notepad. To create your own CFX files, just save the CFX file to a new name after modifying the template values. The next time PSADMIN prompts you for a configuration template to create a domain, your custom CFX file will appear in the configuration templates list.

See Also
Configuration Templates

Deleting a Domain

The **Delete a domain** option shuts down the domain, if running, then deletes the domain’s subdirectory.

Note. For best results, before you delete a domain, make sure that it is not running.

**To delete a domain:**

1. Select 3 from the PeopleSoft Application Server Administration menu.

   PeopleSoft Application Server Administration
   1) Administer a domain
   2) Create a domain
   3) Delete a domain
   q) Quit

   Command to execute (1-3, q) : 3

2. From the **Tuxedo domain list**: select the number that corresponds to the domain that you want to delete

   Tuxedo domain list:
   1) ps800dmo
   2) hr80ora

   Select domain number to delete: 2

3. When prompted to continue, enter y and press ENTER.
This operation will delete the configuration files for this domain!

Warning: If this domain is still running, you will not be able to shut it down cleanly!

Do you want to continue? (y/n) [n] : y

You should see the following on the screen:

Attempting to delete domain...
Domain deleted.

Understanding the Process Scheduler Menu

You can configure and administer your Process Scheduler Server Agent with the PSADMIN utility. Even if you do not plan on running batch processes on the application server, you can use the PSADMIN utility to configure your Process Scheduler/Process Server Agent regardless of where it will ultimately run.

The following sections describe the menus and options within the PSADMIN utility related to the Process Scheduler in the order that they appear in the PeopleSoft Process Scheduler Administration menu—not in the order that you would access them the first time you configure your Process Scheduler Server. For example, the first menu item is

1) Start a Process Scheduler Server

However, logically, at some point previously, you would have already selected

4) Create a Process Scheduler Server Configuration

and

3) Configure a Process Scheduler Server.

Typically, after you have created and configured a Process Scheduler server, the majority of your administration tasks will involve the first two menu options:

1) Start a Process Scheduler Server
2) Stop a Process Scheduler Server

This section does not contain a detailed reference to all of the parameters and configuration options that appear in the PSADMIN, Process Scheduler menus. For information about all of the parameters that apply to Process Scheduler, see the PeopleSoft Process Scheduler documentation. After reading this section you will be familiar with the menus and with the procedures related to configuring a Process Scheduler Server Agent.
To access the PeopleSoft Process Scheduler Administration menu:

1. Select option 2 from the PeopleSoft Server Administration menu.

   --------------------------------
   PeopleSoft Server Administration
   --------------------------------

   1) Application Server
   2) Process Scheduler
   3) Service Setup
   q) Quit

   Command to execute (1-3, q):

2. Select the option from the PeopleSoft Process Scheduler Administration menu that corresponds to the action you need to perform.

   For Windows NT:

   -------------------------------------------
   PeopleSoft Process Scheduler Administration
   -------------------------------------------

   1) Start a Process Scheduler Server
   2) Stop a Process Scheduler Server
   3) Configure a Process Scheduler Server
   4) Create a Process Scheduler Server Configuration
   5) Delete a Process Scheduler Server Configuration
   6) Edit a Process Scheduler Configuration File
   7) Show status of a Process Scheduler Server
   q) Quit

   Command to execute (1-7, q):

   For UNIX:

   -------------------------------------------
   PeopleSoft Process Scheduler Administration
   -------------------------------------------

   1) Start a Process Scheduler Server
   2) Stop a Process Scheduler Server
   3) Configure a Process Scheduler Server
   4) Create a Process Scheduler Server Configuration
   5) Delete a Process Scheduler Server Configuration
   6) Show Status of a Process Scheduler Server
   7) Kill a Process Scheduler Server
q) Quit

Command to execute (1-7, q) :

The following sections explain the options for PeopleSoft Process Scheduler within
PSADMIN. Those options that pertain to UNIX only, are marked accordingly.

See Also
PeopleSoft Installation Guide for your platform
PeopleTools PeopleBooks: Process Scheduler

Starting a Process Scheduler Server

This describes the process for starting a Process Scheduler Server on the application server.
For information about alternate methods of starting the Process Scheduler Server see the
Process Scheduler documentation or your Installation and Administration guide.

To start a Process Scheduler Server:

1. Select option 1 from the PeopleSoft Process Scheduler Administration menu.

2. To start the Process Scheduler server for a specific database, type in the number in the
   Database list: that corresponds to the appropriate database.

   Database list:

   1) ps800dmo

   Select item number to start: 1

Stopping a Process Scheduler Server

This process describes the steps you need to complete to stop a Process Scheduler Server
running on an application server using PSADMIN. If you need information about alternate
methods for stopping a Process Scheduler Server refer to the PeopleSoft Process Scheduler
documentation or your Installation and Administration guide.

Note. You can also stop the server using the Process Monitor.

To stop a Process Scheduler Server:

1. Select option 2 from the PeopleSoft Process Scheduler Administration menu.
2. If you want to stop the Process Scheduler server for a specific database, enter the number from the Database list: that corresponds to the appropriate database.

Database list:

1) ps800dmo

Select item number to stop: 1

Configuring a Process Scheduler Server

Configuring a Process Scheduler server is very similar to configuring application servers and web servers. From the PeopleSoft Process Scheduler Administration menu you invoke a text driven interface that prompts you for parameter values. All of the Process Scheduler server configuration information for a specific database is contained in the PSPRCS.CFG configuration file, and the PSADMIN provides an interface for and prompts you to edit the PSPRCS.CFG file.

Note. The PSPRCS.CFG file supports environment variables. For example, the TEMP setting in the [Process Scheduler] section can look like this: TEMP=%TEMP%.

For Windows NT:

Although you edit PSPRCS.CFG through PSADMIN, on Windows NT you can find the PSPRCS.CFG file in the following directory:

%PS_HOME%\APPSERV\PRCS\<dbname>

For UNIX:

Although you edit PSPRCS.CFG through PSADMIN, on UNIX you can find the PSPRCS.CFG file in the following directory:

$PS_HOME/appserv/prcs/<dbname>

To configure a Process Scheduler Server (edit PSPRCS.CFG):

1. Select option 3 from the PeopleSoft Process Scheduler Administration menu.

2. From the Database list: select the number that corresponds to the server that you want to configure.

Database list:

1) ps800db

Select item number to configure: 1
3. Specify the appropriate values for your site in the following configuration section prompts.

The following sections describe each configuration section for PeopleSoft Process Scheduler and the options they offer.

See Also

*PeopleTools PeopleBooks: PeopleSoft Process Scheduler*, Managing PeopleSoft Process Scheduler

---

**Creating a Process Scheduler Server Configuration**

This section describes the steps you must complete to add a Process Scheduler server configuration on your application server. You must add or create a Process Scheduler before you can configure it.

**To create a Process Scheduler server (configuration):**

1. Select option 4 from the PeopleSoft Process Scheduler Administration menu.

   1) Start a Process Scheduler Server
   2) Stop a Process Scheduler Server
   3) Configure a Process Scheduler Server
   4) Create a Process Scheduler Server Configuration
   5) Delete a Process Scheduler Server Configuration
   6) Edit a Process Scheduler Configuration File
   7) Show Status of a Process Scheduler Server
   q) Quit

   Command to execute (1-7, q) : 4

2. Enter the name of the database that the Process Scheduler server will access.

   Please enter name of Database that server will access : ps800db

3. Select the appropriate configuration template for the operating system on which your application server runs. For example, enter 1 if you’re using Windows NT, 2 if you’re using UNIX, or 3 if you’re using VMS.

   Process Scheduler Configuration templates:

   1) nt
Select config template number: 1

You should see text on the screen similar to what appears in the following example:

Creating Process Scheduler Server for Database ps800db...
Copying Process Scheduler Server configuration file(s)...  
Process Scheduler Server configuration created.

When the add server process completes, you should see the PeopleSoft Process Scheduler Administration menu on the screen.

**Deleting a Process Scheduler Server**

If you need to delete a Process Scheduler server process from the application sever, you can do so using PSADMIN.

---

**To delete a Process Scheduler server (configuration):**

1. Select option 5 from the PeopleSoft Process Scheduler Administration menu.

   -------------------------------------------
   PeopleSoft Process Scheduler Administration
   1) Start a Process Scheduler Server
   2) Stop a Process Scheduler Server
   3) Configure a Process Scheduler Server
   4) Create a Process Scheduler Server Configuration
   5) Delete a Process Scheduler Server Configuration
   6) Edit a Process Scheduler Configuration File
   7) Show Status of a Process Scheduler Server
   q) Quit

   Command to execute (1-7, q) : 5

2. Select the number in the **Database list** that corresponds to the database to which your server has access.

   Database list:

   1) ps800db

   Select item number to delete: 1

3. PSADMIN prompts you to continue; if you want to delete the server, enter y.

   Do you want to continue? (y/n) [n] : y
You should see the following text on the screen.

Attempting to delete directory...
Directory successfully deleted.

Editing the Process Scheduler Configuration File

You can edit the Process Scheduler Server configuration file manually instead of using the prompts in the PSADMIN interface to specify environment variables if you want. This enables you to edit the configuration file in your preferred editor. You must set your EDITOR environment variable to point to the editor. For example:

```plaintext
set EDITOR=c:\apps\utils\kedit\keditw32.exe
```
or if you use Notepad:

```plaintext
set EDITOR=c:\Windows\Notepad.exe
```

**Note.** When editing PSPRCS.CFG, make sure that there are no spaces between the equals sign and the entries. Also, make sure that there are no trailing spaces.

---

**To manually edit the psprcs.cfg:**

1. Select option 6 Edit a Process Scheduler Configuration File from the PeopleSoft Process Scheduler Administration menu.

2. Select the database associated with the file that you want to edit.

   Database list:

   1) ptdmo
   2) ptdmo80
   3) ptdmotst

   Select item number to configure:

3. Enter the variables for the parameters that you need to specify.

   **Note.** The system invokes the text editor that you have set as the %editor% environment variable set on the particular machine, such as Notepad or KEDIT.
Process Scheduler Options

You can elect to have the Process Scheduler server run as a standalone component, or you can have the Process Scheduler server controlled by Tuxedo, which enables automatic restarts if the server goes down.

Process Scheduler Command Line Options

You can bypass the PSADMIN menus to start and stop the Process Scheduler server.

Start the Process Scheduler

To start the Process Scheduler server from the command line, enter the following:

```
psadmin -p start -d <dbname>
```

Stopping the Process Scheduler

To stop the Process Scheduler server from the command line, enter the following:

```
psadmin -p stop -d <dbname>
```

Setting up the PeopleSoft NT Service

Note. This chapter applies only to Windows NT servers. It involves setting up both the application server and Process Scheduler Server Agent as PeopleSoft Windows NT Services. PeopleSoft does not provide an equivalent feature for UNIX servers.

You can start application server domains and Process Scheduler Servers as Windows NT services. The PeopleSoft Service, if configured, automatically starts the application server or Process Scheduler when you boot the server machine. This means that administrators do not need to manually boot each application server or Process Scheduler Server after you reboot a Windows NT server.

In this section, we discuss how to:

- Understand NT services.
- Configure the PeopleSoft service.
- Monitor the executables.
- Understand Services administration.
- Edit the PSNTSRV.CFG file manually.
Understanding NT Services

A Windows NT service is a Microsoft-standard package that automatically starts and stops a process when you boot or shutdown the system. You can also start and stop Windows NT services manually through the Service Control Manager (SCM), which you can access through the Control Panel. A service uses a standard API so that it can interact with the Control Panel and log messages to the standard Event Log.

Note that for PeopleSoft the service we developed starts in an environment that is separate from any users logged on the system (or the machine). This means that administrators no longer need to log on to a machine, launch the Command Prompt, and enter the proper commands to start the server process. It’s also important to note that if you use the PeopleSoft Service, an administrator’s login session does not need to remain open while the Process Scheduler Server or the application server runs.

If you have multiple application server domains and Process Scheduler Servers on the same machine, you can start them all using the same Service Setup.

Note. The PeopleSoft Service supercedes the method provided in the Windows NT Resource Kit. PeopleSoft does not support using SRVANY.EXE or AT commands to start the Process Scheduler or the application server.

We discussed what PeopleSoft Service does. It’s also important to know what it’s not designed to do. The following list describes what not to expect from the PeopleSoft Service.

- It doesn't change the behavior, performance, or resource requirements of PeopleSoft applications.
- It doesn't create or configure servers or domains automatically. Your Process Scheduler Server and application server domain should be installed and configured before installing the service.
- It isn't intended to start anything other than the Process Scheduler Server or an application server domain.
- It doesn't make the Process Scheduler Server or an application server domain more fault-tolerant.
- The PeopleSoft Service only applies to Windows NT servers.

Configuring the PeopleSoft Service

The following procedure assumes that you have already installed and configured an application server domain and/or Process Scheduler Server Agent on the Windows NT server.

After completing this procedure, the specified application server domains or Process Scheduler Servers start and shutdown automatically when the operating system recycles.
To set up the Windows NT Service for an Application Server or Process Scheduler Server:

1. Open the System utility within the Control Panel, and set the following variables on the Environment tab.

<table>
<thead>
<tr>
<th>Variable</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEMP</td>
<td>Specify the location of the TEMP directory on the Windows NT server, as in C:\TEMP.</td>
</tr>
<tr>
<td>TUXDIR</td>
<td>Specify the location of the Tuxedo directory on the Windows NT server, as in C:apps\tux65.</td>
</tr>
</tbody>
</table>

These settings must appear in the **System Variables** section, as shown in the following example.

![System Properties dialog box]

2. Run the PeopleSoft PSADMIN utility, and select option 3) Service Setup from the PeopleSoft Server Administration menu.
3. Select option 1) Configure a Service from the PeopleSoft Services Administration menu.

And, enter y to indicate that you want to change configuration values, as shown.

4. Do you want to change any config values (y/n)? [n]: y

5. Enter the name of the application server domains and the Process Scheduler Databases that you want to be included as part of the Windows NT Service.

For example

Values for config section - NT Services
Service Start Delay=60
Application Server Domains=Domain1, Domain2
Process Scheduler Databases=PT80HRDB, PT80FSDB

Do you want to change any values (y/n)? [n]:

To add multiple domains or databases, you delimit each value with a comma and a space as shown in the previous example.

Note. The NT Services section of the PSADMIN modifies the PSNTSRV.CFG file located in the <PS_HOME>\appserv directory. You can edit this file manually by selecting the option 4) Edit a Service Configuration File on the PeopleSoft Services Administration menu.
6. Select option 2) Install a Service from the PeopleSoft Services Administration menu.

   PeopleSoft Services Administration
   -------------------------------
   1) Configure a Service
   2) Install a Service
   3) Delete a Service
   4) Edit a Service Configuration File
   q) Quit

   Command to execute (1-4, q) : 2

7. Return to Control Panel, and start the Services utility.

8. On the Services dialog box, scroll to find the entry that adheres to the following naming convention, and select it:

   PeopleSoft <PS_HOME>

   For example,

   ![Services dialog box]

   Services dialog box

   **Note.** The default Startup mode is Manual.

9. Click Startup.

10. On the Service dialog box in the **Startup Type** group box, select **Automatic**, and in the **Log On As** group box, select **System Account**.
Service dialog box

For PeopleSoft Process Scheduler services, you need to select **This Account** otherwise problems occur while running Crystal Reports.

**Note.** The Log On As setting needs to reflect that which you set for your Tuxedo IPC Helper process. PeopleSoft recommends that when you install Tuxedo, you set these services to System Account. This affects only the application server because PeopleSoft Process Scheduler is not integrated with Tuxedo.

When you've finished making the appropriate selections, click **OK** to dismiss the Service dialog box.

11. On the Services dialog box, make sure the PeopleSoft service is selected, and click **Start**.

Your application/Process Scheduler servers are now running and will start automatically whenever you boot the server.

**Monitoring the Executables**

To test your Windows NT Service, reboot your server, and then make sure that the appropriate server executables are running.

For the application server, use Windows NT Task Manager or the Server status option from the Domain status menu to see that the following executables are running:
• PSAPPSRV.EXE
• PSSAMSRV. EXE
• BBL. EXE
• WSL. EXE

Also make sure any additional server processes you have configured, such as PSQCKSRV.EXE, are also running.

For PeopleSoft Process Scheduler, use Windows NT Task Manager or the Process Monitor to make sure that PTPURCS.EXE is running. If you’ve customized the name of PTPURCS.EXE, look for your custom name instead.

PeopleSoft Services Administration Reference

There are three options related to your PeopleSoft Service setup. Each option you can specify either using PSADMIN or editing the PSNTSRV.CFG file manually.

Values for config section - NT Services

Service Start Delay=60
Application Server Domains=
Process Scheduler Databases=

Do you want to change any values (y/n)? [n]:

The following sections describe each parameter.

Service Start Delay

When an application server or Process Scheduler Server resides on the same machine as the database server, you should consider using the Service Start Delay setting. Using this feature, you can avoid the situation where the database server is in the process of booting (just like everything else on the machine) and is not ready to process requests at the time that the service attempts to boot the application server domain or Process Scheduler Server. In this scenario, without a delay set, the connection will fail.

You can configure a “Service Start Delay” parameter in the PSNTSRV configuration file that specifies a delay, in seconds, that elapses prior to a service attempting to start any application server domains or Process Scheduler Servers. This allows the RDBMS enough time to boot and become available to accept requests.

The default is 60 seconds.

Application Server Domains

Here specify the names of the domains that you want to automatically start when you boot the application server machine.

If you specify multiple domains, separate each domain with a comma and a space.
**Process Scheduler Databases**

Enter the databases to which a Process Scheduler Server is associated. For each database you specify, the associated Process Scheduler Server starts when you boot the Windows NT server.

If you specify multiple databases, separate each database with a comma and a space.

---

**Editing the PSNTSRV.CFG File Manually**

You can edit the file directly by selecting 4) Edit a Service Configuration File from the main menu. This opens PSNTSRV.CFG in a text editor, where you can enter and save your changes.

---

**Note.** Make sure that your editor environment variable is set correctly.

---

Edit a PSNTSRV.CFG file

PSNTSRV.CFG file
Chapter 4

Understanding Application Server Domain Parameters

This chapter describes all of the configuration options related to an application server domain. In the following topics you will find documentation pertaining to each of the configuration sections and the parameters they contain.

Generally, the documentation reflects the order that the configuration sections appear in the PSADMIN interface or the PSAPPSSRV.CFG configuration file. Some of the configuration options are documented in other PeopleBooks, such as those related to the Integration Broker and the Optimization server.

Note. The application server dynamically scales server processes according to the volume of transaction requests. In PeopleSoft terminology, we call this "spawning" server processes. There is no explicit parameter you must set in order to enable spawning. In the following configuration section descriptions, notice that some server processes enable you to specify a Min (minimum) and Max (maximum) number of server processes. To enable spawning, the Max value must exceed the Min value by at least one increment. As needed, the application server spawns server processes up to the Max value. By setting the Max value greater than that of the Min value, you implicitly enable spawning. As the volume of transactions decreases, the number of spawned server processes decreases, or decays, until the minimum value is reached.

Startup

The Startup section is where you set your database signon values.

Values for config section - Startup
   DBName=
   DbType=
   UserId=
   UserPswd=
   ConnectId=
   ConnectPswd=
   ServerName=

Do you want to change any values (y/n)? [n]:


The following topics explain what each parameter within the Startup section controls.

**DBName**
PeopleSoft database name, such as FSDMO80 or HRDMO80. This parameter is case-sensitive.

**DBType**
Enter the PeopleSoft database type, such as DB2ODBC, DB2UNIX, INFORMIX, MICROSOFT, ORACLE, or SYBASE. If you enter an invalid database type, PSADMIN prompts you with a valid list.

**UserID**
User ID refers to the PeopleSoft User ID that is authorized to start the application server. You use Maintain Security to add this property to a permission list, which is applied to the user profile by way of a role. The Can Start Application Server permission must be set in the permission list. For the application server to boot, the appropriate user ID with the correct authorizations must be assigned to this parameter. This is the ID that the application server passes to the database for authentication and connection.

*Note.* The user ID entered here is not related to the actual user (administrator) that executes the boot command.

The authorization to start an application server does not (directly or indirectly) grant any authorizations or privileges beyond the ability to start the application server. Each user who attempts to signon enters a unique User ID and Password, which the application server uses to authenticate each user.

**UserPswd**
Enter the password used by the specified User ID that will gain access to the database. The value you enter must be specified in UPPERCASE. The reason for requiring that User ID and Password are specified in UPPERCASE is to simplify administration of the system.

**Connect ID**
Required for all database platforms. This is a database level ID that is used by PeopleSoft to do the initial connection to the database. This username must have authority to select from PSACCESPRFL, PSLOCK, PSOPRDEFN, and PSSTATUS.

**Connect Password**
The Connect ID’s password. For instance, this would be the UNIX name’s password (either uppercase or lowercase).
ServerName

Required for Sybase and Informix (ignored by any other RDBMS). This is the name of the server in which the PeopleSoft database is installed. This value is case-sensitive.

Database Options

The Database Options section enables you to specify certain environment variables that may improve the performance of your system. These options do not apply to every RDBMS.

Values for config section - Database Options

SybasePacketSize=
UseLocalOracleDB=0
EnableDBMonitoring=0

Do you want to change any values (y/n)? [n]:

SybasePacketSize

This option enables you to specify a TCP Packet Size. The minimum value is 512 and the maximum value is 65538. The default packet size is 512. If you make any changes to the packet size, make sure that you make the corresponding changes to the Sybase server. See your Sybase documentation for more information about packet sizes.

UseLocalOracleDB

The UseLocalOracleDB parameter enables a batch program to initiate a “local” connection to a PeopleSoft database running on the same machine. PeopleSoft recommends that this be used for all Process Scheduler (batch) and application server configurations that are local (on the same server) to the PeopleSoft Oracle instance. Our internal testing reveals that this type of connection enables batch processes to complete significantly quicker.

To enable this option, enter 1, and to disable it enter 0.

Note. This option applies only to customers whose PeopleSoft database type is Oracle.

EnableDBMonitoring

This option enables you to view more information regarding the clients connected to a database server through application server. For instance, with this enabled, you can view the client machine name or User ID associated with a particular connection. Without this option enabled, all connections appear somewhat anonymously, as in PSFT or APPSERV.

Suppose a particular user keeps submitting a poorly designed query that slows the overall application server performance. Using this feature you can associate the query to a particular machine and then take the “proper” steps to avoid any future problems.

To enable this option, enter 1, and to disable it enter 0.
Note. The behavior/display that this option controls differs slightly per platform. Also, be aware that this feature is not supported on all platforms.

Security

The Security section enables you to set an additional layer to the signon process.

Values for config section - Security
Validate Signon with Database=1

Do you want to change any values (y/n)? [n]:

The following topic describes how you would use this parameter.

Validate Signon With Database

This option enables for an additional level of authorization checking performed at the database level. To enable this option, enter 1, and to disable it enter 0.

With this option disabled and a PeopleSoft user attempts to connect to an application server, the application server ensures that the user’s PeopleSoft user ID and password exist on PSOPRDEFN. If it does not exist, the request to connect fails. This is PeopleTools-level authentication.

With the Validate Signon with Database option enabled, the application server first attempts to connect to the database using the user ID and password as part of the database connection string. If the authorization is successful it disconnects, and then the normal PeopleSoft signon procedure occurs.

When you have this option enabled, to connect successfully to the database the user must be defined on either the operating system or the RDBMS (depending on which RDBMS you’re using) as well as within PeopleSoft.

Note. For DB2 for OS/390 (MVS) the User ID and password must be defined as MVS user logon IDs.

See Also

PeopleTools PeopleBooks: Security, Understanding PeopleSoft Security, Understanding PeopleSoft Signon

Workstation Listener

The Workstation Listener is the component to which Windows workstations send Tuxedo messages.

Values for config section - Workstation Listener
Address=%PS_MACH%
Port=7000
Encryption=0
Min Handlers=1
Max Handlers=3
Max Clients per Handler=40
Client Cleanup Timeout=60
Init Timeout=5
Tuxedo Compression Threshold=5000

Do you want to change any values (y/n)? [n]:

The following sections explain the parameters within the Workstation Listener configuration section.

**Address**

%PS_MACH% resolves automatically to the machine name that PSADMIN obtains by using a system API call. You can also specify the machine’s IP Address (dotted notation) or its resolvable name (DNS Name).

PeopleSoft suggests that you do not change this value except in the following rare cases. If you are configuring files to run an application server on another machine—you plan to copy PSAPPSRV.CFG and PSAPPSRV.UBB to a domain on another machine—you must overlay %PS_MACH% with the other machine’s name.

**Port**

Enter the 4-digit port number to assign to the WSL. Port numbers are arbitrary numbers between 1000 and 64 K and must not already be in use by another service.

For example:

7000

**Encryption**

Causes encryption (scrambling) of data messages between client workstations and the application server. You have the following options:

- 0=no encryption
- 40=40-bit encryption
- 128=128-bit encryption

**Min Handlers**

Number of Workstation Handlers (WSH) started at boot time. The PeopleSoft default for Small and Large templates are 1 and 10, respectively.
Max Handlers

Maximum number of WSHs that can be started for a domain. If Min Handlers = Max Handlers, this means that Tuxedo does not automatically spawn incremental WSHs.

Max Clients per Handler

Specifies the maximum number of client workstation connections each WSH can manage. Each WSH allows up to around 60 client connections. Numbers vary depending upon the resources of the server. In most cases, you will want to decrease this default as opposed to increasing it. The PeopleSoft default is 40.

Client Cleanup Timeout

Specifies the amount of time, in minutes, that a client connection can remain idle (no work requested) before Tuxedo will terminate a client connection. Client disconnects are transparent to a client, and a user just needs to click the mouse to cause a reconnection.

Init Timeout

This value, when multiplied by SCANUNIT (a UBB parameter value, defined in the PSAPPSRV.UBB file) specifies the amount of time, in seconds, Tuxedo will allow for a client connection request to bind to a WSH before terminating the connection attempt.

Tuxedo Compression

Specifies the minimum length of a data message at which the application server initiates data compression. While compression results in favorable performance gains for transactions over a WAN, testing reveals that compression can degrade performance slightly over a LAN due to the compression/decompression overhead.

PeopleSoft recommends using the default threshold of 5000, which sets a balance between WAN and LAN environments. This means that only network request and response messages over 5000 bytes will be compressed, and those 5000 and under will be uncompressed. Customers supporting both WAN and LAN users may configure a hybrid environment by configuring two application servers: one to support WAN users (with compression set to 100) and another to support LAN users (with compression set to 100000, effectively turning compression off).

JOLT Listener

You must set values for this section to enable PIA connections. The Jolt listener enables Tuxedo to exchange messages with the web server.

Values for config section - JOLT Listener

<table>
<thead>
<tr>
<th>Address</th>
<th>%PS_MACH%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port</td>
<td>9000</td>
</tr>
<tr>
<td>Encryption</td>
<td>0</td>
</tr>
<tr>
<td>Min Handlers</td>
<td>5</td>
</tr>
<tr>
<td>Max Handlers</td>
<td>7</td>
</tr>
</tbody>
</table>
Max Clients per Handler=40
Client Cleanup Timeout=60
Init Timeout=5
Client Connection Mode=ANY
Jolt Compression Threshold=1000000

Do you want to change any values (y/n)? [n]:

Address
See the equivalent parameter for Workstation Listener.

Port
Enter the port number used for the JSL (Jolt Server Listener). This value can be any port number not already in use by another service on the machine that runs the application server domain. Note that the port number is not used unless you answer Yes to the prompt that asks whether you want to start Jolt.

Encryption
See the equivalent parameter for Workstation Listener.

Min Handlers
Number of Jolt Server Handlers (JSH) started at boot time. Each JSH multiplexes up to 50 connections.

Max Handlers
Specifies the maximum number of JSHs.

---

Note. JSH Handlers spawn using successive port numbers starting at the port number set for the Jolt Server Listener in the PSAPPSRV.CFG file. Make sure that the additional ports are free before configuring spawning.

Max Clients per Handler
Specifies the maximum number of client connections each JSH can manage.

Client Cleanup Timeout
See the equivalent parameter for the Workstation Listener.

Init Timeout
See the equivalent parameter for the Workstation Listener.
**Client Connection Mode**

This parameter has the options RETAINED, RECONNECT, or ANY. This parameter controls the allowed connection modes from clients.

- **RETAINED** means the network connection is retained for the full duration of a session.
- **RECONNECT** means the client establishes and brings down a connection when an idle timeout is reached and reconnects for multiple requests within a session.
- **ANY**, the default, means the server allows client code to request either a RETAINED or RECONNECT type of connection for a session. Whereas, with the other two options the server dictates from which type of client it will accept a connection. This option translates to the `-c` Connection Mode parameter for the JSL section in the PSAPPSRV.UBB file.

**Jolt Compression Threshold**

Jolt Compression can significantly improve performance. Jolt Compression enables messages transmitted through a Jolt connection to be compressed as they flow over the network. This has always been an option for the Windows Client, and now the equivalent technology is available for the Jolt requests. You are likely to see the most significant performance improvements over a WAN.

For compression, the configuration files contain a default compression threshold. This default value should give the best results for most situations. However, your application server administrator can adjust this value to suit your implementation.

The compression threshold indicates to the server how large a packet must be to require compressing. In other words, the value you set is the minimum number of bytes a single packet must be before the server will compress it.

Many of the XML messages being sent around your system are greater than 100,000 bytes. These messages contain HTML in compressed states so it's generally not required that these messages be compressed. Because of this, the PeopleSoft default is set to 1,000,000 bytes.

Be careful when adjusting compression settings. If you set the threshold too high, then no packets will be large enough to be compressed. If you set the threshold too low, you may greatly reduce network traffic, but be aware that the server will have an increased workload comprised of compressing numerous packets. Typically, PeopleSoft recommends decreasing the threshold according to the bandwidth of your workstation hardware as described in the following paragraphs.

If you are handling only LAN connections, you may want to disable compression by setting the threshold to 99999999. With the threshold set at such a value, only packets larger than 99,999,999 bytes will get compressed. Of course, such a large value effectively disables compression so that no packets get compressed. This means no extra work for the server compressing packets.

Alternatively, if you have mostly low bandwidth, as in 56Kb modem connections over a WAN, then you would most likely want to compress the packets as much as possible. When decreasing the compression threshold, keep in mind that the law of diminishing returns applies. Setting the threshold much below 1000 puts an increasing load on the server, and this can nullify any performance increases you may have gained from reduced network traffic.
**Additional Prompt**

After you have finished *all* of the configuration sections PSADMIN prompts you with the following:

Do you want JOLT configured (y/n)? [n]:

If you have made changes to the JOLT Listener section, and you want JOLT configured to deploy applications to a browser, enter *y* for *Yes*. Essentially, if you are using PIA, you must have Jolt configured.

---

**JOLT Relay Adapter**

Note. Jolt Relay Adapter is primarily intended for use with the PeopleSoft Web Client, a product released with PeopleTools 7.0x and 7.5x. It is possible to use Jolt Relay Adapter with PIA, but performance may become an issue.

You may need to configure this section only if you are deploying the Web Client, *and* you plan to have your web server and application server reside on separate machines. If your web server and application server reside on the same machine, there is no reason to enable Jolt Relay Adapter.

Values for config section - JOLT Relay Adapter

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listener Address</td>
<td>%PS_MACH%</td>
</tr>
<tr>
<td>Listener Port</td>
<td>9100</td>
</tr>
</tbody>
</table>

Do you want to change any values (y/n)? [n]:

After you have finished *all* of the configuration sections PSADMIN prompts you with the following:

Do you want JRAD configured (y/n)? [n]:

If you have made changes to the JOLT Relay Adapter section, and you want JRAD configured so that you can deploy the Web Client from a web server running on a separate machine from the application server, enter *y* for *Yes*.

The following sections explain the settings for the JRAD offered through PSADMIN.

**See Also**

Setting Up Jolt Internet Relay

**Listener Address**

Defaults to %PS_MACH%. Specifies the machine on which the application server is running. See the equivalent parameter in the Workstation Listener section.
Listener Port

This option is for advanced configurations requiring Jolt Internet Relay (JRLY). The Listener Port listens for JRLY requests and must match the JRLY “OUT” port setting in the JRLY configuration file of the sending machine. The port number, as in 9100, will not be used unless you answer “y” to the prompt asking if you want JRAD configured.

Domain Settings

This section enables you to specify general settings for the entire domain—not just a specific component of it.

Values for config section - Domain Settings

Domain ID=PT8
Add to PATH=C:\Apps\Db\Mssql7\Binn
Spawn Threshold=1,600:1,1
Restartable=Y
  Allow Dynamic Changes=N
LogFence=3
Trace-Log File Character Set=ANSI

Do you want to change any values (y/n)? [n]:

Domain ID

Enter the name of your application server domain. It does not need to match the name you specified when you created a domain. This name is important only in that the Tuxedo Web Monitor uses it to identify application server domains on each machine. It should not exceed 8 characters. PeopleSoft suggests using the database name in lowercase.

Add to PATH

The directory that contains your database connectivity software, as in /apps/db/oracle/bin, must be specified in the PATH. If the database connectivity directory is not already specified in the PATH, you can set it by specifying this parameter. The value will be added to the PATH.

On Windows NT, if you don’t enter a value, it defaults to the current PATH.

On UNIX, if you don’t enter a value, it defaults to the current directory—not the current PATH. To have it set by default to the current PATH, enter a “.” (a period without quotes).

Spawn Threshold

Parameters supplied to BEA TUXEDO for control of process spawning using the –p command line option for all server processes. The default settings rarely need to be changed.
This enables the dynamic decay of spawned server processes as the transaction volume decreases. The value can be loosely translated to mean if in 600 seconds there is less than or equal to one job in the queue the decay process begins.

For more information, see servopts(s) in the reference manual of the BEA TUXEDO online documentation.

**Restartable**

For this parameter enter either a y or an n. A y indicates that Tuxedo can restart server processes (except the BBL process) if the server dies abnormally, as in a kill on UNIX or through Task Manager on Windows NT.

**Allow Dynamic Changes**

Often, administrators must set a trace or performance parameter while the domain is up and running. If you enable this option, then you don't need to reboot the domain for the modified parameter value to take affect.

To enable dynamic changes, enter Y, and to disable dynamic changes enter N.

When disabled, you need to reboot (or cycle the processes) for changes to take effect.

When enabled, the server checks an internal timestamp for a particular service request to see if any values have changed for the parameters for which dynamic changes are valid. If values have changed, the system uses the modified parameter value.

PeopleSoft suggests that you enable Allow Dynamic Changes in your test and development domains. For production environments, PeopleSoft suggests that you have dynamic changes enabled selectively.

This option applies to a select list of parameters only. The parameters that allow dynamic changes are:

- Recycle Count
- Consecutive service failures
- Trace SQL, Trace SQL Mask
- Trace PC, Trace PC Mask
- Trace PPR, Trace PPR Mask
- Log Fence
- Enable DB Monitoring
- Enable Debugging
Note. The parameters that allow dynamic changes are also identified through comments in the PSAPPSRV.CFG file. Look for the phrase "Dynamic changes allowed for X." Where "X" is the parameter name.

This option does not apply to configuration parameters that Tuxedo relies on, such as the number of processes, whether restart is enabled, port numbers, amount of handlers, and so on.

LogFence
Sets a desired level of network tracing ranging from -100 (suppressing) to 5 (all). The default is 3. The following list reveals the choices available for LogFence.

-100 - Suppress logging
-1 - Protocol, memory errors
0 - Status information
1 - General errors
2 - Warnings
3 - Tracing Level 1 (default)
4 - Tracing Level 2
5 - Tracing Level 3

The Trace file will be generated in the following directory:

<PS_HOME>\appserv\<domain>\LOGS\psappsrv.log

Trace-Log File Character Set
Specify the character set of the machine to which you typically write and read the traces and log files. If the character sets are not matched between the file and the machine, the file is unreadable. The choices are ANSI and UNICODE.

PeopleCode Debugger
This section enables you to enable and configure the PeopleCode debugging environment.

Values for config section - PeopleCode Debugger
PSDBGSRV Listener Port=9500

Do you want to change any values (y/n)? [n]:

Configuring PeopleCode debugging is discussed in detail in another section within this book.

See Also
Setting up the PeopleCode Debugger
Trace

This section enables you to specify the tracing options that you can enable on the application server to track the SQL and PeopleCode of your domains.

Values for config section - Trace

TraceSql=0
TraceSqlMask=12319
TracePC=0
TracePCMask=4095
TracePPR=0
TracePPRMask=4095
TraceAE=0
TraceOpt=0
TraceOptMask=4095
Write crash dump to separate file=Y

Do you want to change any values (y/n)? [n]:

Note. All of the trace parameters can also be set from the PeopleSoft signon page. Just beneath the Sign In button, click the link that opens the trace flags page. This enables you to set the trace options and then sign on to the system.

TraceSQL

Sets the logging level for SQL tracing for all clients. Traces are written to the following location: $PS_HOME$/appserv/<domain>/LOGS/<Domain User ID>_<svrname>.tracesql. See TraceSQLMask for trace options.

If you enter 0 it disables tracing; use 7 to enable a modest tracing level for debugging. For other levels of tracing, set to a value equal to the sum of the desired options. For example, if you want to trace only SQL, TraceSQL=1; if SQL statements and Connect statements are desired, TraceSQL should be set to 1+ 2 + 4 = 7. A setting of TraceSQL = 7 is recommended for troubleshooting connection and other basic problems. Tracing can consume large amounts of disk space over time so be sure to reset TraceSQL = 0 when you finish trouble shooting.

TraceSQLMask

Sets the logging level ceiling for SQL tracing for individual clients. Traces are written to the following location: $PS_HOME$/appserv/<domain>/LOGS/<Client User ID>_<svrname>.tracesql. Clients must specify the desired SQL tracing level using PeopleSoft Configuration Manager on the Trace tab. To prevent clients from turning on the application server trace, and consuming resources, the application server uses TraceSQLMask as an administrative control facility.

If a client transmits a request to trace SQL, the application server compares the value transmitted to TraceSQLMask. If the client value is less than or equal to TraceSQLMask, the application server enables the trace. However, if the client value is greater, application server
will enable the trace up to the TraceSQLMask value. Trace files are written on the application 
server; no trace shows up on the client workstation.

Trace values are set in the application server configuration file PSAPPRESRV.CFG file. Output 
files are written to directory $PS_HOME/appserver/winx86/<domain>/logs.

For TraceSQL and TraceSQLMask you have the following options:

   1 - SQL statements
   2 - SQL statement variables
   4 - SQL connect, disconnect, commit and rollback
   8 - Row Fetch (indicates that it occurred, not data)
  16 - All other API calls except ssb
  32 - Set Select Buffers (identifies the attributes of columns 
      to be selected).
  64 - Database API specific calls
 128 - COBOL statement timings
 256 - Sybase Bind information
 512 - Sybase Fetch information
 4096 - Manager Information
 8192 - Mapcore information

**TracePC**

Sets a desired level for PeopleCode tracing for activity generated by all clients on a domain. 
Eligible values are defined in the configuration file. TracePC values are displayed in 
PeopleSoft Configuration Manager on the Trace tab. You can find the results in the following 
location: <PS_HOME>/appserv/<domain>/LOGS/<domain>.log.

**TracePCMask**

This parameter controls which of the PeopleCode Trace options requested by client machines 
will be written to the trace file. The results of this trace are written to

   <PS_HOME>/appserv/<domain>/LOGS/<ClientMachine>.<domain>.log

For TracePC and TracePCMask you have the following options.

   1 - Trace instructions
   2 - List the program
   4 - Show assignments to variables
   8 - Show fetched values
  16 - Show stack
  64 - Trace start of programs
 128 - Trace external function calls
 256 - Trace internal function calls
 512 - Show parameter values
 1024 - Show function return value
 2048 - Trace each statement in program
TracePPR and TracePPRMask

You use these options to trace the activity in the page processor. Typically, these options are used internally only by PeopleSoft developers, however, you may need to view the results of this trace when troubleshooting. For the values of each trace, see the following list:

1  - Log extra debug messages
2  - Dump panel after build
4  - Dump buffers after PPRInit
8  - Dump buffers before/after service
16 - Dump buffers after scrollselect
32 - Dump buffers after modal panel
64 - Dump buffers before save
128 - Dump buffers after insertrow
256 - Trace default processing
512 - Dump PRM data
1024 - Log HTML generation errors
2048 - dump memory statistics
4096 - Trace related display processing
8192 - Trace keylist generation
16384 - Trace work record settings

Tracing related display processing is useful for seeing when and if related displays are getting updated, and if they are updating successfully. Some sample output in the log file from setting this flag would be:

Starting Related Display processing
Related Display processing - PPR_RELDSPLVALID not set
Related Display processing - All Rows
  Starting Related Display processing for - PSACLMENU_VW2.MENUNAME
  Related Display processing for - PSACLMENU_VW2.MENUNAME - completed successfully
  Finished Related Display processing

Using the keylist generation tracing in addition to the related display tracing can help you track down why the related displays have the wrong value. It shows where the keys are coming from. The following is a sample of keylist generation tracing:

Starting Keylist generation
  Keylist generation - FIELDVALUE is a key
  FIELDVALUE is low key
  Low key value was supplied =
  Key FIELDVALUE =
  Keylist generation - FIELDNAME is a key
  Keylist generation - Finding value for USRXLATTABLE_VW.FIELDNAME
    Not Found in key buffer
    Searching for field FIELDNAME in component buffers
    Scanning level 1
    Scanning record DERIVED_USROPTN for field FIELDNAME
Field FIELDNAME found in record DERIVED_USROPTN
   Found in component buffers, value = PT_TIME_FORMAT
Key FIELDNAME = PT_TIME_FORMAT
Keylist generation - USROPTN is a key
Keylist generation - Finding value for USRXLATTABLE_VW.USROPTN
   Not found in key buffer
   Searching for field USROPTN in component buffers
   Scanning level 1
     Scanning record DERIVED_USROPTN for field USROPTN
     Scanning record PSUSROPTLIST_VW for field USROPTN
     Field USROPTN found in record PSUSROPTLIST_VW
   Found in component buffers, value = TFRMT
Key USROPTN = TFRMT
Keylist generation complete
   FIELDNAME = PT_TIME_FORMAT
   FIELDVALUE = USROPTN = TFRMT

Here you can see how the system builds the keylist. First searching in the current record (key buffer), then searching the buffers in the current level, and then up a level if still not found, and so on. It also indicates exactly what record the key value is being taken from. This is useful on complex components where there are often several instances of a particular field, and a common problem is the value is derived from an unexpected location.

Combining the keylist tracing and the related display tracing provides a good view of the system behavior. For example,

Starting Related Display processing
  Related Display processing - All Rows
  Starting Related Display processing for - PSACLMENU_VW2.MENUNAME
    Starting Keylist generation
      Keylist generation - MENUNAME is a key
      MENUNAME is low key
      Low key value was supplied = APPLICATION_ENGINE
      Key MENUNAME = APPLICATION_ENGINE
      Keylist Generation complete
      MENUNAME = APPLICATION_ENGINE
      Related Display processing for - PSACLMENU_VW2.MENUNAME - completed successfully

Each related display goes through the keylist generation process, and you can see exactly what key values are used to populated the related displays and where those key values came from.

The work record flag is a performance feature. If every field in a level 0 record has a value from the keylist and is display-only then it will be marked as a work record because the values can't be changed. After it is marked as a work record that affects how the record behaves. For example, PeopleCode for fields in the record but not in the component won't run, data won't be
saved, and so on. By enabling this tracing option, you can see which records are flagged as work records. The output looks like this:

- Work flag cleared for record PSCLASSDEFN_SRC
- Work flag cleared for record PSCLASSDEFN_SRC
- Work flag cleared for record PSCLASSDEFN
- Work flag cleared for record PSPRCSPRFL
- Work flag cleared for record SCRTY_QUERY
- Work flag set for record PSCLASSDEFN
- Work flag set for record PSPRCSPRFL
- Work flag set for record SCRTY_QUERY

Since the flag is turned on and off at various points, the last setting (set or cleared) is the most important. In the previous trace, PSCLASSDEFN is marked as a work record, it was cleared and then set again.

**TraceAE**

To trace your PeopleSoft Application Engine programs, you can activate the specific Application Engine traces using this parameter. For this parameter you have the following options:

1. Trace STEP execution sequence to AET file
2. Trace Application SQL statements to AET file
4. not yet allocated
8. not yet allocated
16. not yet allocated
32. not yet allocated
64. not yet allocated
128. Timings Report to AET file
256. Method/BuiltIn detail instead of summary in report
512. not yet allocated
1024. Timings Report to tables (ignored if Prcs. Instance=0)
2048. DB optimizer trace to file
4096. DB optimizer trace to tables
8192. Transform trace

**See Also**

*PeopleTools PeopleBooks: PeopleSoft Application Engine, “Tracing Application Engine Programs”*

**TraceOpt and TraceOptMask**

The bits enable logging for Optimization Engine components beyond the standard LogFence setting. For example, TraceOpt=3510 sets full trace on all components. The following list shows the options for tracing the Optimization Engine components.

1. OptEngine LSB
2. OptEngine MSB LSB LogFence
Write Cash Dump to Separate File

In the event that the application server shuts down abnormally, or crashes, it's useful to view the log information related to the crash. However, information related to a crash, or crash dump, can be lengthy. To enable you to avoid large, difficult-to-read log files, PeopleSoft provides the option of having the system write crash information to a file other than the appserv.log file.

The advantages of this option are:

- You don't have to sort through all of the other trace information in the log file. Typically, when a crash occurs you want to see only information related to the crash.
- You can reduce the size of your application server log files by routing crash information to a separate file.

To enable this option, indicate **Y**, for Yes, for the following parameter. For example,

Write crash dump to separate file=Y

The system writes the crash dump file to the following location:

PS_HOME\appserv\<domain name>\logs

And the system names the crash dump file according to the following convention:

<server_process_name>.<process_ID>.dmp

If you elect to write crash information to a separate file, when a crash occurs the system indicates in the appserv.log that a crash occurred and that it is redirecting the crash information to a particular file. The following example illustrates what appears in the appserv.log in the event of a crash.

(0) Unhandled exception occurred. Writing crash dump to PSAPPSRV.213.dmp
(3) Switching to new log file b:\appserv\test\logs\PSAPPSRV.213.dmp
To disable this option, enter N, for No, at the prompt.

**Note.** If you do not enable this option, crash information appears in the appserv.log by default.

---

### Cache Settings

The Cache Settings section enables you to specify how you want to handle caching at your site. Enabling caching on the application server improves performance.

**Values for config section - Cache Settings**

```
EnableServerCaching=1
ServerCacheMode=0
```

Do you want to change any values (y/n)— [n]:

The following sections explain each cache option.

#### EnableServerCaching

With EnableServerCaching, you specify what objects the system stores in cache on the application server. To enable application server disk caching the value must be set to 1 or 2.

If you enter 1, the system caches only the most used classes of objects, and if you enter 2, the system caches all object types regardless of the frequency of use. Which option you select depends on internal testing at your site. Typically, you want to use the option that provides the best performance.

To disable application server caching, the value must be set to 0. In most cases there is no reason to disable server caching. Doing so significantly degrades performance, as it requires the application server to retrieve an object from the database each time the system needs it.

**Note.** If you enter any other value other than 0, 1, or 2, the system behaves as though you entered 1.

#### ServerCacheMode

If you have server caching enabled on the application server, which is usually the case, there are two modes of caching from which to choose: shared and non-shared cache files.

If you elect to use the non-shared cache mode, each PSAPPSRV server process that starts within a domain maintains its own separate cache file. In this mode, there is one cache file per PSAPPSRV server process.

To set one cache directory/file per server process, enter 0 at the Set ServerCacheMode prompt. By default, non-shared cache files is enabled. The following path shows where you find cache files with this cache option enabled.
%ps_home%\appserv\<domainName>\cache
\n\nN refers to the number of PSAPPSRV server processes that are configured to start within the domain. For example, if you have two PSAPPSRV processes, the system creates two cache directories, namely \1 and \2, beneath the cache directory.

The shared cache mode offers the following benefits:

- Server processes share a common cache file, which enables you to reduce the disk space consumed by multiple cache files.
- Improved initial transaction load performance. Because all objects are already cached, the initial load performance is equivalent to subsequent loads. This is the major difference from previous behavior.
- Improved performance because the system does not write new items to the cache, and, as such, the cache file never grows. If the cache file never grows, this mitigates the concern of running out of disk space on servers during run time.

Note. Because the system does not write to the shared cache, you should enable shared caching only in a production environment where objects are relatively static, as opposed to a development environment where objects are likely to be changed frequently.

- Simplifies file management by having fewer files for the system to maintain.

To set shared caching for the domain, enter 1 at the Set ServerCacheMode prompt. With this option enabled, the system stores the cache information in the following directory:

%ps_home%\appserv\<domainName>\cache\share

The system assumes that a preloaded cache exists in the share directory. The preloaded cache contains most instances of the managed object types that are cached to file. When you boot the application server, if shared cache is enabled but no cache files exist, the system reverts to unshared caching.

Warning! You must pre-load your shared cache before you enable shared caching on the application server.

Note. PeopleSoft Application Engine processes are independent from application server domains, directories, and configuration files. Because of this, Application Engine processes do not share cache with application server domain processes.

If you enter any other value other than 0 or 1, the system behaves as though you entered 0.
See Also

*PeopleTools PeopleBooks: Data Management, PeopleTools Utilities, Load Application Server Cache*

**Remote Call**

You have one option to set for Remote Call through the PSADMIN: RCCBL Redirect.

Values for config section - RemoteCall

RCCBL Redirect=0

Do you want to change any values (y/n)? [n]:

Enter 0 to disable redirection and enter 1 to enable redirection. Redirection causes the server process to retain intermediate work files used to pass parameter values between the server process and a RemoteCall/COBOL program for debugging purposes. Redirect should always be 0 except for debugging. Work files are written to the /LOGS directory with “.in” and ‘.out’ extensions.

**PSAPPSRV**

The PSAPPSRV server process performs the functional requests, such as building and loading panel groups. It also provides the in-memory-caching feature for PeopleTools objects on the application server. Each server process maintains its own cache.

Values for config section - PSAPPSRV

Min Instances=9
Max Instances=15
Service Timeout=300
Recycle Count=2000
Allowed Consec Service Failures=2
Ignore Undefined Subscription Messages=1
Max Fetch Size=5000

Do you want to change any values (y/n)? [n]:

The following topics describe each of the parameters within the PSAPPSRV configuration section.

**Min Instances**

Specifies how many servers are started at boot. Translates to the PSAPPSRV server’s -m (min) parameter in the UBB file.
**Max Instances**

Specifies the maximum number of servers that can be started. Translates to the PSAPPSRV server’s -M (Max) parameter in the UBB file.

**Service Timeout**

Specifies the number of seconds a PSAPPSRV waits for a service request, such as MgrGetObj or PprLoad to complete, before timing out. Service Timeouts are recorded in the TUXLOG and APPSRV.LOG. In the event of a timeout, PSSAPSRV terminates itself and Tuxedo automatically restarts this process.

**Recycle Count**

Specifies the number of times each server will be executed before being terminated (intentionally) by PeopleSoft and then immediately restarted. Servers must be intermittently recycled to clear buffer areas. The time required to recycle a server is negligible—occurring in milliseconds. Recycle Count does not translate into a native Tuxedo parameter in the PSAPPSRV.UBB file. Instead, the value is stored in memory and is managed by a PeopleSoft server.

**Allowed Consec Service Failures**

This option enables dynamic server process restarts for service failures. To enable this option enter a number greater than zero, and to disable this option enter 0. The default for this parameter is 2. The numerical value you enter is the number of consecutive service failures that will cause a recycle of the server process. This is a catchall error handling routine that enables PSAPPSRV, PSQCKSRV, and PSAMSRV to terminate itself if it receives multiple, consecutive, fatal error messages from service routines. Such errors should not occur consecutively, but if they do it indicates that the server process must be recycled or cleansed. A “Retry” message appears on the client machine when this occurs.

**Ignore Undefined Subscription Messages**

When a channel on the subscribing node contains a subset of the messages assigned to the matching channel on the publishing node, the subscribing node receives some messages for which it has no definitions. How it handles this discrepancy depends on the Ignore Undefined Subscription Messages setting for the current PeopleSoft application server domain. You have the following options with this setting:

- If set to 1, the subscribing node will do just that—ignore any incoming message for which the subscription channel has no definition. This is the default setting.
- If set to 0, the subscribing node will reply to the publishing node with an exception when it encounters an undefined message, which prevents any more messages from being published until the exception is handled.

**Max Fetch Size**

Default is 5000 (K). Specifies the maximum memory used by the server to store fetched rows for a transaction before sending the result set back to a client. If the memory limit is exceeded, the client receives the rows retrieved with a “Memory Buffer Exceeded” warning.
PeopleSoft recommends using the default value. PSAPPSRV supports non-conversational transactions, so this parameter gives users a way to balance high-volume throughput with the needs of users working with large volumes of data. A value of 0 means unlimited memory will be used.

**Note.** The memory is not pre-allocated but is acquired as needed for each transaction.

---

**PSOPTENG**

PSOPTENG is the server processes associated with the PeopleSoft Optimization Framework (POF).

Values for config section - PSOPTENG

Max Instances=1
Service Timeout=270
Opt Max General Services=3
Opt MSSQ Instances=0

Do you want to change any values (y/n)? [n]:

**Max Instances**

Specifies the maximum number of optimization engines that will be started. Because the number of optimization engines does not scale dynamically in Tuxedo, this is exactly the number of engines in the domain.

**Service Timeout**

Specifies the number of seconds a PSAPPSRV process waits for an optimization engine to service a request. This is meant to Stop long-running processes when the user is waiting for processing to complete. Always make this value less than the Service Timeout of the PSAPPSRV section. If an optimization process needs more time to complete, run the process on PeopleSoft Application Engine or as an asynchronous optimization transaction.

**Opt Max General Services**

Specifies the number of distinct SSSQ optimization engines available in the domain. Used by the OptDispatcher code that underlies the PeopleCode OptEngine object.

**Opt MSSQ Instances**

Specifies the number of optimization engines in the MSSQ queue. Currently has no effect. A “Retry” message appears on the client machine when this occurs.

**See Also**

*PeopleTools PeopleBooks: PeopleSoft Optimization Framework, Understanding the Optimization Framework*
The PSSAMSRV server process communicates through the Tuxedo conversational mode. It performs transactional SQL requests (Updates).

Values for config section - PSSAMSRV
- MinInstances=1
- MaxInstances=3
- Service Timeout=300
- Recycle Count=100000
- Allowed Consec Service Failures=2
- Max Fetch Size=32

Do you want to change any values (y/n)? [n]:

The following topics describe each of the parameters within the PSSAMSRV configuration section.

**Min Instances**
Specifies how many servers are started at boot. Translates to the PSSAMSRV server’s -m (min) parameter in the UBB file.

**Max Instances**
Specifies the maximum number of servers that can be started. Translates to the PSSAMSRV server’s -M (Max) parameter in the UBB file.

**Service Timeout**
Specifies the number of seconds the server processes waits for a request before timing out. This is meant to stop Runaway processes like rccbl timeout.

**Recycle Count**
Specifies the number of times each server is executed before being terminated (intentionally) by Tuxedo. Tuxedo immediately restarts the server. Servers must be intermittently recycled to clear buffer areas. The time required to recycle a server is negligible, occurring in milliseconds. Recycle Count does not translate into a native Tuxedo parameter in the PSAPPSRV.UBB file, rather the value is stored in memory and is managed by a PeopleSoft server.

**Allowed Consec Service Failures**
This option enables for dynamic server process restarts for service failures. To enable this option enter a number greater than zero, and to disable this option enter 0. The default for this parameter is 2. The numerical value you enter is the number of consecutive service failures that cause a recycle of the server process. This is a catchall error handling routine that enables PSAPPSRV, PSQCKSRV, and PSSAMSRV to terminate itself if it receives multiple,
consecutive, fatal error messages from service routines. Such errors should not occur consecutively, but if they do it indicates that the server process must be recycled or cleansed.

A “Retry” message appears on the client machine when this occurs.

**Max Fetch Size**

Default 32 (K). Specifies the maximum memory used by the server to store fetched rows for a transaction before sending results to the client and refilling the memory buffer. When the memory limit is reached, the server sends rows to the client, but then resumes refilling the buffer and sending results to the client until the query is complete. PeopleSoft recommends that users leave the default value unchanged.

PSSAMSRV supports conversational transactions, so this parameter enables users to tune performance by adjusting the number of network round-trips required for the “average” transaction. A value of 0 causes unlimited memory to be used, which means one round-trip no matter how large the result set. Note that the memory is not pre-allocated but is acquired as needed.

**PSQCKSRV**

The PSQCKSRV is an optional server process designed to improve performance. Essentially, the PSQCKSRV, or quick server, is a copy of the PSAPPSRV. It performs “quick” requests such as non-transactional (read-only) SQL requests. The PSQCKSRV is designed to improve overall performance by enabling the PSAPPSRV process to direct a portion of its workload to PSQCKSRV.

Values for config section - PSQCKSRV

```
Min Instances=1
Max Instances=3
Service Timeout=300
Recycle Count=100000
Allowed Consec Service Failures=2
Max Fetch Size=5000
```

Do you want to change any values (y/n)? [n]:

The following topics describe each of the parameters within the PSQCKSRV configuration section.

**Min Instances**

Specifies how many servers are started at boot. Translates to the PSQCKSRV server’s -m (min) parameter in the UBB file.

**Max Instances**

Specifies the maximum number of servers that can be started. Translates to the PSQCKSRV server’s -M (Max) parameter in the UBB file.
**Service Timeout**

Specifies the number of seconds a PSQCKSRV waits for a request before timing out. This is meant to stop Runaway processes, like rcbl timeout. Applies to incremental PSQCKSRV servers dynamically started by the Max Instances parameter.

**Recycle Count**

Uses PSAPPSRV’s specifications.

**Allowed Consec Service Failures**

This option enables dynamic server process restarts for service failures. To enable this option enter a number greater than zero, and to disable this option enter 0. The default for this parameter is 2. The numerical value you enter is the number of consecutive service failures that will cause a recycle of the server process. This is a catchall error handling routine that enables PSAPPSRV, PSQCKSRV, and PSAMSRV to terminate itself if it receives multiple, consecutive, fatal error messages from service routines. Such errors should not occur consecutively, but if they do it indicates that the server process must be recycled or cleansed.

A “Retry” message appears on the client machine when this occurs.

**Max Fetch Size**

Uses PSAPPSRV’s specifications.

---

**PSQRYSRV**

PSQRYSRV is designed, specifically, to handle the SQL generated by PeopleSoft Query (PSQED.EXE). With PSQRYSRV configured, SQL intensive, complicated, user-defined queries get offloaded to a dedicated server process thus freeing PSAPPSRV and PSQCKSRV to handle the SQL requests for which they are more suited.

PSQCKSRV is also designed to process SQLRequest services, however, if you have PSQRYSRV configured, it processes all SQLRequests initiated specifically by PSQuery (SQLQuery:SQLRequest).

Like the PSQCKSRV server process, PSQRYSRV is an optional server process. However, if you allow users to initiate queries from PeopleSoft Query, we recommend that you take advantage of this new server process.

Values for config section - PSQRYSRV

Min Instances=1
Max Instances=3
Service Timeout=1200
Recycle Count=100000
Allowed Consec Service Failures=2
Max Fetch Size=5000
Use dirty-read=0
Do you want to change any values (y/n)? [n]:

The following topics describe each of the parameters within the PSQRYSRV configuration section.

**Min Instances**
Specifies how many servers are started at boot. Translates to the PSQRYSRV server's -m (min) parameter in the UBB file.

**Max Instances**
 Specifies the maximum number of servers that can be started. Translates to the PSQRYSRV server's -M (Max) parameter in the UBB file.

**Service Timeout**
Specifies the number of seconds PSQRYSRV waits for a request before timing out. This is meant to Stop Runaway processes.

**Recycle Count**
Specifies the number of times each server is executed before being terminated (intentionally) by PeopleSoft and then immediately restarted. Servers must be intermittently recycled to clear buffer areas. The time required to recycle a server is negligible—occurring in milliseconds.

If the recycle count is set to zero, PSQRYSRV is never recycled.

**Allowed Consec Service Failures**
This option enables dynamic server process restarts for service failures. To enable this option, enter a number greater than zero, and to disable this option enter 0. The default for this parameter is 2. The numerical value you enter is the number of consecutive service failures that will cause a recycle of the server process.

This is a catchall error handling routine that enables PSAPPSRV, PSQCKSRV, PSQRYSRV, and PSSAMSRV to terminate itself if it receives multiple, consecutive, fatal error messages from service routines. Such errors should not occur consecutively, but if they do, it indicates that the server process must be recycled, or cleansed. A "Retry" message appears on the client machine when this occurs.

If this is set to zero, PSQRYSRV is never recycled.

**Max Fetch Size**
Specifies the maximum size (in KB) of a result set returned from a SELECT query. The default is 10000KB. Use 0 for no limit.

**Use dirty-read**
This parameter controls whether a process can read uncommitted data from a table. It is usually acceptable to use this parameter for general reporting or queries.
A value of 0 disables dirty reads, a value of 1 enables PSQRYSRV to read uncommitted data.

---

**Note.** Dirty reads are not recommended if you are reading data and doing subsequent processing based on the disposition of the data at the time it is read. Between the time the data is read by a subsequent process and when the unit of work is completed by the first process, any activity affecting the table data at the time a subsequent process read could be rolled back, invalidating the accuracy of the data that a subsequent process read.

---

**Messaging Server Processes**

There are a variety of server processes devoted to application messaging. If you are not implementing the application messaging technology then you may skip through the delivered, default server processes. These server processes are:

- PSBRKDSP
- PSBRKHND
- PSPUBDSP
- PSPUBHND
- PSSUBDSP
- PSSUBHND

These server processes act as brokers, dispatchers, and handlers of the messages in your messaging system. The messaging technology is described in detail in the *PeopleSoft Integration Tools PeopleBook*.

---

**SMTP Settings**

You can send electronic mail requests—issued with Workflow or PeopleCode—to the application server, and the application server, in turn, passes the requests to the specified mail server (SMTPServer). By having the application server submit the email request you avoid having to install mail connectivity software on each client just as you avoid having to install database connectivity software on each client in a three-tier connection. To specify the appropriate SMTPServer and port to receive the email requests you must edit the SMTP Settings section, as shown in the following example.

```plaintext
Values for config section - SMTP Settings
SMTPServer=
SMTPPort=25
SMTPServer1=
SMTPPort1=0
SMTPSender=PeopleSoft@peoplesoft.com
SMTPBlackberryReplyTo=
```
Do you want to change any values (y/n)? [n]:

The following topics describe each of the parameters within the SMTP configuration section.

**SMTPSourceMachine**
Enter the host name and IP Address of the mail server machine.

**SMTPCharacterSet**
Specify the character set used on the sender’s machine.

**SMTPSourceMachine**
Sender’s source machine name and internet address in the form of MACHINE.XYZCORP.COM. This value is required in some but not all environments.

**SMTPCharacterSet**
Here, specify the character set used on the sender’s machine.

**SMTPPort**
Enter the port number on the mail server machine.

**SMTPPort1**
Enter the port number on the failover mail server machine.

**SMTPSender**
Enter the sender’s Internet address. This must be a valid address such as user1@xyzcorp.com.

**SMTP BlackberryReplyTo**
Enter the internet address that you want to be the "Reply To" address for Blackberry Email Responses. This must be a valid address such as user1@xyzcorp.com.

**SMTPGuaranteed**
Specify whether SMTP messages are guaranteed to be delivered or not.

**SMTPTrace**
Specify whether SMTP messages should be traced or not.

**SMTPSendTime**
Specify whether SMTP messages should be sent at a specific time or not.

**SMTPGuaranteed**
0
**SMTPTrace**
0
**SMTPSendTime**
0
**SMTPEncodingDLL**

Specifies the name of a DLL used to translate the mail message from the sender’s character set, as in latin1, sjis, big5, gb, ks-c-5601-1987, ks-c-5601-1992, to a desired 7-bit safe character set for transmission.

**SMTPGuaranteed**

Set this option to 1 if you want TriggerBusinessEvent email PeopleCode to be delivered through the messaging system. With this option on, the system periodically retries email sent with TriggerBusinessEvent until successful.

By enabling this feature you implement a mechanism to ensure that emails get routed to the appropriate place just in case SMTP mail fails for some reason, such as network timeouts, down mail servers, invalid parameters, and so on.

**SMTPTrace**

Enables you to turn off the tracing of all email details to the log file when LogFence is set to 5. With this option, you can reduce the log file size for high-volume email users. To enable this option enter 1; to disable enter 0.

**SMTPSendTime**

This parameter, if enabled, controls whether the message contains a "send time" populated by the application server. If disabled, the "send time" is blank and is populated by the receiving gateway (depending on the gateway).

To enable this option enter 1; to disable enter 0.

**SMTP Further Considerations**

- PeopleSoft mail integration is on the application server only. Currently, PeopleSoft does not support VIM/MAPI as this option is client-side only integration, and PIA applications execute on the server-side.

- The application server communicates directly with an SMTP server through telnet using standard SMTP commands with MIME 1.0 messages.

- PeopleSoft currently supports UTF-8 encoding of the email messages out-of-the-box, and customers can encode their email messages in other ways. With our server-side integration, we do not have to certify any specific email client application. Customers can use any application to read their email.

- The system sends email through either the SendMail or TriggerBusinessEvent PeopleCode functions. Within PeopleSoft applications, using these functions is the recommended method.
• Outside of PeopleSoft applications, you use PSMAIL.EXE, which is an executable PeopleSoft ships for use by advanced developers. PSMAIL.EXE can send email messages through SMTP based on data passed as parameters to the executable or from an input file. This executable is primarily used for PeopleSoft Process Scheduler programs.

Interface Driver

You set the following parameter for configuring your Interface Driver.

Values for config section - Interface Driver

SCP_LOCALE="LOCALE=EN_US","CHARSET=US-ASCII"

Do you want to change any values (y/n)? [n]:

SCP_LOCALE

The SCP LOCALE parameter applies to the interface driver for business interlinks. It defines the "RPS_LOCALE" string which the driver sends to the Supply Chain Planning (SCP) server.

See Also

PeopleTools PeopleBooks: PeopleSoft Business Interlink Application Developer Guide

PSTOOLS

The following parameters are options that you may need to set in advanced configurations.

Values for config section - PSTOOLS

Add to CLASSPATH=

Proxy Host=
Proxy Port=
Character Set=
Suppress App Error Box=Y
Process exit grace period=5
DbFlags=1

Do you want to change any values (y/n)? [n]:

Add to CLASSPATH

The CLASSPATH environment variable tells the Java Virtual Machine and other Java applications where to find the Java class libraries, including any user-defined class libraries. Because PeopleTools automatically generates CLASSPATH entries for core PeopleSoft
delivered class libraries, use this field to specify any custom or additional class libraries that PeopleSoft needs to access.

**Proxy Host**

If the HTTP destination, such as the Application Messaging Gateway or business interlink remote hose, is "behind" a proxy server for security reasons, then you must identify the proxy server.

Set the Proxy Host parameter to reflect the distinguished name of the proxy server, as in proxy.peoplesoft.com.

**Proxy Port**

You also need to specify the port number on which the proxy server is "listening" for transmissions. For instance, set Proxy Port to 80, a typical default port number.

**Character Set (UNIX Only)**

This option specifies which character set to use for processing data on the application server. The default value for Character Set is *latin1*. This is the character set PeopleSoft supports for use with all Western European languages, including English. If the application server will be used only to process Western European data, then you should accept the default for this parameter.

Otherwise, select one of the valid character set choices from the following list:

- **latin1**: (default) Latin-1 - ISO 8859-P1 - Microsoft codepage 1252
- **sjis**: Japanese Shift-JIS - Microsoft codepage 932
- **big5**: Traditional Chinese - Microsoft codepage 950
- **gb**: Simplified Chinese - Microsoft codepage 936
- **ks-c-5601-1987**: Korean Wansung - Microsoft codepage 949
- **ks-c-5601-1992**: Korean Johab - Microsoft codepage 1361

*Note.* The character set of the application server and the character set of any Windows workstations connecting to that application server must match.

**Suppress App Error Box (Windows Only)**

To suppress an application error box or message from appearing after an application error occurs, enter *Y* for this parameter. If you want to view error dialogs/message boxes, enter *N* for this parameter.

*Note.* If the system generates an error box for an application server process and this parameter is set to *N*, then Tuxedo can't restart the down process until you close the error box.
Process exit grace period (Windows Only)

Occasionally, when a server process is shutdown, recycled, or experiences a service timeout, for various reasons, the server process can enter a "hung" state. Application server processes in this state have a negative impact on performance. To avoid hung server processes, PeopleSoft provides the following parameter:

Process exit grace period=5

The grace period is an interval of time allotted to the server processes within a domain to complete a proper exit. Each server process has its own instance of PSREAPER. At the time of exit, the server process actually invokes a child process named PSREAPER.EXE. The PSREAPER program is designed to perform the following tasks:

- "Sleep" for the interval of time that you specify for the grace period.
- "Kill" the parent process by way of the TerminateProcess function (Tuxedo).

If the server process has not successfully performed a successful exit within the interval specified by the grace period, then PSREAPER shuts down the server process.

Set the grace period to a value greater than the typical amount of time your server processes require to perform an exit. The default that PeopleSoft ships is tuned to our internal environment and does not necessarily apply to your site. A value of 0 (zero) disables the reaper process.

The PSREAPER program applies to service timeouts, server recycles, and shutdowns.

DbFlags

Using this parameter you can disable the %UpdateStats meta-SQL construct. To disable %UpdateStats enter 1. To enable %UpdateStats enter 0.

See Also

PeopleTools PeopleBooks: Application Engine, Using Meta-SQL and PeopleCode, %UpdateStats

Integration Broker

Values for config section - Integration Broker

Min Message Size For Compression=1000000

Do you want to change any values (y/n)? [n]:

Min Message Size For Compression

Enables you to configure the minimum size that a message must be before the system compresses the message.
Select Server Process Options (Final Prompts)

After you enter all of the previous parameter values for your application server, PSADMIN prompts you for the following server process options. You can use these prompts to reduce the amount of server process that start when the domain boots. This, in turn, makes your configuration simpler while helping to conserve system resources.

For instance, if you enter \( n \) for any of the following prompts, the corresponding server process (or set of server processes) will not be configured for the domain. If you enter \( n \) to all the prompts, your domain will contain only the required server processes.

**Do you want the Publish/Subscribe servers configured?**

If you want the application messaging server processes configured and booted, enter \( y \). If you are not implementing the application messaging technology, enter \( n \).

**Move quick PSAPPSRV services into a second server (PSQCKSRV)?**

Enter \( n \) if very few clients will access the domain and concurrency is not an issue. Enter \( y \) to enable the PSQCKSRV in situations where concurrency and optimal transaction throughput are desired.

**Move long-running queries into a second server (PSQRYSRV)?**

If you want all user-generated queries initiated by PSQuery to be handled by a dedicated server process, enable this option. It improves overall performance.

**Do you want JOLT configured?**

JOLT listener is required to support the internet architecture. If you are not going to deploy internet architecture there is no need to configure JOLT.

**Do you want JRAD configured?**

JRAD is used to support specific configurations. Accept the default unless you are attempting to configure JRAD for use with Jolt Internet Relay.

**Do you want to enable PeopleCode Debugging?**

If you want to debug PeopleCode programs with the current domain, enter \( y \).

**Do you want the Optimization engines configured?**

If you want the optimization engine server processes configured and booted, enter \( y \). If you are not implementing the optimization technology on this domain, enter \( n \).
See Also

Setting up the PeopleCode Debugger

Setting Up Jolt Internet Relay

*PeopleTools PeopleBooks: PeopleSoft Optimization Framework*, Understanding the Optimization Framework
CHAPTER 5

Administering Web Servers

This chapter provides an overview of the PeopleSoft Web Server and contains information on the following topics:

- How the different web server components interoperate.
- What the PeopleSoft servlets do and how they connect to the application server.
- Where you can find the configuration files on the web server.
- Configuration parameters in important configuration files.

Understanding the PeopleSoft Web Server

The web server is a vital component within the PeopleSoft Internet Architecture. It is required for deploying PeopleSoft applications to the browser and for implementing PeopleSoft integration solutions.

In this section, we explain the following topics:

- Supported web servers
- Server components
- PeopleSoft servlets
- How to transmit requests to the web server
- Multiple servlets

Supported Web Servers

PeopleSoft supports the following web servers:

- BEA WebLogic 6.1.
- IBM WebSphere 4.0 AEs. (Advanced Single Server Edition)
Server Components

On the server that you have designated to be your web server, the following components are required for successful incorporation into the PeopleSoft Internet Architecture:

- **Web server software.** This is the major piece of software that manages the web server. There is a variety of web server software available. WebSphere 4.0 and WebLogic 6.1 are the servers that PeopleSoft currently supports. Consult PeopleSoft Platform Database on Customer Connection for minor version and service pack information.

- **Web Applications.** PeopleSoft provides two web applications, one for PeopleSoft Portal and a second for PeopleSoft Integration Broker.

- **Servlet Engine.** Because PeopleSoft servlets run on the web server, you need a servlet engine on the web server. A servlet engine is the environment in which servlets run. The servlet engine requires Java executables to run. Both WebLogic and WebSphere come with a built-in servlet engine.

- **Java executables.** Java is a platform-independent programming language widely used for web-based programs. With Java you develop applets and servlets. Applets are small programs embedded in HTML pages that get download to the browser and invoked locally on the client. Servlets are Java programs that run on the web server, not the client. PeopleSoft Internet Architecture uses only servlets. A common set of Java executables shared between the PeopleSoft supported web servers is the Java Runtime Environment (JRE).

**Note.** BEA's WebLogic Server and IBM's WebSphere have all of these components "out of the box."

PeopleSoft Servlets

PeopleSoft servlets are split across the two PeopleSoft web applications. The Portal web applications contains the following servlets:

- PeopleSoft Portal servlet (psp)
- PeopleSoft content Servlet (psc)
- PeopleSoft Report Repository servlets
- PeopleSoft SyncServer.

The PeopleSoft Integration Broker web application contains the following servlets:

- PeopleSoftListeningConnector
- HttpListeningConnector
- PS81ListeningConnector
Depending on your implementation, you may only choose to enable/disable a subset of these servlets/web applications. If you find that you want to implement a technology that requires a servlet, such as Application Messaging, that you did not install initially, you can always install any of the servlets as needed.

The PeopleSoft servlets run inside the servlet engine environment.

PeopleSoft servlets/web applications

The following topics briefly describe the function of each PeopleSoft servlet. The following topics describe the PeopleSoft servlets that you install onto the web server.

**Portal web application**

The Portal servlet handles all of the requests and formatting for the users accessing PeopleSoft through the PeopleSoft Portal. It also manages all aspects of the PeopleSoft Portal such as search, content management, and homepage personalization.

*Note.* In the URL this servlet appears as "psp" for PeopleSoft Portal.

This servlet enables an end user to connect to a PeopleSoft application. The servlet relays requests to the application server, and it also formats the HTML for deployment in a browser. This servlet handles the building of the components on the application server and the presentation of the components in the browser.
For the initial connection the system provides a login HTML file that resides on the server. After a successful login, the application server generates the subsequent HTML pages to complete the transaction. The servlet relays the pages to the browser.

The SyncServer servlet is used in mobile device synchronization.

The Report Repository servlets enable users to easily access and distribute the output of batch reports, such as Crystal and SQR, run through Process Scheduler over the Internet.

**Integration Broker web application (PSIGW)**

The Integration Broker transmits XML based messages between message nodes. The gateway handles PeopleSoft-to-PeopleSoft messages, PeopleSoft-to-third party messages, and third party-to-PeopleSoft messages.

**See Also**

*PeopleTools PeopleBooks: Portal Technology*

---

**Transmitting Requests to the Web Server**

When end users interact with a PeopleSoft application in the browser, they are looking at the HTML presentation produced by the servlet, not an actual static HTML page. You can't find the "page" that users see anywhere on the web server.

PeopleSoft uses the servlets to enable the browser to communicate with an application server domain. Because Tuxedo uses Jolt to extend its capabilities to the Java realm—to establish the connection between the web server and the application server using Java—the servlets must be configured to send messages to a predefined Jolt port on the application server.

The following list shows the order of events that occur during a browser transaction:

- The PeopleSoft servlet establishes a connection to handle your browser’s connection on the web server side.
- The Jolt Server Listener (JSL) at port 9000, by default, handles the initial connection to the application server. It hands off the communications responsibilities to an available handler (JSH).
- The JSH hands the request off to Tuxedo.
- Tuxedo analyzes the Jolt requests, and hands them off to the appropriate PeopleSoft server process queues.
- PSAPPSRV process does virtually all of the work of constructing web pages. Using Tuxedo resources, this PSAPPSRV retrieves object data from cache or the database and builds an HTML page, passing the completed work to the JSH.

- Assigned JSH passes the completed page to the portal servlet.

- Portal servlet displays the page in the browser.

![Diagram of PeopleSoft architecture](image)

Browser connecting through the Portal Servlet

When you install the servlets, you must supply the address of the JSL on the application server. For example, the default value is

```
<MachineName>:9000
```

If you've modified the default value of the Jolt port you must enter the port that corresponds to the domain to which the servlet needs to send requests.

### Multiple Servlets

Each PeopleSoft site is configured to communicate with one-to-many application servers. However, you can install multiple PeopleSoft sites on a single web server, each servlet pointing to a different application server domain.

If the multiple domains happen to reside on the same application server machine, then it's just a matter of making sure that each PeopleSoft site points to the appropriate Jolt port. The machine name value (assume it is XYZ) remains the same. For example,

**Site 1**

```
XYZ:9010
```
Site 2

XYZ:9020

Note. In the previous example the term PSFT servlet does not represent a particular servlet. It represents any of the PeopleSoft servlets. There is no "PSFT" servlet.

If the application server domains reside on separate application server machines, then make sure that both the machine name value and Jolt port value are pointing to the appropriate targets. For example,

Servlet 1

XYZ:9010

Servlet 2

ABC:9020

You set the machine name and port values during the install of the servlets, and, if necessary, you can modify the web server configuration files discussed in the following section.

Web Server Configuration Files

Because there are numerous components involved in the delivering PeopleSoft applications to a browser, it follows that there are a variety of configuration options, parameters, and files. This section contains information regarding what the most important configuration files are and where to find them.
For the most part, PeopleSoft documents the files that you are likely to modify in your PeopleSoft environment. PeopleSoft assumes that you have your web server vendor's documentation available for information regarding general web server configuration files and tasks.

In this section, we discuss:

- WebLogic configuration file locations
- WebSphere configuration files

### WebLogic Configuration File Locations

<table>
<thead>
<tr>
<th>WebLogic 6.1</th>
<th>Windows NT</th>
<th>UNIX</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PeopleSoft Files</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product home</td>
<td>c:\bea\wlserver6.1\</td>
<td>/bea/wlserver6.1</td>
</tr>
<tr>
<td>PORTAL - java classes</td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\classes</td>
<td>/bea/wlserver6.1/config\peoplesoft\applications\PORTAL\WEB-INF\classes</td>
</tr>
<tr>
<td>PORTAL jar files</td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\lib</td>
<td>/bea/wlserver6.1/config\peoplesoft\applications\PORTAL\WEB-INF\lib</td>
</tr>
<tr>
<td>PORTAL HTML (docroot)</td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\ps</td>
<td>/bea/wlserver6.1/config\peoplesoft\applications\PORTAL\ps</td>
</tr>
<tr>
<td>PORTAL psftdocs</td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs</td>
<td>/bea/wlserver6.1/config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs</td>
</tr>
<tr>
<td>configuration.properties</td>
<td>C:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs&lt;site&gt;\</td>
<td>/bea/wlserver6.1/config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs&lt;site&gt;\</td>
</tr>
<tr>
<td>Servlet registration/listings</td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\web.xml</td>
<td>/bea/wlserver6.1/config\peoplesoft\applications\PORTAL\WEB-INF\web.xml</td>
</tr>
<tr>
<td></td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\weblogic.xml</td>
<td>/bea/wlserver6.1/config\peoplesoft\applications\PORTAL\WEB-INF\weblogic.xml</td>
</tr>
<tr>
<td>Integration Gateway servlet registration / listing</td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PSIGW\WEB-INF\web.xml</td>
<td>/bea/wlserver6.1/config\peoplesoft\applications\PSIGW\WEB-INF\web.xml</td>
</tr>
<tr>
<td></td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PSIGW\WEB-INF\weblogic.xml</td>
<td>/bea/wlserver6.1/config\peoplesoft\applications\PSIGW\WEB-INF\weblogic.xml</td>
</tr>
</tbody>
</table>
### WebLogic 6.1

<table>
<thead>
<tr>
<th>Category</th>
<th>Windows NT</th>
<th>UNIX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integration Gateway's Java classes</td>
<td><code>c:\bea\wlserver6.1\config\peoplesoft\applications\PSGW\WEB-INF\classes</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/applications/PSGW/WEB-INF/classes</code></td>
</tr>
<tr>
<td>Integration Gateway's jar files</td>
<td><code>c:\bea\wlserver6.1\config\peoplesoft\applications\PSGW\WEB-INF\lib</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/applications/PSGW/WEB-INF/lib</code></td>
</tr>
<tr>
<td>Common Jar Files</td>
<td><code>c:\bea\wlserver6.1\config\peoplesoft\lib</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/lib</code></td>
</tr>
<tr>
<td>pstools.properties</td>
<td><code>C:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs\&lt;site&gt;\</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/applications/PORTAL/WEB-INF/psftdocs/&lt;site&gt;</code></td>
</tr>
<tr>
<td>errors.properties</td>
<td><code>C:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs\&lt;site&gt;\</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/applications/PORTAL/WEB-INF/psftdocs/&lt;site&gt;</code></td>
</tr>
<tr>
<td>text.properties</td>
<td><code>C:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs\&lt;site&gt;\</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/applications/PORTAL/WEB-INF/psftdocs/&lt;site&gt;</code></td>
</tr>
</tbody>
</table>

### WebLogic Files

<table>
<thead>
<tr>
<th>Component</th>
<th>Windows NT</th>
<th>UNIX</th>
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<tbody>
<tr>
<td>Web server configuration files</td>
<td><code>c:\bea\wlserver6.1\config\peoplesoft\config.xml</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/config.xml</code></td>
</tr>
<tr>
<td>JVM settings, CLASSPATH</td>
<td><code>c:\bea\wlserver6.1\config\peoplesoft\startPIA.cmd</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/setEnv.sh</code></td>
</tr>
<tr>
<td>JRE</td>
<td><code>c:\bea\jdk131</code></td>
<td><code>/bea/jdk131</code></td>
</tr>
<tr>
<td>JAVA 2 security policy</td>
<td><code>c:\bea\wlserver6.1\lib\weblogic.policy</code></td>
<td><code>/bea/wlserver6.1/lib/weblogic.policy</code></td>
</tr>
<tr>
<td>web server log (http requests)</td>
<td><code>c:\bea\wlserver6.1\config\peoplesoft\logs\PIA_access.log</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/logs/PIA_access.log</code></td>
</tr>
<tr>
<td>web server log (non http)</td>
<td><code>c:\bea\wlserver6.1\config\peoplesoft\logs\PIA_weblogic.log</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/logs/PIA_weblogic.log</code></td>
</tr>
<tr>
<td></td>
<td><code>c:\bea\wlserver6.1\config\peoplesoft\logs\peoplesoft-domain.log</code></td>
<td><code>/bea/wlserver6.1/config/peoplesoft/logs/peoplesoft-domain.log</code></td>
</tr>
</tbody>
</table>

### WebSphere Configuration Files

<table>
<thead>
<tr>
<th>Category</th>
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<th>UNIX</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft Files</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WebSphere 4.0 AEs</strong></td>
<td><strong>Windows NT</strong></td>
<td><strong>UNIX</strong></td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------------------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>Product home</td>
<td>c:\Apps\WebSphere\AppServer</td>
<td>/products/WebSphere/AppServer</td>
</tr>
<tr>
<td>PIA's java classes</td>
<td>c:\Apps\WebSphere\AppServer\installedApps\applications\Portal \WEB-INF\classes</td>
<td>/products/WebSphere/AppServer\installedAp ps/</td>
</tr>
<tr>
<td>PIA's jar files</td>
<td>c:\Apps\WebSphere\AppServer\installedApps\applications\Portal \WEB-INF\lib</td>
<td>/products/WebSphere/AppServer\installedAp ps/peoplesoft/PORTAL/WEB-INF/classes</td>
</tr>
<tr>
<td></td>
<td>c:\Apps\WebSphere\AppServer\installedApps\applications\Portal \ps</td>
<td>/products/WebSphere/AppServer\installedAp ps/peoplesoft/PORTAL/ps</td>
</tr>
<tr>
<td>PIA's HTML (docroot)</td>
<td>c:\Apps\WebSphere\AppServer\installedApps\applications\Portal \ps</td>
<td>/products/WebSphere/AppServer\installedAp ps/peoplesoft/PORTAL/ps</td>
</tr>
<tr>
<td>PIA's psftdocs</td>
<td>c:\Apps\WebSphere\AppServer\installedApps\applications\Portal \WEB-INF\lib\psftdocs</td>
<td>/products/WebSphere/AppServer\installedAp ps/peoplesoft/PORTAL/WEB-INF/psftdocs</td>
</tr>
<tr>
<td>configuration.properties</td>
<td>c:\Apps\WebSphere\AppServer\installedApps\applications\Portal \WEB-INF\lib\psftdocs</td>
<td>/products/WebSphere/AppServer\installedAp ps/peoplesoft/PORTAL/WEB-INF/psftdocs/configuration.properties</td>
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<td>error.properties</td>
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<td>/products/WebSphere/AppServer\installedAp ps/peoplesoft/PORTAL/WEB-INF/psftdocs/error.properties</td>
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<tr>
<td>text.properties</td>
<td>c:\Apps\WebSphere\AppServer\installedApps\applications\Portal \WEB-INF\lib\psftdocs</td>
<td>/products/WebSphere/AppServer\installedAp ps/peoplesoft/PORTAL/WEB-INF/psftdocs/text.properties</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>WebSphere Files</strong></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Web server configuration files</td>
<td>c:\Apps\WebSphere\AppServer\config\server-cfg.xml</td>
<td>/products/WebSphere/AppServer/config\server-cfg.xml</td>
</tr>
<tr>
<td></td>
<td>c:\Apps\WebSphere\AppServer\config\plugin-cfg.xml</td>
<td>/products/WebSphere/AppServer/config\plugin-cfg.xml</td>
</tr>
<tr>
<td>servlet registration / listing</td>
<td>c:\Apps\WebSphere\AppServer\installedApps\applications\Portal \WEB-INF\web.xml</td>
<td>/products/WebSphere/AppServer\installedAp ps/peoplesoft/PORTAL/WEB-INF/web.xml</td>
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<td>/products/WebSphere/AppServer/config\server-cfg.xml</td>
</tr>
</tbody>
</table>
### Modifying PeopleSoft Web Server Configuration Files

There is a collection of configuration files (properties files) that exist on the web server within a PeopleSoft site, which are specific to each site. This section identifies and provides information for all of the variables defined in the commonly edited PeopleSoft configuration files—configuration.properties and pstools.properties.

Many of the variables contain suitable default values, but some of them you may want to modify as you tune or customize your system. On the other hand, PeopleSoft does not recommend editing some of the variables; these variables are marked accordingly.

Before you begin editing the configuration files, it's a good idea to have general understanding of which files are associated with which component, what the names of those files are, and where you locate them. The following sections identify the configuration files associated with PIA, the servlets, and the portal.

**Note.** If you make changes to these files, keep in mind that whenever you run the internet setup program again, it overwrites the files on the web server with new copies. If you have any tuned variables you should either back them up to a remote location, or make note of your tuned values.

All keys in these files are case-sensitive, and values may be too, as in class names.

### PeopleSoft Configuration Files

The following files—delivered by PeopleSoft—are the main configuration files related to the general operations of the PIA architecture:
- **configuration.properties.** This is the main PeopleSoft configuration file. If you make modifications to the configuration files, you will find that you make most of your modifications to this file. It contains connection settings, security settings, portal settings, and so on.

- **ptools.properties.** This configuration file contains selected Tuxedo parameters and the locale_settings for specifying global date and time values.

- **errors.properties.** This file contains the error numbers and messages that the system displays during the associated events. The errors.properties file is designed primarily for displaying error conditions and parameters. In most cases, you do not need to modify this file.

- **text.properties.** This file contains the text for pages, which might be indicating a general error condition. In most cases, you do not need to modify this file.

### configuration.properties

The following table contains the PIA configuration variables that are located in configuration.properties files. You will also find comments in the configuration.properties file for easy viewing while editing the file.

**Note.** Variables marked with an asterisk (*) in the configuration.properties file must be reviewed before attempting to use PeopleSoft 8. These variables enable the basic connection to occur between PIA and Tuxedo.

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
</table>
| **General Settings** | *pserver="//machinename:port"*  
The pserver parameter must point to your application server machine name or IP Address, including the Jolt port. PeopleSoft recommends using the server machine name. The PeopleTools version on the application server must match the version of the PeopleTools files on the web server. The syntax of the value is `<domain_name (or IP)>:Jolt port`  
UNIX servers require a domain name. For example,  
NT:  
pserver=SERVER010499:9000  
UNIX:  
pserver=server010400.peoplesoft.com:9000  
To enable Jolt failover and load balancing, include multiple application server domains delimited by commas. For example, |

---

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The pserver parameter must point to your application server machine name or IP Address, including the Jolt port. PeopleSoft recommends using the server machine name. The PeopleTools version on the application server must match the version of the PeopleTools files on the web server. The syntax of the value is `<domain_name (or IP)>:Jolt port`  
UNIX servers require a domain name. For example,  
NT:  
pserver=SERVER010499:9000  
UNIX:  
pserver=server010400.peoplesoft.com:9000  
To enable Jolt failover and load balancing, include multiple application server domains delimited by commas. For example, |
### Variable Description

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
</table>
| NT:      | psserver=SERVER1:9000,SERVER2:9010  
|          | UNIX: SERVER1.peoplesoft.com:9000,SERVER2.peoplesoft.com:9010 |
|          | You must be able to ping successfully the application server from the web server, for the value entered to be valid. To specify a host name, it may be required to specify the fully qualified domain name. If uncertain, use ping <hostname>, ping <hostname.domain.com>, or ping <IP_address> to determine which is appropriate. |
| RPS=     | (Reverse Proxy Servers) Use this property to specify the reverse proxy servers that the portal can expect to retrieve content through. External content retrieved from these sources, which contains relative references, will be rewritten by the portal to contain relative references instead of absolute references to preserve RPS requirements.  
|          | The format of this property is a comma separated list of values. Each value contains the scheme, followed by the protocol separator, the server name, followed by a colon, followed by the http port, followed by a colon, followed by the https port.  
| *helpUrl=| This is where you add the location of your HTML PeopleBooks. When the user clicks the Help button, they will view the PeopleSoft documentation at the location you specify. The value should be constructed as follows:  
|          | http://helpwebserver:port/booktype/f1search.htm?CONTEXT_ID%=LANG_CD% |
|          | For example, http://server1:8080/crm/f1search.htm?ContextID=%CONTEXT_ID%=LANG_CD% |
|          | **Note.** This setting applies only to browser access. It does not apply to users connecting in the Windows environment using PeopleSoft Application Designer and other development tools. |

### Debug and Trace Settings

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>enableTrace=false</td>
<td>If set to true, during signon a URL appears for setting trace parameters.</td>
</tr>
<tr>
<td>signontrace_page=signontrace.html</td>
<td>If you enable tracing, the URL that appears at signon is the signontrace_page. Here you set the trace parameters and then sign on to the system.</td>
</tr>
<tr>
<td>Variable</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>enableDebugDumpFile=</td>
<td>This parameter enables you to specify whether the system writes a dump file to the web server in the event that a Jolt exception error occurs.</td>
</tr>
<tr>
<td>testing=false</td>
<td>If set to true, this option alters the generated HTML to assist with testing and troubleshooting. For instance, it provides additional white space and comments in the HTML to aid readability. Also, it includes additional name attributes for reference from SQA robot scripts.</td>
</tr>
<tr>
<td>ConnectionInformation=</td>
<td>If set to true, the database name, application server address, web server, and User ID information appears in the HTML generated for a &quot;help&quot; page. PeopleSoft provides a hotkey option (CTRL+J) to enable users and system administrators to view such system information for orientation and troubleshooting purposes. Note. Some of the information displayed may not be suitable for end users.</td>
</tr>
<tr>
<td>debug_showlayout=false</td>
<td>If set to true, this option puts border and color attributes in a table layout for pages. This enables developers to see the position of Application Designer objects in HTML.</td>
</tr>
<tr>
<td>debug_inlinestylesheet=false</td>
<td>If set to true, this option inserts the page’s stylesheet into the generated HTML for easy reference.</td>
</tr>
<tr>
<td>debug_inlinejavascript=false</td>
<td>If set to true, writes all the javascript functions used for processing into the generated HTML file.</td>
</tr>
<tr>
<td>debug_overlap=false</td>
<td>If set to true, includes comments in the generated HTML page that may help in diagnosing page layout problems, such as fields that may be overlapping other fields.</td>
</tr>
<tr>
<td>debug_savefile=false</td>
<td>Enables you to debug and view the source HTML that the application server generates. To enable the HTML debug option, set the debug_savefile property value to &quot;true&quot;. It's important to keep in mind that although you enable the HTML debug option in a configuration file (configuration.properties) that resides on your web server, you actually retrieve the copies of the generated HTML from a location on your application server. The application server saves each generated page to the specified log directory on the application server, which is typically PS_HOME\appserv\domain\logs Within the logs directory the system saves the HTML pages according to the following convention: logs\client\component\n.html where logs refers to the log directory on the application server.</td>
</tr>
<tr>
<td><strong>Variable</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>--------------</td>
<td>----------------</td>
</tr>
<tr>
<td>client</td>
<td>refers to the name of the machine or IP Address where the browser is running.</td>
</tr>
<tr>
<td>component</td>
<td>refers to component name (query name for query, program name for iScripts, and so on.)</td>
</tr>
<tr>
<td>n</td>
<td>is the &quot;state number&quot; for the generated page.</td>
</tr>
<tr>
<td><strong>Note.</strong></td>
<td>You should only use this tracing option for troubleshooting and testing. If this trace is turned on in a production environment, you are likely to experience less than optimal performance.</td>
</tr>
</tbody>
</table>

**Cache Settings**

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EnableBrowserCache=</td>
<td>When this variable is set to true, the displayed page is not cached by the browser. Therefore, clicking the “Back” button from browser will result in “Warning: Page has Expired.” from Internet Explorer or “Data Missing…” from Netscape. This variable should be used in Kiosk situations.</td>
</tr>
<tr>
<td>imagedirphys=/cache</td>
<td>Image file cache directories.</td>
</tr>
<tr>
<td>imagedirwebv=/cache</td>
<td>Do not change these settings.</td>
</tr>
<tr>
<td>cssdirphys=/cache</td>
<td>Cascading style sheet cache directories.</td>
</tr>
<tr>
<td>cssdirwebv=/cache</td>
<td>Do not change these settings.</td>
</tr>
<tr>
<td>jsdirphys=/cache</td>
<td>Java Script cache directories.</td>
</tr>
<tr>
<td>jsdirweb=/cache</td>
<td>Do not change these settings.</td>
</tr>
<tr>
<td>chartdirphys=/cache/chart</td>
<td>Chart image file cache directories</td>
</tr>
<tr>
<td>chartdirweb=/cache/chart</td>
<td>Do not change these settings.</td>
</tr>
<tr>
<td>enableNoVersion=false</td>
<td>If set to true, the system writes a copy of image &amp; css cache with no version number. This is provided in the event an external reference to the PeopleSoft stylesheet is needed.</td>
</tr>
<tr>
<td>relativeURL</td>
<td>If set to true the system generates relative URLs. This setting is for use with proxy server implementations.</td>
</tr>
</tbody>
</table>

**Sign in Settings**

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>physicalpath=</td>
<td>If you are using WebLogic web application to refer to PeopleSoft 8 files, you need to enter the actual location of the various load files required by PeopleSoft. By default this value is blank. Typically, you want to point to the standard installation directory.</td>
</tr>
<tr>
<td>WebLogic:</td>
<td>c:/bea/wlserver6.0/config/mydomain/applications/ps84/ps</td>
</tr>
<tr>
<td>signon_page=signon.html, signon.wml</td>
<td>Redirects to the servlet for login process. Do not change this setting.</td>
</tr>
<tr>
<td>signonError_page=signin.html, signin.wml</td>
<td>Page content that presents signin/login process. To customize your signin page, it is recommended that you clone signin.html as a starting point.</td>
</tr>
<tr>
<td><strong>Variable</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>logout_page=signin.html,</td>
<td>You may provide a custom logout page.</td>
</tr>
<tr>
<td>signin.wml</td>
<td>Change with caution, though not recommended.</td>
</tr>
<tr>
<td>Navigation Settings</td>
<td></td>
</tr>
<tr>
<td>start_page=start.html,</td>
<td>Indicates the page to which the system re-directs users after successful login.</td>
</tr>
<tr>
<td>start.wml</td>
<td>References the iScripts that build the PeopleSoft navigation.</td>
</tr>
<tr>
<td>maxSavedState=5</td>
<td>Number of states supported by the browser Back button. Each trip to the server</td>
</tr>
<tr>
<td></td>
<td>equates to one state.</td>
</tr>
<tr>
<td></td>
<td>ICElementNum and ICStateNum work together for the data structure on the web</td>
</tr>
<tr>
<td></td>
<td>server to maintain state for the user:</td>
</tr>
<tr>
<td></td>
<td>State[ICElementNum][ICStateNum]</td>
</tr>
<tr>
<td></td>
<td>ICElementNum is system controlled; ICStateNum is user-configurable by this</td>
</tr>
<tr>
<td></td>
<td>variable.</td>
</tr>
<tr>
<td></td>
<td>Example: States for a user could look like:</td>
</tr>
<tr>
<td></td>
<td>State[0][0]</td>
</tr>
<tr>
<td></td>
<td>State[0][1]</td>
</tr>
<tr>
<td></td>
<td>State[0][2]</td>
</tr>
<tr>
<td></td>
<td>State[0][3]</td>
</tr>
<tr>
<td></td>
<td>State[0][4]</td>
</tr>
<tr>
<td></td>
<td>By the time a user goes to another page, you might end up with:</td>
</tr>
<tr>
<td></td>
<td>State[0][7]. In this case, States[0][0,1,2] are no longer in memory.</td>
</tr>
<tr>
<td>expirePage_ContentName=</td>
<td>Trying to use the browser Back button to get there, gives the user a</td>
</tr>
<tr>
<td>PT_EXPIRE,</td>
<td>“Page Expired” message when they arrive at the web page that has</td>
</tr>
<tr>
<td>PT_EXPIRE_WML</td>
<td>the ICElementNum=2.</td>
</tr>
<tr>
<td>exception_page=expire.html,</td>
<td>It is used in Java to handle exceptions such as Java exception errors.</td>
</tr>
<tr>
<td>expire.wml</td>
<td>Change with caution, though not recommended.</td>
</tr>
<tr>
<td>enableNewWindow</td>
<td>Controls whether or not the user can start a new window, using the New Window</td>
</tr>
<tr>
<td></td>
<td>link. True enables the option, and False disables it.</td>
</tr>
<tr>
<td>startPageScript</td>
<td>Defines the iScript used for starting a new window (if applicable).</td>
</tr>
<tr>
<td><strong>Variable</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>--------------</td>
<td>----------------</td>
</tr>
</tbody>
</table>
| sessionTimeout=1200 | Controls the meta refresh tag in seconds. It should be less than or equal to the session.timeout for the servlet.  
Example usage:  
<meta HTTP-EQUIV='Refresh’ CONTENT='1200; URL=http://SERVER060800/psp/ps/?cmd=expire'>  
For WebLogic it should be less than or equal to than weblogic.httpd.session.timeoutSecs. |
| expire_page=expire.html, expire.wml | The expire page is the HTML page containing text variables defined in text.properties. It appears when user inactivity exceeds the sessionTimeout limit.  
**Do not change this setting.** |
| cookiesrequired_page= | A page containing text variables defined in text.properties. It is displayed when the browser does not accept cookies. You should configure browsers to accept cookies. |
| passwordexpired_page= | An HTML page containing text variables defined in text.properties. Displayed when the user password is expired.  
**Do not change this setting.** |
| passwordwarning_page= | An HTML page containing text variables defined in text.properties. Displayed when user password is about to expire in the number of days specified in PeopleTools Security.  
**Do not change this setting.** |
| userprofile_page | An HTML page containing text variables defined in text.properties. Displayed when user clicks the link from password expired screen.  
**Do not change this setting.** |
| chgPwdOnExpire= | Reflects the change password page content ID. The system uses the value in passwordexpired.html to take user to the password change page when a password is expired.  
For example,  
MAINTAIN_SECURITY.CHANGE_PASSWORD.GBL |
| chgPwdOnWarn= | Reflects the change password page content ID. The system uses the value that you enter in passwordwarning.html to take the user to the password change page when a password warning is required. |
| SSLRequired=false | If the entire website requires the SSL protocol, set this to true to enforce SSL. This prevents the users from using non-SSL protocol to access any link within this website or application. If only some pages require SSL access, leave this parameter set to false. |
| sslrequired_page=sslrequired.html | This is the page that appears when the SSLRequired is set to true and the user is unable to proceed without SSL.  
**Do not change this setting.** |
<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>byPassSignOn=false</td>
<td>If set to true, the system does not prompt the user to sign on during a direct link/page access. In this case, the system authenticates the user by defaultUSERID and defaultPWD. It is commonly used for informational websites where sensitive data is not accessible. You also enable this parameter when you are using an external authentication method.</td>
</tr>
<tr>
<td>defaultUSERID=</td>
<td>Used to connect users when the byPassSignOn is set to true. For example, defaultUSERID=PTDMO</td>
</tr>
<tr>
<td>defaultPWD=</td>
<td>Used to connect users when the byPassSignOn is set to true. For example, defaultPWD=PTDMO</td>
</tr>
<tr>
<td>userIDCookieAge=</td>
<td>If enabled, the system caches the user ID and automatically fills it at the sign on screen. The default value is 7, for seven days. To disable, set 0. This a convenience for end users, not to have to retype a user ID in the USER ID field each session. PeopleSoft recommends 0 in a public area or kiosk situation.</td>
</tr>
</tbody>
</table>

**XML Link Settings**

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>defaultXMLLinkUSERID</td>
<td>User ID that is used to connect users for XML Link technology.</td>
</tr>
<tr>
<td>defaultXMLLinkPWD</td>
<td>Password used to connect users for XML Link technology.</td>
</tr>
<tr>
<td>AuditPWD=</td>
<td>This property is used mainly for PeopleSoft internal configurations. To disable, leave the parameter value blank. This property enables developers, or administrators to enter the following: http://&lt;server&gt;/psp/ps/?cmd=viewconfig&amp;pwd=&lt;password&gt;</td>
</tr>
</tbody>
</table>

**Portal Settings**

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AuthTokenDomain=</td>
<td>Specifies the domain for which the single-signon authentication token is valid. If you require a domain name here, you must also qualify the pswebservername= parameter with the same domain name. For example, if the cookie is shared on web servers foo.peoplesoft.com and bar.peoplesoft.com, the property should be: AuthTokenDomain=.peoplesoft.com</td>
</tr>
<tr>
<td>UseSecureCookieWithSSL=</td>
<td>The valid values to assign to this parameter are &quot;true&quot; or &quot;false&quot;. You use it to control the &quot;secure&quot; attribute of the single-signon cookie. If you set this to &quot;true&quot; and the scheme of the current request is HTTPS (an SSL server), the system sets the &quot;secure&quot; attribute of the single signon cookie (PS_TOKEN) to &quot;true&quot;. This prevents the single-signon token from travelling over an insecure connection. Note. A &quot;dot&quot; must precede the value you assign.</td>
</tr>
</tbody>
</table>
Variable | Description
---|---
network. PeopleSoft single-signon functionality also applies at the web server level. For example, suppose that you have two web servers: server X and server Y. Assume that web server X is a Secured Socket Layer (SSL) site, and assume that web server Y is not. In these situations, many sites want server Y to "trust" the authentication token, PS_TOKEN, issued by server X. This requires that the PS_TOKEN be set to be "secure."

If the PS_TOKEN is not marked as "secure," when a user signs on through server Y the browser sends PS_TOKEN to server Y over the unencrypted, non-SSL link. This is typical behavior for browsers when dealing with "non-secure" cookies. Potentially, in this situation a hacker could "sniff" this token from the clear network and use it to signon to the SSL-secure server X.

Another important use of this property relates specifically to the PeopleSoft Portal. When the portal proxies content with an HTML template, it should only forward PS_TOKEN cookies that are marked "secure" over SSL connections.

Note. If you set UserSecureCookieWithSSL to true, you are effectively disabling single signon to any non-SSL servers.

If, at your site, you want users to signon to an HTTPS server, and then want to do single signon with HTTP servers, set this property to false, which allows single signon between HTTPS and HTTP servers.

Note. If you can tolerate the security risk, and want single signon between secure and non-secure links, you can set this flag to "false". However, before doing this you need to make sure you are aware of all the security implications, such as the security of the HTTPS server may be compromised.

#PortalHTTPPort= If you are using HTTPS, and your HTTP server is using a port other than 80, then uncomment the PortalHTTPPort setting and set PortalHTTPPort equal to the appropriate HTTP Port number.

#PortalHTTPSPort= If you are using HTTPS, and your HTTPS server is using a port other than 443, then uncomment the PortalHTTPSPort setting and set PortalHTTPSPort equal to the appropriate HTTPS Port number.

customHeaders= Not currently implemented.

Miscellaneous Settings

enableProcessingWait=false If set to false, this parameter enables "Processing" notification while the system processes a request.

saveConfirmDisplayTime= This setting determines how long the save_confirm image displays for the user (if the save confirm personalization option is enabled). The value is expressed in milliseconds, so 3000 is three seconds.

singleThreadNS= If set to true, the requests from a Netscape browser are single-threaded so that the browser handles the transaction with better
<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ThreadDelay=</td>
<td>Specifies a delay, in milliseconds, for single-threaded requests. Used only when singleThreadNS is set to true.</td>
</tr>
<tr>
<td>defaultScheme=</td>
<td>Used to overwrite the scheme from request object &quot;http&quot; or &quot;https&quot;.</td>
</tr>
<tr>
<td>defaultPort=</td>
<td>Used to overwrite the port from the request object.</td>
</tr>
<tr>
<td>PortalUseHttpForSameServer=</td>
<td>Set this property to true when you want to use the http protocol instead of https for requests issued by the portal for content hosted on the same server as the portal servlet. Set this property to true when using a hardware SSL accelerator.</td>
</tr>
<tr>
<td>isClusteringConfigured=</td>
<td>This setting only applies to WebLogic web servers. If clustering is configured, set this to true for maintaining session state properties across web servers.</td>
</tr>
<tr>
<td>compressResponse=false</td>
<td>If set to true, this enables compression in the communication between the web server and the browser. Gzip and Compress are supported.</td>
</tr>
<tr>
<td>compressCacheFiles=</td>
<td>If set to true, enables compression of cache files from web server to the browser. Only those cache files that have their mime-types specified in the list of compressMimeTypes are compressed. Gzip and Compress are supported.</td>
</tr>
<tr>
<td>compressMimeTypes=</td>
<td>Specifies a comma-delimited list of the MIME-types of all those web server cache files that should be sent in compressed form to the browser. Note that this is applicable only when compressCacheFiles is set to true. Gzip and Compress are supported. For example, compressMimeTypes= application/x-javascript, text/javascript, text/css, text/html</td>
</tr>
<tr>
<td>portalServletSessionCookieName=</td>
<td>The portal needs to know the name of the cookie used to store the session id. It normally automatically passes along any cookie that has the same value as the session ID. If this is problematic for some reason, the cookie name can be specified here instead by setting the portalServletSessionCookieName to the name of the cookie storing the servlet session ID.</td>
</tr>
<tr>
<td>PortalCacheObjects=</td>
<td>If PortalCacheObjects is set to &quot;true&quot; the portal servlet (psp) will cache the following objects in web server memory:</td>
</tr>
<tr>
<td></td>
<td>• Portal Registry</td>
</tr>
<tr>
<td></td>
<td>• Node (Remote and Local)</td>
</tr>
<tr>
<td></td>
<td>• Content Reference</td>
</tr>
<tr>
<td></td>
<td>• Template (Static only)</td>
</tr>
<tr>
<td></td>
<td>Caching improves system performance by decreasing service requests from the web server to the application server. PortalCacheObjects should be set to &quot;true&quot; for production</td>
</tr>
<tr>
<td>Variable</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PortalCacheStaleInterval=86400</td>
<td>This property reflects the amount of time, in seconds, before portal cache is considered stale and updated with the latest copy from the application server. In other words, this is the amount of time before changes to cached objects take effect. This setting applies to the following objects to the objects cached by the PortalCacheObjects setting. The setting is measured in seconds. For example, a value of 86200 is 24 hours.</td>
</tr>
<tr>
<td>CachePurgeAllHitCount=</td>
<td>The portal automatically discards all cache entries in memory after this many requests.</td>
</tr>
<tr>
<td></td>
<td>Note. This setting applies for all websites on this web server. It should be the same value, within all configuration.properties files on this web server. Setting this value to -1 disables stale cache purging.</td>
</tr>
<tr>
<td>CachePurgeStaleInterval=300</td>
<td>The portal automatically discards all stale cache entries at this interval, in seconds.</td>
</tr>
<tr>
<td></td>
<td>Note. This setting applies for all websites on this web server. It should be the same value, within all configuration.properties files on this web server. Setting this value to -1 disables hit count purging.</td>
</tr>
<tr>
<td>portalUseCachedProxyedJS=true</td>
<td>The portal caches proxied javascripts to improve performance if this property is set to &quot;true&quot;. Set to &quot;false&quot; to turn off javascript proxying.</td>
</tr>
</tbody>
</table>
| CacheTargetContent=true        | Target content is cached in memory when the TargetContent tag in the template specifies that the target should be cached. Only static content should be displayed in a template with a cached target tag. The TargetContent tag should look like this:  
  
  `<TargetContent Name="TransactionContent">`  
  
  `<Cache Scope="application" Interval="1200" >dummy`  
  
  `</Cache>`  
  
  `</TargetContent>`  
  
  Pagelets can be cached using the same mechanism. The CacheTargetContent setting should be "true" to allow caching of target content. Setting this to "false" disables all target content caching in the portal servlet, even if the target tag specifies cached content.                                                                                           |
<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PortalCacheHomepageOnBrowser=</td>
<td>This setting controls whether the homepage is cached on the browser. Set to &quot;true&quot; to allow caching, and &quot;false&quot; to disallow. The homepage is cached on the browser by supplying an &quot;Expires&quot; response header to the browser, which indicates how long to keep the homepage in the cache.</td>
</tr>
<tr>
<td>PortalHomepageStaleInterval=1200</td>
<td>Time in seconds that the homepage remains in cache. After this interval, the homepage will be refreshed by the web server.</td>
</tr>
</tbody>
</table>
| PortalBrowserProps=browserprops.xml | This property provides the option to disable homepage caching for specific browsers while allowing homepage caching for the rest. The property needs to point to a file that contains an XML definition of a set of user agents. The delivered file contains examples of how you implement this option. You can create a custom XML file, but you must store it in the psftdocs/pshome directory—the same directory where we store the delivered version of the file. The browserprops.xml file that is installed by default does not have caching disabled for any browsers. There are user agent definitions in it for several common browsers, but the CacheHomePage value is set to "true". So, by default, homepage caching is enabled for all browsers. You need to explicitly disable caching for specific browsers. To disable homepage caching for a particular browser, include a user agent tag for it. In the user agent tag you must include a property tag that has the name attribute of "CacheHomePage" with the value set to "false". For example,  

```
<useragent id="Mozilla/4.0 (compatible; MSIE 5.01; Windows NT; DigExt)"

<property name="CacheHomePage" value="false" />
</useragent>
```

The user agent you specify must be the exact user agent request header that the browser sends to the web server. To find out what the user agent request header is you need to examine the user-agent header that the browser sends. You do this by executing an iScript from the appropriate browser. In an iScript, the following line of code reveals the user agent header sent by the current browser.  

```
&userAgent = %Request.getHeader("User-Agent");
```

| PortalCookieRules=               | File containing rules that determine how the portal passes cookies to servers in the same domain. For example,  

```
PortalCookieRules=cookierules.xml
```
### Variable | Description
---|---
PortalCacheCookieRules= | PortalCacheCookieRules determines whether the cookie rules file is cached, or parsed each time the rules are accessed.
Set this property to false to debug custom cookie rules. This property should be set to true in production systems.

### Report Repository

| Variable | Description |
---|---|
enableReportRepository=true | Set to "true" to enable Report Repository, and false to disable Report Repository. When disabled, it means no files can be viewed by users. If you did not install the Report Repository during your Internet Architecture install, you can just set this parameter to true. The files for the Report Repository are installed by default, but they are enabled only if you selected Report Repository during the installation program. |
CompressReportOutput=true | If you want the output of your reports compressed to improve performance, set to "true." |
ReportRepositoryPath=c:/psrepo | Report Repository file path. This is where generated reports reside. |
CompressReportOutputNetscape | Used only for Netscape browsers. Enables compression for the report files. To enable, enter true. |

### pstools.properties

The following table contains the variables and descriptions of the items that appear in the pstools.properties file.

| Variable | Description |
---|---|
Tuxedo Settings | |
tuxedo_network_disconnect_time | The amount of the time to wait and while disconnecting the Jolt connection. Entering 0 means no limit. |
tuxedo_send_timeout=50 | The send timeout indicates the maximum number of seconds that the servlet allows for a request to be sent to the application server. This setting does not indicate a maximum amount of time for the service to complete; it only indicates the maximum amount of time to send the request to the application server. |
tuxedo_receive_timeout=600 | The receive timeout indicates the maximum number of seconds that the servlet waits for a response from the application server. If you increase your application server service timeouts, such as the Service Timeout setting for PSAPPSRV, then increase the tuxedo_receive_timeout parameter to be greater than the Service Timeout values that appear in the PSAPPSRV.CFG configuration file on the application server. |
### Variable Description

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>locale_</td>
<td>The locale_ settings relate to date and time values for globalization. Typically, you do not need to change these values. If you do, refer to the comments in the pstools.properties file.</td>
</tr>
</tbody>
</table>

### General Administration

The following are general administration topics that apply to all supported web servers. For details on your specific web server refer to the appropriate chapter in this book.

**See Also**

- Working with BEA WebLogic
- Working with IBM WebSphere

### Setting Jolt Failover

To enable jolt failover and load balancing in the PeopleSoft Internet Architecture, you enter multiple application server domains in the psserver parameter in the configuration.properties file.

For example,

```
psserver=//SERVER1:9000, //SERVER2:9010, //SERVER3:9020
```

### Linux Shell

You can use the Linux operating system for PIA web servers. If you use a Linux server, PeopleSoft requires that you use the ksh shell.

**Important.** Always check the PeopleSoft Platforms database on Customer Connection for information regarding the current support options. The appearance of the Linux reference in this document does not necessarily imply support for Linux and your particular PeopleTools version.

If the version of Linux that you use is RedHat 6.2, ksh may not have been installed by default. To install it, mount the RedHat 6.2 CD-ROM and issue the following command to install ksh:

```
cd /mnt/cdrom; rpm -Uvh pdksh-5.2.14-2.i386.rpm
```

If you are not running RedHat 6.2, or if you prefer a more "UNIX-like" interface, the AT&T version of ksh is available at the following internet location:

http://www.kornshell.com
The build/install instructions for the AT&T version are available from this website. The AT&T ksh is similar to the ksh shell used on UNIX systems.
This chapter discusses the following topics:

- Web Applications
- PeopleSoft domain
- WebLogic administration

Understanding Web Applications

The PeopleSoft servlets are deployed as web applications on WebLogic. This enables the packaging of an application containing multiple servlets as a single web application. Each web application runs within its own servlet context on the web server, and each web application has its own CLASSPATH. This enables different versions of a servlet to be used simultaneously.

Some benefits of using web applications for PeopleSoft are:

- An industry standard way to run multiple versions of PeopleSoft (PeopleTools 8.4 and later) on the same web server.
- Specific directories for:
  - Sensitive data files that a browser can't access, but the servlet can.
  - Class files.
  - JAR files.

Understanding the PeopleSoft Domain

The default installation of PIA on WebLogic Server 6.1 builds a WebLogic Server domain called 'peoplesoft'. Defined within that domain are two WebLogic servers and two PeopleSoft web applications. You indicate which web application you want to access through the web application name in the URL. This is also referred to as the "servlet context." Within the PeopleSoft domain are two servers: PIA and WebLogicAdmin.
### PIA Server

The PIA server is the main server used for browser connections to the PeopleSoft applications and PeopleTools. Generally, all Portal, Integration Gateway, and WebLogic administration activity should be done through the PIA server. The PIA Server deploys the following web applications:

- **Portal.** Handles all portal and Report Repository transactions.
- **PSIGW.** This is the Integration Gateway. It distributes messages for the messaging and Integration Broker technology.
- **WebLogic Server Console.** A BEA web application used to administer the server and domain.
- **Certificate.** A BEA web application used to generate certificate requests.
- **Serverinfo.** A BEA web application used to collect and display server Information

**Note.** The default http/https listening ports for the PIA server are 80/433, respectively.

### WebLogicAdmin Server

The WebLogicAdmin server is used for the option to configure a WebLogic Cluster, which is a domain that contains multiple servers. WebLogicAdmin is also used to repair the configuration for the PIA server if necessary.

**Note.** PeopleSoft servlets are not deployed to the WebLogicAdmin server.

If needed, the default http listening ports for the WebLogicAdmin server are 6100.

### PeopleSoft Web Applications

The following table presents the installation location and access URL for each of the delivered PeopleSoft web applications.

<table>
<thead>
<tr>
<th>Web Application</th>
<th>Installation Location</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>PORTAL</td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL&lt;site&gt;....</td>
<td><a href="http://localhost/ps/signon.html">http://localhost/ps/signon.html</a></td>
</tr>
<tr>
<td>Integration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gateway</td>
<td>c:\bea\wlserver6.1\config\peoplesoft\applications\PSIGW</td>
<td><a href="http://localhost/PSIGW/">http://localhost/PSIGW/</a></td>
</tr>
</tbody>
</table>
**Accessing the WebLogic Server Console**

The main utility used in administering and monitoring your WebLogic server processes is the WebLogic Server Console. You access the console by pointing your browser to the following URL:

http://<local_host>/console

Before the console launches, the system prompts you for the system ID and password. The default ID is `system` and the default password is `password`. After you are authenticated, the console appears.

The WebLogic console, provides an interface to monitor and tune aspects of your PeopleSoft application from a web server point of view.

Parameters that require a server restart for changes to take effect are prefaced with ![important].

Parameters prefaced with a ![help], enable you to click the link to context sensitive help for that field.

The console’s highest level of separation is at the WebLogic domain level. Domains are represented as a globe; one of which is the "peoplesoft" domain. The default PeopleSoft server is named PIA. To view the settings for the PIA server, open the Servers folder and select PIA.

---

**Note.** For detailed information about the WebLogic Server Console, refer to BEA's WebLogic documentation.
Starting WebLogic

This section discusses starting the PeopleSoft server on Windows and UNIX.

Starting WebLogic on Windows NT

To run WebLogic Server on NT, there are two options: an NT service or a foreground process.

**Using the Command Prompt**

Running WebLogic as a foreground process is beneficial if you need to monitor WebLogic in real-time. To run WebLogic as a foreground process, submit the following command at the command prompt:

```
c:\bea\wlserver6.1\config\peoplesoft\startPIA.cmd
```

**Using the NT Service**

Two benefits of running WebLogic as an NT service are: WebLogic can automatically start when the NT server boots, and you can start and stop the service from a remote NT machine.

To install the service, enter the following command:

```
c:\bea\wlserver6.1\config\peoplesoft\installNTservicePIA.cmd.
```

To start WebLogic as an NT service, you may either start the service named `<WebLogicDomain-ServerName>`, for example “peoplesoft-PIA” using the Windows NT Control Panel's Services utility, or you may start it from a command prompt by issuing the following command:

```
NET START peoplesoft-PIA
```

**Note.** If WebLogic fails to start as a service, try starting it as a foreground process. To uninstall the service, enter the following command:

```
c:\bea\wlserver6.1\config\peoplesoft\UninstallNTservicePIA.cmd
```

Starting WebLogic on UNIX

To start PeopleSoft on UNIX use the following script:

```
<bea_home>/wlserver6.1/config/peoplesoft/startPIA.sh
```

To start WebLogic Server, use the `$WL_HOME/startWebLogic.sh` script provided. This script sets some required environment variables and then starts a Java runtime environment to run WebLogic within it. As delivered, this script starts the Java runtime environment, and, in effect, starts WebLogic as a foreground process.
To run WebLogic in the background, enabling you to logoff the UNIX server and close your telnet session, perform the following steps.

**To start the WebLogic server in the background:**

1. Open startPIA.sh in edit mode.

2. Near the end of the file, locate the line that begins with “java $JAVA_OPTIONS.

This is the command that launches the Java virtual machine and starts WebLogic. Edit this line and preface it with “nohup” and append to it “&” as shown below.

```bash
```

**Note.** The “nohup java $JAVA_OPTIONS . . .” line is all one line.

**Stopping WebLogic**

For both Windows and UNIX, you can stop the PeopleSoft server from the WebLogic Server Console (http://localhost/console). Expand the peoplesoft domain, select Servers, right-click on PIA, and select Stop this server. The server may also be stopped via the command line.

**Windows NT**

The PeopleSoft server can be stopped either as the NT service or the through the command file.

**From the Command Prompt**

To stop the PeopleSoft server from the command prompt enter the following:

```bash
c:\bea\wlserver6.1\config\peoplesoft\stopPIA.cmd
```

**Stopping the NT Service**

You stop the PeopleSoft service from the Control Panel's Services utility, or you can enter the following command at the command prompt:

```bash
NET STOP peoplesoft-PIA
```
UNIX

To stop the PeopleSoft server run the following script:

```
<bea_home>/wlserver6.1/config/peoplesoft/stopPIA.sh
```

**Working with the PeopleSoft Domain**

This section discusses how to:

- Run multiple PeopleSoft versions.
- Install additional PeopleSoft sites.
- Remove sites.

**Installing Additional Sites**

Typically, multiple sites exist in a PeopleSoft implementation. For instance, there is often a HR site, a CRM site, a Financials site, and so on.

**Note.** This procedure assumes that each site is running the same version of PeopleTools.

**To install additional sites:**

1. Shutdown the WebLogic Server.
2. Run the multi-platform PIA installation program.
   ```
   Run %PS_HOME%/setup/mpinternet\setup.exe.
   ```
3. Select Existing domain from the installation wizard.
4. Select the existing WebLogic domain to update.
   For example, if you are adding the new site to the peoplesoft domain, select `peoplesoft`.
5. Specify the new site name, as in `crm`, and click next.
6. Specify the application server address.
   Specify the appropriate application server name (or IP address) and JSL port of the application server to which the site should connect. Each site on a single web server must have the same values for HTTP Port and HTTPS Port.
7. Complete the PIA install as instructed in the *PeopleSoft Installation guide*.
9. Test the installation.

   Access your new site using the following URL:

   http://localhost:port//<newsite>/signon.html

   For example, if you a new site named 'crm', you access that site using the following:

   http://serverXYZ/crm/signon.html

---

**Running Different PeopleSoft Versions**

In some cases, you may need to run multiple PeopleSoft versions on the same web server. You add the new version as a custom web application. The different sites would be connecting to the different application servers, however, the web sites are still maintained on the same web server.

---

**Note.** The ability to run different versions of PeopleTools on a single web server is only available for PeopleTools 8.4 and above.

---

**To set up multiple PeopleSoft versions on the web server:**

1. Shutdown the WebLogic Server.

2. Run the multi-platform PIA installation program.

   Run `%PS_HOME%\setup\mpinternet\setup.exe` for the PeopleTools version you want to add.

3. Select Existing domain from the installation wizard.

4. Select the existing WebLogic domain to update.

   For example, if you are adding the new custom web application to the peoplesoft domain, select `peoplesoft`.

5. Specify the custom web applications to install.

   Select *custom web application* and specify the names of the new web applications. If you want a different site name, specify that also. You can install both PORTAL and Integration Gateway as custom web applications or only change the name one. In both cases select *custom web application* to make the appropriate name change.

6. Complete the PIA installation as instructed in the PeopleSoft Installation documentation.

   If you are installing PORTAL as a custom web application, be sure to specify the appropriate application server name (or IP address) and JSL port to which the site should connect.
Note. Each site on a single web server must have the same values for HTTP Port and HTTPS Port.

7. Start the WebLogic Server.

8. Logon to the WebLogic Server Administrative Console.

9. Expand the peoplesoft domain, expand the Deployments folder, select Web Applications, and click **Configure a new Web Application**.

Note. This step must be performed for each custom web application that you have installed that is not listed here.


Configure a new web application by specifying the following information:

- **Name.** Enter the name of the web application you specified during the PIA install.

- **Path URI.** The OS level path to the web application, as in `c:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL`

Click **Create**.

Note. This step must be performed for each custom web application that you have installed.

11. Target your new web application.

Target your new web application to the server on which it will be available, such as PIA. Select the Targets tab, select the server, click the right arrow, and click **Apply**.

Note. This step must be performed for each custom web application that you have installed.

12. Test the installation.

Access your custom web app using the following URL:

http://localhost:port/<webapp>/<site>/...

For example, if you install PORTAL to a custom web application called PORTAL-new, with a site name of "ps", you would access that web application and site with:

http://serverXYZ/PORTAL/ps/signon.html
Setting up a Reverse Proxy Server (RPS)

PeopleSoft supports the use of proxy servers with WebLogic. A proxy server supplies the URL to which the browsers connect, but a backend web server handles the transaction processing.

IIS

Microsoft Internet Information Server (IIS) is supported as a reverse proxy server (RPS) to one or more WebLogic Server instances. Multiple instances can be independent instances or grouped into a cluster. When using a reverse proxy it is common to have requests routed through the RPS. This means that any URL used to access your PeopleSoft application (even URLs stored in the database) must point to the RPS, not the WebLogic Server.

These instructions are based on a logical separation of WebLogic Server and IIS, where both web servers are installed on the same machine. If your configuration has WebLogic Server and IIS on separate machines, you must perform three additional steps. Those steps are:

- From your WebLogic Server, copy c:\bea\wlserver6.1\bin\iisproxy.dll to c:\inetpub on your IIS server.
- From your WebLogic Server, copy c:\bea\wlserver6.1\bin\iisforward.dll to c:\inetpub on your IIS server.
- In the following procedure, change any reference to c:\bea\wlserver6.1\bin to read c:\inetpub.

To set up an IIS RPS:

1. Install PIA.

   Run the multi-platform PIA install from %PS_HOME%\setup\mpinternet\setup.exe.

2. Access IIS configuration.

   - Windows 2000 Server: Start, Programs, Administrative Tools, Internet Services Manager
   - Windows NT 4 Server: Start, Programs, Windows NT 4.0 Option Pack. Microsoft Internet Information Server, Internet Service Manager.

   **Note.** IIS/Personal Web Server on Windows NT 4 workstation or Win 2000 Professional is not supported.

3. Select the Default Web Site, right-click, and select Properties.

4. Add an ISAPI Filter.

   - Select the ISAPI Filters tab, and click **Add** to define a new filter.
• For Filter Name enter \textit{IISFORWARD}
• For Executable enter \texttt{c:\bea\wlserver6.1\bin\iisforward.dll}

5. Select the Home Directory tab and click \textbf{Configuration...}


   Click \textbf{Add} on the App Mapping tab to define a new application mapping. Specify the following:
   • For Executable enter \texttt{c:\bea\wlserver6.1\bin\iisproxy.dll}
   • For Extension enter \texttt{.wlforward}
   • For Verbs enter \textit{All Verbs}

7. Create the IIS-Plugin configuration file.

   Create \texttt{c:\bea\wlserver6.1\bin\iisproxy.ini} containing the following lines, setting the values appropriately.

   \begin{verbatim}
   WebLogicHost=<hostname or IP of weblogic server to forward requests to>
   WebLogicPort=<HTTP port of weblogic server to forward requests to>
   WLForwardPath=/
   DebugConfigInfo=OFF
   \end{verbatim}

8. Restart IIS.

   Restart the following NT services: IIS Admin Service and World Wide Web Publishing Service using Control Panel's Services utility or by issuing the following three commands at a Command prompt:

   \begin{verbatim}
   NET STOP IISADMIN /Y
   NET START IISADMIN
   NET START W3SVC
   \end{verbatim}


10. Test.

    Test your configuration by accessing your IIS server using the URL for your site. For example,

    \texttt{http://<IIS\_server>:port/ps/signon.html}

\underline{Note.} To connect to IIS using HTTPS, you must install digital certificates on your IIS server.

\textbf{See Also}

BEA doc for IIS-plugin: \texttt{http://edocs.bea.com/wls/docs61/adminguide/isapi.html}
To configure WebLogic Server 6.1 as a reverse proxy (RPS) to one or more backend WebLogic servers, complete the following steps.

These instructions are based on a logical separation of the WebLogic Server running the PIA servlets and the WebLogic Server acting as the RPS. If the WebLogic Server running the PIA servlets and the WebLogic Server acting as the RPS are on different physical machines, install WebLogic and PIA on the machine acting as the RPS. Then complete the following instructions on the machine running the PIA servlets.

To set up a WebLogic RPS:

1. Install the web application.
2. Start the PIA server.
3. Logon to the WebLogic Server Administrative Console.
   - Expand peoplesoft domain.
   - Expand the Deployments folder.
   - Select Web Applications.
   - Select Configure a new Web Application... and specify the following information:
     - Name: HttpClusterServlet
     - Path URI: config/peoplesoft/applications/HttpClusterServlet
     - Click Apply.
5. Configure a new server.
   - Expand peoplesoft domain.
   - Open the Servers folder.
   - Select Configure a new Server... and specify the following information:
     - Name: RPS
     - Port: <The HTTP port you want this server to listen on>
     - Other settings: Update any other setting that you need, such as SSL certificates, logging, and so on.
6. Specify the default web application.

Select the HTTP tab and specify HttpClusterServlet as the default web application for the RPS server, and click **Apply**.

7. Edit deployment descriptor for the HttpClusterServlet web application.

   - Expand peoplesoft domain.
   - Open the Deployments folder.
   - Expand Web Applications.
   - Select HttpClusterServlet.
   - Click the Edit Web Application Descriptor link.

8. Configure HttpClusterServlet servlet parameters.

   - Expand HttpClusterServlet.
   - Expand Web App Descriptors
   - Expand Servlets.
   - Expand HttpClusterServlet.
   - Expand Parameters.
   - Select defaultServers, and update the Param Value on the Configuration tab to contain a string of weblogic servers to which proxy requests are to be sent. The Syntax is as follows:

     **hostname:http_port:https_port|....**

     **Note.** The 'https_port' value in the server list is required. If you are not using https specify an arbitrary port number.

     - Click **Apply**.

9. Validate and save changes.

   - Select HttpClusterServlet (at the highest level above Web App Descriptor)
   - On the Configuration tab, click **Validate** to verify that your changes are valid.
   - Click **Persist** to save your changes to disk.

10. Start the RPS server. (on the RPS machine.)
On the machine that will be running the RPS, start the RPS server using
`..\config\peoplesoft\startManagedWebLogic.cmd(sh)`. Use the following syntax:

```
startManagedWebLogic RPS http://<url_to_pia_server:http_port>
```

For example, if PIA was running on a machine called XYZ032500 and listing on port 80, then
the command would be.

```
startManagedWebLogic.cmd RPS http://XYZ032500:80
```

If you want to connect to your reverse proxy over HTTPS, you will need to install certificates
on your RPS server. You have the following options:

- If you already have certificates installed for your PIA server on the same machine,
  you can share the same certificate files.
- Request new certificates.
- Lastly, as a temporary solution until you obtain official certificates for your server,
  you can use the demo certificates provided with WebLogic.

See Also

For more information see HttpClusterServlet:


Setting up SSL

For additional security for internet applications, install Secure Socket Layer (SSL) security.
This involves generating a digital certificate and submitting it to a Certificate Authority.

Generating a Certificate

To generate a digital certificate signing request:

1. Point your browser to http://<webserver>/certificate to access the Server Certificate
   Request Generator servlet.
   Use the same system ID and password used to sign on to the WebLogic Server Console.

2. Fill in the certificate request substituting your information where applicable and then click
   Generate Request.
   The fields marked with an 'R' are required. The following fields require special attention:
• **Full host name.** The host name entered here must match the host name that users will specify in the URLs. If users will specify a fully qualified domain name when connecting to the server, then you must specify the fully qualified domain name here, as in crm.peoplesoft.com.

• **Private Key Password.** If you specify a Private Key Password you need to enable the Key Encrypted field on the SSL tab of the Server window in the WebLogic Server Console.

• **Random string.** An optional string used to add an external factor to the encryption algorithm. For production web servers the use of a random string is *highly recommended* based on the following:

  http://developer.bea.com/code/security_011109.jsp

3. View the certificate request.

The Certificate servlet displays your certificate signing request (CSR) and creates three files in your WebLogic Server directory. On Windows this is c:\bea\wlserver6.1, and on UNIX this is /apps/bea/wlserver6.

The system generates the following files:

• `<webserver>-key.der`. Private key (binary format).

• `<webserver>-request.der`. Certificate signing request (binary format).

• `<webserver>-request.pem`. Certificate signing request (ASCII version of `<webserver>-request.der`).

4. Move the certificates.

   For Windows, move the generated files from

   c:\bea\wlserver6.1\

   to

   c:\bea\wlserver6.1\config\peoplesoft\n
   For UNIX, move the generated files from

   /apps/bea/wlserver6.1/ directory

   to

   /apps/bea/wlserver6.1/config/peoplesoft/

---

**Note.** The *.PEM files must be FTP’ed in ASCII mode.
Submitting a Certificate to Verisign

The following procedure is a sample procedure for submitting a certificate to Verisign. Submitting a certificate to another Certificate Authority is likely to differ slightly.

To submit a digital certificate request:

1. Submit your certificate request to Verisign.

   The Verisign button provided by BEA on the BEA WebLogic Server Certificate Request Generator does not work. To install a Verisign test certificate, access VeriSign's test certificate enrollment site at the following URL:


2. Complete the Verisign CSR.

   This includes the following:
   - Agree to the license and continue to "Step 2 of 5: Submit CSR".
   - In the large edit box provided, copy and paste the contents from your <webserver>-request.pem
   - Click Continue.

3. Supply Verisign with Contact information.

   Fill out the table titled Enter Technical Contact Information with your information and verify that the option for the Free 14-day Trial Server ID is selected. After this is done, agree to the license information and click Accept.

   Your certificate will be emailed to the email address you specified. By selecting the free trial ID, you do not need to fill out the Cardholder Information table.

4. Check your email.

   After you receive your certificate email from VeriSign, you will see your actual certificate in the following format.

   ```
   -----BEGIN CERTIFICATE-----
   DMICHDCiQcYCEAHSeRkM2guFW+60vHr4AS0wDQYJKoZIHvcNAQEBBQAwgakxFjAP
   ADNVBAcTDVZ1cm1TaWdULCBJbmMzRzBFbG9vNBAsTPn3dy52ZXJpc21nbib5jb20S
   Vcmwb3NpdG9yeS9UZXNQOB1TIE1uY29ycC4gQmkgUmVmLiBMaWFiLiBMVEQuMYVF
   EAYEVQQLEx1Gbi3IgVmVyaWNpZ24gYXV0aG9yaXplZCB0ZXN0aW5nIG9ubHkuIEST
   LiGzc3YVYW5jZXMpKEmpV1bOWFrdtsvf67TTwWDAwMDAwMDAwMTIzODIA
   ONT10VoweTELMakGAIUEBhMCVVMpEyARBgNVBAGtCgkzJuaWExEzARBgNK
   VBAUC1BeZWFsYW50b24xEmARBgNVBAMcUClb3BsZVMvZnQxFDASBgNVBAsUC1BT
   Eb3eZVRvb2xzcMRU0xWvYDQQAFAxEjLPV04zMTExMDAwMDA5NDAwMDA5MDA5MDA5
   SAAALAb1IKEucf/MQoSchkk4QD5i14gp6WYMc4IaRecyEkAmDAVcYzJ3R
   Mdp4RC8EAbd3bjjiOHCocak9U6oSwL+H6IDAQABMA0GCSqGSGlF
   -----END CERTIFICATE-----
   ```
Copy the certificate information, including --BEGIN CERTIFICATE-- and --END CERTIFICATE-- and save it as a file named as follows

c:\bea\wlserver6.1\config\peoplesoft\<webserver>-cert.pem

**Note.** Do not use a word processor such as Microsoft Word that inserts formatting or control characters.

If you need to FTP your certificate to UNIX, you must FTP it in ASCII mode.

5. Install the VeriSign TestCA certificate:

Download the VeriSign test CA certificate from http://digitalid.verisign.com/cgi-bin/getcacert.

For Windows NT, when prompted save the certificate to disk as

c:\bea\wlserver6.1\config\peoplesoft\verisigntestca.cer

For UNIX, FTP the CA certificate in binary format to

/apps/bea/wlserver6.1/config/peoplesoft/ directory

6. Open the WebLogic Server Console.

7. Expand the peoplesoft domain, expand the Servers folder, select PIA, and select the SSL tab.

8. Update the SSL information, which includes the following:

- **Enabled.** Select the Enabled check box to enable the use of SSL.

- **SSL Listen Port.** The port WebLogic Server listens for SSL connections. Note than on UNIX a value below 1024 requires root authority. The recommended value is 443.

- **Server Key File Name.** Private key (binary format). The recommended value is config/peoplesoft/\<webserver>-key.der.

- **Server Certificate File Name.** Your Public Key (issued from your Root CA) The recommended value is config/peoplesoft/\<webserver>-cert.pem

- **Server Certificate Chain File Name.** Root CA’s public key. The recommended value is config/peoplesoft/verisigntestca.cer.

Once complete, click the **Apply** button on the bottom of the page.
(Optional) To set up client-based certification:

1. Generate a client certificate request on the browser.

2. Expand the peoplesoft domain, expand the Servers folder, select PIA, and select the SSL tab.

3. Update the following controls:
   - **Client Certificate Enforced.** Selection this option to enable mutual authentication.
   - **Trusted CA File Name.** The name of the file that contains the digital certificate for the certificate authority(s) trusted by WebLogic Server. This file specified can contain a single digital certificate or multiple digital certificates for certificate authorities. The file extension (.DER or .PEM) tells WebLogic Server how to read the contents of the file. The recommended value is config/peoplesoft/verisigntestca.cer.

### Adjusting the JVM Heap Size

If you need to adjust the JVM heap size, you edit the WebLogic setEnv.cmd (.sh on UNIX) script. The default JVM min and max heap are 1MB and 64MB. Average memory usage is 30 MB.

The -ms parameter controls the minimum heap size and the -mx parameter controls the maximum heap size.

#### Windows

The JVM heap size is specified in setEnv.cmd through the JAVA_OPTIONS environment variable.

```
......
SET JAVA_OPTIONS=-hotspot -ms1m -mx64m
 ......
```

**Note.** If you make changes to setEnv.cmd and you are running WebLogic as an NT service, you must reinstall the 'peoplesoft-PIA' NT service by running ..\peoplesoft\installNTservice.cmd again.

#### UNIX

The JVM heapsize is specified in setEnv.sh using the JAVA_OPTIONS environment variable.

```
......
JAVA_OPTIONS="-ms64m -mx64m"
 ......"
Note. Platform specific overrides may exist in the setEnv.sh. Review the entire script before making changes.

Understanding the CLASSPATH Setting

The web application specification defines both the CLASSPATH and the directory structure where PeopleSoft (PIA) is installed. Specifically, the CLASSPATH is set dynamically to include the ./classes/ directory and all JAR files under ./lib/.

If a jar file is placed in ./lib, WebLogic finds it and adds it to the CLASSPATH. The exact class loading order is ./classes first, followed by an alphabetical listing of JAR files in ./lib. The classes and JAR files reside in the following directories.

- ../PORTAL/ Contains static files, HTML files, and JSP files in this directory (or subdirectories). This directory is the document root of your web application.
- /WEB-INF/classes/ Contains server-side classes such as HTTP servlets and utility classes.
- /WEB-INF/lib/ Contains .jar files used by the web application.

The Portal and Integration Gateway servlets also share a /lib directory under the domain directory (.\config\peoplesoft\lib\..) that contains common JAR files for both web applications. Those JAR files are added to the CLASSPATH by way of the setEnv.cmd (.sh UNIX) command.

If you need to include JAR files or class files outside of the web application directory structure, you must manually edit the setEnv script.

Enabling Logging on the Web Server

You set the logging levels using the WebLogic Server Console. For specific PeopleSoft logging, expand the Servers folder, and select PIA.

- The Logging tab controls the logging settings.
- The General tab controls the logging severity that gets written to the PIA_weblogic.log.
- The Rotation tab controls when the domain level log rotation occurs.
- The Domain tab controls if domain level logging is used.
- The HTTP tab controls HTTP PIA_access logging (off by default).

The default location of the log files is ../peoplesoft/logs/.
WebLogic Tuning

This section contains some performance tuning recommendations that have improved performance in certain circumstances. Not all of the changes will be suitable for all configurations, and any change should be tested thoroughly in a demonstration environment. Consult your WebLogic documentation for a complete listing of WebLogic tunable parameters.

JVM Heap Size

The heap size (memory size) determines how often, and for how long, the JVM will spend deallocating unused Java objects. The larger the heap the more memory WebLogic, and the PeopleSoft Internet Architecture servlets have to use, but the longer it will take for object de-allocation. Typically during this process, no other requests can be processed by the JVM until de-allocation is complete. This may change as OS vendors enhance and improve the JVM.

You need to test JVM sizes for your specific JVM version and OS version to determine the optimal configuration for your implementation. For example, a single JVM of 512MB on UNIX may operate optimally on a 4-CPU server, whereas the same configuration on WinNT may require two 256MB JVM servers to optimally utilize the available CPUs.

A general guideline is to run a single JVM (a single WebLogic Server) per 1-4 JVM with a maximum JVM heap size of approximately 384MB. Consult your JVM vendor (usually either your OS vendor or Sun’s JavaSoft) for information pertaining to JVM sizing. Also refer to the PeopleSoft Platform database for certified major JVM versions (as in, JVM 1.2, not 1.3) and BEA’s WebLogic platform documentation for certified minor JVM patches (as in, 1.2.2_005, not 1.2.2_004)

The goals of tuning your heap size are twofold: minimize the amount of time that you spend doing object de-allocation while maximizing the amount of clients that you can handle at a given time.

The following sections describe how to increase the Java virtual machine heap size.

**Note.** WebLogic server needs to be restarted for any changes to take effect.

Windows NT

If you are running WebLogic on NT, as an NT service, or through wlserver.exe, use the utility %WL_HOME%in\wlconfig.exe.

For example, the following command,

```
C:\weblogic\bin\wlconfig -mx128M
```

sets the max heap size at 128MB. To see what the current settings are, simple run

```
%WL_HOME%\bin\wlconfig.exe.
```
To lower the initial heap size (the amount of memory allocated at startup), use “-ms” in place of “-mx”.

**UNIX**

Edit $WL_HOME/startweblogic.sh, and at the end of the file, below the comments of "# Find out which java version we're running" and "# Java 2", there is a line that starts the Java virtual machine. For example, to change the max heap size to 128MB, make the following change.

```
# Find out which java version we're running
# Java 2
JAVACLASSPATH=./lib/weblogic510sp6boot.jar:./classes/boot:.....
$JAVA $JAVA_OPTIONS -ms64m -mx128m -classpath $JAVACLASSPATH
-Dweblogic.class.path=$WEBLOGICCLASSPATH -Dweblogic.home=. -Djava.security.manager -Djava.security.policy=`pwd`/weblogic.policy
PSweblogic
fi
```

The “-ms” parameter specifies the initial heap size (the amount of memory allocated at startup)

---

**Available Execution Thread**

```
weblogic.system.executeThreadCount=integer
```

One of the most important resources in the server is its threads. WebLogic has a pool of threads (its size is controlled by this property) that is created at startup and used and reused efficiently throughout a server session. Threads can be allocated and reallocated dynamically to increase performance for particular application profiles. A single thread can correlate to a single execution event, but does not represent a direct 1:1 relationship to a single logged on user.

A single thread can and does process requests for different users sequentially. Increasing the executeThreadCount can enable more concurrent users, but a thread count set too high can adversely effect performance.

---

**Size of weblogic.log**

```
weblogic.system.maxLogFileSize=sizeOfFileInKB
```

You can configure the maximum size of the log file (in K). At runtime, WebLogic Server checks the size of the current log file against the maximum log file size. If the size of the current log file exceeds the maximum, the WebLogic Server file rotation feature starts a new log file and saves the old log file under a version number in the same directory. Be sure to manually delete old log files when they are no longer needed.

You can disable the file rotation feature, which results in no size limit of the log file, by setting this parameter to 0.
HTTP Logging

weblogic.httpd.enableLogFile=bool
weblogic.httpd.logFileBufferKBytes=size
weblogic.httpd.logFileFlushSecs=seconds

WebLogic Server writes HTTP-specific log information to a separate common-log-format access log if you set this property to true. The default is true. If you enable the access log file, it writes HTTP-specific log information into the access log, as well as into the weblogic.log.

This file is always referenced as path relative to the per-server directory, generally this refers to ..\weblogic\myserver\.

The logFileBufferKBytes parameter sets the size of the buffer for the BufferedOutputStream used in HTTPD. The larger the buffer, the fewer physical writes are required, which can enhance performance. By default, this buffer size is set to 8K.

Default logging format is common. Switching to extended log format (World Wide Web Consortium standard WD-logfile-960323), is controlled by the weblogic.httpd.logFileFormat parameter.

If you are testing the log format, you should set the logFileFlushSecs property to 1 second, so it is updated frequently. Otherwise, the server may not flush the log file before you shut down the server. The default value is 60 seconds to improve performance. For a production system, you should use the default or a higher value. Setting this value too high can generate OutOfMemory errors if the logFileBufferKBytes size is set too low.

HTTP Keepalive

weblogic.httpd.http.keepAliveSecs=integer
weblogic.httpd.https.keepAliveSecs=integer
weblogic.httpd.http.keepAlive.enable=boolean

These properties configure persistent connections for HTTP and HTTPS requests, as defined in section 8.1 of the HTTP 1.1 specification. When persistent connections are used, the HTTP connection from a client to the server remains open so that subsequent requests need not open new connections. A common advantage is where an HTML response references many inline images. In this case, the request for each image can use the original persistent connection, avoiding the need to open a new connection for each image request.

Persistent connections are enabled in WebLogic by default. You can tune server performance to work in certain network conditions by increasing or decreasing the keep-alive of browser clients. To disable persistent connections, set the weblogic.httpd.keepAlive.enable property to false.

A keepAlive value set too high can cause WebLogic to manage too many idle client connections. Symptoms are that WebLogic appears idle, but clients cannot connect. A keepAlive set too low can cause connection to be re-established too often, which can be a very costly with respect to response time.
**Client Connect Timeout**

`weblogic.login.readTimeoutMillis=integer`
`weblogic.login.readTimeoutMillisSSL=integer`

Sets the number of milliseconds that WebLogic waits for a client login request to fail before timing out the socket. For some client login operations, as in a client logging in over a secure line with authentication/encryption enabled, the login process may require several seconds, and this property may need to be increased. The default is 5000 milliseconds for plain connections and 25000 milliseconds for SSL connections. If the server within this limit receives no information, the login fails, and the incoming connection is dropped.

**HTTP POST Timeout**

`weblogic.httpd.postTimeoutSecs=integer`

You can control the amount of time available to read HTTP POST data using the `weblogic.httpd.postTimeoutSecs=integer` property. The argument sets the time available to read the data in seconds. The range of valid arguments is between 10 and 120 seconds with the default being 30.

**HTTP Session Timeout**

`weblogic.httpd.session.timeoutSecs=x`

Sets how long WebLogic waits before timing out a session, where x is the number of seconds between a session's activities. Sessions occupy RAM, and on busy sites you can tune your application by adjusting the time-out of sessions appropriately. While you want to give a browser client every opportunity to finish a session, you do not want to tie up the server needlessly if the user has left the site or otherwise abandoned the session. The default is 3600; minimum is 1, maximum is Integer.MAX_VALUE.)

**TCP Connection Backlog Buffering**

`weblogic.system.acceptBacklog=x`

During operations, if many connections are dropped or refused at the client, and there are no other error messages at the server, the problem could be with the TCP backlog parameter. This parameter specifies how many TCP connections can be buffered in a wait queue. This queue is populated with requests for connections that the TCP stack has received by the application has not accepted yet. This is a fixed size queue definable by this parameter. The default is 50.

If you are getting "connection refused" messages when you access the WebLogic Server, raise this number from the default by 25%. Continue increasing the value of `weblogic.system.acceptBacklog` by 25% until the messages cease to appear.
This chapter provides an overview of WebSphere AEs and discusses how to:

- Administer WebSphere.
- Work with the PeopleSoft site.
- Use Proxy Servers.
- Configure SSL.

**Note.** This information is not intended to replace any IBM WebSphere documentation. Always refer to the IBM documentation for detailed information on WebSphere. This information is included in PeopleSoft because it applies directly to your PeopleSoft system.

**Note.** IBM WebSphere is a new web server platform to PeopleSoft support. Always check the *PeopleSoft Internet Architecture Answer Book* on Customer Connection for updated WebSphere information.

### Understanding WebSphere AEs

This section provides a brief overview of what WebSphere AEs 4.0 offers. It's important to keep in mind that PeopleSoft supports the AEs version of WebSphere, not the full product WebSphere AE.

The AE version is designed for the production environment, and it contains all of the workload management, administration, security, and database access options. The AEs version is the Single Server option. Single server means that the implementation is limited to one application server on one node. AEs is ideal for development and testing though it can be used in a production environment for applications with light traffic.

The AEs version offers the following:

- Web services support.
- J2EE 1.2 Compliance.
- XML parsing.
- Apache-based web server.
- Browser-based administration.
- Firewall support.
- Java Technology, such as EJB, JMS, and servlets.
- Lotus Domino interoperability.
- WebSphere Tools integration.

The AEs version presents the following limitations:

- The AEs version houses both the administrative server and the application server in the same Java Virtual Machine (JVM).
- Single Server runs only on a single machine, or node.
- Single Server is not enabled for workload management.
- Security on Single Server is limited to using the local operating system as a user repository.
- The Single Server versions do not support Java 2 Connectors nor will they work with the Enterprise Extensions. They do not use WSCP or XMLConfig administrative tools to modify configurations, nor do they include the JDBC Drivers from Merant for access to databases.

Note. As always, refer to the IBM documentation for a complete set of offerings and limitations related to the AEs version of WebSphere Application Server.

**WebSphere Administration**

The following topics cover general WebSphere administration tasks.

**Starting WebSphere**

**Windows NT**
To start WebSphere on Windows NT, on the command line enter:

```
c:\Apps\WebSphere\AppServer\bin\StartServer.bat
```

**UNIX**
To start WebSphere on UNIX, on the command line enter:

```
# cd /<opt or user>/WebSphere/AppServer/bin
# .startServer.sh`
Stopping WebSphere

Windows NT
To stop WebSphere on Windows NT, on the command line enter:

```
c:\Apps\WebSphere\AppServer\bin\StopServer.bat
```

UNIX
To stop WebSphere on UNIX, on the command line enter:

```
# cd /<opt or user>/WebSphere/AppServer/bin
# .stopServer.sh
```

Working with Default Web Server Settings

Default Web Server Settings
The following table presents the default settings for the most frequently changed settings:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Default Value/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTTP listening port</td>
<td>9080</td>
</tr>
<tr>
<td>HTTPS listening port</td>
<td>9433</td>
</tr>
<tr>
<td>JVM minimum heap size</td>
<td>1 MB</td>
</tr>
<tr>
<td>JVM maximum heap size</td>
<td>64 MB (average memory usage is ~30 MB)</td>
</tr>
<tr>
<td>./DefaultWebApp_myserv/</td>
<td>Static files, HTML files, and JSP files in this directory (or subdirectories). This directory is the document root of your Web Application.</td>
</tr>
<tr>
<td>WEB-INF/classes/</td>
<td>Contains server-side classes such as HTTP servlets and utility classes.</td>
</tr>
<tr>
<td>WEB-INF/lib/</td>
<td>Contains JAR files used by the Web Application.</td>
</tr>
<tr>
<td>CLASSPATH</td>
<td>The CLASSPATH is set dynamically to include the ./classes/ directory and all JAR files stored beneath the ./lib/ directory. For example, if a JAR file resides in ./lib, WebSphere locates it and adds it to the CLASSPATH. The class loading order is: First, ./classes. Then, alphabetical listing of jar files in ./lib.</td>
</tr>
</tbody>
</table>

Changing Web Server Settings
If you need to change web server configuration, such as listening ports, use the WebSphere console. To access the console, open your browser and enter the following URL:
http://localhost:9090/admin

When prompted for username, you can just click the submit button. After being authenticated, drill down to Nodes, hostname, Application Server, Default Server. The Default Server area is where you change the properties of the WebSphere Server. Refer to your IBM documentation for details.

**Changing the Default HTTP/HTTPS Ports**

**To change the HTTP/HTTPS Ports:**


    /WebSphere/AppServer/config/server-cfg.xml.
2. Search the entire file for 9080 and change it to the port number you require.
3. Search for 9443 and change it to the port number you require.
4. Save the file.
5. Repeat steps 2–4 for plugin-cfg.xml file and re-start the proxy server and WebSphere.

This file resides in the following location: /WebSphere rootdirectory/config/plugin-cfg.xml.

---

**Uninstalling WebSphere**

If you need to uninstall the WebSphere application server, complete the following procedure for your operating system.

**To uninstall WebSphere on Windows NT/2000:**

1. Open the command prompt.
2. Navigate to the WebSphere Application Server directory.
   
   For example,
   
   ```
   C:\>cd WebSphere\Application Server\bin
   ```
3. Run uninstse.exe.
   
   For example,
   
   ```
   C:\WebSphere\Application Server\bin>uninstse
   ```
4. Respond to the following prompts:
   - Indicate Yes when asked if you want to uninstall the product.
   - Select whether you want to back up your product files.
5. After the uninstall program completes, reboot the server.

**Note.** If you installed IBM HTTP Server as part of the WebSphere Application Server installation, you may need to separately uninstall IBM HTTP Server.

**To uninstall WebSphere on UNIX:**

1. Ensure that you are logged into the machine with superuser (root) privileges.
2. If IBM HTTP Server or another web server is running on your system, stop the web server.
Note. IBM HTTP Server is not uninstalled when you uninstall WebSphere Application Server. It must be uninstalled separately.

3. Ensure that your DISPLAY and TERM environment variables are set properly.

4. Navigate to the root installation directory (/opt/WebSphere/AppServer on HP-UX, Linux, and Solaris; /usr/WebSphere/AppServer on AIX) and execute the `uninstall.sh` script as follows:

   ```sh
   # ./uninstall.sh
   ```

5. When the Uninstall dialog box appears, click **Uninstall**.

6. On the command line, issue the following command:

   ```
   rm -r
   ```

   This ensures that subsequent installations of WebSphere Application Server do not conflict with files left on the machine from a previous installation.

   **Note.** Use caution when executing this command to prevent the unintentional removal of portions of the file system.

---

### Modifying the Java Heap Size

**To increase/decrease the Java heap size:**


2. Search for `jvmSettings` tag.

3. In the `jvmSettings` tag, locate the following parameters:

   ```xml
   initialHeapSize="4" maximumHeapSize="256"
   ```

4. Adjust the `initialHeapSize` and `maximumHeapSize` accordingly.

5. Save the `server-cfg.xml` file.

6. Re-start WebSphere.

---

### Running WebSphere and WebLogic on One Server

WeLogic and WebSphere can co-exist on a single machine if each server uses a separate port.

By default, WebSphere runs on 9080 and 9443. If WebLogic is using ports other than 9080 and 9443, then it is possible to run both the servers with each handling PeopleSoft transactions.

If you use IBM HTTP Server along with WebSphere, then IBM HTTP Server listens on port 80 and 443 and WebSphere listens on 9080/9443. If WebLogic is running on ports 80/443, then there will be conflict between the WebLogic ports and IBM HTTP Server ports.

Make sure you adjust the listening ports to avoid conflicts.

### Understanding Servlet registrations

Servlets are registered in each web application’s web.xml. For the default web application that file is located in the following locations.

- c:\Apps\WebSphere\AppServer\installedApps\applications\PORTAL\WEB-INF\web.xml
- c:\Apps\WebSphere\AppServer\installedApps\applications\PSIGW\WEB-INF\web.xml
- c:\Apps\WebSphere\AppServer\installedApps\applications\PSINTERLINKS\WEB-INF\web.xml

### Understanding CLASSPATH Settings

PeopleSoft runs as a web application. The web application specification defines both the CLASSPATH and the directory structure where PeopleSoft is installed. Specifically the CLASSPATH is set dynamically to include the './classes/' directory and all jar files under './lib/'.

If a jar file is placed in './lib/', WebSphere finds it and adds it to the classpath. The exact classloader order is /classes first followed by an alphabetical listing of jar files in ./lib. The following table provides more information related to these settings and locations.

<table>
<thead>
<tr>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>../DefaultWebApp_myserver/</td>
<td>Static files, HTML files and JSP files in this directory (or subdirectories). This directory is the document root of your Web Application.</td>
</tr>
<tr>
<td>/WEB-INF/classes/</td>
<td>Contains server-side classes such as HTTP servlets and utility classes.</td>
</tr>
<tr>
<td>/WEB-INF/lib/</td>
<td>Contains jar files used by the Web Application.</td>
</tr>
</tbody>
</table>
Working with the PeopleSoft Site

Installing Additional Sites with MP Installer

Typically, multiple sites exist in a PeopleSoft implementation. For instance, there is often a HR site, a CRM site, a Financials site, and so on.

After you complete Step 1 your directory structure should appear as follows:

Directory structure including new site

Note. This procedure assumes that each site is running the same version of PeopleTools.

To install additional sites:

1. Shutdown the WebSphere Server.

2. Run the multi-platform PIA installation program.
   
   Run \%PS_HOME\%\setup\mpinternet\setup.exe.

3. Select Existing for Select Domain Type prompt, and click Next.

4. For the Select domain name from list prompt, select the existing WebSphere domain to update, and click Next.
   
   For example, if you are adding the new site to the peoplesoft domain, select peoplesoft.
5. Specify the new PeopleSoft site name, as in *crm*, and click Next. (Accept other defaults).

6. Specify the connect information, and click Next.

   Specify the appropriate application server name (or IP address) and JSL port of the application server to which the site should connect. Each site on a single web server must have the same values for HTTP Port and HTTPS Port.

7. Complete the PIA install as instructed in the PeopleSoft Installation guide.

8. Test the installation.

   You can now access your new site via the URL of http://localhost:port/<newsite>/signon.html  For example, if you a new site named 'crm', you would access that site via the URL of http://localhost:9080/crm/signon.html

9. Update the plugin-cfg.xml file to add the additional site.

   Open /WebSphere/AppServer/config/plugin-cfg.xml file.

   Add the crm alias in the plugin-cfg.xml file. For example,

   ```xml
   <Uri Name="/psftmodified"/>
   <Uri Name="/ps"/>
   <Uri Name="/crm"/>
   ```

---

**Running Different PeopleTools Versions**

In some cases, you may need to run multiple PeopleSoft versions on the same web server. You add the new version as a custom web application. The different sites would be connecting to the different application servers, however, the web sites are still maintained on the same web server.

The different PeopleTools version is installed as a custom web application. After completing the install of this customer web application, the directory structure appears as follows:
Custom web application installation

To set up multiple PeopleTools versions on the same web server:

1. Shut down the WebSphere server.
2. Install PeopleSoft on the web server.
   Run the multi-platform PeopleSoft install (%PS_HOME%\setup\mpinternet\setup.exe) for the PeopleTools version that you want to add.
3. For the Select domain type prompt, select Existing.
4. For the Select domain name from list prompt, select the name of the domain that you want to update.
5. Specify custom webapp(s) to install.
   Select custom web application and specify the names of the new web applications. If you want a different site name, specify that also. To explain this scenario, we will consider the web application names as PORTAL-nightly and PSIGW-nightly. Adding multiple PeopleTools versions requires updating the WebSphere configuration files. You can
install both PORTAL and Integration Gateway as custom web applications or change only the name for one. In both cases select custom web application to make the appropriate name change.

6. Complete the PIA install as normal.

If you are installing PORTAL as a custom web application, be sure to specify the appropriate application server name (or IP address) and JSL port for the site. Each site on a single web server must have the same values for HTTP Port and HTTPS Port.

7. Modify the Server-cfg.xml.

- Open /WebSphere/AppServer/config/server-cfg.xml.
- Search for token "PSINTERLINKS" in the <installedApps> element.
- Add the new Web Applications. The following assumes you have selected "PORTAL-nightly", PSIGW-nightly, and PSINTERLINKS-nightly.

Copy and paste the following below <modules

```xml
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_11" uri="PSINTERLINKS"/>
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_12" uri="PORTAL-nightly"/>
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_13" uri="PSIGW-nightly"/>
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_14" uri="PSINTERLINKS-nightly"/>
```

- The <installedApps> element should appear as follows:

```xml
<installedApps xmi:id="ApplicationRef_8" name="installedApps 8.4 Enterprise Application" archiveURL="${APP_INSTALL_ROOT}\peoplesoft"
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_9" uri="PORTAL"/>
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_10" uri="PSIGW"/>
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_11" uri="PSINTERLINKS"/>
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_12" uri="PORTAL-nightly"/>
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_13" uri="PSIGW-nightly"/>
<modules xmi:type="applicationserver:WebModuleRef" xmi:id="WebModuleRef_14" uri="PSINTERLINKS-nightly"/>
```
Update the Web Container.

Look for the <webContainer> element. As shown below.

```
<webContainer xmi:id="WebContainer_1" installedWebModules="WebModuleRef_1 WebModuleRef_2 WebModuleRef_3 WebModuleRef_4 WebModuleRef_5 WebModuleRef_6 WebModuleRef_9 WebModuleRef_10 WebModuleRef_11">
```

Add web Application reference to the webContainer above.

```
<webContainer xmi:id="WebContainer_1" installedWebModules="WebModuleRef_1 WebModuleRef_2 WebModuleRef_3 WebModuleRef_4 WebModuleRef_5 WebModuleRef_6 WebModuleRef_9 WebModuleRef_10 WebModuleRef_11 WebModuleRef_12 WebModuleRef_13">
```

Save the server-cfg.xml file.

8. Modify Plugin-cfg.xml.

   - Add servlet context for respective web applications.
   - Open /WebSphere/AppServer/config/plugin-cfg.xml File.
   - Search for <Uri Name="/PSINTERLINKS"/>
   - Add the following below the <Uri Name="/PSINTERLINKS"/>
     ```
     <Uri Name="/PORTAL-nightly"/>
     <Uri Name="/PSIGW-nightly"/>
     ```

A portion of the plugin-cfg.xml file should appear similar to the following.

```xml
<Uri Name="/xmllink/*"/>
<Uri Name="/xmllink"/>
<Uri Name="/PSIGW"/>
<Uri Name="/PSINTERLINKS"/>
<Uri Name="/PORTAL-nightly"/>
<Uri Name="/PSIGW-nightly"/>
<Uri Name="/psftmodified"/>
<Uri Name="/ps"/>
<Uri Name="*.jsp"/>
<Uri Name="/j_security_check"/>
<Uri Name="/SyncServer/*"/>
```
9. Modify application.xml.

- Open \WebSphere\AppServer\installedApps\peoplesoft\META-INF\application.xml file.
- Add the servlet context to the application.xml file
- Locate the following:

```
<module id="WebModule_3">
  <web>
    <web-uri>PSINTERLINKS</web-uri>
    <context-root>/PSINTERLINKS</context-root>
  </web>
</module>
```

- Add three new web application servlet contexts.

```
<module id="WebModule_4">
  <web>
    <web-uri>PORTAL-nightly</web-uri>
    <context-root>/PORTAL-nightly</context-root>
  </web>
</module>

<module id="WebModule_5">
  <web>
    <web-uri>PSIGW-nightly</web-uri>
    <context-root>/PSIGW-nightly</context-root>
  </web>
</module>
```

- application.xml should appear similar to the following:

```
<module id="WebModule_1">
  <web>
    <web-uri>PORTAL</web-uri>
    <context-root>/PORTAL</context-root>
  </web>
</module>
```
<web>
  <web-uri>PSIGW</web-uri>
  <context-root>/PSIGW</context-root>
</web>
</module>

<module id="WebModule_2">
  <web>
    <web-uri>PSIGW</web-uri>
    <context-root>/PSIGW</context-root>
  </web>
</module>

<module id="WebModule_3">
  <web>
    <web-uri>PSINTERLINKS</web-uri>
    <context-root>/PSINTERLINKS</context-root>
  </web>
</module>

<module id="WebModule_4">
  <web>
    <web-uri>PORTAL-nightly</web-uri>
    <context-root>/PORTAL-nightly</context-root>
  </web>
</module>

<module id="WebModule_5">
  <web>
    <web-uri>PSIGW-nightly</web-uri>
    <context-root>/PSIGW-nightly</context-root>
  </web>
</module>

- Save application.xml.

10. Update the web.xml File for PORTAL-nightly Web Application.
Open file \WebSphere\AppServer\installedApps\peoplesoft\PORTAL-nightly\WEB-INF\web.xml

Change the <display-name> and <description> elements to PORTAL-nightly

<display-name>PORTAL-nightly</display-name>

<description>PORTAL-nightly</description>

Repeat the same procedure for PSIGW-nightly Web Application. Change the name to PSIGW-nightly, as shown below. You can find the web.xml file at the following location \WebSphere\AppServer\installedApps\peoplesoft\PSIGW-nightly\WEB-INF\web.xml

<display-name>PSIGW-nightly</display-name>

<description>PSIGW-nightly</description>

11. Re-start the WebSphere.

12. Test the installation.

You can now access your custom web app via the URL of:

http://localhost:9080/<webapp>/<site>/....

For example, if you install PORTAL to a custom web application called 'PORTAL-nightly', with a site name of 'ps', you would access that web application and site via the URL of


---

**Working with Proxy Servers**

PeopleSoft supports the use of proxy servers in deploying PeopleSoft applications. A proxy server acts as the HTTP server to the backend web server running the servlets, which in this case is WebSphere.

---

**Setting up a Proxy Server**

Setting up a proxy server is the same for each type of proxy server. After you setup the proxy server you must define the alias as discussed in the following topic.

---

**To set up a proxy server:**

1. Install the web service software of the proxy server, such as Microsoft IIS, IBM HTTP Server, or Apache.

2. Run the WebSphere setup.exe as described in the *PeopleSoft Installation Guide*.

3. In the introduction page of the install wizard, click Next.
4. On the Previous Installation Detected page, click Next.
5. On the Installation Options page, click Custom Installation.
6. On the Choose Application Server Components page, select Web Server Plugins only, and click Next.
7. On the Choose Web Server Plugins page, select the appropriate plug in for your proxy server, and click Next.
8. (If prompted) In the Product Directory page, enter the root location of WebSphere and click Next.
   For example, C:\Apps\WebSphere\AppServer.
9. In the Install Options Selected page, verify that you’ve selected the appropriate options, and click Next.
   The install program updates the plugin information for the plugin option you selected.
10. Stop and re-start both the proxy web server and WebSphere.
11. Test the plugin installation.
   - Open a browser.
   - Enter the following URL: http://<hostname>/psftmodified/servlet/snoop.
   - Make sure you see the Snoop Servlet page.

### Changing Default Ports for a Proxy Server

If you want to run Peoplesoft through WebSphere on non-default ports using the proxy, complete the following procedure, which uses the IBM HTTP Server as an example.

**Note.** The following procedure changes the default ports from 80/443 to 8080/8443. The port values you decide to use depend upon the implementation at your site.

**To change the proxy server default ports:**

2. Change the Port value from Port 80 to Port 8080, and change the Listen value from Listen 80 to Listen 8080.
   For example,
   Port 8080
   Listen 8080
3. Open the `/WebSphere/AppServer/config/server-cfg` file.

4. Change the Ports 80 and 443 to 8080,8443 respectively for http and https.
   
   For example,
   
   `<aliases xmi:id="HostAlias_3" hostname="*" port="80"/>
   <aliases xmi:id="HostAlias_4" hostname="*" port="443"/>
   
   Note. This procedure assumes you have set up SSL on Port 8443.

5. Open `plugin-cfg.xml` file and change any references to 80/443 to 8080/8443.

6. Re-start both the proxy and WebSphere Server.

**Configuring SSL**

The following example depicts the typical flow of a request from a browser to a WebSphere Application Server.

The browser sends a request to the Web server over connection A. The WebSphere plug-in recognizes that the request is intended for WebSphere Application Server and forwards it over connection B to the application server.

Each connection (A and B) has both a client and a server. For connection A, the browser is the client and the web server is the server. For connection B, the WebSphere Application Server plug-in is the client and the WebSphere Application Server is the server.

Either or both of these connections can be an SSL connection. It's up to your site's requirements to determine what is the adequate tradeoff between security and performance. For example, if the link between the web server and the WebSphere Application Server is thought to be safe, you may decide to forward a request to the application server over a non-secure TCP connection. This may be desirable to increase performance because a TCP connection is much faster than an SSL connection. If you are transmitting sensitive data, both connection A and connection B should be SSL connections.
Each component has its own SSL configurations. If both connection A and B require SSL connections, you must complete four SSL configurations:

- Browser.
- Web server.
- WebSphere plug-in.
- WebSphere Application Server.

The following sections cover setting up SSL on the Microsoft IIS HTTP server, the IBM HTTP server, and the WebSphere Application Server.

### Setting up SSL on Microsoft IIS

The following is a sample procedure that applies to configurations where the Microsoft IIS web server is acting as the HTTP server. The sample used applies to Windows 2000, but a Windows NT procedure would be similar.

If you want to use the IIS Http Server with WebSphere, then select the IIS Http Server during the WebSphere installation. After the installation select Start, Control Panel, Administrative Tools, Internet Information Services, and make sure that IBMWebAS and sePlugins appear in the Default Web Site.

#### Windows 2000

**To configure SSL on Windows 2000:**

4. Create a new certificate.

   Complete the wizard, answer the questions and store the certificate in .txt file. This file will be used later. Click finish when complete.
5. Open the certificate signing request (c:\newkeyrq.txt).

   It should appear as follows:

   ```
   -----BEGIN NEW CERTIFICATE REQUEST-----
   MIICgzCCAi0CAQAwczEXMBUGA1UEAxMOc2t1bGthcm4wOTA2MDExFDASBgNVBAsT
   C1Blb3BzZVhvb2xxZMRw6EQYDVQQKEwpQZW9wZhbVb240MRw6EQYDVQQHEwpQbGhl
   c2FudGVyM5uQywCQYDVQQIEwJDQTELMAkGA1UEBhMCVVMwXDANBgkqhkiG9w0BAQf
   AANLADBIAkEA6JvGRz6AVE/uMAsRJ87TB+JRG12rH0xbiJ4jEvO6H/9F7LmErJ1aA
   RabYqdmu+I0Yd4rlxJcVCjHdW7NMtcdQIDAQABoIBUzAaBgorBgEEAYI3DQI
   ```
Submit a certificate signing request.

- Launch a browser and go to http://pwong031000/CertSrv/CertEnroll/krenroll.asp. If you are using VeriSign, then send the certificate request to VeriSign and then get the secured certificate from them. Please follow the VeriSign documentation for more details. Set up mentioned below is for PeopleSoft only.

- Paste the entire certificate signing request into the form.

- Submit the request.

- Click the "Download" button and save the file (newcert.cer) to disk.

Start, Control Panel, Administrative Tools, Internet Information Services-Default Web Site.

Right click on the default web site and click on Properties and then click on Directory Security.

The Certificate Wizard should indicate that you have a pending certificate request.

On the Pending Certificate Request page, select Process the pending request and install the certificate.

Enter the *.cer file you generated and complete the wizard.

Stop and re-start the IIS.

Test the SSL by going to the following URL:

https://localhost

You should be able to see the IIS page.

Start the WebSphere App Server and test the snoop servlet for HTTP and HTTPS requests.

--- END NEW CERTIFICATE REQUEST ---

Setting up SSL on IBM HTTP Server

This section provides a brief example of configuring SSL for the IBM HTTP Server.
Setting up the System Environment (UNIX)

The IKEYMAN GUI is Java-based and needs a JDK or JRE to run. The minimum JDK levels for IKEYMAN support are:

- AIX 1.1.6+ or 1.1.8
- NT 1.1.8
- HP-UX/Linux 1.1.7

On Windows and Solaris, the GSKit libraries installed as part of the SSL component include a JRE. No additional environment setup is required on these platforms. To run on AIX, HP, or Linux, or to use another JDK on Solaris, set your system environment using the following guidelines:

Set the variables for using the JDK. These variables vary, depending on the JDK version and should be verified by reading the documentation included with the JDK.

For JDK Version 1.1.x, set the JAVA_HOME variable:

```
EXPORT JAVA_HOME=the JDK home directory full path name
```

For JDK Version 1.2.x, update the PATH variable:

```
EXPORT PATH = <the JDK home directory full path name>
/jre/sh:<the JDK home directory full path name>/sh:$PATH
```

If you want the ability to run IKEYMAN from any directory, add the path where IKEYMAN installs to your PATH environment variable:

```
EXPORT PATH=$IKEYMAN_HOME/bin:$PATH
```

Linux for S/390 users: See Using the IKEYCMD Command Line Interface for more detailed information regarding IKEYCMD.

To run IKEYMAN on Linux for S/390, set up environment variables to use the IKEYCMD command line interface as follows:

Set your PATH to where your Java or JRE executable resides:

```
EXPORT PATH=/opt/IBMJava/bin:$PATH
```

Set the following CLASSPATH environment variable:

```
EXPORT CLASSPATH=/usr/local/ibm/gsk/classes/cfwk.zip:/usr/local/IBM/gsk/classes/gsk4cls.jar:$CLASSPATH
```

Once completed, IKEYCMD should run from any directory. To run an IKEYCMD command, use the following syntax:

```
java com.ibm.gsk.ikeyman.ikeycmd <command>
```

You can substitute JRE for Java, depending on whether you are using a JRE or JDK. Example:
jre com.ibm.gsk.ikeyman.ikeycmd <command>

Each IKEYCMD (except create database) requires that the key database and password for the key database be specified. This is a required action since the database is opened with each command. See Using the IKEYCMD Command Line Interface, for more detailed information on IKEYCMD.

**Using the IKEYMAN Graphical**

To start the IKEYMAN graphical user interface, enter

```bash
ikeyman
```

on the command line.

Go to the start UI and select Start Key Management Utility.

---

**Note.** If you are starting IKEYMAN to create a new key database file, the file is stored in the directory where you start IKEYMAN.

---

**Setting up Pwong Certificate Authority**

**To setup Pwong certificate authority:**

1. Start IkeyMan ( /webSphere/AppServer/bin/ikeyman ).

   On Windows, start IkeyMan from the WebSphere Application Server entry on the Windows Start menu.

2. Create a new key database file.
   - Click Key Database File and select New.
   - Specify settings:
     - Key database type: JKS
     - File Name: appServerKeys.jks
     - Location: your myKeys directory, such as "product_installation_root\myKeys
   - Click OK.
   - Enter a password (twice for confirmation) and click OK.

3. Add the Certificate Authority PWONG031000_PeopleTool.cer as a Signer Certificate using iKeyMan
   - From the Key Database Content field, select Signer Certificates
   - Enter the following values to Add a CA certificate:
Data type: Binary DER data
Certificate file name: PWONG031000_PeopleTool.cer
Location: C:\IBM HTTP Server\MyKeys\n
Click "OK" when done:

- Enter the Name you want to call this signer certificate
- When done, you should see <selected name > as a Signer Certificate
- In the Key database content field, select Personal Certificate Requests
- Click New button
- Populate The Key Label , Organization and CSR File name.
  - Key Label: Machine Name
  - Organization: PeopleSoft
  - Enter the name of the file to store the certificate request, product_installation_root\myKeys\CSR.arm
- Click OK, and you should see the Key Label.

4. Open product_installation_root\myKeys\CSR.arm in text editor , Copy the entire contents of the file.

5. Copy and Paste the contents( product_installation_root\myKeys\CSR.arm ) from text editor into the Web Server Enrollment Page (http://pwong031000/CertSrv/CertEnroll/krenroll.asp)

6. Click Submit

7. Download the new certificate to your myKeys directory (product_installation_root\myKeys).

8. From the IKeyMan , select Personal Certificates from the Key Database Content field

9. Click on "Receive" and enter the following values
   - Data Type: Base64-encoded ASCII data.
   - Certificate file name: Name of new cert download form Enrollment page.
   - Location: product_installation_root\myKeys.
   - Click OK.
   - You should see your personal certificate in the Personal Certificate box.

10. Close iKeyMan.
11. Open server-cfg.xml file from product_installation_root\config\server-cfg.xml

- Search for text defaultSSLSettings and update the Element as follows.

```xml
<defaultSSLSettings xmi:id="SecureSocketLayer_1"
    keyFileName="${WAS_ROOT}/myKeys/key.jks" keyFilePassword="Enter password"
    keyFileFormat="JKS" trustFileName="${WAS_ROOT}/myKeys/key.jks"
    trustFilePassword="Enter password" clientAuthentication="true"
    securityLevel="HIGH" enableCryptoHardwareSupport="false">
    <cryptoHardware xmi:id="CryptoHardwareToken_1" tokenType="PKCS#11"
        libraryFile="" password="{xor}"/>
</defaultSSLSettings>
```

- Next search for transports with port 9443. Refer the snippet below and update as follows.

```xml
<transports xmi:type="applicationserver:HTTPTransport"
    xmi:id="HttpTransport_2" hostname="*" port="9443" sslEnabled="true">
    <ssl xmi:id="SecureSocketLayer_1HttpTransport_2"
        keyFileName="${WAS_ROOT}/myKeys/key.jks" keyFilePassword="Enter password"
        keyFileFormat="JKS" trustFileName="${WAS_ROOT}/myKeys/key.jks"
        trustFilePassword="Enter password" clientAuthentication="false"
        securityLevel="HIGH" enableCryptoHardwareSupport="false">
        <cryptoHardware xmi:id="CryptoHardwareToken_1HttpTransport_2" tokenType="PKCS#11"
            libraryFile="" password="{xor}"/>
    </ssl>
</transports>
```

12. Stop and start the WebSphere and invoke https://<hostname>:9443/ps/signon.html or any other servlets.

**Setting up Verisign Certificate Authority**

- Start IKeyMan. (/webSphere/AppServer/bin/ikeyman ). On Windows, start IKeyMan from the WebSphere Application Server entry on the Windows Start menu.
- Create a new key database file.
- Click Key Database File and select New.
- Specify settings:
  - Key database type: JKS
  - File Name: appServerKeys.jks
  - Location: your myKeys directory, such as "product_installation_root\myKeys"
- Click OK.
- Enter a password (twice for confirmation) and click OK.
- In the Key database content field, select Personal Certificate Requests
- Click New button
• Populate all the fields on the Create New Key and Certificate Request as shown in the example below.

![Create New Key and Certificate Request](image)

Creating New Key Request.

• Click OK, and you will see the Key Label.

• Open `product_installation_root\myKeys\certreq.arm` in a text editor. Copy the entire contents of the file.

• Invoke the following URL: https://www.verisign.com/cgi-bin/clearsales_cgi/leadgen.htm?form_id=0100&toc=b108628610100100&email=

• Register for Trial copy for 14 days. Continue the Wizard. You will be prompted to enter the `certreq.arm` File (Enrollment Form). Paste the contents of `certreq.arm` into the (Enter CSR Information) Box. Continue with the wizard, and if the information matches the data entered, then the Trial veriSign certificate will be sent to you.

• When you receive the response, open the email and copy and paste the certificate into `product_installation_root\myKeys\certfromVeri.txt`.

• Go to URL http://www.verisign.com/server/trial/faq/index.html and download the VeriSign Test CA into `product_installation_root\myKeys\getcacert`, leave the default file type as “Security Certificate.”

• In the Key database content field, select Singer Certificates.

• Click Add, and enter follow information as shown below. Select the certificate file name as the getcacert Security Certificate. Click OK.
• Enter the Label for the Certificate as "WebVeriSign".

• From the IKeyMan, select *Personal Certificates* from the Key Database Content field.

• Click Receive and enter the following values:
  - Data Type: Base64-encoded ASCII data
  - Certificate file name: Name of new cert download form Enrollment page (product_installation_root\myKeys\certfromVeri.txt)
  - Location: product_installation_root\myKeys

• Click "OK" and you should see your personal certificate in the Personal Certificate box.

• Close iKeyMan.

• Open server-cfg.xml file from product_installation_root\config\server-cfg.xml

• Search for text defaultSSLSettings and update the Element like the following.

```xml
<defaultSSLSettings xmi:id="SecureSocketLayer_1"
  keyFileName="${WAS_ROOT}/myKeys/key.jks" keyFilePassword="Enter password"
  keyFileFormat="JKS" trustFileName="${WAS_ROOT}/myKeys/key.jks"
  trustFilePassword="Enter password" clientAuthentication="true"
  securityLevel="HIGH" enableCryptoHardwareSupport="false">
  <cryptoHardware xmi:id="CryptoHardwareToken_1" tokenType="PKCS#11"
      libraryFile="" password="{xor}"/>
</defaultSSLSettings>
```

• Next, search for transports with port 9443. Refer the snippet below and update like the following:

```xml
<transports xmi:type="applicationserver:HTTPTransport"
  xmi:id="HttpTransport_2" hostname="*" port="9443" sslEnabled="true">
  <ssl xmi:id="SecureSocketLayer_1HttpTransport_2"
    keyFileName="${WAS_ROOT}/myKeys/key.jks" keyFilePassword="Enter password"
    keyFileFormat="JKS" trustFileName="${WAS_ROOT}/myKeys/key.jks"
    trustFilePassword="Enter password" clientAuthentication="false"
    securityLevel="HIGH" enableCryptoHardwareSupport="false">
    <cryptoHardware xmi:id="CryptoHardwareToken_1HttpTransport_2"
        tokenType="PKCS#11" libraryFile="" password="{xor}"/>
  </ssl>
</transports>
```
- Stop and start the WebSphere and invoke https://<hostname>:9443/ps/signon.html or any other servlets.

**Editing /IBM Http Server/conf/httpd.conf File**

**Windows**

LoadModule ibm_ssl_module modules/IBMModuleSSL128.dll
Listen 443
<VirtualHost <hostname>:443>
SSLEnable
SSLClientAuth none
</VirtualHost>
SSLDisable
Keyfile "C:\IBM HTTP Server\myKeys\key.kdb"
SSLV2Timeout 100
SSLV3Timeout 1000

**UNIX**

LoadModule ibm_ssl_module libexec/mod_ibm_ssl_128.so
AddModule mod_ibm_ssl.c
Listen 443
<VirtualHost <hostname>:443>
SSLEnable
SSLClientAuth none
</VirtualHost>
SSLDisable
Keyfile /opt/IBMHTTPD/ssl/key.kdb
SSLV2Timeout 100
SSLV3Timeout 1000

**Setting up SSL on WebSphere Application Server**

After SSL is working between your browser and web server, you must configure SSL between the web server plug-in and the WebSphere Application Server. This involves the following tasks:

- Creating a SSL Key file.
- Modifying the Plug-in Configuration file.

**Note.** This procedure is not required if the link between the plug-in and the application server is known to be secure. If privacy of application data is a concern, however, this connection should be an SSL connection.
Creating the SSL Key File

When configuring SSL, you must first create an SSL key file.

Note that if you are using the IBM HTTP Server, you may use the same SSL key file which the Web server is using; however, it is recommended that separate SSL key files be used because the trust policy for the connection to the web server will likely be different than the trust policy for the connection to the application server.

For example, we may want to allow many browsers to connect to the Web server's HTTPS port, whereas we only want to allow a small, well-known number of WebSphere plug-ins to connect directly to a WebSphere application server's HTTPS port. The following is an example of how to create an SSL key file for your WebSphere plug-in which will only allow the plug-in to connect to the application server on its SSL port.

To create the SSL key file:

1. Create the directory product_installation_root\myKeys if you have not already done so.
   This directory will contain all of the SSL key files and extracted certificates that you will create.

2. Start the key management utility of GSKit.
   GSKit is the SSL implementation used by the WebSphere plug-in, which is the same implementation used by the IBM HTTP Server.
   The default path on Windows to this utility is C:\Program Files\ibm\gsk5\bin\gsk5ikm.exe.

3. Click the Key Database File pull-down list box and select New.

4. Specify the following settings and click OK.
   • Key database type: CMS Key Database File
   • File name: plug-inKeys.kdb
   • Location: your myKeys directory

5. Enter a password for your SSL key file (twice for confirmation).

6. Select the Stash the password to a file? option. Click OK.
   This causes a file such as "product_installation_root\myKeys\plug-inKeys.sth to be created containing an encoded form of the password. This encoding prevents a casual viewing of the password but is not highly secure. Therefore, operating system permissions should be used to prevent all access to this file by unauthorized persons.

7. When you see the list of default Signer Certificates, select the first certificate and click Delete.
   Repeat this step until all of the signer certificates have been deleted.
8. Create a self-signed certificate:
   - Click the Signer Certificates menu and select Personal Certificates.
   - Click New Self-Signed.
   - Enter "plug-in" for the Key Label and "IBM" for the Organization.
   - Click OK.

9. Extract the certificate so that you can import it into the application server key file later.
   - Click Extract Certificate.
   - Specify settings and click OK:
     - Base64-encoded ASCII data: Data Type
     - Certificate file name: plug-in.arm
     - Location: path to your myKeys directory

10. Click the Key Database File menu and select Close.

**Modifying the Plug-in Configuration File**

The plug-in configuration file can be found in the following location:

Windows NT:
```
...\webpshere\appserver\config\plugin-cfg.xml
```

UNIX:
```
../webpshere/appserver/config/plugin-cfg.xml
```

Now that you have created the SSL key file for the plug-in, edit the plug-in configuration file so that it references your SSL key file.

This configuration causes the plug-in to forward HTTP requests to the HTTP port of the WebSphere Application Server and to forward HTTPS requests to the HTTPS port.

Make sure that the path of this file is specified in your Web server configuration (for example, in "httpd.conf" for IBM HTTP Server).
Chapter 8

Building and Maintaining Search Indexes

This chapter provides an overview of the search architecture and discusses how to:

- Work with indexes.
- Build record-based indexes.
- Build file system (spider) indexes.
- Build HTTP spider indexes.
- Administer search indexes.
- Build portal registry search indexes.
- Modify the VdkVgwKey key.
- Understand search index limitations.
- Understand how users search.

PeopleSoft Portal search functionality depends on two main sets of technology: PeopleSoft-built Portal technology and the Verity search engine. The end result of combining these technologies is that portal users can easily and efficiently search for any content references registered in the portal registry as well as external content included in the search index.

Understanding the Search Architecture

Searching involves two different operations:

- Creating and maintaining the search indexes, which is done by application developers and system administrators.
- Issuing queries, which is done by end users.

This discussion is intended for application developers and system administrators.

A Verity search is based on a collection, which is an index of files that can be searched quickly. There are three types of collections that PeopleSoft search supports:
• Record-based
• Web site-based
• File system-based

Each of these types of collections represents a gateway. A collection can have only one gateway. For instance, a collection can't be both record-based and website-based. A collection is either one or the other.

Documents are associated with a vdkvgwkey key, which is a user-defined string that points to the collection so that documents can be returned. If the data to be returned resides in a database, the key takes the form of SQL, and if the data is on the internet, the key takes the form of an URL. PeopleSoft applications issue search queries against the Verity API set, and when the system returns the result set, then content for each item is retrieved using the unique Verity vdkvgwkey for that document or chunk of data.

PeopleSoft enables you to build collections by scanning the content of:

• File systems (documents)
• Web sites
• PeopleSoft database records

The following illustration provides an overview of the major components of the search architecture in PeopleTools. As you can see, there are two main areas of technology—that provided by the PeopleSoft Portal and that provided by Verity. They are connected by the PeopleSoft search API. Each component is discussed in more detail in the following sections.
Components of the PeopleSoft Portal search architecture

**PeopleSoft Portal Technologies**

The PeopleSoft Portal search technology contains the following components:

- **Search Input Field.** Captures a query string entered by users in the portal header.
- **Search API.** Passes the query string captured in the search input field to the Verity search engine.
- **Portal Registry API.** Applies security to filter search results.
- **Portal Registry.** Contains a repository of content references that can be searched.
- **Search Results Page.** Formats and displays search results for the user.
- **Search Options.** Enables users to personalize search behavior and results.

**Note.** By default, PeopleSoft Search performs case-insensitive searches.

**Verity Technologies**

The basic items of the Verity architecture incorporated in the PeopleSoft Portal search architecture are:
**Verity Collection.** This is the set of files forming a search index. When a user performs a search, the search is conducted against the Verity collection. You can create and maintain your own collections with the Search Design and Search Administration PeopleTools.

**BIF File.** This is an intermediate file created in the process of building a Verity collection. The BIF file (or “bulk insert file”) is a text file used to specify the documents to be submitted to a collection. It contains a unique key, document size (in bytes), field names and values, and document location in the file system.

**XML File.** This is another intermediate file created in the process of building a Verity collection. The XML file is a text file named INPUT.XML that contains all the information from the documents that are searchable yet not returned in the results list. This information is stored in zones. Zones are specific regions of a document to which searches can be limited.

**Style Files.** These files describe a set of configuration options used to create the indexes associated with a collection.

**MKDVK.** This is Verity’s command-line tool. It is used for several tasks:

- To index a collection
- To insert new documents into a collection
- To perform simple maintenance tasks, like purging and deleting a collection
- To control indexing behavior/performance

The various pieces composing the Verity product are discussed in more detail in the following sections.

---

**Search Technology in Action**

The following illustration depicts the components involved with the search technology.
Understanding PeopleSoft Search Utilities

To create and administer search indexes for use with PeopleSoft, use the PeopleTools utilities found under the menu PeopleTools, Search Engine. The utilities enable you to administer your indexes as well as create filesystem, spider, and record-based indexes. Each of these topics is discussed in detail in the following sections.

Working with Indexes

Before we begin describing the details of the Search Design interface, this section discusses some common procedures and elements of the interface, such as how to:

- Open existing indexes.
- Create new indexes.
- Understand the controls common to each index design interface.
Search Designer Changes

Note. Consider the following items as you implement your search configuration for PeopleTools 8.4.

- Setting the Search Designer's Store Index at field has no effect on the system. The location of the collection is specified in the application server configuration file, PSAPPSRV.CFG. In a future release, PeopleSoft intends this field to be a read-only field indicating the location of the collection.

- Setting Remap Path to This URL for Filesystem indexes will have no effect. This feature has not been implemented for PeopleTools 8.4.

See Also
Specifying the Index Location
Building File System (Spider) Indexes

Opening Existing Collections

If you already built a record-based index and need to view or modify it, complete the following procedure.

To open an existing index:

1. Select PeopleTools, Search Engine.
2. From the available menus, select the type of collection you want to open, as in Record-based Indexes, Filesystem Indexes, or HTTP Spider Indexes.
3. On the Find an Existing Value tab use the Search for: drop-down list box to select the appropriate criteria: either begins with or contains.
4. In the edit box to the right, enter the character string that reflects the appropriate "begins with" or "contains" criteria.
5. Click Search.

Creating New Indexes

If you need to create custom indexes, complete the following procedure.

To create a new collection:

1. Select PeopleTools, Search Engine.
2. From the available menus, select the type of collection that you want to create, as in Record-based Indexes, Filesystem Indexes, HTTP Spider Indexes.

3. Select the Add a New Value page.

4. Enter a name for the collection.

5. Click Add.

6. Specify the appropriate attributes for your collection as described in the following sections.

7. Save your work.

   **Note.** You can’t create indexes of the same name regardless of what type they are.

8. Build the index.

---

**Understanding Common Controls**

The following controls appear on the pages used for designing Record-based, Filesystem, or HTTP Spider indexes. Read the following sections for controls that are specific to designing each type of index.

- **Index**
  Shows the name of the index you opened or the name that you gave the index on the Add New Value page.

- **Build Index**
  Invokes the collection build program. Before clicking this button, you should make sure that you have selected all of the appropriate options for your collection.

- **Test Index**
  After building an index you can click this option to test that the build program assembled it properly. The Test Index page contains a single text field with a query button. Enter text to search for in the collection and click the [?] button to submit the query. The results returned are a list of the keys stored by Verity in the collection.

- **Show Logs**
  View the log files produced by the collection build program during execution. Used mainly for troubleshooting.

- **Location of Style Files:**
  Enter the location of the of the style files used for your site.

- **Append to Verity Command Line**
  **Warning!** This control is for internal PeopleSoft use only.

---

**Supported Mime Types**

The following list contains the supported Mime types. Verity ignores any type not in this list.
type: "application/msword"

8-8      BUILDING AND MAINTAINING SEARCH INDEXES  PEOPLESOFT PROPRIETARY AND CONFIDENTIAL
Building Record-Based Indexes

In this section, we discuss how to:

- Use record indexes.
- Specify record index properties.

Understanding Record-Based Indexes

The record-based index extracts data from database tables, inserts the data into bulk submit files, which are then indexed by Verity. The individual creating the index chooses the records (tables) to be indexed.

Note. The record-based index supports only data stored in PeopleSoft databases.

Modifying Record-Based Index Properties

Select PeopleTools, Search Engine, Record-Based Indexes.
**Design a Search Index**

**Record (Table Name)**
You can enter tables, views, PeopleSoft view that contains data. If you want to combine the data from multiple PeopleSoft tables, you need to create a view on those tables and specify the name of that view here.

**WHERE clause to append**
Enables you to fine-tune the data you receive even more using a SQL WHERE clause.

**Key returned in search results**
The document returned from a search request is associated with the vdkvgwkey "key." The system uses this key to retrieve a particular document from the content source.

Use this control to edit the vdkvgwkey key, which supports an XML-like syntax enabling you to customize the tag returned by Verity.

You have the following options:
- `<pairs/>`: Inserts a string of "NAME=VALUE;". One such pair is returned for each key of the record.
- `<row/>`: Inserts the record keys in a SQL-like syntax.
- `<field fieldname='MYFIELD'/>`: Inserts the value of MYFIELD if it exists in the record.

- `<sql stmt='SQL STATEMENT'/>`: Inserts the value returned by the SQL STATEMENT. The system accepts only the first row returned, and PeopleSoft does not support SQL statements returning more than one column.

**Edit Key**

This link takes you to the page where you can change the results returned by the "Key returned in search results" functionality.

**Fields**

**How to Zone the Index**

There are two options: One Zone and Field Zones. One Zone puts all the data into one zone. With this option the collection builds more quickly but the application can't restrict searches to the portions of the index that come from a particular field. The Field Zones option creates one zone for each field on the record, and applications can specify that they want to access that particular zone in their searches.

**Field Name**

After you specify a record name, the fields in that record appear in this grid. You need to select the following options for each field in the record: Verity Field, Word Index, or Has Attachment (each option is explained in the following sections).

**Verity Field**

Verity supports the ability to flag data that's in its search input file and enables you to perform comparisons against it. Fields with this check box selected are indexed specially so that Verity returns them as fields in the query object.

**Word Index**

Enables you to eliminate data from the search result. If you wanted to eliminate some system data from the return results that you are not interested in viewing, clear this check box. This means that the data doesn't appear in the search collection and because of this the system won't search for it.

**Has attachment**

Enables you to index attachments that are referenced in the field as URIs. It is selected only if the field contains character data, as numeric fields cannot contain URLs.

To use this field, you need a record designed with this feature in mind. In the record, each row has a text field that contains a URI or an empty string.

The text must be a valid FTP URI (including the login and password string) of the following form:
• ftp://user:pass@host/path/to/filename.doc
• a valid record URI of the form record://RECORDNAME/path/to/file.doc
• A string of the form <urlid name="A_URLID"/>/path/to/file.doc.

The third form references an entry in the URL table (Utilities, Administration, URLs). If the URLID named in the name attribute is valid, the entire URI will be rewritten with the part in brackets replaced by the actual URI.

For example, if A_URLID is equal to:
ftp://anonymous:user@resumes.peoplesoft.com
the entire string in the previous example would become:
ftp://anonymous:user@resumes.peoplesoft.com/path/to/file.doc
and treated like any other FTP URI.

Rows of data with empty strings in the URI field are ignored with no error.

If the string is one of these three valid URI forms, and a document can be retrieved at that URI, the document will be indexed with the same key as the rest of the row of data and will be searchable.

To add Subrecords to the index, select the Subrecords tab, and insert the child records that you want to include in the index.

---

**Note.** Setting the Search Designer's **Store Index at** field has no effect on the system. The location of the collection is specified in the application server configuration file, PSAPPSRV.CFG. In a future release, PeopleSoft intends this field to be a read-only field indicating the location of the collection.

---

**See Also**
Specifying the Index Location

**Adding Subrecords to Search Indexes**

Select PeopleTools, Search Engine, Record-Based Indexes, Subrecords.

To index more than one record as a single document, the records must be hierarchically related. For example, the record specified on the previous page must be a parent of all the others. Formally, this means that the keys of each subrecord named must be a superset of the
keys of the parent record. The parent record is the one you specify in the Record (Table Name) field on the Primary Record page.

**To add subrecords to an index:**

1. Create and save the index definition.
2. Select PeopleTools, Search Engine, Record-Based Indexes, Subrecords.
3. Use the Add a new row button (plus sign) to insert the name of the records that is a child of the parent record defined on the Primary Record page.

On the Primary Record page, the fields of the child record will be added to the Fields Grid. When you build the index, data from the child records whose keys match the row in the parent record is included as part of the parent record. When an end user searches for data found in the child, the system returns a reference (VdkVgwKey) for the parent.

**Building File System (Spider) Indexes**

You can index file systems that are local to the application server. This refers to any file system on the physical server on which your application server domain runs, and it also refers to any drives that are accessible from the application server machine. File systems might include file servers, report repositories, and so on.

The index is compiled using spider technology. The program descends into the directory structure recursively and indexes the file types that you've selected to be indexed.

---

**Note.** It indexes only files that Verity supports for collections.

In this section, we discuss the:

- File System Options page
- What to Index page

**File System Options Page**

Select PeopleTools, Search Engine, Record-Based Indexes.
File System Options page

List local file system path to spider
Specify the network file systems that you want the spider functionality to search for documents to add to the collection. Ensure that the local application server has the proper access to the file systems you include in the list.

For Windows NT this means the drive mappings must be set up from the applications server. For UNIX this means the correct NFS mappings must be set on the application server.

To add a file system to the list, use the plus button. To remove a file system, use the minus button.

Remap Path to This URL
Note. This setting has no effect. This feature has not been implemented for PeopleTools 8.4.

What to Index Page
Select PeopleTools, Search Engine, Record-Based Indexes, What to Index.
Design a Search Index

Index: TEST
'S tore Index at: C:/TEMP/TEST
Location of Style Files: [Field]

Backslashes ($) in path will be converted to forward slashes (/)

Mime Types

- **Index all Mime-types**
- **Index only these Mime-types**
- **Exclude these Mime-types**

Mime/Types Allowed:

Filenames

- **Index all filenames**
- **Index only these filenames**
- **Exclude these filenames**

Pathname Globs List:

What to Index page

**Mime Types (Multipurpose Internet Mail Extensions)**

- **Index all Mime-types**: To index all Mime types on a website, select this option.
- **Index only these Mime-types**: If you are interested in indexing only a certain Mime type, select this option and specify the file type in the Mime Type list. Use the plus button to add an item, and use the minus button to delete an item.
- **Exclude these Mime-types**: To exclude a set of Mime types, such as temporary files, but you want to index all others, select this option and specify the Mime types to exclude.

- **Mime/Types Allowed**: Add a list of mime types separated by spaces.

**Filenames**

- **Index all filenames**: To index all file types on a website, select this option.
- **Index only these filenames**: If you are interested in indexing only a certain file type, select this option and specify the file type in the Pathname list. Use the plus button to add a pathname, and use the minus button to delete a path name.
Exclude these filenames
If you want to exclude a set of file types, such as temporary files, but you want to index all others, select this option and specify the file types to exclude.

Pathname Globs list
Add the globs that you want to incorporate into your index. Separate the entries with spaces. Globs expand wildcard characters in a path name.

Note. Setting the Search Designer's Store Index at field has no effect on the system. The location of the collection is specified in the application server configuration file, PSAPPSRV.CFG. In a future release, PeopleSoft intends this field to be a read-only field indicating the location of the collection.

See Also
Supported Mime Types
Specifying the Index Location

Building HTTP Spider Indexes

HTTP Spider indexes are similar to the indexes that the spider functionality compiles for the file system index. When using the creating a spider index on a web site, the spider program (Vspider) starts at the home page of the site and then follows each link on that page to the next level of the site. For each page at the next level, Vspider follows each link on each page. After following a link, Vspider indexes all the data on the target page.

You can specify as many web sites as you want, and you can configure the depth, or number of layers of links, that Vspider will follow into a web site and index.

In this section, we discuss the:

- HTTP Gateway page
- What to Index page

HTTP Gateway Page

Select PeopleTools, Search Engine, HTTP Spider Indexes.
Depending on the level of detail that you want to index within a certain site, you set this value accordingly. If you set this value to 1, the Vspider program starts at the homepage and then follows each link on that page and indexes all the data on the target pages. After that it stops. If you were set the value to 2, Vspider follows the links on the previous pages and indexes one more level into the website.

As you increase the number, the number of links followed increases geometrically. It is important to make sure that you do not set this value too high, as it can impact performance negatively. PeopleSoft recommends that you do not set this value to exceed 10.

You can add multiple URLs to spider. To add more to the list, use the plus button. To remove a URL from the list, use the minus button. If you forget to include the http:// (scheme) portion of the URL, the system automatically includes it.

Limits spidering to a single domain. For example, suppose that you are spidering www.peoplesoft.com and you selected this option. If a link pointed to a site outside the PeopleSoft domain (as in yahoo.com), the collection would ignore the link.

Enables you to further limit spidering within a single server. If you select this option, the collection contains references to content only on the current web server, or host. Links to content on other web servers within
PeopleSoft Internet Architecture Administration

8-18      BUILDING AND MAINTAINING SEARCH INDEXES  PEOPLESOFT PROPRIETARY AND CONFIDENTIAL

domain are ignored. For example, if you are spidering www.peoplesoft.com and you selected Stay in Host, you would be able to index documents on www.peoplesoft.com, but not on www1.peoplesoft.com.

Proxy Hostname, Proxy Port
Enables you to specify a host and port for vsfinder to use.
Enter the same settings that you would use in your web browser if you need a proxy to access the internet.

What to Index Page
Select PeopleTools, Search Engine, HTTP Spider Indexes, What to Index

HTTP Gateway  What to Index

Design a Search Index

Index: TEST
*Store Index at: C:TEMP/TEST
Location of Style Files:
Backslashes (\) in path will be converted to forward slashes (/)

Mime Types
- Index all Mime-types
- Index only these Mime-types
- Exclude these Mime-types

Mime/Types Allowed:

Filenames
- Index all filenames
- Index only these filenames
- Exclude these filenames

Pathname Globs List:

What to Index page

Mime Types (Multipurpose Internet Mail Extensions)

Index all Mime-types  To index all Mime types on a website, select this option.
Index only these Mime-types  If you are interested in indexing only a certain Mime type, select this option and specify the file type in the Mime Type list. Use the plus button to add an item, and use the minus button to delete an item.
Exclude these Mime-types  To exclude a set of Mime types, such as temporary files, but index all others, select this option and specify the Mime types to exclude.

Mime/Types Allowed  Add a list of mime types separated by spaces.

Filenames

Index all filenames  To index all file types on a website, select this option.

Index only these filenames  If you are interested in indexing only a certain file type, select this option and specify the file type in the Pathname list. Use the plus button to add a pathname, and use the minus button to delete a path name.

Exclude these filenames  To exclude a set of file types, such as temporary files, but index all others, select this option and specify the file types to exclude.

Pathname Globs List  Add the globs that you want to incorporate into your index. Separate the entries with spaces. Globs expand wildcard characters in a path name.

Note. Setting the Search Designer's Store Index at field has no effect on the system. The location of the collection is specified in the application server configuration file, PSAPPSRV.CFG. In a future release, PeopleSoft intends this field to be a read-only field indicating the location of the collection.

See Also

Supported Mime Types

Specifying the Index Location

Administering Search Indexes

After you've designed and built your search indexes, the Search Administration interface enables you to configure where the collection resides and maintain your collections. An important aspect of maintaining the collections involves scheduling PeopleSoft Process Scheduler jobs that, on a regular basis, rebuild the collection completely or incrementally update the index. Search index administration also includes deleting old indexes and building indexes to support additional languages.

In this section, we discuss how to:

- Specify the index locations
- Use the Search Index Administration page
• Use the Edit Properties page
• Use the Schedule page

Specifying the Index Location

You set the search index location at the application server level in the application server configuration file, PSAPPSRV.CFG. This enables you to specify alternate search index locations for an application server if necessary.

Note. You must manually edit the file to include the locations. You do not add search index locations using PSADMIN.

To add a search index location on the application server:

1. Open the PSAPPSRV.CFG file for the appropriate application server domain.
2. Locate the [Search Indexes] configuration section.
   For example,
   
   [Search Indexes]
   ;=========================================================================
   ; Search index settings
   ;=========================================================================
   ; Search indexes can be given alternate locations if there is an entry here.
   ; Entries look like: IndexName=fs location (ie EMPLOYEE=c:\temp)

3. Add an entry for each search index location that you want to specify for an application server using the following syntax:
   
   <Index Name>=<location>

   For example, if you wanted to specify the location for search INDEX_A and INDEX_B, your entries would look similar to the following:

   [Search Indexes]
   ;=========================================================================
   ; Search index settings
   ;=========================================================================
   ; Search indexes can be given alternate locations if there is an entry here.
   ; Entries look like: IndexName=fs location (ie EMPLOYEE=c:\temp)
   INDEX_A=c:\temp
   INDEX_B=n:\search

Note. Make sure your entries are not commented out with a semi-colon (;) appearing before them.
4. Save the PSAPPSRV.CFG file.

Note. The previous procedure assumes that you’ve already used the Search Index Designer to define, build, and store the search indexes you specify in the PSAPPSRV.CFG file.

Search Index Administration Page

Select PeopleTools, Search Engine, Administration.

<table>
<thead>
<tr>
<th>Defined Search Indexes</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Index</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Store Index at</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Edit Properties</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Schedule</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Index

Shows the name of the index so that you can identify specific indexes. To select a particular index, select the check box to the left of the index name.

Store Index at

Shows the current location of the index.

Edit Properties

Click this link to go to the interface for changing the index location and to build indexes to support additional languages.

Schedule

Click this link to go to the interface for scheduling the program that maintains your collection.

Delete checked Indexes

If you have selected indexes to be deleted, click this button to remove them from the system. The delete process deletes the index definition and the collections stored in the file system.

Edit Properties Page

Select PeopleTools, Search Engine, Administration, Edit Properties.
Modifying index properties

**Where to store Index**

Enables you to specify custom locations for your collections if you decide to move them to another location within your system.

**Language Code**

Select the language for which you want to build an index.

**Language to Map**

Currently disabled.

**Build**

After you've added the additional indexes you want, click Build to create the indexes.

### Schedule Page

Select PeopleTools, Search Engine, Administration, Schedule.

In PeopleSoft Process Scheduler you define Run Recurrence definitions that enable you to schedule jobs to run at regular intervals, such as monthly, weekly, daily, and so on. Keep in mind that the more current you keep your collections, the more accurate your search results will be.
Type of Build

- **Rebuild**: Drops the existing collection and rebuilds a new collection. This applies to all types of collections.

- **Increment**: Applies only to the record collection indexes. When using the Vspider capabilities for the Filesystem Gateway and HTTP Gateway, incremental updates occur automatically.

For record collections, this enables you to run the build program at regularly scheduled intervals and when it runs it updates the collection to include only data that has changed.

**Run Recurrence Name**
Select the appropriate Run Recurrence definition for your collection maintenance requirements.

**Server Name**
Specify the Process Scheduler server on which you want the build program to run. Your PeopleSoft Process Scheduler system needs to be installed and configured before you can schedule the collection build program to run as a job.

---

**Building Portal Registry Search Indexes**

To enable accurate, high-performance searches through the portal, the search engine must reference a comprehensive, up-to-date search index. Furthermore, to be useful, the search index must be easy to create and maintain, as content is likely to change frequently within the portal registry.

**Note.** There currently is no method to index documents other than content references within the portal registry.

---

**Building a Search Index for a Portal Application**

If you want to build a search index for a portal application, the process is fairly easy because data in the portal registry is already in a known format, which can be used to build the search index. Essentially, you just select to build the index from the Portal Administration pages, and the index gets built. Of course, there are number of steps that take place to build the index. But because the data is a known format, a number of PeopleSoft processes can take the manual work out of building the Verity index.

When you select to build a search index from the Portal Administration pages, an Application Engine program calls a C++ program that reads from the portal registry. The C++ program then generates the bulk insert files, which MKDVK takes as input to creating the search index. The following illustration below represents this process.
Building a search index from the Build Search Index page in Portal Administration

The following procedure leads you through the exact steps required to build the search index from the Portal Administration pages.

**Note.** Each time you build the search index you are overwriting the existing search index.

### To build a search index:

1. Select PeopleTools Portal, Build Registry Search Index.
   
   The Build Search Index appears.

2. Select whether to build the search index for **All Installed Languages** or not.
   
   The default is to *not* build the index for all installed languages. Change this setting if necessary.

3. Select the **Language Code** for which you want to build the search index.
   
   The language code defaults to the base language.

4. Click **Run** to launch the build process.
   
   When you click Run, PeopleSoft Process Scheduler initiates an Application Engine program named PORTAL_INDEX. You can click the **Process Monitor** hyperlink to view the status of the index build, and you can click **Report Monitor** to review output (if any).
Modifying the VdkVgwKey Key

To make the VdkVgwKey more readable and easier to parse, use the following XML-like syntax:

```xml
<field fieldname='MYFIELD'/>
<row/>
<pairs/>
<sql stmt="SELECT 'Y' FROM PS_INSTALLATION"/>
```

- Fieldname and the SQL statement support single and double quotes, as well as no quotes at all (in which case only the first word is considered part of the option). Using double quotes for the SQL statement is recommended.
- The SQL statement must return only one column. Multiple rows are ignored. Trying to return more than one column results in a collection-build-time error.
- Currently the only tag style supported is `<tag/>` with the `/ (slash) at the end.
- The VdkVgwKey can include any amount of literal text interspersed with the tags. This will be copied into the VdkVgwKey that goes into the BIF file, unmodified.
- Fieldnames are automatically set in uppercase.

Understanding Search Index Limitations

The following list presents the PeopleSoft search limitations.

- Verity does not run on IBM OS/390.
- Verity collections must reside on the PeopleSoft application server or be accessible from it through a shared drive. This can take different forms depending on your Application Server’s operating system. On NT, this could be a network drive. On UNIX, this could be an NFS-mounted drive.
- PeopleSoft recommends that you do not exceed a maximum of one million documents within a collection.
- Verity collections are most efficient if you index large groups of data, rather than indexing one or two documents at a time. Small updates degrade the index and require that you run the Verity cleanup utility.
- You can have only one language per collection.

Understanding How Users Search

A user submits a search request by entering a search string into the search input form field in the portal header. The `<form action=...>` in the portal header is generated at runtime to link to a PIA page, and a Java script submits the form. The query string is passed to the Search API
as a parameter named PortalSearchQuery to find matching results. Those results are filtered for security through PeopleCode by the Portal Registry API. The search results page echoes the original query string, and displays a list of content references that match the request. If the user clicks the Go! button but does not enter a search query, the search results page displays without any results.

The search results page performs the following steps:

- **Changes the case of the entered text to all uppercase characters.** By default, the Verity search engine searches for all mixed-case variations when a query string is entered in all lowercase or in all uppercase. However, search queries entered in mixed-case automatically become case-sensitive. (For example, a query on *Apple* behaves as if the user had specified *Apple*—which would find only the precise string *Apple*—while a query on *apple* finds *APPLE*, *Apple*, and *apple*.) But the portal makes one important change: It changes the case of the query string to all uppercase, prohibiting users from truly executing case-sensitive searches. This avoids situations where mixed-case searches would otherwise return no results. On the search results page, however, the original case is echoed back to the user.

- **Formats the query string to pass to the Search API.** This includes filtering out expired and hidden content references, and content references that are not valid yet.

- **Calls the Search API.** This returns the query results.

- **Calls the Portal Registry API.** This is done to apply security filtering to the results. Security is applied in PeopleCode by checking the “Authorized” property.

- **Formats and displays search results.** This completes the user’s search request.
CHAPTER 9

Administration Considerations

This chapter discusses additional topics that may be of interest to application server administrators. It explains how to:

- Set up the PeopleCode Debugger
- Use the System Information page
- Set up Jolt Internet Relay

Setting up the PeopleCode Debugger

You can debug your PeopleCode programs in the following configurations:

- Two-tier connection to the database
- Three-tier connection to the database

**Note.** PeopleCode debugging is not supported on OS/390.

The following sections describe how to configure debugging for each configuration option.

Setting up PeopleCode Debugging for a Two-Tier Connection

Debugging in two-tier connections involves connecting directly to the database, not through the application server. Use this method to debug two-tier Windows applications.

**Note.** By default, the port number used by the PeopleCode debugger is 9500. Unless this port number is being used by another application, you *do not* need to alter any environment settings, and after you signon to the database, you are able to debug PeopleCode.

If you need to change the PeopleCode Debugger port settings, complete the following procedure.

**To change the default PSDBGSRV listener port number:**

1. Open PeopleSoft Configuration Manager.
2. Select the Trace tab.

3. Locate the PeopleCode Debugger section, and make sure that the default value for the **Local PSDBGSRV Listener Port** is suitable for your system.

   For example, make sure that no other applications are configured to listen on the default port number (9500). If so, you must assign a port number that is not being used.

---

### Setting up Debugging for a Three-Tier Connection

Use three-tier debugging to debug three-tier Windows applications and PIA applications. For three-tier debugging, use PSADMIN to make sure that the following items are set.

- The appropriate PSDBGSRV Listener Port is specified in the PeopleCode Debugger section of PSADMIN.
- At least two PSAPPSRV processes configured to boot in the domain with the Service Timeout parameter set to 0 (zero).
- You indicate **y** for Yes at the "Enable PSDBGSRV Server Process" prompt at the end of the PSADMIN interface.

You set these parameters as you configure or create a domain.

---

### Setting the PSDBGSRV Listener Port

In the PeopleCode Debugger section of PSADMIN make sure that the value assigned to the PSDBGSRV Listener Port is not already in use by another application or listener on the application server. The default value is 9500. If the default is not acceptable, assign a suitable value to the parameter. If it is acceptable, **no** changes are required.

For example,

```
Values for config section - PeopleCode Debugger
    PSDBGSRV Listener Port=9500
```

Do you want to change any values (**y/n**) ? [n]:

Consider the following when debugging PeopleCode:

- If multiple application server domains are running on a single, physical machine, each domain needs to use different debugging port numbers. Otherwise, there is contention for the PSDBGSRV Listener Port value. This is the same principle that requires each application server domain on a server to have unique workstation listener port numbers.

- When you are not debugging, the Enable Debugging parameter should be turned off (set to 0). The debugging mode results in an unavoidable amount of overhead, which can degrade performance.
• Regarding performance, you should not perform debugging on a production domain. Debugging should be performed on a designated testing domain only.

**Enabling Multiple PSAPPSRV Server Processes**

The minimum requirements for PeopleCode debugging are:

• Two (2) PSAPPSRV server processes configured to boot in the domain.

• The Service Timeout value in the PSAPPSRV configuration section must be set to zero (0).

For the debugger to work, it has to run in parallel with the application it’s debugging. Suppose your domain only has one PSAPPSRV server process running. In this case, the PSAPPSRV can process the requests of only one component at a time, and therefore debugging is not possible. Debugging involves two items, the debugger (PSDBGSRV) and the PSAPPSRV server process running the application PeopleCode.

Provided that you have two PSAPPSRV server processes configured, one PSAPPSRV handles the debugger program while the other handles the application you’re stepping through with the debugger. In this case, the two programs run in parallel, which enables interactive debugging.

The configuration templates that PeopleSoft delivers all have at least two PSAPPSRV processes. However, if you are using a custom template, make sure you configure the domain to start two PSAPPSRV processes prior to debugging. To do this, in PSADMIN set the Min Instances parameter in the PSAPPSRV section to 2.

You must set the Service Timeout parameter for PSAPPSRV to zero. Disabling service timeouts prevents the application server processes from timing out if you stop at a particular point in your program while debugging.

The following example shows a sample PSAPPSRV section properly configured for debugging PeopleCode:

```
Values for config section - PSAPPSRV
  Min Instances=2
  Max Instances=2
  Service Timeout=0
  Recycle Count=0
  Allowed Consec Service Failures=0
  Max Fetch Size=5000

Do you want to change any values (y/n)? [n]:
```

When configuring the PeopleCode debugger:

• PeopleSoft recommends using the "Developer" configuration template because this template, by default, provides two PSAPPSRV server processes and has Service Timeout set to zero.
PeopleSoft recommends using a simple configuration where you are assured that the server that PeopleSoft Application Designer connects to is the same server that the application you are debugging is running on.

**Important.** If you do not have the settings for PSAPPSRV set correctly (at least two PSAPPSRV processes with the Service Timeout value set to 0 (zero)), PSADMIN automatically sets these values to comply with the minimum requirements when you enable PeopleCode Debugging (as discussed in the next section).

**Requesting a PSDBGSRV Server Process**

After you have specified your settings using PSADMIN the system prompts you with a series of options, such as setting up messaging server processes, enabling Jolt, and so on.

When prompted to enable the PSDBGSRV, enter `y` to indicate Yes. The Developer template defaults to `y`.

```
Do you want to enable PeopleCode Debugging (PSDBGSRV) (y/n)? [n]:y
```

**Using the PeopleCode Debugger**

After the system is configured properly, using the PeopleCode debugger is just a matter of signing onto the PeopleSoft system and entering the PeopleCode Debugger Mode in Application Designer.

**Warning!** You must use a unique user ID when performing PeopleCode debugging as opposed to using a shared user ID such as those delivered by PeopleSoft like QEDMO, PS, or VP1. Shared ID's are likely to be used by others connecting to the same test database, which can affect debugging.

**See Also**

*PeopleTools PeopleBooks: PeopleCode Developer’s Guide*, Debugging Your Application

**System Information Page**

With the combination of accessing PeopleSoft applications with a browser, single-signon between databases, and the PeopleSoft Portal, users and system administrators need a quick tool to provide orientation information and information regarding the current environment. For this reason, PeopleSoft provides the system information page.
Overview

With single-signon and the portal, it may not be apparent to all end users just exactly what database or application they are currently accessing. Viewing environment information can help end users orient themselves.

In most cases, the administrators use the system help page to aid in troubleshooting. If a user is having trouble accessing a particular application, the system administrator can instruct the user to provide the system information displayed in the help page so that the administrator can immediately identify the current application server, database, software version, operating system, and so on.

Viewing the System Information Page

To view the system information help page you press the CTRL+J hotkey while a PeopleSoft page is active. The following example illustrates the type of information that appears.

<table>
<thead>
<tr>
<th>Browser</th>
<th>IE/5.01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating System</td>
<td>WINNT</td>
</tr>
<tr>
<td>Browser Compression</td>
<td>ON (gzip)</td>
</tr>
<tr>
<td>Tools Release</td>
<td>8.40-I82</td>
</tr>
<tr>
<td>Application Release</td>
<td>PeopleTools 8.14.00.001</td>
</tr>
<tr>
<td>Service Pack</td>
<td>0</td>
</tr>
<tr>
<td>Page</td>
<td>ACL_GENERAL</td>
</tr>
<tr>
<td>Component</td>
<td>ACCESS_CNTRL_LISTX</td>
</tr>
<tr>
<td>Menu</td>
<td>MAINTAIN_SECURITY</td>
</tr>
<tr>
<td>User ID</td>
<td>QEDMO</td>
</tr>
<tr>
<td>Database Name</td>
<td>QE840IB2</td>
</tr>
<tr>
<td>Database Type</td>
<td>MICROSOFT</td>
</tr>
<tr>
<td>Application Server</td>
<td>//MLEE.2021800:7000</td>
</tr>
</tbody>
</table>

To return to the previous page, click continue.

The following table briefly describes each item.
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browser</td>
<td>The browser version and type, as in Internet Explorer or Netscape.</td>
</tr>
<tr>
<td>Operating System</td>
<td>The operating system running on the computer on which the browser is running. For example, this refers to the operating system of the end user's workstation or the operating system running on a kiosk machine. It does not refer to the operating system running on the application server, web server, or database server.</td>
</tr>
<tr>
<td>Browser Compression</td>
<td>Indicates if browser compression is enabled in the configuration.properties file.</td>
</tr>
<tr>
<td></td>
<td>• <strong>ON</strong> means flag is ON in the web server configuration and the page is compressed. Either (gzip/zip) is the type of compression.</td>
</tr>
<tr>
<td></td>
<td>• <strong>OFF</strong> means the page is not compressed due to the flag being set to OFF in the web server configuration.</td>
</tr>
<tr>
<td></td>
<td>• <strong>OFF (not supported)</strong> means the page is not compressed due to the browser not supporting compression, however the flag is turned ON in web server configuration.</td>
</tr>
<tr>
<td>Tools Release</td>
<td>The version of PeopleTools that is currently installed at your site. For example, PeopleTools 8.4, 8.40.01, and so on.</td>
</tr>
<tr>
<td>Application Release</td>
<td>The version of PeopleSoft applications currently installed at your site.</td>
</tr>
<tr>
<td>Service Pack</td>
<td>Typically, updates to PeopleSoft applications arrive in the form of a Service Pack. This item shows the current Service Pack applied to your applications.</td>
</tr>
<tr>
<td>Page</td>
<td>The current page that the user is accessing.</td>
</tr>
<tr>
<td>Component</td>
<td>The component to which the current page belongs.</td>
</tr>
<tr>
<td>Menu</td>
<td>The name of the menu under which the component appears.</td>
</tr>
<tr>
<td>User ID</td>
<td>The user ID of the currently user accessing PeopleSoft.</td>
</tr>
<tr>
<td>Database Name</td>
<td>The name of the database that the user is currently performing a transaction in.</td>
</tr>
<tr>
<td>Database Type</td>
<td>The type of the current database, as in Microsoft, Oracle, DB2, and so on.</td>
</tr>
<tr>
<td>Application Server</td>
<td>The DNS name or IP Address and the JSL port number.</td>
</tr>
</tbody>
</table>

Depending on your site's policy, you may not want the User ID, Database Name, Database Type, or Application Server information readily available. You use the Connectioninformation parameter in the configuration.properties file on the web server to determine what appears when a user or administrator presses CTRL+J.

If Connectioninformation is set to true, as in

```
Connectioninformation=true
```
then all information appears in the system help page. Alternatively, if you set this parameter to false, the User ID, Database Name, Type, and Application Server name do not appear in the help page.

See Also
configuration.properties

Setting Up Jolt Internet Relay

Note. Jolt Internet Relay and Jolt Relay Adapter are products used in previous PeopleSoft releases. They do not necessarily apply to the PeopleSoft Internet Architecture.

Jolt Internet Relay (JRLY) is a BEA product that is required for Web Client connections to an application server only in cases where the web server—containing PeopleSoft HTML and applets—is on a separate machine than the application server. If the web server is on the same machine as the application server, JRLY is not required. PeopleSoft allows configurations where the web server and application server are on the same or separate machines.

Overview

Jolt Internet Relay consists of two components: Jolt Relay and Jolt Relay Adapter. It is important that you understand the difference between these two components.

Jolt Relay (JRLY) consists of a standalone program and configuration file that runs on the same machine as the web server. JRLY receives Jolt messages from a PeopleSoft Web Client and routes those messages to the Jolt Relay Adapter on the application server. It receives the Jolt message through one port—the LISTEN port—and connects to the JRAD using another port—the CONNECT port. JRLY is sometimes referred to as a “Front-End Relay”.

Jolt Relay Adapter (JRAD) runs on the same machine as the application server. It is configured automatically on the application server domain as part of PeopleSoft’s PSADMIN domain configuration procedure. JRAD listens for JRLY messages on its LISTENER port and transfers the message to the JSL or JSH. JRAD is sometimes referred to as a “Back-End Relay”.

The following example illustrates the relationship between the components and, most importantly, their respective port numbers. When you are configuring the Jolt Internet Relay system, it is very important to make sure that you specify the correct port numbers through which each component receives messages and to which port number they send messages. Any inconsistency will result in a failed connection.
Note. Using Jolt Internet Relay is intended for use with the Web Client (an internet solution from previous releases), however, you can also use it with PIA. Using Jolt Relay with PIA is not recommended for performance reasons. For use with PIA, you must specify that the page servlet connect to the JRLY Listener port on the web server as opposed to specifying the JSL on the application server.

Jolt Internet Relay port numbers

In the example, assume that the web server and the application server reside on separate machines. The following list describes what takes place within each numbered step.

1. When the Web Client connects to a URL, PeopleSoft HTML and Java applets will be downloaded to the supported browser. Contained in the downloaded HTML is the port number used to connect to Jolt—in this case 9000.

2. After downloading the HTML, the Web Client reconnects to port 9000 on the web server machine. Port 9000 reflects the JRLY Listener. The JRLY Listener passes the Java message to the JRRLY Connect process. For security reasons, the Web Client must always reconnect to the same machine from which it downloads the HTML. Keep in mind that the Web Client reconnects only to the same machine—not to the web server process on the machine.

3. The JRRLY Connect process uses the machine IP Address and port number to connect to the Jolt Relay Adapter (JRAD) process on the application server machine.

4. JRAD passes the request on to the Jolt Station Listener, which initiates the transaction. The return message to the Web Client follows the same path in reverse.

When you implement Jolt Internet Relay, the JRRLY Listener must match the port number specified in the downloaded HTML. However, the Jolt Listener port on the application server may or may not match the port number specified in the HTML. For instance, in our example the JRRLY Listener must be set to 9000 to match the port number specified in the HTML, but
the JSL on the application server is set to 9020. The JSL could also be set to 9000 or any other valid port number. On the other hand, when the web server and application server are on the same machine and JRLY is not required, the JSL on the application server machine must match the port number specified in the downloaded HTML.

Note. A firewall may separate (and probably does in most cases) the web server and the application server.

Remember that if you are planning to support Web Clients connecting through JRLY and Web Clients connecting directly to the JSL on the application server, the JRLY Listen port must equal the JSL port.

Summary:

- The JRLY Listener must match the port number specified in the HTML.
- JRLY Connect must match the JRAD Listener.
- JRAD Connect is set automatically by PeopleSoft to connect to the JSL.

**Installing Jolt Internet Relay (JRLY)**

This section contains the instructions for installing Jolt Internet Relay on UNIX and Windows NT. JRLY can connect to JRAD installed on any supported application server platform. For information about the platforms on which JRLY is supported (by BEA), refer to BEA support documentation.

**To install JRLY on UNIX:**

1. Log in as root, and create the UNIX group and the user-name of the individual who will be the owner of Jolt Relay.

   Depending on your operating system, the utility you use to create user and group will be different. For example, HP-UX uses the sam utility, AIX uses the smit utility, and so on. For the exact utility you should use, refer to your operating system documentation.

2. Insert the CD-ROM into the CD-ROM drive, and mount the CD-ROM from the root login.

3. List the root directory on the CD-ROM.

4. Log in as the Tuxedo administrator.

   You should no longer be logged on as root.

5. List the root directory on the CD-ROM, and change to the /jrelay directory.

6. Execute the shell script, install.sh.

   install.sh
7. You are prompted for the following values for the installation of the Jolt Front-End product; enter the appropriate response for your site.
   - You may install Jolt Front-End into any directory you choose.
   - Select 1 to install BEA Jolt (it is your only choice).
   - Select the menu option corresponding to your operating system and release. For example:
     
     \[ 03= ibm/aix421/6.4 \]
   - Select 4 to install the Jolt Relay Front-End product.

8. Following the installation, examine the Jolt Relay installation directory.

   Note that in \(<joltrelay>/relay\), the following two files were installed: jrly.config and jrly. These are the only two files used in configuring and starting Jolt Relay and are discussed in the next section.

   **To install JRLY on Windows NT:**

   1. Insert the CD-ROM into the CD-ROM drive.
   2. Using Windows Explorer, navigate to the CD-ROM directory
   3. Change directory to Jrelay\winnt and execute setup.exe
4. The installation program presents you with a series of dialog boxes, and, for the most part, they are intuitive, however make sure you make note of the following items:

- On the BEA Jolt User Registration dialog box enter the appropriate information for your site.

- On the Jolt Installation Selection dialog box, select the **Jolt Relay Front-End** check box and clear all the other check boxes. Also, use the **Browse** button to specify the desired installation directory.
When the installation program completes you should see the following message:

5. Using Windows Explorer, examine the Jolt Relay installation directory.

Note that in `<joltrelay>\udataobj\jolt\relay`, the following two files were installed: `jrly.config` and `jrly.exe`. These are the only two files used in configuring and starting Jolt Relay and are discussed in the following section.
Configuring Jolt Relay (Front-End) on UNIX or Windows NT

Configuring Jolt Relay is identical on UNIX and Windows NT.

To configure Jolt Relay:

1. Go to `<joltrelay>`\relay and open JRLY.CONFIG using one of the following editors.
   - On UNIX edit the configuration file using VI or an equivalent editor.
   - One Windows NT, you must edit the configuration file using write.exe (WordPad).
     Notepad and other editors will not format the file correctly.

2. Modify the parameters in the configuration file to reflect your site specifications.
   Use the following table for guidance.
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOGDIR=/tmp</td>
<td>LOGDIR is the directory where JRLY will create access and error log files. This directory must exist—the JRLY program will not start if it cannot find this directory. The path specified for LOGDIR should be an absolute path (starting from / on UNIX systems, starting from &lt;DRIVE&gt;: on Windows NT systems). The JRLY will accept relative path names but then the LOGDIR will be relative to the directory from which the JRLY program is started.</td>
</tr>
<tr>
<td>ACCESS_LOG=JRLY_access_log</td>
<td>ACCESS_LOG is the file name where JRLY records access information. This file will be created in $LOGDIR. If the file already exists the most recent information will be appended to it. This can be any valid file name. Everything after the equal sign (=) to the end of the line is treated as the file name, so an entry of ACCESS_LOG=&quot;access log&quot; would create a file named &quot;access log&quot; (including the double quotes). Leading and trailing blanks are ignored after the equals sign (=). So an entry of ACCESS_LOG= access_log would create a file named access_log (without the double quotes). If the JRLY program cannot create the ACCESS_LOG file or open it for appending, the program will exit.</td>
</tr>
<tr>
<td>ERROR_LOG=JRLY_error_log</td>
<td>ERROR_LOG is the file where JRLY records error information. This file follows all the rules that apply to the ACCESS_LOG parameter. JRLY_error_log will be created in /tmp.</td>
</tr>
<tr>
<td>LISTEN=sp-ibm02:9000</td>
<td>The LISTEN key word specifies the host and port on the current machine (that is, the machine where you are installing Jolt Relay). JRLY will listen for client connections. The following formats are acceptable: LISTEN=192.9.100.100:9000 LISTEN=/192.9.100.100:9000 LISTEN=sp-ibm02:9000 LISTEN=/sp-ibm02:9000 Specify the port number in decimal; it must match the port number specified in the HTML. If a machine has multiple network interfaces, you should use the IP Address notation, because specifying the hostname could be ambiguous (OS dependent result). If the JRLY program cannot establish a network listening end-point at the host:port specified, it will print an error and exit. (The hostname specified for LISTEN must be the name of the host on which the program is running)</td>
</tr>
</tbody>
</table>
### Parameter Description

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| CONNECT=192.9.100.100:9100 | The CONNECT key word specifies the location of the Jolt Relay Adapter (JRAD) machine and process port on the application server machine to which the JRLY program connects. A JRLY communicates only with a single JRAD. The address specified in the JRLY connect parameter must match the JRAD listener address on the application server machine. (Check the PSAPPSRV.CFG file in <PS_HOME>/appserv/<domain> directory.) The JRAD does not have to be running when the JRLY is started. The JRLY will attempt to connect to the JRAD when it first starts, and if the JRAD is not available, the JRLY will try again whenever a new client connects to the JRLY. You can use the following format:  
CONNECT=192.9.100.100:9100  
CONNECT=/207.135.44.91:9105  
CONNECT=sp-hp06:9105  
CONNECT=/sp-hp06:9105  
PeopleSoft has found that formats are operating system and environment dependent. If one fails to connect to the application server, try another format. |

### Configuring Jolt Relay Adapter (JRAD)

Jolt Relay’s Connect port will connect to Jolt Relay Adapter’s Listener Port specified on the application server machine. JRAD then routes the message to Jolt—either the JSL for initial connection from a web client or to the JSH for all subsequent connections from a web client. The return message will follow the same path in reverse.

**Note.** Jolt Relay’s Connect port must match JRAD’s Listener port.

**To configure JRAD:**

1. Launch PSADMIN, and navigate to the PeopleSoft Domain Administration menu and select 4) **Configure this domain.**

2. Follow the prompts until you reach the Jolt Relay Adapter section.

   Values for config section - JOLT Relay Adapter  
   
   Listener Address=%PS_MACH%  
   Listener Port=9100  

   Do you want to change any values (y/n)? [n]:
3. Enter the appropriate port number for the Listener Port.

   **Note.** The Listener Port must match the Jolt Relay Connect port.

4. Later in the series of PSADMIN prompts you must specify that you want JRAD configured; enter *y* to do so.

   Do you want JRAD configured (y/n)? [n]: y

   You must specify YES to this prompt if you plan to implement JRAD. This will start the JRAD Listener service each time you boot the application server. Even if you manually edit the PSAPPSRV.CFG file, you still need to launch PSADMIN, specify that you do not want to make any changes to the configuration parameters, and enter *y* at this prompt.

---

### Starting Jolt Relay

To start Jolt Relay follow the appropriate procedure for your operating system.

#### To start Jolt Relay on Windows NT:

1. Change directories to the Jolt Relay directory.
   ```
   cd \apps\jrelay
   ```

2. Enter the following command:
   ```
   JRLY.EXE -f JRLY.CONFIG
   ```

#### To start Jolt Relay on UNIX:

1. Change directories to the Jolt Relay directory
   ```
   cd /apps/jrelay
   ```

2. Enter the following command:
   ```
   jrly -f jrly.config &
   ```

   **Note.** The & causes JRLY to run in the background.

---

### Stopping Jolt Relay

To shutdown Jolt Relay on UNIX, use the UNIX kill -9 command.

To shutdown Jolt Relay on Windows NT, use Task Manager.
Jolt Relay Notes

The following list provides additional information to keep in mind as you configure your Jolt Internet Relay components.

- **JRLY.EXE** and its corresponding JRLY.CONFIG file must exist in the same directory. To start multiple Jolt Relays on a machine, copy JRLY.EXE and JRLY.CONFIG into each subdirectory, modify the parameters in the JRLY.CONFIG file, and start Jolt Relay.

- You can start the JRLY process before or after you start JRAD. The JRLY will attempt to connect to JRAD on the client request. If the JRLY is unable to connect to the JRAD, the client is denied access and disconnected.

- If you are installing Jolt Relay on UNIX and anticipate a large number of concurrent connected clients, PeopleSoft recommends increasing the file descriptors limit before running the JRLY executable.

- At runtime, if you get the following message:


  PeopleSoft recommends that you increase the MaxUSERS kernel parameter and regenerate the kernel.

- If you are unable to connect, make sure that you check the following items:
  - Port numbers do not match. Print out the JRLY.CFG file and the PSAPPSRV.CFG file and compare the port numbers you have specified.
  - Make sure the application server is running.
  - Make sure JRLY is running.
  - Make sure the port numbers in the HTML are correct.

Make sure that JRAD is running on the application server and that in the PSADMIN interface you have opted to configure JRAD.
The terms in this glossary are used among multiple Financials and Supply Chain Management applications.

Numbers

401(a)(17) Limits
The limitations on the earnings that may be included in the calculation of benefits under qualified U.S. pension plans.

1st Year Amount
In PeopleSoft Workforce Analytics, 1st Year Amount is an employee-level compensation amount, totaling the calculations for the first calendar year’s worth of accounting periods, in a compensation scenario.

A

Abend
Abnormal End (to a process).

ABM (Activity-Based Management)
See PeopleSoft Activity-Based Management.

ABPS (Activity-Based Planning and Simulation)
See Activity-Based Planning and Simulation.

Absence
An absence occurs when an employee is not at work (absent) during a normally scheduled work period. Absences may be scheduled or non-scheduled, compensated or uncompensated, excused or unexcused. An absence may occur for a variety of reasons like illness, family emergency, civic obligations (e.g. Military duty or jury duty), or vacation.
**Absence Entitlement**
Element which defines the rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

**Absence Take**
Element which defines the conditions that must be met before a payee is entitled to take paid time off.

**Accepted Exception**
An exception that has been reviewed and validated (see Time Management).

**Accommodations**
Accommodations are efforts your organization is able to make for employees or applicants with disabilities, such as purchasing special equipment or making structural changes to a work environment.

**Account Management**
In PeopleSoft Demand Planning, a feature that enables you to divide a centrally held corporate forecast into multiple subsections for easier maintenance and management. These subsections are separate databases that can be distributed to account managers for use and updates, then rejoined with the main database at a later date.

**Account**
A code for recording and summarizing financial transactions as expenditures, revenues, assets, or liabilities balances. This is a delivered PeopleSoft ChartField, specific use of which is typically defined by the organization during implementation of PeopleSoft General Ledger.

**Account Type**
A name for one of the different kinds of accounts used in a PeopleSoft General Ledger, such as Asset, Liability, Equity, Revenue, and Expense.

**Accounting Class**
In PeopleSoft Enterprise Performance Management, an attribute that defines how the particular resource would be treated for generally accepted accounting practices. Inventory denotes whether a Resource will become part of a balance sheet account such as inventory or fixed assets, while Non-inventory denotes that the Resource will be treated as an expense of the period during which it occurs.

**Accounting Date**
The date that a transaction is recognized as opposed to the date the transaction actually occurred—the **Transaction Date** (although the two dates can be the same). The accounting date determines the period in the general ledger to which the transaction is to be posted. You
can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date. In PeopleSoft Asset Management, the difference between accounting date and transaction date determines whether prior period depreciation must be calculated, and how much. Accounting Date must be later than or equal to Transaction Date.

**Accounting Entry**

A set of related debits and credits. An Accounting Entry is made up of multiple *Accounting Lines*. In most PeopleSoft applications, accounting entries are always balanced (debits = credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in general ledger, and so forth (depending on the application).

**Accounting Entry Template**

A user-defined table that controls the use of system-generated accounting lines in the posting processes.

**Accounting Split**

Method indicating how expenses are allocated or divided among one or more sets of accounting ChartFields.

**Accredited Education**

Education above the high school level completed in a U.S. college, university, or other educational institution that has been credited by one of the accrediting agencies or associations recognized by the Secretary, U.S. Department of Education.

**Accrual**

Any hours that employees accumulate for use at another time in the form of earned vacation time or sick leave, for example.

**Accrual Basis Accounting**

Accounting that records the impact of a business event as it occurs, regardless of whether the transaction affected cash.

**Accrual Class Codes**

Classes or categories of accruals.

**Accrual Type**

Defines an accrual such as annual leave or sick leave.
**Accumulate Demand**
In PeopleSoft Demand Planning, a transfer process function that adds demand quantities for an item to any quantities that already exist for the period.

**Accumulator**
Element which allows you to combine several elements. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated. See also Time Administration.

**Accumulator [Global Payroll]**
Element which provides a means for storing the cumulative values of defined items as they are processed. As you make payments, take deductions, and perform calculations, you’ll use accumulators to track accumulated amounts, or balances. You can accumulate a single value over time or multiple values over time, as your requirements specify. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

**Action**
In PeopleSoft Deduction Management, a task that you perform to obtain information required to resolve a deduction.

**Action and Conditions**
A process that defines actions and conditions independently of one another and then combines them to create a complete rule (see Rule Creation).

**Action Code**
In PeopleSoft Engineering, a user-defined code associated with an event/action triggered by the implementation of an engineering change order (ECO). Actions could include analyzing an item's existing quantity on hand, scrapping existing inventory, or modifying current documentation.

In PeopleSoft Product Configurator, a 2-character code that identifies rule types. For example, $FP$ is the action code for the Finalize Price rule, and $CN$ is the action code for the Condition rule. The rules control the processing path for configured items.

**Action List**
An online list of customers who meet predefined credit management criteria. The list also includes appropriate procedures for each action and contact information for the customer.

**Action Owner**
In PeopleSoft Deduction Management, the individual assigned a task to obtain information to resolve a deduction.
**Action Reason**

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

**Active Control**

A target control requiring that the user validate the budget against the planning targets before submitting it. If the budget totals are not within the tolerance levels, the system indicates that the status is invalid and the user cannot submit their budget until the budget is modified and the amount is within the tolerance range of the planning target.

**Activity**

In PeopleSoft Receivables and Deduction Management, an action taken on an item, such as creating an item, unposting an item, or writing off an item.

In PeopleSoft Projects, the unit of work that provides a further breakdown of projects—usually into specific tasks. Resources are assigned directly to activities within a project, not directly to projects.

A self-contained task that is part of one or more business processes. Business process maps display the activities that make up the process. An activity consists of steps representing the pages the user needs to complete and events representing the workflow routings triggered by the user's actions.

In PeopleSoft Enterprise Warehouse, the work of an organization and the aggregation of actions used for Activity-Based Costing.

**Activity Attributes**

Activity Attributes provide pieces of activity information. For example: capacity and performance, cost drivers, cycle time and performance measures.

**Activity-Based Costing (ABC)**

A methodology that measures the cost and performance of activities, resources and cost objects, assigns resources to activities and activities to cost objects based on their use and recognizes the causal relationships of cost drivers to activities.

**Activity-Based Management (ABM)**

*See* PeopleSoft Activity-Based Management (ABM).

**Activity-Based Planning and Simulation (ABPS)**

ABPS, a feature of PeopleSoft Activity-Based Management, calculates resource demands, new rates, costs, and activity volumes based on demand forecasts. It converts the new
resource demands into new cost requirements at the General Ledger item level to feed as input for budgeting.

**Activity Driver**
An Activity Driver indicates the amount of demand there is for a particular activity and it is used to assign cost to cost objects. In some instances, an activity driver may represent the yield of an activity.

**Activity Fragmentation**
The part of the Employee Profile feature that provides information about the number of employees that is involved in completing a particular activity on a full or part-time basis.

**Activity ID**
A unique 15-character alphanumeric identifier given to each activity within a project. Activity IDs need only be unique within a single project.

**Activity List**
In PeopleSoft Pension Administration, a checklist used to monitor pension-related activities.

**Activity Type**
A user-definable identifier for grouping activities.

**Activity Type**
Also known as Activity Code. A categorization of work effort. Typically work effort is categorized as productive or non-productive; Repair, Maintenance, Enhancement, or Improvement; or Development or Construction. Activity type is usually required to support cost accounting or financial accounting (recording) functions. It may also be required to support some organizational administration requirements such as organizational productivity goals, or employee performance measurement. In some companies, activity type is inferred from job function, work group affiliation, or organization.

**Activity Use**
An attribute used to describe the behavior of an Activity as defined within PeopleSoft Enterprise Performance Management. A Primary Activity is an activity that is performed for the purpose of directly generating revenue within the course of business. A Secondary Activity is generally performed in direct support of a Primary Activity such as activities related to human resources or MIS.

**Actual Base Hours**
This defines the number of hours that an employee is expected to work within a given period under analysis within PeopleSoft Enterprise Performance Management. Hours worked in excess of Actual Base Hours are generally considered overtime, while hours worked less than Actual Base Hours would illustrate that the employee is working part-time.
**Actual Contribution Percentage (ACP)**

The amount of an employee's after-tax or employer matching contributions made in a Section 401(m) plan on behalf of highly compensated plan participants, divided by the employee's annual compensation, or an amount determined in the same manner with respect to non-highly compensated employees. The Base Benefits business process is set up to perform ACP nondiscrimination tests for Section 401(m) plans. See Nondiscrimination Tests and Highly Compensated Employee.

**Actual Date**

Calendar date in which a punch occurred (see Time Reporting).

**Actual Deferral Percentage (ADP)**

The amount of salary reduction contributions made by an employee to a Section 401(k) plan for a year, divided by the employee's total compensation for that year. The Base Benefits business process is set up to perform ADP nondiscrimination tests for Section 401(k) plans. See Nondiscrimination Tests and Highly Compensated Employee.

**Actual Demand**

In PeopleSoft Demand Planning, an **Array** of demand by historical period imported from an external system. The demand figures are determined by imported values and typically include shipments, orders booked, orders booked by requested ship date, or shipments.

**Actual Rates**

An Actual Rate is the rate that your business currently uses for its business practice.

**Actuarial Assumptions**

Any assumptions used to calculate an equivalent benefit for an optional form of payment or an alternative retirement date.

**Actuarial Valuation**

A comparison of a pension plan's assets and liabilities.

**Actuarial Valuation Extract**

A PeopleSoft Pension Administration data extract containing data that a plan actuary needs in order to determine the plan’s assets and liabilities.

**Address Type**

A high-level address classification that identifies addresses associated with a **Material Issue**. Examples include Ship To Address, Bill To Address, and Ship Notification Address.
**Adjusted**
In the Enterprise Planning and Simulation forecasting process, in addition to versions of the statistical forecast, there is an adjusted version of the forecast. Managers create this version by reviewing the forecasts and entering adjustments that cannot be inferred statistically. For example, there may be a promotional campaign next quarter that is expected to boost volume for certain products over several weeks.

**Adjusted Demand**
In PeopleSoft Demand Planning, an *Array* of demand after adjustments have been made to the actual demand values. The adjusted figures may include both manual and system-generated changes, such as demand filtering and depromotion. The system uses adjusted demand rather than actual demand in the Forecasting Reset process and in the recalculation of model components during period-end processing.

**Adjusted Forecast**
In PeopleSoft Demand Planning, a *Statistical Forecast* that has been adjusted using management overrides, proration, or summarization.

**Adjustment**
See Bill Adjustment or Inventory Adjustment.

**Adjustment Voucher**
A PeopleSoft Payables voucher that enables you to apply an adjustment to an existing voucher or to relate one voucher to another.

**Advice**
The Form that employees who choose direct payroll deposit receive in lieu of a check.

**Affiliate**
A control person of a corporation. Generally, an officer, director, or major shareholder that has the ability to influence the corporate management decisions.

**After-tax Deductions**
Deductions that reduce net pay. These deductions are subtracted from gross pay after taxes have been taken out. Also called “post-tax” deductions.

**Agency**
Any Department or independent establishment of the Federal Government, including a government-owned or -controlled corporation, that has the authority to hire employees in the competitive, excepted, and senior executive services.
**Aggregated**
In Enterprise Planning and Simulation, each period the statistical forecast is calculated automatically by the system. A forecast for each individual product can be computed using history for that product. Then these forecasts can be aggregated (that is, summarized) into forecasts for the product family.

**Aggregate Reporting**
The ability to report time as a collection or mass. In Time and Labor aggregate time reporting features include the ability to report time in a lump sum, as a pattern, in a range of dates, or for an entire crew.

**Aging Data**
Updating data from separate sources, and separate dates, to a common date using an annualized factor.

**Aging ID**
A code representing rules for aging open items.

**Alias**
Any of several PeopleSoft Pension Administration utilities that look up or calculate employee information.

**Allocated**
In Enterprise Planning and Simulation, the computed forecast and the summarized forecast are two different versions of the statistical forecast. In addition, the forecast at the product family level can be allocated down to the individual products. Usually this allocation is done in proportion to the calculated product forecasts at that level. This version of the (statistical) forecast is called the allocated or prorated statistical forecast.

**Allocated Inventory**
The inventory assigned to a specific stock request.

**Allocation Manager**
Perform allocations using the Allocation Manager. Allocations enable you to distribute revenue, expense, and statistical quantities across business units, departments, and so on. You can allocate budget planning to detail levels so that you may perform detailed budgeting. The type of allocation you select determines the output.

**Allocation Manager Rules**
In the PeopleSoft Enterprise Warehouse, Allocation Manager rules allow you to specify the basis as well as the target tables for moving, aggregating, or multidimensionalizing your output. Rules use Allocation Manager methods to enrich the PeopleSoft Enterprise Warehouse data. See Allocation Manager Methods.
**Allocation Manager Methods**
There are several methods: Arithmetic Operation, Prorata, and Spread Even. Each method enables you to move and/or enrich output.

**Allocations**
A process of distributing budget amounts to and from other Budget Centers. Budget amounts are allocated to cover, or offset, the costs in one Budget Center by charging them to another Budget Center. An allocation is also the budget amount that is distributed to or from a Budget Center. A budget amount that is charged to another Budget Center appears as a negative amount. This same budget amount appears as a positive amount in the other Budget Center receiving the allocation. PeopleSoft Budgeting-specific.

**Allotment**
This is a voluntary deduction from pay. Employees may elect up to two allotments from pay, transmitted to a financial institution to the employee's checking or savings account.

**ALM (Asset Liability Management)**
*See* PeopleSoft Asset Liability Management.

**Allowances**
The amount owed to an employee in addition to base salary and which is not defined as part of gross salary. For example, vacation can be considered an allowance. PeopleSoft Budgeting-specific.

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

**Alternate BOM**
Identifies the multiple ways in which an item can be produced. The primary production BOM is designated as BOM code 1. By using BOM codes, you can associate up to 98 other alternate BOMs with the item.

**Alternate Routing**
A routing, usually less preferred than the primary routing, but resulting in an identical item. You can specify up to 98 alternate routings for production routing types by entering additional Routing Codes (greater than 1) for the same routing type.

**Alternative Minimum Tax (AMT)**
AMT is calculated by adjusting the taxpayer's regular taxable income with a number of tax preference items and adjustments. Tax preference items are positive items increasing
Alternative Minimum Taxable Income (AMTI) and are excluded from regular taxable income. Tax preference items include gain from the exercise of incentive stock options.

**Amount Type**
In PeopleSoft Workforce Analytics, the Amount Type specifies whether a benefits compensation amount is a value or expense, to the employee or the employer.

**Analysis Base**
Defined static, historical data used both to seed and compare against proposed budgets.

**Analysis Group**
A grouping of analysis types. Analysis groups can be used for project analysis and grouping or for mapping analysis types.

**Analysis Template**
A set of pre-defined reports that you can view and publish online. These templates access data in the Enterprise Warehouse tables, and organize it by function, role and industry. The templates allow you to pivot, sort, rank, drill and chart the data, for your analysis needs.

**Analysis Type**
A 3-character, user-definable identifier that enables you to label the different types of costs. For example, you might want to track budgeted costs (BUD), committed costs (COM), and actual costs (ACT).

**Analytical Applications**
See PeopleSoft Analytic Applications.

**Analytic Forecasting**
Analytic Forecasting is the part of the Planning and Simulation feature that creates forecasts for your business requirements.

**Annual Amount**
In PeopleSoft Workforce Analytics, Annual Amount is an employee-level compensation amount, totaling the calculations for a full fiscal year’s worth of accounting periods, in a compensation scenario.

**Annual Declaration Report**
The French Annual Declaration report is a payroll report which checks establishment profiles to see whether an establishment has to produce the report, and then calculates the amount of all the social security contributions for this establishment.
**Annual Leave**
Annual leave is absence from work with pay and must be approved by the employee's supervisor in advance. This type of leave (Plan Type 51) is accrued based on years of service: Full-time Permanent/Full-time Seasonal employees...0-3 years - 4 hours per biweekly pay period; 3-15 years - 6 hours per biweekly pay period (plus an additional 4 hours in the final pay period of the leave year); and 15+ years - 8 hours per biweekly pay period. Part-time Permanent/Part-time Seasonal employees...0-3 years - 1 hour for every 20 hours worked; 3-15 years - 1 hour for every 13 hours worked; 15+ years - 1 hour for every 10 hours worked. Generally, there is a leave year ceiling of 240 hours on accrual; amounts accrued in excess of the ceiling and not used prior to leave year-end are forfeited.

**Annual Shareholders Meeting**
A meeting of corporation’s directors, officers, and shareholders held for the purpose of communicating the operating and financial results for the prior year, the prospects for the future and major decisions of management.

**Annual Workforce Survey by Nationality and Professional Category (Enquête sur l'activité et les conditions d'emploi de la main d’œuvre)**
In France, companies are required to submit the Annual Workforce Survey by Nationality and Professional Category to the Ministry of Labor. This report provides an analysis of the company’s foreign workforce, which includes any employee who does not have French citizenship.

**Annualized Tax Method**
A payroll tax calculation method that divides the tax on an annualized amount by the number of pay periods in the year to find withholding for a given pay period, based on the number of withholding allowances. Annualized is the most common tax method.

**Annuitant Amount**
The gross monthly annuity a federally retired employee receives.

**Annuitant CSA Number**
A unique number assigned by OPM for a retired employee.

**Annuitant Indicator**
A code used to indicate the status of an annuitant appointed to a position in the Federal civilian service. Text for the codes is as follows:
1. Reemployed annuitant - Civil Service/FERS
2. Retired military officer receiving pay
3. Retired military non-officer (enlisted) receiving pay
4. Retired military officer receiving pay and a reemployed annuitant - Civil Service
5. Retired military non-officer (enlisted) receiving pay and a reemployed annuitant - Civil Service

6. Not applicable (none of the above)

**Annuitant Indicator (cont)**

A. Reemployed Annuitant – FERS
B. Former Annuitant - FERS
C. Retired Officer/Reemployed Annuitant - FERS
D. Retired Officer/Former Annuitant - FERS
E. Retired Enlisted/Reemployed Annuitant - FERS
F. Retired Enlisted/Former Annuitant - FERS

**Annuity**

A series of periodic payments made to an individual. Under a pension plan, these payments are generally made monthly.

**Anti-Dilutive**

Typically, options or shares where the price is greater than the current fair market value of the security.

**APE (Activité Principale Exercée) Codes**

APE codes classify the type of industry or activity your French company is in, such as software, banking or insurance. The APE codes are a normalized set of codes that are required by law and are used in regulatory reporting.

**API**

An Application Programming Interface (API) is the technology that a software product supplies so you can control it or communicate with it from another application. PeopleSoft APIs enable the user to perform desired actions upon PeopleSoft data without having to know the internal logic or rules of the program.

**Applicant Hire Process**

The procedure of hiring an applicant who has been tracked and administered in the Recruitment pages. Once you assign an Employee ID, the system uses recruitment data to populate the fields in the Personal Data pages.

**Application agent**

An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
**Application Designer**

The integrated development environment used to develop PeopleSoft applications.

**Application Engine**

PeopleTools batch processes consisting of a set of defined SQL statements. Application Engine processes is more efficient than COBOL or SQR, since they operate within the database system, and don’t rely on external processing.

**Application Journal Template**

A set of rules and default values to control the creation of journals from accounting entries.

**Application Processor**

The Application Processor is the PeopleTools runtime engine that controls processing of the application from the time the user requests a panel group from an application menu through the time that the database is updated and processing of the panel group is complete.

**Application Server**

The application server is the centerpiece of PeopleSoft's three-tier architecture. It utilizes Tuxedo, BEA Systems' transaction monitor, to manage client transactions and provide the business rules and workflow capabilities of PeopleSoft's enterprise applications.

**Application Server Domain**

The collection of server processes and associated resource managers defined by a single PSTUXCFG configuration file. Each application server domain is configured to connect to a single database. Multiple application server domains can exist on the same server machine.

**Appointing Authority**

The basis that authorized the appointing officer to effect personnel actions on an employee.

**Appointing Officer**

Denotes if the employee has appointment authority based on laws and regulations.

**Approve Time**

The Time and Labor feature that approves all employee daily time before it can be sent to payroll for processing. You can approve time by group or by individual employee. You can also unapprove previously approved time.

**Approving Official**

Individual with the delegated authority responsible for signing the action(s) taken on an employee.
**Array**
An ordered grouping of data by period and year. PeopleSoft Demand Planning uses arrays in forecasting demand.

**Array**
Element which enables you to extract information based on a column value. One way of thinking of an array is that it is a SQL statement that retrieves data from an existing table.

**Array Dimension**
Determines which inventory-stocking possibilities are included in a Cube View. This standard one-level dimension consists of the key fields that include, for example, order quantity, safety stock, and turn rate.

**Arrears Balance**
An amount owed to either the employer or employee, usually the result of a deduction not fully taken.

**Ask Price**
The price at which someone who owns a security offers to sell it; also known as the asked price.

**As-of-Dated**
Refers to a snapshot of the data at a given point in time.

**Asset Assignment**
A streamlined means of associating project costs to assets or asset profiles within PeopleSoft Projects.

**Asset Budgeting**
Budget for planned asset acquisitions and the associated depreciation expense that can be associated with a Capital Acquisition Plan (CAP).

**Asset Catalog**
A list of asset profiles which includes information about that asset type, including Cost, Life, Salvage Value, Depreciation Method, Currency Code, and Asset and Depreciation Account.

**Asset Category**
A standard group of assets. Typical asset categories include Furniture and Fixtures, Machinery and Equipment, Land, Buildings, Leasehold Improvements, and the like. These generally correspond to General Ledger asset accounts. Assets in one category usually share some depreciation characteristics, such as estimated service life and depreciation limits.
**Asset Class**
An asset group used for reporting purposes. It can be used in conjunction with Category to refine asset classification.

**Asset Liability Management**
See PeopleSoft Asset Liability Management.

**Asset Life**
The number of years an asset will depreciate, after which time it might be kept or sold for its Salvage Value. Also see Useful Life.

**Asset Profile**
A template that contains standard depreciation criteria for an asset type and its corresponding asset books. You can use the information in asset profiles as default values when adding assets.

**Assignment of Life Insurance**
Effective 10/3/94, Federal employees can assign their Basic, Option A and Option B insurance to another person(s), firm(s), or trust(s); Option C is excluded. The assignment of benefits transfers ownership of the FEGLI coverage to the assignee(s). The insured no longer has control over his/her insurance coverage and can no longer designate beneficiaries. Assignment is irrevocable. Either all or none of the insurance can be assigned. Assignment does not have to be to the same person or firm. Assignments must be made in percentages of total insurance versus an assignment of Basic Insurance to one person and Option A to another. Additionally, terminally ill employees can assign their insurance to a Viatical Settlement Firm in exchange for cash (approx. 60% - 85% of the face value of the coverage). Life Expectancy is usually 24 months or less for a Viatical Settlement Agreement.

**Assignment Type**
This defines the behavior of the object, (resource, activity, or cost object) within PeopleSoft Activity-Based Management. If the object is identified as a source then costs may be allocated from that object to another object, which must be identified as a target. If an object ID is identified as a target it may be allocated costs from another object ID but may not allocate costs. An object ID can be both a source and a target, thereby having the functionality of each.

**Associated Primary BOM**
With multiple outputs, it’s possible that a given co-product can be created in more than one way – in other words, an item is a co-product on more than one items’ primary BOM. By assigning an associated primary BOM to a co-product, you are telling the system which BOM to use in exploding the co-product to the next level.
**AT Section**
In France, this stands for Section Accident du Travail, or Work Accident Section. It is information needed to identify the establishment risk code for insurance purposes.

**ATP Reserved Order**
An order that has been promised against future supply. The user has an obligation to the customer to fulfill the order quantity by a certain date. ATP-reserved orders are also referred to as promised orders.

**Attendance**
A component of time reporting application whose purpose is to apply business rules related to Benefit Entitlement and Administration and Organizational Administration to time reported as worked or not worked, and to satisfy a variety of reporting needs.

**Attendance Reporting**
A Time and Labor report that indicates an employee’s attendance record. It includes sick leave, vacation time, and other leaves taken.

**Attribute**
An attribute is an element within a dimension. For example, the element “Store” is an attribute of the dimension “Geography” for the retail industry. An attribute is also a column heading on an analysis and reporting template.

**Audit Trail**
See Drill-Back Calculation.

**Auditor**
Person designated to review expense sheets and cash advances before payment.

**Automatic Revision Incrementing (Auto Rev)**
The ability to automatically set up revision control and generate revisions for revision-controlled items at the business unit level. This includes setting up a revision scheme or a predetermined, ordered list of revision names.

**Automatic Spouse Benefit**
A joint and survivor pension benefit provided without any actuarial reduction to a pension benefit. The automatic benefit is a n% joint and survivor; the employee is still entitled to choose any optional form of payment and any beneficiary for the remainder of the benefit.
**Availability Date**

The date a lot becomes acceptable for fulfillment in PeopleSoft Inventory or for consumption in PeopleSoft Production Management. (Availability Date = Creation Date + Availability Lead Time)

**Available to Promise (ATP)**

The projected supply of a product less the actual demand, which informs the sales and marketing department of the products that can still be sold without modifying the master schedule. ATP isn’t cumulative – it’s calculated for each period.

**Average Daily Balancing**

A feature in PeopleSoft General Ledger that enables you to target the ChartFields on which you base average balance calculations, summarize amounts for selected ChartField values according to your reporting requirements, and define the periods for these calculations.

Used by the financial analytic applications in Enterprise Performance Management. For a reporting period (usually monthly) this refers to the average daily balance of an account as opposed to the month-end-balance, which is the balance as of the last day of the month.

**Average Daily Balance Ledger (ADB_Ledger)**

In the PeopleSoft Enterprise Warehouse, the Average Daily Balance Ledger table (PF_ADB_LEDGER_F00) is similar to the functionality of the PF Ledger table (PF_LEDGER_F00), in that it too supports reporting. However, the Average Daily Balance Ledger is used for average daily balances. It is a table that is used mostly for processes associated with the financial services industry.

**Average Inventory**

In PeopleSoft Inventory Planning, one half of the average lot size plus the safety stock when demand and lot sizes are expected to be relatively uniform over time. When demand and lot sizes are not uniform, the stock level versus time can be charted to determine the average.

**Average Price**

The average price derived from either the bid and ask prices (for bid/ask/average) or from the high and low prices (for high/low/average).

**Average Static Calc Flag**

In PeopleSoft Inventory Planning, a method used with static policies. The average method sets the static policy equal to the weighted-average, time-phased policy over the next argument periods.

**Award**

A special payment to an employee for certain prescribed kinds of activities or accomplishments.
**Back Pay Interest**
Under certain circumstances, an employee can be eligible to receive additional pay relative to a delayed receipt in salary caused by administrative error in processing a personnel action. The U.S. Office of Personnel Management has established guidelines for Federal agencies on when and how to make these calculations.

**Background Process**
Any task or process that is grouped with another and runs in the background. Background processes are usually scheduled to run on a regular basis. All background processes are executed through process-specific COBOL programs run outside the Windows environment.

**Backlog Reason Code**
An identifier indicating the reason an item could not be shipped. Example codes might include out of stock, discontinued, or seasonal.

**BAD Forecast Ratio**
In PeopleSoft Demand Planning, the maximum acceptable value of the ratio of the and the base component (Standard Deviation/Base Component). When this value is exceeded, the system automatically resets forecast model parameters. The higher the value, the less likely it is that the system will reset the parameters. In most organizations, a BAD ratio of 1.00 or lower is appropriate for most items.

**Balance Segmentation**
Balance Segmentation is used in Funds Transfer Pricing to divide balances in deposit accounts between core (stable) and non-core (volatile) segments. Core funds represent the minimum balances that are retained on a long-term basis, building a relatively reliable source of funding to the bank. Non-core funds are temporary in nature due to their volatility caused by customer preferences for liquidity, and cannot be utilized on a long-term basis.

**Balance Type**
Balance Type is a lookup code used to define the type of instrument balances that will be stored in the PeopleSoft Enterprise Warehouse and processed by the analytic applications. Examples of different Balance are Current Balance, Average Daily Balance, Period Ending Balance, or Commitment Balance.

**Balanced Scorecard**
See PeopleSoft Balanced Scorecard.
**BAM**

Business Analysis Model. XXX I think this term is incorrect because we use BAM to refer to the application. If we were referring to the business analysis model, we would say BAM model (that is, Business Analysis Modeler model.)

**BAM Model**

The BAM database published from the template. The model contains both the data and analytic structure used in the application. The BAM database is physically separate from the Enterprise Warehouse database. Data is sent to the model through migration processes.

**BAM Template**

A file created using BAM design tools, representing the model prior to its creation as a database. This file has an extension of .MDL. This file is published to a BAM database once the model design process is complete. Each application using BAM will deliver templates which the customer will review and publish to a database in their environment.

**Bank Identification Number (BIN)**

In PeopleSoft Payables, a part of the bank information that identifies business unit banks.

**Base Budget**

The initial budget defined by the Budget Coordinator. The base budget is distributed as a starting point for Budget to review and edit. The base budget can be zero-based or incremental.

**Base Compensation**

In PeopleSoft Workforce Analytics, Cash Compensation that is typically categorized as fixed. It includes base pay and shift differentials as well as associated merit, equity, and step increases.

**Base Currency**

Base Currency is used to consolidate and report financial results of a multinational company. When a company transacts its business operations in different transaction currencies, those currencies are translated to the base currency for reporting purposes.

**Base Currency Equivalent (BCE) Amount**

If the monetary amount is in a currency other than the base currency, either the Extract-Transform-Load (ETL) process or the Multi Currency Engine can be used to convert the monetary amount to the Base Currency Equivalent (BCE) Amount.

**Base Factor**

In PeopleSoft Demand Planning, an element of a smoothing constant simulation set that controls base component smoothing in the Model Reset Simulation process.
**Base Metric**
Metric found on a fact table. A base metric usually contains an aggregate operator, for example “sum” or “count”.

**Base Pay**
A pay component included in the job comp (job compensation rate) calculation. It is pay for a regularly assigned workweek. For example, you can set up a regular hourly rate plus a shift rate, a union-negotiated rate for hazardous work, and so on.

**Base Pay Structure**
A PeopleSoft Workforce Rewards module you use to create or revise pay structures, and to assess the cost and impact of implementing new structures.

**Base Time Zone**
Customer defined time zone used for converting reported time to a common time zone for ease of applying rules (see Time Administration).

**Batch**
Batch systems are used when realtime updates are not needed. Batch-oriented data collection applications, developed in-house or by a third-party vendor, produce transactions that are collected in an ASCII text file. The text file is fed to a PeopleSoft SQR program that loads the transactions into the database.

**Batch Processes**
Any of the background programs in the client/server environment of PeopleSoft applications. Batch processes perform operations—such as pay confirmation, deduction calculation, and so forth—on groups of records, and are usually scheduled to run on a regular basis. You run these processes from the Process Scheduler, and they are executed through process-specific COBOL programs.

**Before-Tax Deduction**
Deduction that reduces net pay and FWT taxable gross, applied prior to the calculation of federal and state/provincial withholding taxes. Also called “pre-tax” deductions.

**Begin Calc Date**
The date on which PeopleSoft Asset Management begins to deduct from an asset's life.

**Begin Depr Date**
The date on which PeopleSoft Asset Management begins to calculate depreciation for an asset. Begin Depr Date is calculated using In-Service Date and Prorate convention.
**Benchmark Job**
In PeopleSoft Workforce Analytics, this refers to a Job Code for which there is corresponding salary survey data from published, third party sources. Jobs for which there is no corresponding salary survey data are referred to as non-benchmark jobs.

**Benefit Commencement Date (BCD)**
The date on which a pension payee elects to begin receiving payments.

**Benefit Deduction**
Any amount taken from an employee’s pay check to offset all or part of the cost of the employee's benefits.

**Benefit Eligibility**
The PeopleSoft Pension Administration function that determines if an employee is eligible for retirement or ancillary benefits. A plan may have several retirement types—normal, early, late, death, and disability—each with its own eligibility criteria.

**Benefit Entitlement**
Any rules governing the circumstances under which employees are entitled to receive certain benefits. Typically, entitlement to benefits is based on type of employee (for example, full time, part time, occasional), length of employment, and specific rules which apply thereto, i.e., work group affiliation, and compensation base. Other criteria may also apply, such as reasons-for-claiming or job performance.

**Benefit Formula**
The formula that determines a participant’s pension benefit in a defined benefit plan, as well as the PeopleSoft Pension Administration function that calculates the benefit.

**Benefit Group**
Part of a group of defaults assigned to job codes. Benefit group may include medical, dental, and health benefits dependent on individual company parameters.

**Benefit Plan**
A specific benefit within a plan type. For example, your company’s life plan type might include benefit plans of one times salary, two times salary, and three times salary.

**Benefit Plan Type**
Any category of benefit, such as health, life, or savings.

**Benefit Program**
A set of benefits and deductions valid for an employee or group of employees. A single company may have any number of programs. An individual employee may belong to only
one program; the deductions and benefits contained in that program are the only valid deductions and benefits for that employee.

**Benefit Tables**

Any of the tables that contain employee benefits information. These are often relevant to payroll processing.

**Benefits Base**

The salary used for benefit calculations. The benefits base will be either the employee Annual Rate or Annual Benefits Base Rate.

**Benefits Compensation**

In PeopleSoft Workforce Analytics, Benefits Compensation is value associated with employment benefits. It can include benefits types for Health and Welfare (Medical, Life Insurance), Retirement (annuities, savings plans, pensions), and Paid Time Off (Vacation Leave, Sick Leave). Benefits compensation is sometimes fixed, and sometimes variable, depending upon the benefit type.

**Betriebszählung (Company Statistics Report)**

Also called the OFIAMT report. This report provides statistics required by the Swiss Federal Department of Statistics (BFS).

**Bias Signal Limit**

In PeopleSoft Demand Planning, a number between one and six that indicates how many Forecast Periods to test for bias. If the bias test is violated, the system records a Tracking Signals error in the period up to the number of periods determined by the bias signal limit.

**Bias Test**

In PeopleSoft Demand Planning, a forecasting test that sets the limit for tripping a Tracking Signals. The lower the value, the more likely it is that a tracking signal is set.

**Bid Price**

The price a prospective buyer is prepared to pay at a particular time for trading a unit of a given security.

**BIF file**

This is the bulk insert file (input.bif) used with the Verity search engine to specify the documents to be submitted to a collection (search index). It contains a unique key, document size (in bytes), field names and values, and document location in the file system.

**Bilan Social Report**

See Employee Survey Report.
Bill
In PeopleSoft Billing, any group of bill lines.

Bill Adjustment
The process of making credit or credit and rebill adjustments to an invoiced billing activity.

Bill By Identifier
The Bill By Identifier is used to define how billing activity is grouped when added to a bill through the billing interface or the Populate Billing process.

Bill Header
The record containing information that pertains to the bill as a whole. Each bill has a unique bill header that identifies it within the system.

Bill Inquiry Phone
Bill Inquiry Phone is the number printed on your invoices for your customers to call if they have any questions about their bill.

Bill Line
The basic unit of billing activity representing a billable charge, including the charge identifier, quantity, price, and any other information regarding an individual transaction. Every bill line is related to a bill header that may have one or more bill lines related to it.

Bill Search
A method of finding a bill or bill line when you don't have enough information to call up the bill directly. Customer Bill Search enables you to locate a bill by Customer Name. You can also choose other parameters to limit your search. With Bill Line Search you first search for a particular bill and then a line on that bill. Parameters for bill line search include Reference, Date, and Amount.

Bill Source
The point where billing activity originates. Bill sources may be external to the system (imported through the billing interface) or entered directly online. Examples of bill sources include order management, project costing, and contract administration.

Bill To Customer
A customer who receives an invoice.

Bill Type
A category of billing activity variety. Examples of Bill Types include standard and custom order activities.
Bill Update
The process that adjusts bills that have either been entered manually or generated within the system.

Billable Indicator
A status flag that identifies an item as eligible for billing to a customer.

Billback Discount (BB)
A per unit discount which typically requires a customer to perform one or more merchandising activities to receive the discount. A BB discount is not deducted from the customer invoice, but once the customer performs the merchandising activity, a sales representative or broker can approve payment for the discount amount. Billback discounts can originate from a National Allowance or Customer Promotion, and are passed to PeopleSoft Order Management for informational purposes only. Billback discounts are recognized as a liability when the product is shipped.

Billing Location
A number identifying a customer address. Each customer may have multiple locations, but must have one Primary Location at which you contact them.

Blackout Period
The period of time, determined by the company, which prohibits certain activity in the company stock. Blackout Periods can affect the trading of some key individuals or can be placed on the entire company.

Bonus Tax Method
Annualizes your year-to-date earnings by multiplying them by the number of pay periods in the year. This method is used for Canadian tax processing.

Book
In PeopleSoft Asset Management, a data location storing financial information—like cost, depreciation attributes, and retirement information—on assets.

Borrow/Loan
The temporary reassignment of an employee to other task reporting or compensation requirements to allow the business to meet unexpected, short-term, fluctuations in staffing or work load. Typically, this kind of reassignment is done informally at a local level, where HR isn’t involved and a new job record isn’t created. Companies may have specific rules about how long an employee may be borrowed/loaned, how and where productive, non-productive, and compensated absence time will be charged, and what business rules to apply to the borrowed employee’s time for the purpose of compensation and benefit entitlement and administration. See also Casual work Assignment.
**Bracket**
Brackets are a way to look up and retrieve database table values. After you've defined a table, the system finds a corresponding row on that table and returns the value of the bracket. The result is then available for use in other items such as formulas.

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

**Branch Of Military Service**
Identifies, if any, military service in which the employee served.

**Breadcrumbs**
Breadcrumbs show the navigation path to the current web page location. As you drill down through the different levels of the registry, a “breadcrumb trail” appears that shows the path you’ve selected. Each registry level is separated by an angled brace (>), and you can select any level to navigate directly back to that level.

A typical Breadcrumb would look like this:

```
Home > HR > Administer Workforce > Benefits
```

**Break Funding**
Charges assessed for mortgages that are paid off before maturity. In the Funds Transfer Pricing (FTP) application, Break Funding charges are factored into the transfer price for a loan that may be prepaid.

**Break in Service**
A period of time for which an employee does not meet stated service requirements.

**Break Price**
The price used to determine which options are eligible for repricing. For example, if the break price is $36, then all outstanding option with a grant price of $36 and greater are eligible for repricing.

**Break Punch**
An in/out punch of when a time reporter takes a break.

**Brokers**
Individuals or organizations who buy and sell securities. Often they are account executives who work for firms registered with the Stock Exchanges and the SEC. Unlike Transfer Agents, (who are not responsible for sales) Brokers do not maintain records on all your company’s certificates. They maintain only sales records and stocks for their clients.
**BSC (Balanced Scorecard)**

See PeopleSoft Balanced Scorecard.

**Budget Activity**


**Budget Amount Ledger**

Stores budget amounts and is updated by posting budget entries, transfers, and adjustments.

**Budget Analyst**

A role within PeopleSoft Budgeting. Budget Analysts are typically people within an organization responsible for reviewing and analyzing a prepared budget before submitting it to the Budget Coordinator. PeopleSoft Budgeting-specific.

**Budgetary Account Only**

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

**Budget Category**

A set of related expenses that are accumulated for proposal budgets and reporting to a sponsor. The estimated cost for a set or class of accounts.

**Budget Category**

Numeric/alpha identification given to each category of positions.

**Budget Center**

In PeopleSoft Budgets, any entity responsible for producing or reviewing budget data. For example, a Budget Center might be the individual departments responsible for producing budgets.

**Budget Center Dimension**

In PeopleSoft Budgets, the dimension by which you distribute budget data. If you budget by department, your department dimension will be your Budget Center Dimension. You’ll assign Budgets Users to the nodes and detail values on the tree you use to build your Budgets Center Dimension.

**Budget Check**

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

Selective suspension of Budget Processing. With this feature you can override the controlled budget for a transaction that failed budget checking due to insufficient funds; or override the tolerance limits for a transaction rejected due to exceeded tolerance limits. When you push the Override button, the system flags the transaction to allow the Budget Processor to process successfully regardless of available funding. You can cancel the override any time before the Budget Processor is run by clicking the Cancel Override button.

**Budget Control**

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

**Budget Coordinator**

A role within PeopleSoft Budgeting. Budget coordinators are responsible for monitoring the budget process. The Budget Coordinator is typically located within an organization’s central budget office and builds the budgeting model. PeopleSoft Budgeting-specific.

**Budget Detail**

A level of itemization that when combined makes up a major budget category.

**Budgeted Rates**

In PeopleSoft Activity-Based Management, the rate your organization uses based on the budget.

**Budget Error Exception**

A transaction that fails budget checking, causing an Error or Warning to be issued. See Error Exception and Warning Exception.

**Budgeting Functions**

PeopleSoft Budgeting’s six main action categories, including: system administration, budgeting setup, budgeting preparation, budgeting analysis, data integration and my profile. Your user role determines how many of these functions display and are available.

**Budgeting Model**

The framework for an organization’s budget development process. Business unit defines a Budgeting Model. The Budget Coordinator typically defines the model and includes the time period of a budget cycle, time period for phases within a budget cycle, the sources of data that will be available to budget users, the methods that will apply to line-item budgets, and other budget options and control parameters. PeopleSoft Budgeting-specific.
**Budgeting Type**
Associated with the budget ledger type set definition, a budget type is an indication of whether the organization uses a standard budget ledger, project budget ledger, or controlled budget ledger for budgeting.

**Budget Justification**
Written explanation further defining the what and why of a budget category.

**Budget Period**
The period in which you define plans to meet your organization's training requirements.

The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary, and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

**Budget Phase**
In PeopleSoft Budgets, a span of time during which a budget or portion of a budget is to be completed. You’ll filter dimensions, assign alternate Budgets Users, enable Position and Asset budgeting, and specify Budgets User notification options at the Phase level.

**Budget Plan**
In PeopleSoft Workforce Rewards, when working with a Compensation Planning BAM model. A budget plan is a rollup of like compensation rules. For example, for base pay rules budget plans are a rollup of values for like Action Reasons. For variable pay rules budget plans are a rollup of the values for like Variable Compensation Plan IDs.

**Budget Preparer**
A role within PeopleSoft Budgeting. Budget preparers are typically people within an organization responsible for developing the detailed budget for a Budget Center and submitting it to a Budget Reviewer or Analyst for review and approval. PeopleSoft Budgeting-specific.

**Budget Reviewer**
A role within PeopleSoft Budgeting. Budget reviewers are typically people within an organization responsible for reviewing and approving a prepared budget submitted by a Budget Preparer. PeopleSoft Budgeting-specific.

**Budget Seeding**
Represents a new budget or forecast, such as historical data that is manipulated to develop a more current representation for a proposed budget. Uses detail data as the budget seed or basis to create the base budget that represent the level of detail in which budget numbers are prepared.
**Budget Translation Trees**
Trees translate (summarize) source transactions into the appropriate levels for processing against control budgets. This is because you usually budget above the level of your source transaction ChartFields on a tree.

**Budget Type**
Indicates whether a budget is for expenditures or revenues.

**Budget Warning**
See Warning Exception.

**Budgets User**
In PeopleSoft Budgets, any user who needs to gain access to the Budgets. You’ll designate Budgets Users on the Budgets Users page through the Coordinate Budgets window. You’ll also assign these users to the tree representing your Budget Center Dimension.

**Budget View**
A user-defined view where selected dimensions, columns and rows of data determine the layout of line-item budgets affecting the view or entry of data.

**Budget Year**
The institutionally defined, consecutive, 12-month period to which a financial transaction or summary applies.

**Build Option**
A detailed PeopleSoft Planning model that specifies a method of building an assembly item. This model specifies the routing, resources, and materials that are necessary to produce the item.

**Built-in function**
Prior to PeopleTools 8.0, there were only built-in functions, like FetchValue, ScrollSelect, etc. A built-in function, in your code, is on a line by itself, and doesn't (generally) have any dependencies. You don't have to instantiate anything before you can use a built-in.

**Business Interlink Definition**
A definition encapsulating an external Transaction or Query and providing a set of generically typed input/outputs that can be assigned to PeopleCode variable or Record Fields at runtime. A Business Interlink Definition is added to the Application Designer’s objects at the same level as Fields, Records, Panels, etc.
**Business Interlink Design-Time Plug-in**

An XML file that, when coded for an external system, encapsulate that external system and provide a catalog of Transactions, Classes and Criteria specific and meaningful to that external system.

**Business Interlink Framework**

The framework for integrating any external system with PeopleTools application objects. It is composed of the following components:

1) An External System, 2) Generic definitions for a Transaction/Query command interfaces, 4) Business Interlink Definitions, 4) Business Interlink Plug-in.

**Business Interlink Object**

An instantiation based on a Business Interlink Definition. Actual data can be added to the inputs of the Business Interlink Objects once the appropriate bindings are provided. The Business Interlink Object can be executed to perform the external service. Once a Business Interlink Object is executed, the user of that object can retrieve the outputs of the external service. The Business Interlink Objects use buffers to receive input and send output. When a Business Interlink Object is executed, the transaction/query/class associated to the Business Interlink Object will be executed once per each row of the input buffers corresponding to the input Records. If there is only one row, after appropriate substitution by the driver, it is executed only once.

**Business Interlink Runtime Plug-in**

A set of C++, Visual Basic, or other high-level language methods that, when coded for an external system, encapsulate that external system and provide the execution methods to match the Business Interlink Design-Time Plug-in. (The catalog of Transactions, Classes and Criteria provided by the Design-Time Plug-in can also be provided by the Runtime Plug-in.)

**Business Objects**

A way of identifying those mass changes that have been designed to be referenced by a flexible formula and provide them with a shorter name to simplify the creation of flexible formulas.

**Business Planning**

The type of planning that focuses on elimination activities that are not needed by changing the drivers.

**Business Rules**

Rules that can process information differently depending on the values of data in the PeopleSoft Enterprise Warehouse.
**Business Unit**

A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions. PeopleSoft General Ledger business units typically comprise individual entities for accounting purposes.

Business units in PeopleSoft Projects represent operational structures but not necessarily independent financial units.

PeopleSoft Payables business units are either *Vouching* (have payables accrued to them) or *Charge to* (have voucher expense distributions charged to them), and pass journals to general ledger units.

PeopleSoft Purchasing business units share vendor, purchase order, and receiving information with PeopleSoft Payables units in the same SetID.

A PeopleSoft Inventory business unit is a storage facility that maintains its own replenishment and costing methods, as well as its own definitions and guidelines.

The Manufacturing business unit must be identical to the Inventory business unit in order to link the manufacturing and inventory processes.

The Order Management business unit controls certain order processing parameters (tax and freight calculation methods, base currency, credit card hold options, and so on) for its associated PeopleSoft eStore and Mobile Order Management merchant variants.

**Business Unit Audit List**

One or more business units specifically targeted for expense report and cash advance audits.

**Buying Agreement**

You can structure flexible and easy-to-use buying agreements for customers or groups of customers. You can set up maximum amounts and specify the minimum dollar value per order placed against it. You can automatically generate sales orders or create sales orders online from buying agreements. Rebate and penalty calculations can be implemented for buying agreements.

**Cafeteria-Style Benefits**

Any programs offering several benefit plans from which participants make elections. Cafeteria-style benefits may or may not include flexible credits.

**Calculation**

In PeopleSoft Pension Administration, the determination of a participant’s pension benefit.
**Calculation Rule**
Criteria for calculating benefits, including as-of dates for age, service, premium, and coverage calculations; rounding rules; and minimum and maximum coverage amounts. Any number of program and plan combinations can use a single set of calculation rules.

**Calculation Rule [Global Payroll]**
Any rule you develop using combinations of elements to command the system to perform a type of calculation.

**Calendar**
In PeopleSoft Manufacturing, a list defining the days your enterprise is available and the hours of operation for each day. The system first looks to see whether you are using a work center specific calendar. If none is defined, it looks at the production calendar. If no production calendar is defined, planning and scheduling functions base start and due dates on a five-day workweek.

In PeopleSoft Demand Planning and Inventory Planning, a list defining the start and end dates for each time-phased period. It also contains daily weights for distributing raw data into different period buckets.

In PeopleSoft General Ledger, your accounting calendar defines the time periods to which you post transactions for different ledger group and business unit combinations. You can have multiple calendars, so you can keep a calendar for actuals, another for budget and forecast activity, and still others for special reporting or transitional needs.

**Calendar Group ID**
Allows you to group together multiple Calendars that you want to run together at the same time. It also controls the order in which the Calendars are processed. You can only group calendars together that are for the same country (based on pay entity country).

**Calendar Scope**
A time period type (Day-Factored, Month-Factored, or Week-Factored) for use in building your time period calendar.

**Canada Academic Teaching Surveys**
Statistics Canada requires that all Canadian universities (all degree granting institutions) produce full-time and part-time *Canada Academic Teaching Surveys*. These reports are a legislative requirement. PeopleSoft HRMS 8 provides you with the functionality to code HRMS information using Statistics Canada codes and create both the full-time and part-time Academic Teaching Surveys.

**Canadian Industrial Sector**
The Canadian industrial classification code with which employees are associated for Canadian employment equity reporting purposes.
**Canadian National Occupational Classification (NOC) Codes**
NOC codes are occupational classification codes for Canadian companies provided by the government.

**Canadian Standard Occupational Classification (SOC) Codes**
SOC codes are occupational classification codes for Canadian companies provided by the government.

**Cancellation**
A process that terminates stock fulfillment requests, allowing reserved and allocated items to be returned to inventory.

**Cancellation**
In the context of an employee stock plan, a transaction (usually triggered by a specific event, such as a termination of employment) in which outstanding securities are declared void and inactive and returned to the pool of securities reserved for issuance under the plan or retired.

**Candidate Keys**
In PeopleSoft Demand Planning, elements of data that can be used to construct the Forecast Item key field at different levels of the forecast.

**Capacity Rate**
A rate you assign to a capacity cost object. This enables you to track and report on excess capacity.

**Capacity Fence**
A time fence that indicates the date and time after which PeopleSoft Enterprise Planning or Production Planning solvers ignore capacity violations. The solvers do not use this date in processing capacity violations.

**Capacity Multipliers**
A multiple used in PeopleSoft Enterprise Planning and Production Planning to determine the available capacity on a resource. Since a capacity multiplier is effective-dated, you can use it to vary the resource’s available capacity over time.

**Capital Acquisition Plan (CAP)**
A method of projecting and tracking capital expenditures for a project. Budgeted assets and actual expenditures can be associated with a CAP Plan so the owner can track planned against actual costs.
Capital Gain
The difference between an asset’s purchase price and selling price, when the difference is positive. Capital gains can be either short-term (where the capital asset was held for 12 months or less) or long-term (where the capital asset was held for 12 months or more).

Capital Gains Tax
A tax on profits from appreciation in owned real property, recognized at the time the property is sold; real property includes owned company shares.

Capitalization
The total types and amount of the outstanding securities that have been issued by a corporation. Generally includes both equity and debt securities.

Capital Markets Instrument
In the financial services industry, Capital Market Instruments are assorted financial instruments issued by organizations to raise capital for funding operations. Participants are made up of interested parties that choose to supply or acquire the capital funding through such vehicles. Derivatives, debt instruments, equities and foreign exchange instruments that are traded in highly liquid markets represent the instruments. In the PeopleSoft financial analytic applications, Capital Market securities refer to instruments that are bought/sold by the institution for its own investment account. The capital markets set the product prices and interest rates.

CAP Sequence Number
The number that distinguishes a small project belonging to a CAP plan. Budgeted assets can be associated with an overall CAP Plan and a CAP Sequence, if that level of detailed tracking is desired.

Carry-Forward
Residual contributions that remain in a stock purchase participant’s account after the purchase of shares that are used toward future purchases.

Carrying Cost
In PeopleSoft Inventory Planning, a value that shows the cost associated with holding a dollar of inventory for one year. The value is presented as a percentage.

Case Officer
In Germany employees in your company are designated as Case Officers, and have responsibilities for handling health and safety incidents.

Cash Balance Accounts
The PeopleSoft Pension Administration function that tracks the activity in an employee’s hypothetical account under a cash balance plan.
**Cash Balance Plan**
A defined benefit plan designed to look like a defined contributory plan. The plan periodically credits a percentage of pay to each employee's hypothetical account.

**Cash Compensation**
In PeopleSoft Workforce Analytics, Cash Compensation is a component of direct compensation. Cash Compensation consists of direct cash payments made to an employee for base compensation and short-term variable compensation.

**Cash Exercise**
At the time of exercise, the optionee is required to pay in cash the total option price plus any withholding taxes due to the company.

**Cash Flow Generator**
This is a support module for the PeopleSoft financial services analytic applications. It generates actual and projected cash flows for financial instruments by using output from the other support modules, such as loan prepayment rates, deposit runoff rates, product pricing indices, discount rates, and product definitions (such as start and end dates, balance amount, interest rate, term, payment dates, repricing and compounding frequency, and accrual basis) to generate the cash flows. The Financial Performance Measures module accesses the cash flow results to calculate the required financial measures.

**Casual Preparer**
An additional user role at the lowest level of budget preparation for a budget center. This user performs the same activities as the Budget Preparer role when access is granted. The system does not, however, enable the Casual Preparer role to define their own private views for line-item budgeting.

**Casual Work Assignment**
The temporary assignment of an employee to a work position or location to meet the needs of the business. Typically, there is no Human Resource activity to support the work assignment (that is, a new Job record is NOT created). Often compensation rules that accrue to the temporary assignment override the compensation rules that apply to the employee's normal work assignment. See also Borrow/Loan.

**Catalog**
The list of transactions, classes, and queries used to interface to the external system. Integration users are presented with this list when they pick the type of Business Interlink Plug-in they are going to use. There are four types of catalogs: transaction, class, operator, and configuration parameter.

**Catalog**
A way of organizing your training courses into classifications for increased flexibility. Catalogs consist of categories and subcategories.
**Category**

Categories are the primary level of a two-tier structure of training courses. Categories can consist of subcategories that provide further course definition.

**Category Tree**

A hierarchical structure that groups products by category to control how they are displayed in PeopleSoft eStore web pages. Used also by Mobile Order Management to enable product information to be accessed by a wireless device.

**CBM**

See PeopleSoft Customer Behavior Modeling.

**Census Metropolitan Area (CMA) Code**

In Canada this code is prescribed by the government and refers to the area of an urbanized core with a population of at least 100,000.

**Central Personnel Data File (CPDF)**

Two types of reporting made by agencies to the OPM include the Dynamic and Status files (quarterly and monthly, respectively) covering a range of employee personnel/payroll data.

**Certain and Continuous Payment Option**

A form of pension payment where the benefit is paid out for the lifetime of the participant with a specified number of payments guaranteed so that a beneficiary will receive payments until the end of the guarantee period if the employee dies before the guaranteed payments are complete. For example, under a ten-year certain and continuous payment option, a retiree who lives less than ten years receives payments until death, then the retiree's beneficiary continues to receive payments for the remainder of the ten year period. A retiree who lives longer than ten years continues receiving payments after the ten year period until death. Also knows as a "Term Certain and Continuous" payment option.

**Certain Only Payment Option**

A form of pension payment where the benefit is paid out entirely over a specified period of time—usually five, ten, or fifteen years—without ongoing payments after the specified period. If the retiree dies before payment period is over, the remaining payments are made to a beneficiary. Also known as a "Term Certain" payment option.

**Change To Lower Grade**

- For positions under the General Schedule or under the same wage grade schedule, a change-to-lower grade changes the employee to a lower grade; and
- When both the old and new positions are under the same type ungraded wage schedule, or in different pay-method categories, a change-to-lower grade changes the employee to a position with a lower rate of basic pay.
**Charge Out**

A **Material Issue** used when the item is scheduled for future return.

**ChartField**

A field storing a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

**ChartField Balancing**

PeopleSoft enables you to set up ChartFields and indicate that you want specific ChartFields to match (balance) on the debit and the credit side of a transaction. When you work with Controlled Budgets, the Fund and Budget Period are already set up in the system to balance (match). For example, suppose you want to balance by Class and Program. You indicate that these on a panel that these ChartFields are required, along with Fund and Budget Period which should already be selected. When you enter a transaction, you must enter the same Class, Program, Fund, and Budget Period ChartFields on both sides of the accounting entry, but you can modify any ChartFields, other than these four, on the user-defined line. The system always requires that total debits equal credits.

**ChartField Combination Edit**

Also called **Combo Edit**. The process of editing journal lines for valid ChartField combinations based on user-defined rules.

**ChartKey**

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

**ChartViews**

Charts of data in the model, presented through the Worksheet which retains the ability to drag dimensions on the chart as desired.

**Check In/ Check Out**

The process of retrieving planning activities from the BAM database (check out) and posting changes and results back into the database (check in).

**Child**

A node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes—projects, customers, and so on—can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
**Child**
A node or detail of a tree linked to another, higher-level node referred to as the parent. Child nodes can be rolled up into their parent. A node can be a child and a parent at the same time depending on its location within the tree.

**Chunking**
Chunking is a PeopleSoft Enterprise Warehouse mechanism that makes voluminous processing easier through the use of multiple small parallel processes. By enabling chunking, multiple jobs are spawned from one Jobstream. These jobs run in parallel (behind the scenes) to process data efficiently.

**Citizenship Code**
Numeric indicator as to whether the employee is a U.S. citizen or a foreign national serving in the U.S. The codes are:

- citizen
- other

**Civil Service Retirement System (CSRS)**
A retirement plan available to employees of the federal government. CSRS covers all employees appointed to a position in the federal government before January 1, 1984. Coverage includes a basic annuity plan with employee contributions and the Medicare Hospital Insurance component (1.45%) of the Social Security tax.

**Class catalog**
Lists classes used to interface to an external system. A class contains data members of basic types and/or objects that are typed after another class. A Class can also contain lists of basic types or objects.

**Class ChartField**
A ChartField value that identifies a unique appropriation budget key when you combine it with a Fund, DeptID, and Program Code as well as a Budget Period. Formerly called “sub-classification.

**Classification Code**
Need App A code that categorizes an engineering change. Example classification codes include the following: Mandatory, Optional, Upgrade, Quality, and Safety.

**Clock Hour Reporting**
Method of reporting time by recording actual times in and out (start and stop) (see Time Reporting).
**Clone**
To create a unique copy of an object. When used in PeopleCode, clone will always mean to make a unique copy. Copy, on the other hand, may or may not mean making a unique copy. Copy may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

**Cloning**
The process that enables you to copy run controls to create employee schedules from existing Run Control ID’s that have already been executed and saved.

**Close Date**
The date in which time entry is no longer allowed for a given pay period. Defined as an offset number of days to the pay period end date.

**Close Price**
The price of the final trade for a security at the end of the trading day.

**Closure Calendar**
A calendar that establishes closure dates for shipping, receiving, and materials management operations for a specific Business Unit. Typically, application processes account for these closure dates when determining Lead Time and dates for anticipated fulfillment processing dates (scheduled shipment dates, scheduled arrival dates, and lot retest dates, for example).

**CMA (Census Metropolitan Area) Code**
In PeopleSoft Workforce Analytics, the CMA code is prescribed by Statistics Canada, and refers to the main labor market area of an urbanized core with a population of at least 100,000.

**COBRA (Consolidated Omnibus Budget Reconciliation Act)**
In PeopleSoft Workforce Analytics, this refers to legislation that requires employers to offer continued health care coverage to employees, and their dependents, who lose benefits coverage under certain defined conditions such as voluntary termination, divorce, becoming an overage dependent, or retirement. Any individual, whether employee or dependent, that is covered under a health plan at the time of a qualifying event, has the option to elect COBRA coverage.

**Codepage**
One character set.

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

**Combined Federal Campaign (CFC)**
A vehicle used by federal employees to contribute to a charity or charities of their choice.

**Commercial-Off-The-Shelf (COTS)**
Equipment or software that is currently sold commercially to at least one customer.

**Commission Tax Method**
A payroll tax calculation method that adds year-to-date earnings to earnings for this pay period and finds the annualized gross by multiplying by the number of pay periods in the year; the gross is then divided by the number of tax periods specified on the paysheet. This method is used for Canadian processing only.

**Commitment Control**
Commitment control includes budget control and commitment accounting functionality.

**Common Shares Issued and Outstanding**
Represents the residual ownership interests in the corporation. This is the composite number of shares available and tradable on the open market.

**Community Background**
In the United Kingdom Community Background refers to the religious category, such as Catholic or Protestant, of employees, job applicants or appointees. See the Northern Ireland Report for more information.

**Compa-Ratio**
In PeopleSoft Workforce Analytics, Compa-Ratio is most commonly defined as the relationship between current pay and the midpoint calculated as: (Incumbent Pay/Midpoint)*100. Usually expressed in whole numbers, or in percentage form by dropping the multiplication operation. Much less common is the use of a compa-ratio calculation as: range midpoint/market rate.

**Compensation Frequency**
In PeopleSoft Workforce Analytics, this is the frequency at which a job is paid. This is the value you use for reporting or quoting pay. Examples include Annually, Monthly and Weekly.
**Compensation Planning**

In PeopleSoft Workforce Analytics, this is the process through which employee compensation plans are defined, and compensation budgets are allocated throughout an organization. Major components of compensation planning include designing pay structures, setting individual pay levels, and budgeting and forecasting compensation spending.

**Compensation Rate**

In PeopleSoft Workforce Analytics, this is the compensation rate for a job. This is the rate the company uses for quoting and reporting pay.

**Comp time (compensatory time)**

A PeopleSoft Time and Labor-managed employee benefit where time off is granted in exchange for time worked based on customer-defined criteria; is associated with an expiration and is used as reported time (see Attendance).

**Compensation**

The process by which a worker is remunerated for services rendered to, or work performed on behalf of a business entity.

**Compensation Package**

All of the base and non-base components on a job row.

**Compensation Rules**

Business methodology or logical process that is applied to reported time in order to determine payable time (see Time Administration).

**Competency**

In PeopleSoft Workforce Analytics, Competency is a knowledge, ability, skill, accomplishment, or National Vocational Qualification (NVQ).

**Competency Inventory**

All of the roles, tasks, competencies and accomplishments possessed by the workers in the current workforce. This data is migrated from internal source systems into the data warehouse tables of the PeopleSoft Enterprise Warehouse.

**Competency Strategy**

The type and number of roles, tasks, competencies and accomplishments essential to accomplishing a business scenario based on your strategic business goals.

**Competitive Appointment**

An appointment to a position in the competitive service following open competitive examination or under direct-hire authority. The competitive examination, that is open to all applicants, may consist of a written test, an evaluation of an applicant's education and
experience, and/or an evaluation of other attributes necessary for successful performance in
the position to be filled.

**Competitive Service**
All positions as defined by 5 USC 2102 in the executive branch of the Federal Government
are in the competitive service unless they are specifically excluded from it. Positions in the
legislative and judicial branches are outside of the competitive service unless they are
specifically included.

**Compress**
The act of placing a Planning task as early as possible in the schedule without violating any
constraints.

**Compressed Split**
In PeopleSoft Demand Planning, an optional function that allows a split database to be
compressed so it can be transferred to an account manager’s computer.

**Concurrent Offerings**
Multiple stock purchase offerings that are active and outstanding at the same time. The end
date is measured from the employee’s grant date.

**Concurrent Processing**
The situation in which you run multiple batch processes at a time. In PeopleSoft Benefits
Administration, for example, simultaneous open enrollment and event maintenance qualifies
as concurrent processing.

**Configuration Code**
A unique 50-character identification code that accurately tracks and costs inventory with the
PeopleSoft Product Configurator. It corresponds to a lot number for a non-configured item.

**Configuration Costing**
The overall process of reviewing and evaluating anticipated cost data for a configured item.

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

**Consolidate Assets**
In PeopleSoft Asset Management, the process of consolidating multiple load lines, usually
coming from a separate application, into one asset.
**Consolidate Depreciation**

In PeopleSoft Asset Management, the process of summing all open Add and Adj transactions by transaction type, **Transaction Date**, and accounting date for all composite members reporting to one composite asset.

**Consolidated Bill**

A grouping of bills gathered together for invoice presentation. The bills belonging to a consolidated bill are invoiced and printed together, with a page summarizing the bills as a group.

**Consolidations**

The PeopleSoft Pension Administration functions that accumulate hours, earnings, and pension contributions based on payroll data.

**Consolidations-Elimination Set**

A related group of intercompany accounts that is processed during consolidations. Once eliminated, this group of accounts should normally net to zero.

**Constraint**

A limit to a schedule, that, when violated, must be repaired to produce a valid schedule. User-configurable Planning constraints include Missed Request Dates, Missed Promise Dates, BI Shortages, RM Shortages, Capacity Overloads, Missed Inventory Targets, Changeovers, and Excess Inventory. See also **Temporal Constraint**.

**Constraints**

In the PeopleSoft Enterprise Warehouse, a constraint can consist of one or more filters and is used to define complex business logic. Constraints are based on DataMaps.

**Consumption Pattern**

In PeopleSoft Activity-Based Management, an attribute used to describe how an activity interacts with the cost objects to which it has been assigned. A unit type activity can expect to be performed on a regular basis so that each time a product is produced. A batch type activity may only be performed periodically for a given range of transactions. For example, each time a machine is setup to produce another product type. Sustaining type activities generally occur to support the overall operation of a company unrelated to products produced or customers served.

**Contact**

A person associated with a Customer ID. Contacts can be internal contacts or external contacts. Internal contacts are your employees who manage the relationship with your customers, from handling billing inquiries to product/warranty questions, to basic product/service questions. Interactions with customers can be recorded via PeopleSoft Conversations. Self service interactions can be recorded through PeopleSoft Contact Us. External contacts are your customer’s representatives who can access self-service transactions
and receive documents such as sales order acknowledgements. Contacts must have a User ID to access self-service transactions.

**Contact Us**

A method by which customers and unregistered guest users send email messages to specific addresses or members of the merchant’s organization. Merchants can also define automatic response messages.

**Container**

An Inventory stock unit for receiving, putaway, bin to bin transfers, picking, shipping, adjustments, and physical accounting. Each container is associated with a unique container ID.

**Content Reference**

Content references are pointers to some kind of content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three broad categories: target content, templates, and template pagelets.

**Contextual reference**

PeopleCode refers to a row or buffer field determined by the current context; that is, the context in which the PeopleCode program is currently executing.

**Contingent Beneficiary**

In PeopleSoft Pension Administration, any non-spouse pension beneficiary, including a child, other relative, or a trust. Spousal consent is required in order for an employee to name a contingent beneficiary.

**Contracting Officer (CO)**

Individual who has the authority and the official responsibility to produce a sound acquisition document.

**Contracting Officer's Technical Representative (COTR)**

Individual responsible for monitoring a contract and its associated tasks and deliverables.

**Contractor**

Any individual or non-employee reporting time that will not be paid through the payroll system.

**Contribution**

Represents money a stock purchase participant elects to contribute to the plan. Contributions are deducted from the participant’s paycheck and used to purchase stock pursuant to the offering and purchase period they are enrolled.
**Contributory Plan**

A Pension plan to which employees contribute. Contributions are typically a percentage of pay deducted from the employees’ paychecks.

**Control Budget**

Commitment control enables you to establish budgets that provide extensive, active budgetary controls over transactions, rather than just passively recording transactions.

**Control ChartField**

A control ChartField is a key ChartField that you designate to be the control field. Designating a ChartField as the control allows you to set attributes for a specific value of the ChartField that are different from the attributes specified for the budget type in general. For example, if the tolerance for a Projects budget type is set to 10% in general, you can override this value, making it higher or lower for specific projects.

**Control Group**

A mechanism to relate vouchers together for the purpose of controlling voucher input into PeopleSoft Payables. Generally used for assigning vouchers to data entry personnel and for reviewing input.

A set of parameters that determines the major forecast process options. The Control Group code is assigned to a group of **Forecast Item** and controls the forecast development and tracking for each item in the group.

Control groups are used by the Analytic Forecast Component to govern particular properties of the forecast rule, such as what accuracy to expect and what statistical method to apply. Forecast elements are assigned to exactly one control group. They manage differences among forecasts within a set.

**Control Hierarchy**

The relationship between business units, origins, vendors, and control groups in PeopleSoft Payables that defines which processing data will be automatically entered on each voucher.

**Control Number**

A sequential identifying number used to identify an exercise.

**Control Plan**

In PeopleSoft Quality, a plan that brings together application, measurement, and control and response criteria for a specific product and process.

**Conversation**

Any notes, transcript, or detail of a telephone call between an employee and a customer. Conversations may be tied to items, payments, purchase orders, document references, or bills of lading.
**Conversion data profile**
A conversion data profile takes the values from a particular PeopleSoft database table (such as the table holding bank transaction codes) and specifies how that value appears in PeopleSoft Business Documents.

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A conversion data profile takes the values from a particular PeopleSoft database table (such as the table holding bank transaction codes) and specifies how that value appears in PeopleSoft Business Documents.

**Conversion Loader**
A sample SQR delivered with PeopleSoft Asset Management that transfers data from multiple fixed-length ASCII files into sample, relational conversion tables.

**Copy Bill**
In PeopleSoft Billing, the online environment providing for the replication of a single bill, generating a new bill with its own unique invoice number.

**Core Functionality**
Core functionality is the set of information in PeopleSoft HRMS that is common to your entire global workforce tracking needs—and is always displayed on the primary page.

**Core hours**
The hours a workday, workweek or pay period in which a time reporter must be present for work in a flexible work schedule (see Scheduling).

**Corporate Account**
In PeopleSoft applications, this is equivalent to the Account (ACCOUNT) ChartField. The term is used to make a distinction between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (Alternate) accounts required by a regulatory authority for recording and reporting financial information.

**Corporate Reporting**
Companies with more than $10 million in assets whose securities are held by more than 500 owners must file annual and other periodic reports. Publicly held companies are required to file documents with the SEC which include:

- Registration statements for newly-offered securities
- Annual and quarterly filings (Forms 10-K and 10-Q)
- Proxy materials sent to shareholders before an annual meeting
• Annual reports to shareholders
• Documents concerning tender offers (a tender offer is an offer to buy a large number of shares of a corporation, usually at a premium above the current market price)
• Filings related to mergers and acquisitions

**Corporate Repurchase**
When a corporation elects to repurchase some of it’s own securities. This reduces the Common Shares Issued and Outstanding. Typically, used to improve the valuation of the company’s common securities outstanding as well as the Earnings Per Share (EPS).

**Correction to IRR**
An IRR type used when corrections need to be made to an original IRR that has already been submitted to the Office of Personnel Management (OPM). Federal employees covered by the CSRS retirement plan require SF-2806-1. Federal employees covered by the FERS retirement plan require SF-3101. A Correction IRR is also used if original retirement deductions were over-reported. See also Individual Retirement Record (IRR).

**Correspondence Customer**
A customer to whom all correspondence (statements) is addressed, often a corporate customer receiving correspondence for associated child customers.

**Cost Accounting**
A method where business costs are accumulated and distributed to products, processes, or discrete undertakings on an equitable basis. There are a variety of cost accounting methods, but they all share the same basic functions: classifying costs, recording costs, allocating costs to products or activities, summarizing and reporting costs to management. Cost accounting requirements and financial accounting requirements are not necessarily synonymous.

**Cost Assignment**
Resources assigned to cost objects or activities.

**Cost Basis**
Typically, this refers to the original price of an asset used in determining capital gains. However, in the case of death of an optionee, the appraised value of the asset at the time of death is the cost basis.

**Cost Center**
A Time and Labor Business Unit, in which all related costs attributable to some center within a business (such as an activity, an organization, or a program), are segregated for accounting or reimbursement purposes.
**Cost Element**

See [Inventory Cost Element](#) and [Manufacturing Cost Element](#).

**Cost Flow**

Determines how depletions will occur for purposes of costing a transaction. Cost flows available include Specific Lot ID, Specific Serial ID, FIFO, and LIFO.

**Cost Objects**

Cost objects represent cost information about products, customers, and channels. They are the final results of the activities performed by your business, representing the focal point of costing and profitability analysis. Examples are products, customers and channels. They are the final results of the activities performed by your business. Your model’s resources and activities are linked to the cost objects. They are often the focal point of profitability analysis.

**Cost of Capital**

An attribute used to describe the behavior of a particular cost object. A primary cost object is typically the main focus of the activity-based management analysis. This may be a product, customer or channel that you wish to calculate cost for. A support cost object may be used in a similar manner but may be further allocated to other support cost objects or primary cost objects.

**Cost Of Living Allowance (COLA), Non-Foreign**

A cost-of-living allowance payable to an employee at a location in a non-foreign area where living costs are substantially higher than those in the Washington, DC area.

**Cost Profile**

A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

**Cost Profile Group**

A grouping of items for the purpose of costing transactions and valuing inventory for a given book. Assigning an item to a cost profile group determines the books used by the item when accounting for that item.

**Cost Roll-up**

A process for calculating item costs. Cost roll-up provides a summation of all of the costs associated with the bill of material structure and the routing used in producing the item.

**Cost Row**

A cost transaction and amount for a set of ChartFields.
**Cost Template**
A collection of cost components that you can apply to a group of purchased items.

**Cost Type**
A user-defined method of categorizing item costs in Manufacturing for simulations and what-if analysis. Examples of cost types include current costs (which reflect the item's current bill of material or routing), proposed costs (which could be used in preparation for the next standard cost period), or activity-based costs (which include costs for items that consume a given activity).

**Cost Version Type**
A combination of cost types and cost versions used in cost rollups. Valid values include production (rolls up only manufacturing data and uses only the primary BOM and routing, each with a code of 1), engineering (can roll up with either manufacturing or engineering data, with any combination of BOM/routing codes), or simulation (only rolls up with manufacturing data, but can use any combination of BOM/routing codes).

**Count Grade**
A user-defined evaluation of a counting event.

**Count Point**
A predefined step on a routing or operation list where you can gather operation completion information. You define the appropriate points on the routing, record completions at these count points, and the system automatically backflushes the prior operations. This is only used on production IDs.

**Counts**
Count elements allow you to count the number of days or hours from a specific period of time. Counts are used primarily during proration calculations, but can potentially be utilized in other situations as well.

**Court-Ordered Benefits Coverage**
As prescribed in Title 5, United States Code and Title 5, Code of Federal Regulations, court orders that stipulate that an employee must continue or begin the coverage features for all employee benefits must be enforced. Federal employees are mandated by court orders to continue covering or begin covering their former spouses and/or children under their federal employee benefit programs (health, life, and thrift savings).

**Court-Ordered Garnishments**
As prescribed in Title 5, United States Code and Title 5, Code of Federal Regulations, court orders enforcing child support, alimony, or collection of commercial indebtedness are served on the appropriate entity within the Federal agency and implemented as offsets against the employee's salary.
**Coverage**
An employee’s chosen benefit plan and coverage level; that is, what sort of benefit is provided as well as the value.

**CPAM (Caisse Primaire d'Assurance Maladie)**
In France, CPAMs are the local social security offices that manage health coverage for French workers. CPAMs are regulated and established by the French government. If you’re managing a French workforce you’ll need to identify and track the CPAM offices that impact your enterprise.

**CRAM (Caisse Régionale d'Assurance Maladie)**
In France, CRAM is the regional social security body which oversees the running of CPAMs. CRAM offices work with companies to both prevent and compensate workers for industrial injury.

**Create Date**
The date that you extracted a deduction or offset to PeopleSoft Deduction Management or created a split deduction.

**Create Missing Items**
In PeopleSoft Demand Planning and Inventory Planning, a feature that enables automatic system generation of master records that don’t exist in the system.

**Created Time**
Time collecting device time or elapsed time generated by the system based on the time reporter’s schedule (see Time Administration)

**Creating Time**
The preliminary generation of time segments as close as possible to their likely values when you officially report time—so that the information on the time records is as fresh and current as possible. The system shows you time that has already been created, rather than you having to create it “on the fly” when you come in to report. The process fills in reporting day gaps as defined by work schedules.

**Credit Analyst**
A required field used in PeopleSoft Receivables, Billing, Order Management, and Deduction Management when working with items. Each item must be assigned to a credit analyst. If no credit analyst is assigned to an item, the credit analyst assigned to the customer is used as the default.

**Credit Risk Spreads**
In the financial services industry, the additional charge to a risk-free interest rate, based on a riskier credit rating.
**Credits**
See Flexible Credits.

**CREF**
Acronym for Content Reference.

**Crew Reporting**
A Time and Labor process that enables you to report the earnings which consist of one or several time reporting codes and associated quantities of hours, amounts, or units, and task information for one date under report for a user-defined crew. The system transforms the information into instances of daily time for each crew member for the entered date.

**Critical Success Factors (CSFs)**
In PeopleSoft Balanced Scorecard, things that an organization must do well or excel at to achieve its goals. One or more key factors or objectives that must be accomplished for a particular strategic thrust. Key Performance Indicators are attached to CSFs.

**CRM Warehouse**
See Warehouses.

**Cross Border Walker**
This term is used in Europe for an employee who lives near a border in one country and works in another country. Such employees are subject to different tax and social security rules.

**Cross-Plan Validation**
The process by which the PeopleSoft Benefits Administration determines enrollment prerequisites for benefit plans. You can define four types of cross-plan validation prerequisites: prerequisites based on plan types, benefit plans, dependent enrollments, and coverage percentage limits for Life and AD/D plans.

**Cross-View Reconciliation**
In PeopleSoft Demand Planning, a process that enables the balancing of forecasts between selected levels of related views with the same Forecast Item key. The process is used when adjustments have been made to a working view and are then required in a related view.

**Cube**
See Multidimensional Database (MDDB).

**Cube View**
In PeopleSoft Demand Planning, defines the user's own view of a forecast. The parent working view and dimensions determine what forecast data is included and how aggregates are formed.
**Cumulative Tax Method**
A payroll tax calculation method that adds together year-to-date earnings and earnings for the current pay period, then annualizes the result before calculating tax. This method is useful when payrolls vary greatly in amounts from pay period to pay period, such as in the case of sales commissions.

**Currency Calendar**
In the financial services industry, business calendars for markets outside the organization’s domestic operations that reflect the foreign markets’ holiday schedules.

**Currency Conversion Engine**
A PeopleSoft Enterprise Warehouse Engine that processes financial information in multiple currencies.

**Current Period**
The earliest pay period for which the close date has not passed (see Time Reporting).

**Current Period (Time and Labor)**
In Time and Labor, the employee's current pay period which will be determined via the employee's Pay Group affiliation. Although there can be only one definition of Current Period per installation, the user can change it manually.

**Current View**
A reporting screen in Time and Labor whose effective date is within the date boundaries of an employee's current pay period, and for which pay has not yet been confirmed. A *Future Time Reporting Transaction* is one that has an effective date after the last day of the employee's current pay period. An *Historical Time Reporting Transaction* is one that has an effective date before the first day of the employee's current pay period.

**Current Year**
A period for event maintenance processing.

**Curve Generator**
A supporting module (common to financial services industry applications) that enables you to construct curves used to determine appropriate interest rates for given maturities and / or time periods. You can import market data from outside sources such as Bloomberg, upload the data from a spreadsheet, or manually enter the data. You can then build configured curves from segments or combinations of other curves.

**CUSIP Number**
A nine digit alphanumeric number associated with issuers’ securities. CUSIP (Committee on Uniform Securities Identification Procedures). A uniform numbering system widely used to identify specific securities and their issuers.
**Custom Statement**
A user-created logical or mathematical expression that determines information about an employee in PeopleSoft Pension Administration. Custom Statements commonly define employee groups and benefit formulas.

**Customer Inquiry**
A window containing options to review customer balances, aging, history, items, actions, and conversations.

**Customer Scorecard**
See PeopleSoft Customer Scorecard.

**Customer Tree**
A user-defined graphical representation of your current sales organization. A customer tree is used to establish and distribute funds and to determine authority levels for promotional activities.

**Cut Session**
Cut sessions are a means of dividing a course session. You use cut sessions where a course session does not run on consecutive days from start to finish, or if there are multiple instructors or locations. Each cut session has its own start/end date, location, and instructor. For example, if you have a course that runs for two days a week for a month, you would divide the course session into four cut sessions, each of which is two days long.

**Cycle Count**
A manual counting event that does not cover an entire inventory business unit. Usually includes every item (and lot, if applicable) in a location or family.

**Cycle Interval**
The number of days between cycle counts.

**Cycle Procedures**
Inventory planning tasks that need to be performed on a regular basis to ensure an up-to-date Inventory Policy. The tasks can be performed either at the end of a processing period or within the period, and should always be performed if the forecast or Control Group or Policy Item parameters change. Tasks include generating a policy and reviewing Work Queue messages.
**DAT file**
A text file (input.dat) used with the Verity search engine that contains all of the information from documents that will be searchable but not returned in the results list.

**Data Elements**
Data elements, at their most simple level, define a subset of data and the rules by which to group it.

For PeopleSoft Balanced Scorecard, data elements are used as the basis for key performance indicators, and as target values for Key Performance Indicator (KPI) objects.

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

**Data Entry Access List**
Used to present a concise list of often-performed data entry tasks to a user. You can assign multiple control plans to a single data entry access list.

**Data Extract**
A report that creates a file used to transmit data to a third party on magnetic media. There is no meaningful printed output for this type of report.

**Data Loader**
Data Loader is a PeopleSoft Enterprise Warehouse utility that moves data from the Operational Data Store staging area to either the ODS reporting area or the Data Warehouse. The Data Loader utility is made up of several pages that allow you to enter Metadata to define your source and target records and your transformation rules and then perform the load by running an Application Engine.

**Data Loader Map**
Defines how to extract data from the Operational Data Store (ODS), transform it, and load to a Target Table. The target table can reside in the warehouse or the ODS layer.

**Data Manager**
A PeopleSoft Enterprise Warehouse engine that distributes revenue, expense, analytical application engine results, statistical quantities and other measures across business units, departments, products, customers and channels—any field or logical group in the chart of accounts. You can define a number of types and options within this engine. It is also used as a means of posting to the Performance Ledger.
**Data Manager Rules**

In the PeopleSoft Enterprise Warehouse, Data Manager rules use Constraints to specify the source as well as the target tables for moving, aggregating, or multidimensionalizing your engine output. Rules use Data Manager methods to enrich the PeopleSoft Enterprise Warehouse data.

*See* Data Manager Methods.

**Data Manager Methods**

There are several methods: Copy, GL Mapper, Prorata, Spread Even, and Tree Aggregation. Each method enables you to move and/or enrich engine output.

**Data Mart**

A Data Mart is a data structure that uses a central fact table and related dimension tables to generate a “relational cube” or directly generate an Insight report.

**Data Mart Builder**

The Data Mart Builder is a multiple Application Engine (AE) process, that is, a framework of procedural programs, that creates a Data Mart.

**DataMaps**

Information that builds upon the data captured in the TableMap records. DataMaps enable you to define a logical view of the physical PeopleSoft Enterprise Warehouse tables. DataMaps bring together information from many different tables and fields and define it all as one entity or table.

**Data Row**

Contains the entries for each field in a table. To identify each data row uniquely, the system uses a key consisting of one or more fields in the table.

**DataSet**

DataSets are used as input for various engines and processes, for instance, the Analytic Forecasting component, the Data Manager, user defined functions, drivers in Activity-Based Management, and data elements in the Key Performance Indicator Manager. DataSets provide a user defined set of information to the engines. DataSets use Constraints to restrict used columns and restrict returned rows. Each DataSet is created by a process specific setup. However, the underlying logic is the same, enabling you to more easily understand the functional aspects of the process.

**Data Warehouse**

A large database containing data summarized from one or more transactional systems, optimized to support the analysis needs of the enterprise. An ideal data warehouse contains all the data necessary to make business decisions. Users analyze the data in the warehouse using Online Analytical Processing (OLAP) tools and ad hoc query/reporting tools. An increasing
number of organizations have "virtual" data warehouses, where the data warehouse is not one physical database, but rather a collection of specialized (and distributed) data marts.

See also PeopleSoft Enterprise Warehouse.

Data Warehouse Tables
Data Warehouse tables act as the portal for getting data into the PeopleSoft Enterprise Warehouse from PeopleSoft, OLTP applications or other "outside" sources. These tables are used:

- As targets for loading operational data.
- For error detection and handling
- For data validation.
- For aggregation.

Database Alias
The PeopleSoft Pension Administration utility that looks up employee data.

Dataset
A file containing data to be analyzed by the Quality Server program. The dataset is similar in content to a spreadsheet. In PeopleSoft Planning, a file that stores schedule information such as tasks, resources, calendars, and so on.

Date
See Accounting Date Transaction Date or Effective Date.

Date
If you want to either include a date in a calculation, or determine a new date by taking a starting date and either adding or subtracting a period of time to come up with another date, you use a date element.

Date Classified
Date the Position Description is approved by Management/Position Management.

Date Eligible To Retire
Date an employee is eligible to optionally retire based on the combination of age and service that meets legal requirements.
**Date Under Report**
The date (day) in PeopleSoft Time and Labor for which time is being reported. The Date Under Report does not have to equal today's date.

**Day Breaker**
Customer defined time that is used to determine when one day becomes the next. It’s used to determine the “logical” date of a punch. (See Understanding Workgroups.)

**Days Supply**
In PeopleSoft Inventory Planning, a method that can be used with several types of Inventory Policy. Using this method, a specific number of days of supply for an item should be used to calculate the item's inventory policy.

**Deal Type**
PeopleSoft Treasury has categorized deals into several basic deal types from which you can choose when defining an instrument.

**Death Coverage**
The PeopleSoft Pension Administration function that determines the factor used to reduce an employee’s benefit when the plan charges for PRSA coverage.

**Decompressed Split**
In PeopleSoft Demand Planning, a function for returning a compressed split database to its original form. See also Compressed Split.

**Deduction**
Any amount taken from an employee’s pay check each pay period. Deductions may include health or medical benefits, union dues, and so on. See also Benefit Deduction and General Deduction.

**Deduction Date**
The as of date for the deduction item in PeopleSoft Receivables.

**Deduction Item**
An individual item that you created in receivables and is an open receivable on the customers account due to a deduction that they took in a payment for a receivable item.

**Deduction Reason**
Code that describes the type of deduction. When assigned to a write-off resolution, it determines what accounting entries to create.
**Deduction Specialist**
The individual responsible for tracking and resolving deductions in PeopleSoft Deduction Management.

**Deduction Subset**
A group of deductions selected from a company’s standard set of deductions. Deduction subsets minimize data entry time in special processing situations such as bonus check runs.

**Default Mode (DM) model**
In the financial services industry, an approach used by financial institutions to predict a decline in portfolio value. Only two outcomes are considered – default or non-default. If the debt does not default, there is no change in the value. If the debt does default, then the loss is calculated as the difference between what was contractually owed and the value of any collateral recovered.

**Defection Analysis**
In PeopleSoft Workforce Analytics, the identification of employees who are likely to leave the organization based on predefined assessment criteria.

**Deferred Compensation**
Compensation payments that are payable to an individual in the future such as pension plan payments, annuities, stock awards and profit sharing. Note: Profit sharing can be considered direct pay if paid out in cash on a periodic basis or deferred pay if cumulative with the intention of payment in the long-term future.

**Deferred Vesting**
The adjustment made to the original option’s vesting schedule that pushes the vesting into the future.

**Defined Benefit Plan (DB Plan)**
A retirement income plan (usually called a pension plan) where the employee’s benefit is definitely determinable based on a plan-specified benefit formula.

**Definition or Function Definition**
The parameters for any of PeopleSoft Pension Administration’s nineteen core functions. A definition has to be explicitly associated with an employee Group Definition before it can be applied.

**Dekit**
The ability to return material issued in kits to inventory. This is used when entire kits need to be returned; individual components are handled through kit issues/returns.
Delete Non-Matching Items
In PeopleSoft Inventory Planning, an option used in the Generation process to delete Inventory Planning items that don’t have corresponding items in Demand Planning. The item deletion occurs when the system generates the policy.

Delta
When retroactive processing occurs for a given payee, the system recalculates each element generated for the payee. The system compares the recalculated results to the original results. The difference between these results is typically referred to as the retro “delta.” A retro delta can represent either an underpayment or an overpayment that results in an adjustment to the payee’s earnings.

Demand
Collection of training requests. This could be an employee demand, a departmental one or a company-wide demand.

Demand Filter Width
In PeopleSoft Demand Planning, specifies the confidence interval within which demand is considered to be reasonable. Actual demand that is outside the confidence interval is automatically filtered and replaced by the value at the edge of the interval. The value is expressed as a percentage.

Demand Filtering
In PeopleSoft Demand Planning, provides a way to detect and highlight unusual demands and forecast errors. If the demand falls outside of a band that is considered reasonable, the system automatically adjusts it to the level of the boundary and logs a message to the Work Queue.

Demand Number
The configured product sub-component sequence number.

Demand Planning
In PeopleSoft Activity-Based Management, this type of planning focuses on studying the impact of cost objects and activity volumes.

Demand Priority
The placing of importance on independent demand. The Planning engine uses the demand priority value to determine the order in which you fulfill the demand. You can set a demand priority from 1 to 998 with 1 being the most important level. The priority value of 999 is reserved for the system.

Demand Priority Rules
In PeopleSoft Inventory, a set of rules that will sort demand so the most important demand will have the first opportunity to reserve available inventory. If demand priority rules have
been defined, the Material Reservations process (INPLDMND) sequences orders by priority rank, processing those with the lowest rank value first.

**Deplete Cost Method**

Determines how you cost a depletions transaction within a book. The deplete cost methods available include Actual, Non-Cost, Perpetual Weighted Average, Periodic Weighted Average, and Value at Current Standard.

**Depreciate When in Service**

A switch that indicates whether PeopleSoft Asset Management should allocate depreciation as of the date an asset was placed in service. This is valid only in the year the asset was acquired.

**Depreciation - Declining Balance**

Budgeting calculates this as: Cost minus Accumulated Depreciation divided by Life divided by number of periods per year. It results in a higher depreciation expense in the early years of an asset, which decreases as you near the end of its useful life.

**Depreciation - Double Declining Balance**

Budgeting calculates this as: Cost minus Accumulated Depreciation multiplied by 2 divided by Life divided by number of periods per year. It results in a higher depreciation expense in the early years of an asset, which decreases as you near the end of its useful life.

**Depreciation Methods**

The various methods of spreading the acquisition cost across the life of an asset rather than expense the full value of an asset at the time you acquire it. The value of the asset consequently decreases (or depreciates) through time. The four depreciation formulas delivered with PeopleSoft Budgeting include: declining balance, double declining balance, straight line, and sum of the years.

**Depreciation - Straight Line**

A method of depreciating asset value in equal amounts across the life of the asset. Per-Period Straight-Line depreciation is calculated as the cost of an item minus the salvage value divided by the number of periods to depreciate.

**Depreciation - Sum of the Years**

A depreciation method equal to the value of the remaining years of life divided by the sum of the years remaining is multiplied by the Net Book Value. This figure is then multiplied by the percent of years to depreciate. This results in a higher depreciation expense in the early years of an asset, which decreases as you near the end of its useful life.
**Depromote**

In PeopleSoft Demand Planning, the process of making an adjustment to actual demand data that removes the effect of a promotion during a defined period. As a promoted period moves into history, the system creates an adjusted demand entry that is equal to the **Prorated Forecast**.

**DeptID**

A ChartField that defines departments or administrative offices that have operational, fiscal and/or budgetary responsibility for specific sets of activities.

**Derived Metric**

The result of a calculation on a report of base metrics.

**Detail**

A temporary assignment to a different position for a specified period when the employee is expected to return to his/her regular duties at the end of the assignment. This employee is considered for pay and strength count purposes to be permanently occupying his/her regular position. Unless the agency chooses to use an SF50, a detail is documented with an SF52.

**Detail Tree**

A tree that employs ranges of detail values under each node; you must manually specify the detail values.

**DFI ID (Depository Financial Institution ID)**

A PeopleSoft Payables bank identifier, consisting of Transit Number, Swift ID, or CHIPS ID.

**Dimension**

A single element of a business model, such as product, department, or location. Cube Manager uses the term Conforming Dimension.

In terms of data analysis, dimensions can be thought of as criteria, such as time, product, and location, used to pinpoint a particular piece of data. For example, in the retail industry a set of dimensions could be geography, product, time, customer, and vendor. The geography dimension would include company, chain, region, district, and finally store attributes. A dimension is also a column heading on an analysis and reporting template which you can drill through or roll up to the multiple levels.

In PeopleSoft Budgeting, a view option that assists in summarizing the rows of data in line-item budgeting.

A single element of a budgeting model, such as account, product, project, department, or operating unit. In PeopleSoft Budgeting, these dimensions typically represent the ChartFields used by your organization during your budgeting process.
**Dimension Table**

In the PeopleSoft Enterprise Warehouse, Dimension Tables store additional attributes or data about Facts. Some example dimensions include Customer, Channel, Geography and Product.

**Direct Compensation**

In PeopleSoft Workforce Analytics, Direct Compensation is payment made to workers in exchange for their contributions to the organization. Direct Compensation is typically categorized as including Cash Compensation and Long-term Variable Compensation.

Cash payments made to workers in exchange for their contributions to the organization. Direct pay is typically categorized as fixed pay (for example, base pay, shift differentials) and variable pay (for example, profit sharing, incentive, bonus). Note: Profit sharing can be considered direct pay if paid out in cash on a periodic basis or deferred pay if cumulative with the intention of payment in the long-term future.

**Direct Calculation**

Calculate actual and directly assigned dollars.

**Direct Cost**

In PeopleSoft Workforce Analytics, a direct cost of an activity or a cost object. An example is the salary cost of employees working on a project.

**Director**

An affiliate of the company who holds a seat on the Board of Directors for the corporation. A Director, generally, is not an employee of the corporation.

**Disability and Discrimination Act of 1995**

In the United Kingdom this act makes it unlawful to discriminate against individuals on the basis of their disability in relation to recruitment, promotion, training, benefits, terms and conditions of employment, and dismissal.

**Disability Rate Code**

The desired percentage of disabled persons that should be employed by French employers, as mandated by the French government.

**Disbursement View**

In PeopleSoft Demand Planning, a Forecast View that allows the forecast from a working view to be reported on using an alternate key. Disbursement views are built directly from the working views and inherit many working view attributes, including time period and associated user data definitions, from the parent working view.
**Discounted Stock Option**

Rights to a stock option at a price less than 100 percent of fair market value at the time of grant.

**Discretionary Plan**

In PeopleSoft Workforce Analytics, this is a plan for distributing compensation awards that provide managers the ultimate discretion over a pool of money which is either funded based on company, group, or employee performance, or it’s budgeted. The discretionary award determination is sometimes guided by a pre-determined percent of the participant’s salary, expressed as an opportunity. This figure can then be modified based upon management’s perception of actual value created by the group or employee.

**Disqualifying Disposition (DD)**

When an optionee sells or otherwise disposes of the shares of stock acquired through the exercise of an incentive stock option or through an employee stock purchase plan before the holding period for preferential tax treatment has lapsed.

In the case of Incentive Stock Options, the holding period is one year of the date of exercise and two years of the date of grant. At the time of disposition, the individual recognizes compensation income equal to the difference, if any, between the option price and the fair market value of the corporation’s stock on the date of exercise. If the sale price is less than the fair market value of the stock on the date of exercise, the compensation income is limited to the total sales price less the total option price, less any fees.

In the case of purchases through an employee stock purchase plan, the holding period is one year from the purchase date and two years from the enrollment date. Compensation income in a disqualifying disposition is equal to the difference between the total fair market value on the purchase date and the total purchase price.

**Distribution**

Provide a repository of time and associated estimated and actual allocated labor costs to other systems

The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.

**Distribution Network**

A distribution network is a prioritized list of Inventory business units (IBUs). When a customer orders a product, the system uses this network to determine which warehouse the stock ships from.

**Distribution Profile**

A definition of ChartField distributions assigned for compensation costs. A distribution profile can be used to set up defaults for how the system should distribute costs associated with a position’s salary, benefits, and earnings. PeopleSoft Budgeting-specific.
**Distribution Rule**
You use distribution rules to determine the order in which the system searches for matches against the distribution sets matrix when sales orders are entered.

**Distribution Set**
Distribution Sets assign account distribution information to combinations of defining elements used on sales orders.

**Distribution Type**
An identifier that defines one of the different transactions that move an item into or out of an inventory business unit. Distribution types are used to create debit and credit transactions to the general ledger via the Journal Generator.

**Dividend**
Distribution of earnings back to shareholders, prorated by the class of security and paid typically in the form of money or stock. The amount of a dividend is decided by the Board of Directors and is usually paid quarterly.

**Document Management**
The process through which a user has complete control of document version including the ability to view, query, and edit documents in a secure vault. Document management enables you to seamlessly perform online document queries and view documents directly, launching them from within PeopleSoft applications. You can associate pertinent documents with engineering change requests (ECR), engineering change orders (ECO), item revisions, bills of material, manufacturing and engineering routings, production component lists, and production operation lists.

**Document Sequence Number**
A value that the PeopleSoft system assigns to a document (such as an invoice, voucher, or journal) when you create a document for a business unit that you have enabled for document sequencing. The system determines the number by the values of the business unit, accounting date, and document type.

**Document Sequencing**
A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in your system for the purpose of statutory reporting and tracking of commercial transaction activity. Document sequencing requires that you classify all financial transactions into three transaction types—journal type, journal code, and document type—and that within each transaction type, all documents you enter are numbered sequentially. When you create a document (such as an invoice, voucher, or journal), the PeopleSoft system assigns a document sequence number to that document.
**Document Type**

The final level of three categories for defining a financial transaction (or document), necessary when using document sequencing. It represents the business purpose of a financial transaction, such as domestic customer invoice or customer credit memo. Document type is within one and only one journal code; journal code is within one and only one journal type. Document type is the only required category, because the values of the other two categories can be derived from document type.

**Dollar Tolerance**

In PeopleSoft Inventory, the acceptable cost difference between expected cycle count quantities and actual quantities counted. This value allows a margin of error for an item during cycle count reconciliation based on item cost.

**Domestic Relations Order (DRO)**

A preliminary version of a court order (usually stemming from a divorce settlement) ordering a division of a participant’s pension benefits. The order is not in effect until it is determined to be “qualified” by virtue of meeting certain requirement. At that point it becomes a Qualified Domestic Relations Order, or QDRO.

**Double Byte Characters**

If you’re working with Japanese or other Asian employees, you can enter the employee’s name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].

**Draft Worksheet**

A work space used in PeopleSoft Receivables to track a draft through its processing life cycle.

**Drill-Back Calculation**

Assigns indirect dollars and Drill-Back calculations. Also, this picks-up all costs in the Calculations Detail (CALC_DETAIL_F00) that was assigned during direct calculations.

**Drill Down**

The ability to go down to the next level of detail in a set of data. For instance, if you’re looking at an expense figure for a division, you can drill down to the expenses for each department in the division.

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**Driver Lookup Table**

Tables associated with a driver that enable different rates and amounts unique to a budget center.

**Drivers**

In PeopleSoft Activity Based Management, drivers are a means of assigning dollar amounts from resources, activities, and cost objects to other resources, activities, and cost objects throughout the model in PeopleSoft Activity-Based Management. Drivers can also be assigned across business units. There are different types of driver categories (transactional, duration, and intensity), and different ways of specifying how those dollar amounts are calculated (amount, percentage, spread even, and direct), as well as different ways that dollar amounts are assigned (depending on assignment type and object type).

In PeopleSoft Business Planning, a driver can be defined as a set of values that are used as an input to another process. In this context, a driver should be interpreted as a projection of external factors and other indicators. The user can define a relationship between the driver and a financial result. The driver values and the defined relationship then combine to produce a projection of the financial result. For example, a projection of the number of square feet used (driver) and the price per square foot paid in rent (driver) can combine to produce a projection of rent expense (financial result).

**DRO**

See Domestic Relations Order.

**DSS (Decision Support System)**

A DSS is a workstation-based analysis and reporting system, typically aimed at analysts and line managers. OLAP tools provide a powerful DSS.

**Duration**

In PeopleSoft Pension Administration, the utility that calculates the length of time between two dates.

**Duration [Global Payroll]**

An element type that calculates a period of time between two dates. For example, if you want to determine a payee’s age, you can calculate the duration between his birth date and the calendar period end date.

**Dynamic Group**

A group in Time and Labor that enables you to establish criteria or attributes for a group of employees. All employees who fit this criteria at processing time belong to the group.

**Dynamic Tree**

A tree that takes its detail values—Dynamic Details—directly from a table in the database, rather than from a range of values entered by the user.
**Dynamic Views**

In PeopleSoft Demand Planning, a **Forecast View** that allows interaction with the forecast data using an alternate key structure. By using dynamic views, you streamline the working view and can complete the working-view design without having to anticipate all conceivable adjustments.

**Earliest Change Date**

Determines both the range of dates and the amount of data that will be processed for each time reporter (see Batch Processing)

**Early Punch**

A punch that is more than the predefined number of hours/minutes before a scheduled punch where a time reporter is warned

**Early Retirement Date (ERD)**

A retirement date earlier than a plan-specified “normal” retirement date. Employees usually must meet age and/or service requirements to be eligible for early retirement, and early retirement benefits are often reduced to compensate for the longer duration of payments.

**Early Retirement Factor**

The reduction made to an employee's benefit if the employee elects for early retirement.

**Early Warning**

In commitment control, warning of possible future budget exceptions. You can specify that you are to receive a warning when commitments and expenditures reach a predetermined percentage of budget. For example, you can instruct the system to let you know when commitments and expenditures reach 50%, 80%, or some other percent of a budget.

**Early/Late Adjustments**

The PeopleSoft Pension Administration function that calculates early retirement factors or late retirement factors.

**Earning Group**

Part of a group of defaults assigned to job codes. Earnings group may include non-salaried items such as holidays and bonus pay dependent on individual company parameters.

**Earnings**

The amount owed to an employee based on salary, hours worked, or other calculation routines, plus other types of compensation and holiday, vacation, and bonus pay.
**Earnings [Global Payroll]**
An element type that defines the different types of compensation that are added to a person’s pay. Examples include salary, commission, bonuses, and retirement pay.

**Earnings Accrual Class**
Categorizes a set of accruable earnings.

**Earnings Code**
Codes that represent the various types of earnings such as regular, overtime or leave.

**Earnings Per Share (EPS)**
The portion of a company's profit allocated to each outstanding share of common stock. Net income (reported or estimated) for a period of time is divided by the total number of shares outstanding during that period.

**Earnings Type**
An abbreviated and encrypted set of business instructions containing compensation instructions. Earnings Type may also contain Benefit Entitlement and Administration instructions, taxation instructions, Financial Accounting instructions, Organizational Administration instructions, work group and labor affiliation instructions, and other instructions.

**Economic Loss**
In Funds Transfer Pricing, this refers to the break fund economic loss, calculated by applying the theoretical value of the interest rate differential (IRD) against a cash flow stream, based on the amount of the prepayment or cancelled draw-down.

**Economic Value Added**
In the financial services industry, Economic Value Added is a financial metric that factors into the measurement of an activity’s profitability the cost of economic capital assigned to that activity.

**EDGAR (Electronic Data Gathering, Analysis, and Retrieval)**
An electronic system implemented by the SEC that enables companies to file documents in conjunction with disclosure requirements mandated by the SEC.

**EDI Agent**
Used in EDI processing, the inbound EDI Agent loads trading partner data (flat files) into the PeopleSoft database using transaction, map, and trading partner definitions set up using EDI Manager. The outbound EDI Agent extracts information from the PeopleSoft database and generates data files that can then be processed for transmission to a trading partner.
**EDI Manager**

A suite of online pages used to define transaction sets, trading partner profiles, and translation maps for EDI transactions.

**Edit Table**

A table on the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

**EEO Company Code**

In the United States companies are assigned this federal code for EE0 and VETS100 reporting.

**Effective Date**

A method of dating information in your system. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect.

**Effective Periods**

In PeopleSoft Demand Planning, the number of periods of historical demand used in the Model Reset process. The value can be used to exclude older, possibly unrepresentative historical demand data from model Optimization.

**Effective Sequence**

A system-generated number assigned to distinguish between two job entries with the same effective date.

**Effective Tax Rate**

The ratio of income tax paid over gross income, showing the percentage of income actually paid in taxes.

**Effectivity Date**

The date on which a component can be added or substituted in production, typically specified on an item's bill of material.
**EIS (Executive Information System)**

An EIS is a workstation-based analysis and reporting system for executives. An EIS provides a higher-level view of the data than a DSS, and typically requires less knowledge about the underlying transactional systems. OLAP tools provide a powerful EIS.

**Elapsed Schedule**

A method of scheduling a time reporter’s time that is based on TRC and duration. This method can be used for scheduling of elapsed time reporters (see Scheduling.)

**Elapsed Time**

Reporting non-clock time in increments of hours or partial hours (see Managing Time / Understanding Time Reporting).

**Elapsed Time Service**

A method of calculating a period of service that uses only the start and end dates of the period to determine the amount of service. Hours worked or other measures of the actual work performed during the period are not taken into account.

**Electronic Certification System (ECS)**

An automated Payment Voucher authorized by the Certifying Officer for use within the Treasury Department, Financial Management Service's financial system. PeopleSoft provides a method to record and generate data files for on- and off-cycle processed payments.

**Element**

In PeopleSoft Global Payroll, an element refers to both primary elements and supporting elements. Primary elements are comprised of earnings, deductions, absence entitlements, and absence take elements. Supporting elements are element components that are combined to create primary elements.

In PeopleSoft Enterprise Performance Management, elements are used to create a Profile. An Element can be one or more columns of data in an Enterprise Warehouse table, associated with a single dimension (for example, Customer, Product, Department, or Channel). An Element can also be KPI, Population, subscription data from a third party, preexisting Profiles, and data mining scores.

**Element Group**

Element Group identifies a group of elements to provide eligibility. You can then use this as a notational shortcut—instead of having to list each element, you can use the element group name. Element Group’s expedite the process of manipulating earnings and deductions.

**Element Name**

Name assigned by the user for data fields, rules, formulas, and tables. For example, the names you give to new rules, elements, or objects.
**Element Segment**
When an element changes mid-period, requiring the affected element (and perhaps a subset of other elements) to be calculated multiple times on either side of the date on which the change takes place, element segmentation is used. Unlike period segmentation, the system segments only the elements you select, and creates separate result columns only for the specified elements. In element segmentation, there is only one gross-to-net result set.

**Eligibility Group**
Eligibility groups define the possible earnings, deduction, absence entitlement, and absence take elements that a payee might be eligible to receive. This enables you to group payees so as to assign eligibility for certain pay elements.

**Eligibility Rule**
PeopleSoft Benefits Administration uses eligibility rules during Benefits Administration processing to determine which benefit programs and options an employee is eligible for. Eligibility rules are closely associated with event rules: they determine what options an employee can have, while event rules determine which of those options an employee will actually be able to choose.

**Elimination Set**
See Consolidations-Elimination Set.

**Email Template**
Pre-defined parameters that establish automatic email generation during budget submittal, rejection, publishing, and/or targeting.

**Employee**
An individual employed by an organization and administered as an employee in the PeopleSoft Human Resources system.

**Employee Accounts**
The PeopleSoft Pension Administration function that tracks employee contributions to a pension plan.

**Employee ID**
A unique identification code for an individual associated with your organization.

**Employee Paid Benefit**
The portion of a pension benefit funded by the employee’s own contributions to the pension plan. Also, the PeopleSoft Pension Administration function that determines this amount.
**Employee Profile**
This PeopleSoft Activity-Based Management feature enables time and labor information to be part of an analysis.

**Employee Stock Purchase Plan**
A type of statutory stock option plan through which employers grant options to their employees in order to provide them with additional forms of compensation.

**Employee Survey**
In PeopleSoft Workforce Analytics, a method for capturing information about the activities performed by a given employee as well as the amount of time they spend performing each activity to perform activity-based management.

**Employee Survey Report**
The Employee Survey Report is an annual regulatory report that the French government requires from employers with more than 200 employees. In French it is called "Le Bilan Social". The report is communicated to both labor unions and the government. It provides a snapshot view of the company over the past 3 years for about 200 indicators.

**Employee Training Cost**
Amount budgeted to pay for students’ salaries while on training courses.

**Employer Identification Number (EIN)**
In the United States a company is typically defined as a business enterprise that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes.

**Employer’s Liability Insurance Associations (Berufsgenossenschaften)**
Social Insurance in Germany is maintained and administered by private organizations that act as employer’s liability insurance associations. Employers pay out premiums to these associations, who administer and pay out funds to workers who are injured on the job.

**Employment Cost Index (ECI) Adjustment**
Annual increase to wages established/permited by statute.

**Employment Equity Computerized Reporting System (EECRS)**
Canadian companies are required to report to the Federal Government on employment equity. PeopleSoft Human Resources contains the Canadian Employment Equity report (PER101CN), which creates a data interface file to the federal government’s Employment Equity Computerized Reporting System (EECRS).
**Employment Record Number (EMPL RCD#)**

A field in PeopleSoft Human Resources Management Systems and PeopleSoft Workforce Analytics that indicates an employee has multiple job records in the system. A numeric value (0, 1, 2) is assigned to each job as a way to uniquely identify that job record.

**Encumbrance**

A claim against funds. It is a projection of future expenses based on the situation, as we know it today. Encumbering funds is not the same as spending them or even guaranteeing that you will spend them. It just means that if the situation as it exists today does not change, you will spend all of those funds by the end of the fiscal year.

**Engineering Bill of Material (EBOM)**

A listing of all the parts, raw materials, and subassemblies that form the basis of all item and product structures. EBOMs differ from MBOMs (Manufacturing Bills of Material) in that they are not visible within Production Planning or Production Management and are isolated from Manufacturing.

**Engineering Change Order (ECO)**

A revision to a blueprint or design, released by engineering to modify or correct a part and/or bill of material. PeopleSoft Engineering uses ECOs to manage and document required assembly and component changes.

**Engineering Change Request (ECR)**

A document that allows you to request manufacturing process improvements and report product defects directly to the engineering department. When workflow is enabled, ECRs can also be routed for review and approval, after which they change into ECOs.

**Engineering Cost Version**

The process of generating cost versions for new and modified configurations based on engineering bills of material (EBOM) and costing data.

**Engineering Workbench**

An engineering environment, separate from production, consisting of engineering bills of material (EBOM), engineering change requests, engineering change orders, EBOM cost roll-up capability, online BOM comparisons, and seamless integration to a document management vault.

**Engineering Workbench**

An engineering environment, separate from production, consisting of engineering bills of material (EBOM), engineering routings, engineering change requests, engineering change orders, EBOM cost roll-up capability, online BOM comparisons, and seamless integration to a document management vault.


**Enterprise**
In PeopleSoft Time and Labor, all of the business units of the installation site.

**Enterprise Performance Management (EPM)**
See PeopleSoft Enterprise Performance Management

**Enterprise Portal**
The PeopleSoft Enterprise Portal is a separate product offering purchased independently of any other PeopleSoft applications. It can be used with or without any PeopleSoft application. It can be used as a standalone corporate portal that does not access PeopleSoft data at all.

**Enterprise Resource Planning (ERP)**
The encompassing term for all the transaction-oriented database applications an organization deploys across its business enterprise. The term includes financial, manufacturing and supply chain, human resources, and payroll applications, among others.

**Enterprise Warehouse (EW)**
See PeopleSoft Enterprise Warehouse

**Entry Authority**
Authorization granted by employees to specific user IDs for entering expense data on their behalf.

**Entry Currency**
The currency used to enter budget data.

**Entry Event**
An automated process that generates multiple debits and credits resulting from single transactions, to produce standard supplemental accounting entries.

**Entry Event Code**
Designation of an Entry Event; an identifier or label.

**Entry Event Generator**
A mechanism that generates standard, supplemental accounting entries based on Entry Event codes.

**Entry Event Process**
An accounting transaction. Entry Event processes combine to form Entry Events. For example, requisition posting is a Purchasing process, and cash clearing is a Payables process. Each process can involve one or several Entry Event Steps.
**Entry Event Step**

Part of an accounting transaction. For example, the BUDG process includes these steps, among others: prepare allotment budgets, prepare organization budgets, and prepare revenue estimates. Entry Event steps combine to form Entry Event processes.

**Entry On Duty Date (EOD)**

Date that indicates when an employee started to work at his/her current agency.

**Entry Type**

Any activity that creates or updates an item.

**EPM (Enterprise Performance Management)**

See PeopleSoft Enterprise Performance Management

**Equal Employment Opportunity Commission (EEOC)**

In the United States the EEOC requires that most companies file one or more reports from a series named EEO-1 through EEO-9. These reports include counts by federal employment categories of male and female employees in certain ethnic groups.

**Equitization**

A process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations. For organizations with complicated parent/subsidiary business unit relationships, this automated process reduces the process time and reduces the possibility for errors.

**Equity Increase**

In PeopleSoft Workforce Analytics, Equity Increases are base pay increases granted to bring an employee’s pay up to some internally specified standard for your organization.

**Equivalent Standard Deviation**

In PeopleSoft Demand Planning, a Standard Deviation developed during the Model Reset process that enables you to compare standard deviations from different models. The deviation is calculated by multiplying the Model Equivalency Factors defined on the Control Group by the standard deviation.

**ERISA (Employee Retirement Income Security Act of 1974)**

The U.S. Federal legislation enacted to prevent abuses of employee pension rights by employers.
**Error Exception**
A transaction that is stopped because the budget limits would be exceeded if it continued. For the transaction to proceed, action must be taken, such as canceling or reducing the transaction amount, increasing the budget amount, overriding the budget limits, or transferring available funds from another budget.

**Error Ratio**
The ratio of the statistical Standard Deviation to the base component that gives an indication of the accuracy of the forecast. The ratio is presented in the PeopleSoft Demand Planning Audit and Accuracy Review and is calculated during the Forecast Calculation Process.

**Estimated Gross**
Estimated labor cost associated with reported time (see Managing Time, Understanding time Reporting Codes).

**Estimated Shipments**
A group of shipment schedules used to manage sales order requested shipment data and actual shipment data. Used in conjunction with weight and volume pricing and freight charge calculations.

**Ethnic Code**
The Federal Office of Management and Budget (OMB) racial and ethnic census categories used for classifying individuals in U.S. Government reports.

**ETL (Extract-Transform-Load)**
See Extract-Transform-Load.

**ETL maps**
ETL maps provide rules for importing your source data to the data warehouse tables.

**Evaluated Receipts Settlement (ERS)**
A PeopleSoft Payables feature that matches receipts against purchase orders and generates vouchers without requiring an invoice.

**Evaluations Periods**
In PeopleSoft Demand Planning, indicates the number of future periods to use for the calculation of forecast errors. For example, if the number of evaluation periods is two, then the forecast error in April 2001 (after posting demand for April) would be determined by comparing the actual demand for April and the April forecast generated in February 2001. Evaluation periods are set separately for each view.
**Event**

Events are predefined points either in the Application Processor flow or in the program flow. As each point is encountered, the event fires on each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, OnRouteSubscription, and so on.

**Event**

Occurrence or happening.

**Event Class**

An event or type of event that results in a change of benefits eligibility for an employee or dependent. Event classes are prominently used in COBRA and Benefits Administration processing.

**Event Maintenance**

The process that enables you to manage ongoing enrollments during a plan year. Changes involving maintenance include new hires and re-hires, terminations, family status changes, and changes to benefits eligibility.

**Event Rule**

Used by PeopleSoft Benefits Administration to determine how events are processed by the system. Event rules look at the benefit plan options an employee is eligible for and determine which options the employee can actually choose. Event rules are closely associated with eligibility rules but it is important to note that they are not the same. Event rules should not be used to determine eligibility.

**Event Trigger**

You use triggers to tell the system that when a change takes place to certain data (an event), it should perform an action automatically. When the event occurs, the system writes a line to a trigger table. Then when it’s time for the action, the system reads the data from the trigger table and performs the appropriate action.

**EW (Enterprise Warehouse)**

See PeopleSoft Enterprise Warehouse.

See also PeopleSoft Enterprise Performance Management (EPM).

**Expected Losses**

In the financial services industry, the amount the institution predicts it will lose in portfolio value. Loan loss reserves are set aside to cover the expected losses.
**Excepted Service**
As defined by 5 USC 2103, the Excepted Service consists of those civil service positions that are not in the competitive service or Senior Executive Service.

**Exception**
User or system delivered, defined conditions applied to scheduled, reported or payable time that require audit or review (see Time Management)

**Exception Rules**
A rule(s) that is applied to scheduled, reported time, and payable time in order to determine conditions which require audit or review (see Time Administration).

**Exception Severity**
The degree of importance associated with an exception. For example, in exception which is a result of an employee clocking in late may have a Medium severity, while an exception which is a result of an employee not clocking in has a High severity (see Time Management).

**Exception Time Reporting**
A method of time reporting where only differences to the schedule are provided (see Time Reporting).

**Excess Plan**
A pension plan where the benefit formula provides an increased benefit for Final Average Earnings above a specified integration level. This compensates for the fact that Social Security benefits are based only on earnings up to a specified maximum.

**Exchange Rate Variance**
In PeopleSoft Cost Management, the change in currency exchange rate between the time the item is received into inventory and vouchered in Accounts Payable.

In PeopleSoft Payables, a matching feature that compares the exchange rate on the purchase order and the invoice and then copies any variance to PeopleSoft Inventory tables for analysis and accounting purposes.

**Exclusive Pricing**
Supersedes all pricing structures in effect for customers and products, except Buying Agreement, and enables you to drive pricing with a promotional structure. Exclusive pricing can be set up for a specific time frame and associated with particular orders.

**Executive Schedule (EX)**
Compensation and pay plan used by the Executive Branch of the federal government. Statutory pay limits are derived from several of the pay levels within this plan and imposed on the General Schedule and other existing pay plans throughout the Federal government.
**Exercisable**
The option shares that are available to the optionee to exercise.

**Exercise**
The transaction in which an individual purchases or “exercises” the right to purchase the option shares. The IRS refers to the purchase of company stock in an employee stock purchase plan as an exercise.

**Exercise Date**
The date on which an individual purchases underlying shares from and option grant or transacts a simultaneous purchase and sale of underlying option shares through a cashless exercise and collects option profit in cash or shares.

**Exercise Price**
The price per share required to exercise a stock option.

**Exercise Proceeds**
Cash, stock or other recognition received by a company as a result of option exercises, including cash or stock paid by individuals to exercise options and cash company tax savings from deducting non-statutory option profits at exercise.

**Expense Location**
Geographic area defined to enable the recording, tracking, and reporting of expense activity.

**Expense Location Amount**
Authorized spending defined for an expense type in a particular expense location and currency.

**Expense Location Group**
Collection of expense locations based on a common classification such as state, country, or continent.

**Expense Type**
Means of itemizing various kinds of business expenses. Examples are hotel, dinner, or ground transportation.

**Expense Type Edit**
User-defined requirement that mandates input of additional data—such as an airline ticket number or number of nights in a hotel—when an expense type is selected in an expense report.
**Expense Type Group**
Expense types that are classified together for reporting and tracking.

**Expensed Item**
Non-inventory item which may represent software, manuals, documentation, or any item for which no quantity on hand is maintained, but which can be specified on a bill of material (BOM). Expensed items can only exist as components on a BOM and cannot have a BOM, routing, or production area/item definition.

**Expiration**
The process by which the outstanding shares of an option cease to be exercisable, generally at the end of the option term. The length of the option term and the date of expiration are established in the Grant Agreement.

**Expiration Date**
In PeopleSoft Inventory, the date a lot exceeds its Shelf Life and is no longer acceptable for fulfillment or consumption. (Expiration Date = Creation Date + Shelf Life)

**Expiration Date**
The last day of an option term in which the option is canceled and no longer exercisable.

**Expiration Grace Period**
When you enter a stock action allows the exercise of the already vested shares as of the action date, the system will calculate the date these shares expire based on the grace period defined on the Stock Action Rules page for that stock action. The system will automatically cancel vested shares not exercised at the end of the expiration grace period.

**Express Customer**
A customer for whom the minimum necessary information is entered.

**Expressions**
Expressions enable you to create pseudo-columns made up of mathematical calculations based on actual fields on a table. Since expressions are resolved at run-time, duplicate information is not stored on the database.

**Express Order**
An order entry shortcut in PeopleSoft eStore and Mobile Order Management whereby the customer populates the shopping cart and goes directly to the order summary to checkout, bypassing any billing or shipment modification screens. Billing and shipping information defaults in as previously entered.
**External Data**
Data from external sources. For instance, in PeopleSoft Workforce Analytics, external data may include third party salary surveys and benchmark metric surveys.

**External Scheme**
In the United Kingdom an External Scheme is a vocational training, education and job placement program involving an employee, an employer and the government.

**External System**
Any system that is not directly compiled with the PeopleTools servers.

**Extra Time**
Any hours worked outside of an employee's normal (scheduled/shift) hours or days. Extra time may be scheduled in advance of when it is worked, and may be subject to special compensation rules. It may be treated differently than standard time for purposes of Benefit Entitlement and Administration.

**Extraction**
A reusable query that specifies what information should be retrieved from the Quality database.

**Extract-Transform-Load (ETL)**
The extraction and transport of data from one server to another remote server. In PeopleSoft budgeting ETL specifically refers to the process by which financial and human resource data is extracted from PeopleSoft Financials and HRMS and transferred to the PeopleSoft Enterprise Warehouse which PeopleSoft Budgeting uses to access and record data transactions. Within PeopleSoft Enterprise Warehouse, data migration typically refers to information moved from outside sources into the Operational Data Store tables.

**Extrinsic Rewards**
Tangible rewards that can be given to the individual. Typically categorized as financial and non-financial rewards. Financial rewards would include direct compensation, indirect compensation and deferred compensation. Non-financial rewards are provided to the individually and viewed as a benefit by the individual based on the culture of the organization such as the size or location of one’s office.

In PeopleSoft Workforce Analytics, tangible rewards given to an individual. Typically categorized as financial and non-financial rewards. Financial rewards would include direct compensation, indirect compensation and deferred compensation. Non-financial rewards are provided to the individually and viewed as a benefit by the individual based on the culture of the organization such as the size or location of one’s office.
**Fact**
Facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

**Fact Table**
A fact table is where facts are stored in the PeopleSoft Enterprise Warehouse.

**Fair Labor Standards Act (FLSA)**
A federal regulation governing several time and labor issues. *FLSA Overtime* requires that all nonexempt employees be paid at a rate of time-and-one-half for all hours over 40 physically worked during a workweek. This requirement may be superseded by state or local laws when the lesser law is to the greater benefit of the employee, or by union contract. An *FLSA Workweek* is a permanently established, regular workweek for a group of employees.

**Fair Market Value (FMV)**
The price of a company stock based on the current market value as determined by supply and demand, or a valuation method. The stock market sets the fair market value for a public company. For a private company the fair market value is more subjective, but typically determined by financial factors or set by an outside valuation company.

**Fair Market Value Tracking Methods**
Methods used to track and report trading activity on various exchanges (i.e. NYSE, AMEX, NASDAQ, etc…).

**Family Medical Leave Act (FMLA)**
A federal regulation that protects health benefits and job restoration for employees who must take a leave from work to care for themselves or family members. FMLA regulations contain provisions regarding employer coverage, employee eligibility and entitlement, notice and certification, continuation of health benefits, and job restoration. PeopleSoft Benefits applications offer FMLA Plans that help employers and employees determine FMLA eligibility and schedule and track FMLA leave requests.

**Federal Employee Group Life Insurance Program (FEGLI)**
Generally, if the employee has Federal retirement coverage or is on a temporary appointment exceeding one year, he/she is eligible to participate in the FEGLI program. Once eligible, he/she is covered automatically for Basic Life Insurance and premiums will be deducted from gross salary unless coverage is waived within the first period of eligibility. The program offers Basic Insurance coverage and three types of optional coverage: Option A (Standard), Option B (Additional), and Option C (Family).
Federal Employee Pay Comparability Act (FEPCA)

This law provides a structure and methodology to determine and authorize locality-based pay adjustments to Federal employees in order to elevate their basic pay to be commensurate with private sector employees working in the same occupations in the same geographic localities. It also includes a feature to authorize agencies to make advance salary payments to attract candidates for open positions which have consistently been hard-to-fill in certain geographic areas.

Federal Employees’ Compensation Act (FECA)

This law provides compensation and medical benefits to civilian employees of the United States for disability due to personal injury or disease sustained while in the performance of duty. A feature of this law provides for the continuation of pay (COP) without charge to leave for up to 45 calendar days due to disability and/or medical treatment following a traumatic injury. Employees file claims with the U.S. Department of Labor, Office of Worker's Compensation, which adjudicates the claims and compensates the employing agencies for the employee's pay and benefits during the claim period.

Federal Employees Health Benefits (FEHB)

Generally, the employee is entitled to coverage by the FEHB program if appointed to a position with Federal retirement coverage or has been on the rolls on a temporary appointment for more than one year. The Federal employer shares the cost of the premium (about 75%); actual premiums depend on the plan selected. If under a temporary appointment, the employee pays both the employer and employee shares. If the position is part-time, the employee pays the employee share and a portion of the employer’s share.

Federal Employees Retirement System (FERS)

A retirement plan available to employees of the federal government. FERS covers all employees appointed to a position in the federal government after January 1, 1987. Coverage includes Social Security, a basic annuity plan, and a TSP.

Federal Employer Identification Number (EIN)

Used to identify the tax accounts of businesses. Businesses, which have employees or operate business as a partnership or corporation, must obtain an EIN.

Federal Insurance Compensation Act (FICA)

Employee and employer contributions to Social Security.

Federal Reserve Transit Number

A unique identifier for U.S.-based banks, allowing banks to transfer funds within the Federal Reserve system.
**Feeder Line**
A type of production line replenishment used in PeopleSoft Flow Production. If you are using feeder line replenishment, smaller production lines create subassemblies that feed directly to your production line.

**FEGLI Living Benefits Act**
Beginning 7/25/95, a Federal employee who is terminally ill may elect to receive a lump-sum payment equal to the full amount of basic life insurance only, or a limited portion designated in multiples of $1000. An election to receive this benefit is irrevocable; the individual is considered terminally ill if his /her life expectancy is 9 months or less.

**FICA (Federal Insurance Contributions Act)**
FICA consists of both a Social Security (retirement) payroll tax and a Medicare (hospital insurance) tax. The tax is levied on employers, employees, and certain self-employed individuals.

**Fictitious Calculations**
Fictitious calculation rules perform temporary calculations. A fictitious calculation is a sub-calculation run during a normal calculation to determine a net that would have been computed if certain parameters were used. This result is then used for further processing in the normal calculation. A fictitious calculation is always started from inside a normal calculation, run for one payee, and run for a specified set of periods.

**FIFO (First In First Out)**
Method used by companies to record Disqualifying Disposition Income. If a company uses this method they record the optionees disposition of shares by attributing the shares to the earliest exercise, purchase or release dates for which shares remain available for sale.

**Fill-In Employment**
Employment held by persons during the time period after leaving their regular occupation in anticipation of, but before entering, military service.

**Filter**
A filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.

**Final Average Earnings (FAE)**
The PeopleSoft Pension Administration function that averages earnings from a specified period of an employee’s career. The result is used as a component of the pension benefit formula.
**Final Forecast**

The final forecast is the prorated version of the adjusted forecast, summarized to all levels of the product hierarchy. This is the best-guess version of the forecast that is used to make all decisions dependent on the forecast.

**Final Table Merge Engine**

Final Table Merge Engine is used by the PeopleSoft Enterprise Warehouse; it moves enriched data from one table into another. When you run a job in a jobstream, the immediate results are stored in temporary tables. At the end of the jobstream, the Merge Engine runs and merges the output temporary tables into the final tables, where processing can continue.

**Financial Accounting**

The accounting for a business entity’s assets, liabilities, revenues, and expenses to determine its net worth and to produce financial statements. Within Generally Accepted Accounting Principles, a business has some latitude as to when and how to record its financial transactions, as long as it continues to meet its legal and regulatory requirements. A business’ financial accounting requirements are not necessarily the same as its cost accounting requirements. The one should not be mistaken for the other (i.e. the extent to which a company’s financial accounting system meets its cost accounting needs depends on how it has chosen to describe its chart of accounts and the level at which it has chosen to record financial transactions.

**Financial Instrument**

In the financial services industry, a specific product or service sold by a financial institution to its customers. In terms of the reporting hierarchy, a product falls under a ledger account, while an instrument falls under a product. A product may be treated like a generic description or category, while an instrument is a specific instance of a category.

**Financial Performance Measures (FPM)**

For the financial services industry, the Financial Performance Measures program performs calculations on financial instruments based on the rules defined in the Financial Calculation Rules module, and using input from the Cash Flow Generator, Stratification engine, Product Pricing, and Curve Generator. Its calculations include: measures of duration, option-adjusted spread and option-adjusted cost for PeopleSoft Funds Transfer Pricing, and Monte Carlo simulation for PeopleSoft Asset Liability Management.

**Financial Product**

In the financial services industry, a product or service sold by a financial institution to its customers. In terms of the reporting hierarchy, a product falls under a ledger account, while an instrument falls under a product. A product may be treated like a generic description or category, while an instrument is a specific instance of a category.
**Financial Services Instrument**
In the financial services industry, products created by financial institutions and sold to retail customers. Product prices and interest rates are set by the financial institutions and take into account its customers’ behavioral models.

**Financial Statement Simulation**
A facility within Planning & Simulation which establishes rules for simulating future period, or pro-forma, financial statements. The user defines corporate financial policies, such as corporate tax rates, dividend distribution frequency, and force balancing rules, which are then applied to cash flows for a given future accounting period. The Financial Statement Simulator engine drives costs and revenues to accounts on PF_LEDGER_F00 via a scenario.

**Financials Warehouse**
See Warehouses.

**First Year Amount**
See 1st Year Amount.

**Fixed Basis**
The basis option enables you to create the data for the Basis online, as part of the rule. Fixed Basis is used with the Allocation Manager only. It is available with all methods except when Period-Based Allocation is being used. The Fixed Basis is a predetermined table that can be populated online.

**Fixed Offering**
The offering type is fixed when the end date of each offering is the same for all employees regardless of the employee’s grant dates.

**Fixed Percentage**
A fixed percentage value. The source pool amount will be split based on this percentage to get the target amount. Used with the Allocation Manager.

**Fixed Period Requirements**
In PeopleSoft Enterprise Planning and Production Planning, a lot-sizing technique that sets the order quantity to the demand for a given length of time.

**Fixed Picking Bin**
A dedicated picking location for an inventory item. Fixed picking bins are replenished from bulk locations when the available quantity falls below the optimal quantity.
**Fixed Plan**
A stock purchase offering period where the ending offering date will be the same as the purchase date. Eligible employees will always purchase stock on the specific purchase dates and by the purchase rules you define.

**Fixed Quantity**
An **Inventory Policy** method that defines a fixed amount of an item to be ordered to meet replenishment needs. This method can be selected as an inventory policy for order quantity, safety stock, **Reorder Point**, and minimum and maximum parameters.

**Fixed Source**
The fixed source option enables you to create the data for the Source online, as part of the rule. Fixed Source is used with the Allocation Manager only. It is available with all methods except when Period-Based Allocation is being used. The Fixed Source is a predetermined table that can be populated online.

**Flexible Credit**
Any credit associated with a given benefits program, plan, or type of coverage. Credits based on an entire program can be applied toward the benefit costs however the employee chooses.

**Flexible Hours**
Hours during the workday, workweek or pay period during which a time reporter covered by a flexible work schedule may choose to vary his times of arrival and departure from the worksite (see Scheduling)

**Flexible Spending Account (FSA)**
An account to which an employee and (optionally) an employer pledge an annual amount for a plan year. The employee then submits claims for authorized expenses.

**Flexible TimeSpan**
A user-defined period into which costs can be collected. Flexible TimeSpans can be as long or as short as you like—covering multiple years or a single day. The main purpose of Flexible TimeSpans is to assist you in analyzing costs.

**Flexible Work Schedule**
A method of scheduling a time reporter’s time that is based on a range of flex hours of start and stop times and core work hours. This method can be used for scheduling clock and elapsed time reporters (see Scheduling)

**FLSA Status**
A PeopleSoft Human Resources term that is used to indicate whether a job is exempt or nonexempt according to the Fair Labor Standards Act. All employees associated with a
particular job will receive that job’s FLSA Status. FLSA Status is an eligibility determination factor for PeopleSoft Benefits Administration.

**Forecast Attribution**
A FSI (financial services industry) transformation process through which forecasted product originations are pooled and run through the cash flow engine for future periods.

**Forecast Calculation Process**
In PeopleSoft Demand Planning, the process by which a **Statistical Forecast** is generated for each item at each level of the view. When a **Forecast Item** is set to recalculate, the system tries several forecast calculation methods and picks the one with the least amount of error. This process also makes adjustments for promotions and filters for abnormal demand.

**Forecast Definition**
Forecast definitions are a set of forecasting rules that generally govern multiple forecasts distinguished by key properties such as products, customers, channels, and so forth.

**Forecast Element**
Each forecast within a single definition is called a Forecast Element.

**Forecast Fulfillment**
In PeopleSoft Demand Planning, a process used to manage forecasted demand over a period of time. The process makes it possible to divide the total forecast demand into portions so that certain portions can be met, even if the total forecast cannot be met entirely.

**Forecast Item**
In PeopleSoft Demand Planning, a logical item used as the basis to forecast demand. The components of a forecast item key are defined for each level in a forecast view.

**Forecast Level**
See Level.

**Forecast Period**
A period in time as defined by the calendar for which data is processed through the PeopleSoft Demand Planning model.

**Forecast Start Period/Year**
Determines the most recent period for which demand data is available for a forecast view. This period can also be described as the last actual demand period to have had an impact on the forecast.
**Forecast View**
See View.

**Foreign Education**
Education acquired outside of any state of the U.S., the District of Columbia, the Commonwealth of Puerto Rico, a Trust Territory of the Pacific Islands, or any territory or possession of the U.S.

**Form 10-K**
A form used for annual reports pursuant to Section 13 or 15(d) of the Securities Exchange Act of 1934 for which no other form is prescribed.

**Form 10-Q**
A form used for quarterly reports under Section 13 or 15(d) of the Securities Exchange Act of 1934, filed pursuant to Rules 13a-13 or Rule 15d-13. This report, which public companies are required to file quarterly with the SEC, provides unaudited financial information and other selected material.

**Form 5500 Participant Count Extract**
A PeopleSoft Pension Administration data extract containing data that a plan administrator needs in order to complete IRS Form 5500, used to report on the number of plan participants.

**Form S-8**
A form used to register securities offered by a reporting company under its employee benefits plans, including stock option plans. Also called the Registration Statement under the Securities Act of 1933.

**Form W-2**
A form used by employers to provide workers with a statement of wages, tips and other compensation from the previous year. This form, distributed employees by January 31 of each year, reflects state and federal taxes, social security, Medicare wages, and tips withheld.

**Formula**
Element which enables you to define your own formulas for use—gives further flexibility to define complex organizational needs.

**Formula Plan**
This compensation distribution plan type is based on a pay out rule, as the pay out rule is defined. The pay out rule can be based on a flat amount, a percentage, or a data element. Whereas a Target Plan distributes pay out based on a comparison of a performance measure against a target, in a Formula Plan the pay out is based just on the pay out rule.
**French Professional Elections**
French companies employing a certain number of employees must hold elections for selecting personnel representatives (Délégués du personnel), and members of the Work Council (Comité d’Enterprise).

**Frozen Rate**
A rate that is applied to allocate resources to activities in place of the actual, budgeted and capacity rates calculated by the Activity-Based Management (ABM) Engine.

**FTE (Full Time Equivalency)**
FTE is the percent of full time the employee should normally work in this job. Full time is defined by the Standard Hours specified in either the Salary Plan Table or the Default Standard Hours specified in the Installation Table.

**FTP (Funds Transfer Pricing) Adjustments**
Adjustments made to the PeopleSoft Funds Transfer Pricing (FTP) base rate, for such factors as geographic premiums, liquidity premiums, embedded options, or incentive programs.

**FTP (Funds Transfer Pricing) Base Rate**
In PeopleSoft Funds Transfer Pricing (FTP), this refers to the basic charge or credit that is applied to a ledger account, a product, or an off-balance sheet position.

**FTP (Funds Transfer Pricing)**
*See* PeopleSoft Funds Transfer Pricing.

**Full-Time Equivalent**
*See* FTE.

**Function**
A category of pension calculation. PeopleSoft Pension Administration divides a pension calculation into nineteen “core functions” such as Service, Final Average Earnings, and Benefit Formula.

**Function Result**
The calculation rules for any of PeopleSoft Pension Administration’s nineteen core functions. These rules match Definitions—the specific parameters for the function—to the Groups of employees that use that particular definition. Function Result also refers to the value produced by the rules.
Fund ID
In the financial services industry, Fund ID is a lookup code used to track investment funds associated with a financial instrument or account. Provided primarily by the financial analytic applications to track investment funds for insurance policies.

Funds Transfer Pricing (FTP)
See PeopleSoft Funds Transfer Pricing.

Fungible
This term describes a resource used for multiple activities.

Future Period
Any pay period which is not current and whose close date hasn’t passed (see Time Reporting).

Future Periods
The number of periods of future forecasts maintained by the PeopleSoft Demand Planning system.

G

Gang Reporting
See Crew Reporting.

General Deduction
Any non-benefit deduction. Examples include charitable deductions, union dues, parking, garnishments, and bonds. General Deductions are calculated from the General Deduction Table; Benefit Deductions draw on one of the benefits tables.

General Ledger Distribution
The process and guidelines by which accounting information is transferred from your PeopleSoft Receivables or Deduction Management system to a general ledger system.

General Schedule (GS)
Compensation and pay plan used by the Executive Branch of the federal government.

Generation Control
Generation control elements allow you to indicate to the system whether to process an element based upon criteria you define. There are six parameters that control this function and comprise the definition of the generation control element—HR Status, HR Action/Reason, Segment Status, Frequency, Formula, and Run Types.
**Generic Conversion Factor**
A conversion factor that applies universally between two units of measure. The factor is used in the conversions between levels of PeopleSoft Demand Planning **Forecast Items** and Inventory Planning **Policy Item**.

**Generic Process Type**
This term applies to Process Scheduler. Process types are identified by a generic process type. For example, the generic process type "SQR" includes all SQR process types, such as "SQR Process," "SQR Report," and so on.

**Geo RSZ Code**
This code is for Belgian employers to track the geographical location for RSZ codes.

**Geographic Location Code**
In Canada this code is prescribed by the government and refers to the location a business is in.

**Giveaway Adjustment Type**
In PeopleSoft Order Management, the price break tables are set up to indicate what product the user receives as a free premium based on defined quantities or prices. The giveaway item does not have to be the same product that the customer is purchasing. For instance, you may set up a price break that indicates that a purchase of 100 widgets entitles the customer to one or more free T-shirts. The system automatically adds an order line for the free item. Giveaways cannot be applied to the total order.

**Goals Matrix**
In PeopleSoft Workforce Analytics, a matrix used to create calculation rules for group or employee performance goals. You can combine and standardize multiple performance goals into a single, weighted, goal score, against which actual performance is compared. A Goals Matrix can be used to in conjunction with a pay out distribution plan called a Target Plan.

**Grace Period**
A period that is a number of hours or minutes before or after a scheduled punch where a time reporter’s punch is accepted. For Stock Administration, the period of time an optionee has to exercise an option after termination and before the option expires.

**Grade**
A range of pay in a graduated scale that includes positions of different occupational groups. The work performed should be equivalent as to the level of difficulty and responsibility and the level of qualification requirements of the work. The levels are established and designated within a specific pay plan by law or regulation.
**Graduate Education**
Successfully completed education in a graduate program for which a bachelor's or higher degree is normally required for admission. To be creditable, such education must show evidence of progress through a set curriculum, i.e., it is part of a program leading to a master's or higher degree, and not education consisting of undergraduate and/or continuing education courses that do not lead to an advanced degree.

**Grandfathered Benefit**
A benefit that an employee was entitled to prior to a change in the plan and that defines the employee’s new minimum level of benefits. The change might be caused by a plan merger, new legislation, or a plan amendment.

**Grant**
A contractual right giving an individual the option to purchase a specified number of shares of stock through an Equity Compensation Plan. Also known as an option.

**Grant Agreement**
The legal document issued by a company defining the number of shares granted, grant price, vesting schedule and other terms and conditions of the stock option or stock award.

**Grant Date**
The date the individual begins participating in a stock purchase offering. The date on which an option or other award is granted. The date the company enters into the grant agreement. The underlying stock’s fair market value on this date generally derives the option price.

**Grant Price**
The price per share at which the stock option was granted. This is the price per share the individual must pay when exercising the option.

**Gross Salary**
The sum of an employee’s salary and earnings defined as part of gross salary. The gross salary is used to calculate budget amounts for benefit plans defined as a percentage of an employee’s salary.

**Gross-up**
The process used to calculate taxes and resultant gross pay from a check for an exact net amount.

**Group**
In PeopleSoft Billing, a specific term for a posting entity composed of one or more transactions (items, deposits, payments, transfers, matches, or write-offs).
**Group**
Any set of records associated under a single name or variable in order to run various calculations in PeopleSoft Business Processes. In Time and Labor, for example, employees are placed in groups for time reporting purposes, while in Administer Variable Compensation, groups identify which employees are eligible for what forms of compensation. In PeopleSoft Pension Administration, you’ll use Custom Statements to define criteria for grouping employees, then by associating calculation rules (Definitions) with specific Groups, you can vary rules for different classes of employees.

**Group Asset**
A financial asset with no cost information. It is used to depreciate the sum of the costs of its associated group member assets.

**Group Asset Depreciation**
The depreciation of a group asset calculated using an average service life set by a local regulatory agency and a calculated group depreciation rate.

**Group Coverage (Or Generic) Qualification Standards**
Standards prescribed for groups of occupational series that have a common pattern of education, experience, and/or other requirements.

**Group Member Asset**
A financial asset with cost information. Cost information for all group members of a group asset is summed up to the group asset level, where depreciation is calculated.

**Group Security**
The ability to grant or deny access to groups. You can set up group security by Group ID or by user ID.

**Group Security [Time and Labor]**
The ability to grant access to employee time, by providing security through Time and Labor’s groups functionality. For example, you might want your employees to only access their own records, or allow your supervisors who handle all of the time input for have access to specific groups. You can restrict the user from accessing everyone, or allow the user to be able to access only their own records, or only a specific group. This feature also provides the ability for employees to report their own time.

**Group Type**
An indicator of the activity that created the billing group: billing, maintenance, payment, transfers, or unposted.
Handicap Code
A code that identifies a type of physical or mental impairment that substantially limits one or more of an employee's major life activities.

Hazard/Disposal Code
An inventory item group sharing a disposal routine.

Headcount
The number of people represented by a given Employee Survey record in the PeopleSoft Enterprise Performance Management product line.

Health and Safety Executive (HSE)
Health and Safety reporting for your UK operations is sent to the local office of the HSE per the requirements of the RIDDOR (Reporting of Injuries, Diseases, and Dangerous Occurrences Regulations).

Health Benefits Code
An alpha/numeric code that identifies each Health Benefit plan.

Health Benefits Effective Date
Date the health benefit plan goes into effect or the effective date of cancellation.

Hierarchy
Hierarchy refers to the relationship between the levels in a dimension.

Highly Compensated Employee (HCE)
An IRS employee category applied to employees who are considered “highly compensated” according to a federally set standard. This distinction is used for the purposes of nondiscrimination tests, to determine that Section 401 and Section 129 plans do not discriminate in favor of highly compensated employees.

HIPAA
The Health Insurance Portability and Accountability Act of 1996. PeopleSoft Benefits applications enable you to comply with this act, which requires that employers provide Certificates of Group Health Plan Coverage to employees who have their health coverage terminated. This certificate lists group health coverage an employee had for the twelve month period prior to the date coverage ended as a result of termination of coverage. The HIPAA certificate will be used by subsequent health coverage carriers to evaluate pre-existing condition clauses, if applicable.
**Historical Periods**

In PeopleSoft Demand Planning, a component that indicates the maximum number of periods of historical demand maintained for a Forecast Item within a Forecast View. Historical periods must be a minimum of two years in order to support the development of seasonal models based on an item’s demand history.

**Historical Rules**

An element used to set up rules that retrieve data from prior periods. Historical rules can be used in formulas and fictitious calculations.

**Historical Usage Calculation Method**

In PeopleSoft Inventory Planning, a method that defines the set safety stock or minimum inventory level. The usage is based on the review of historical demand over the number of effective periods. The historical demand quantity is determined by one of four methods; maximum possible usage, Lead Time, estimated daily or period use, and static values calculations.

**Hold Grade/Step**

Grade/step the employee was in prior to receiving a temporary promotion.

**Hold Last Equivalent Increase (LEI)**

Date held by an employee for this event prior to receiving a temporary promotion. Necessary in order to establish the WGI due date if returning to original grade/step.

**Hold Position Description**

The new position description number that is the result of a reclassification action prior to the NOA being processed.

**Hold Purchase**

A flag that tells the system to keep this participant in the purchase process. The hold flag is maintained at the contribution page.

**Hold Within Grade Increase (WGI) Due Date**

WGI due date prior to an employee receiving a temporary promotion.

**Holding Period**

Typically refers to the holding period required for ISO’s and Qualified Section 423 Purchase Plans, to receive preferential tax treatment on a disposition of shares. See Disqualifying Disposition.
**Hours Counting Service**
A service calculation that uses actual or generated hours to determine the service credited to a pension plan participant.

**Hours Equivalence Service**
A service calculation that uses hours to determine service, but that uses a set number of hours per day, week, or other period worked rather than counting actual hours.

**HR Action/Reason Category**
A group of related job actions—for example, hire and rehire—treated similarly for pension purposes in PeopleSoft Pension Administration.

**HRMS Warehouse**
See Warehouses.

**Ignore Plan**
Complex event processing feature of PeopleSoft Benefits Administration that enables the user to designate plan types linked to a particular Event Rules/Event Classification combination as being unaffected by Benefits Administration processing.

**Ignore Violations**
The ability to report over capacity violations but not to score or repair them during the optimization process.

**Imputed Income**
Theoretical income that a company pays on behalf of an employee but the individual does not actually receive. This “theoretical income” must be added to the employee’s gross wages. In general, imputed income refers to the value of excess Group Term Life or Dependent Life coverage.

**In Punch**
Indicates start of a shift.

**In the Money Option**
When the fair market value of the stock is greater than the grant price of an option.
**INAIL code**
In Italy, the INAIL code is used to classify jobs according to the level of risk associated with the job and the related risk insurance required by the employer. INAIL codes are defined by the employer.

**Incentive Pay Plans**
In PeopleSoft Workforce Analytics, pay plans that are formula-driven based on the expected results defined at the beginning of a performance cycle. Incentive plans are designed for the individual worker, or for group levels such as teams, business units, divisions, or company-wide. Incentive plans are used for a variety of reasons; including cost control, alignment of employee and shareholder interests, and increased focus on specific performance indicators.

**Incentive Plans**
Pay plans that are formula-driven based on the expected results defined at the beginning of a performance cycle. Incentive plans can be designed for the individual worker or at group levels such as teams, business units, divisions or company wide.

**Incentive Stock Option (ISO)**
For an option to be considered an Incentive Stock Option, it must have the following characteristics:

- The option must be granted pursuant to a plan which includes the aggregate number of shares which may be issued under options and the employees (or class of employees) eligible to receive options, and which is approved by the stockholders of the granting corporation within 12 months before or after the date such plan is adopted;
- The option must be granted within 10 years from the date such plan is adopted, or the date such plan is approved by stockholders, whichever is earlier;
- The option is not exercisable after the expiration of 10 years from the date such option is granted;
- The option price is not less than the fair market value of the stock at the time such option is granted;
- The option is not transferable by such individual otherwise than by will or the laws of descent and distribution, and is exercisable, during his lifetime, only by him, and;
- The optionee, at the time the option is granted, does not own stock possessing more than 10% of the total combined voting power of all classes of stock of the employer corporation or of its parent or subsidiary corporation.

**Incomplete Punch**
A punch that cannot be processed (i.e. missing employee ID, invalid date or time).
**Incremental Budgeting**
A budgeting option during budget development that uses prior year actual or budget values as a basis and then applies a percentage that increments the base. PeopleSoft Budgeting-specific.

**Incumbent**
An employee currently assigned to a position.

**Indirect Compensation**
Typically involves non-cash types of compensation awarded to the individual in exchange for their contribution to the organization. Common types of indirect pay include health and welfare benefits (for example, medical, dental, vision, long-term disability, short-term disability, unemployment insurance), payment for time not worked (for example, holiday, vacation, sick), and employee services and perquisites (for example, club memberships, parking, holiday gifts).

**Indirect Cost**
A cost that is assigned by management to an activity or a cost object. An example is the cost of office space assigned to an activity.

**Individual Occupational Requirements**
Requirements, e.g., experience or education, for particular occupational series of positions within a series and are used in conjunction with a group coverage (generic) standard.

**Individual Retirement Record (IRR)**
Used by the Office of Personnel Management (OPM) as the basic record for determining the retirement benefits payable to separated federal employees and their survivors. Employees covered by the CSRS retirement plan require SF-2806. Employees covered by the FERS retirement plan require SF-3100. In addition, the SF-2806-1 and SF-3101 are used for corrections to the IRR. See also Correction to IRR.

**Inherit Control Group Policies**
In PeopleSoft Inventory Planning, a feature that controls whether the policy for an item is set explicitly or defaults from the associated **Policy Control Group**. A series of check boxes enable you to define which policies to inherit.

**Initial COBRA Events**
The event which makes an individual eligible for COBRA coverage. Typical initial COBRA events include loss of benefits eligibility due to termination, reduction in hours, retirement, and military leave, as well as divorce, death of employee, and Medicare entitlement. See COBRA and Secondary COBRA Events.
**INSEE (National Institute for Statistical and Economical Studies) Codes**

INSEE is an official statistics and economics organization in France. INSEE codes for your French company's organizations are used in regulatory reporting.

**INSEE PCS (Classification par Catégorie Socio-Professionnelle) Code**

Each PeopleSoft Human Resources French Jobcode is linked to a four-digit INSEE PCS, or social/professional classification code.

**In-Service Date**

In PeopleSoft Asset Management, the date upon which an asset is placed in service. In-service date is used in conjunction with an asset's prorate convention to determine Begin Depr Date.

**Inservice Placement**

Includes a noncompetitive action in which a position is filled with a current or former competitive service employee through promotion, reassignment, change to lower grade, transfer, reinstatement, reemployment, or restorations. Inservice placement also includes noncompetitive conversion f appointees whose Federal excepted positions are brought into the competitive service under Title 5 CFR 316.702, and Department of Defense/Nonappropriated Fund (DOD/NAF) and Coast Guard NAF employees whose positions are brought into the competitive service.

**Insider**

An officer, director or principal shareholder of a publicly owned company and members of his or her immediate family. This category may also include other employees of the company and people who obtain nonpublic information about the company.

**Insider Trading**

When a person trades a security while in possession of material non-public information in violation of a duty to withhold the information or refrain from trading. The securities law broadly prohibits fraudulent activities of any kind in connection with the offer, purchase, or sale of securities.

**Instance**

A row of data on the Positive Input table. Instances of positive input can be entered manually, or can be system generated. They can also be received from other applications, such as PeopleSoft Time and Labor.

**Integration Level**

The salary level in a defined benefit excess plan at which a higher benefit rate becomes applicable. For example, the following formula uses a $10,000 integration level: 1% of Final Average Earnings up to $10,000 plus 1.75% of Final Average Earnings over $10,000.
**Integration Template**
A high-level template that defines the integration between PeopleSoft Projects and your other financial applications. Each integration template you create defines a specific set of business units from your other financial applications. Each project is then assigned an integration template containing this preset integration information. You can use Integration Templates to set up joint ventures, and new transactions added to that project will reflect the business units defined in the integration template.

**Intensity**
The cost for each unit of the activity driver.

**Interest**
Some companies pay interest on the monies that are being withheld from employees’ paychecks. The interest plus the employees’ stock purchase contributions are used to purchase stock at the end of the purchase period.

**Interest Rate Modeling**
An FSI feature that allows you to model interactively interest rate scenarios for Asset Liability Management, and to run rate scenarios and analysis in real time.

**Interest Rate Sensitivity Model**
In the financial services industry, this support module describes in granular terms how a group of customers holding a specific type of instrument with a particular interest rate will respond to changes in interest rates in the market.

**Interface Loader**
An SQR delivered with PeopleSoft Asset Management that is used to transfer load lines into the PeopleSoft Asset Management loader tables.

**Internal Data**
Data from PeopleSoft ERP systems, or other legacy ERP systems used by your organization.

**Interpolation**
To calculate a value of a function, or series, between two known values.

**Interunit Account**
The account for each business unit to which other business units in the same corporation refer when they need to distribute amounts across business units. These accounts are used to keep the individual ledgers in balance when a single transaction affects multiple business units.
**Inter-Unit Drivers**

Drivers that provide a means of establishing relationships between the cost objects of one organization with the supporting activities of the organizations that share business units and models.

**Interunit Transaction**

A transaction that involves moving amounts from an account in one PeopleSoft General Ledger business unit to an account in another General Ledger business unit.

**InterUnit Transfer**

A transfer that occurs between different business units.

**IntraUnit Transfer**

A transfer that occurs within one business unit.

**Intrinsic Rewards**

A reward that is generated by the worker internally such as job satisfaction, as opposed to Extrinsic Rewards which are tangible rewards.

**Inventory Adjustment**

A process that enables you to change the quantity of an item in the inventory system to match the actual physical quantity found in the **Storage Location**.

**Inventory Business Unit**

Usually a warehouse. You establish a separate inventory business unit (IBU) for any one of the following reasons: 1) You want on hand visibility to a specific location of your business that manages inventory. 2) You want to define replenishment rules for a specific location of your business that manages inventory. 3) You maintain standard and average costs in a specific location of your business that manages inventory.

**Inventory Cost Element**

A cost that can be associated with inventory items and inventory transactions. Examples include freight, overhead, and transportation. Each cost element has a unique cost code.

**Inventory Item**

A tangible commodity that is stored in an Inventory business unit (Ship From warehouse).

**Inventory Location**

See **Storage Location**.
**Inventory Policy**

In PeopleSoft Inventory Planning, a set of rules that controls how inventory policy values are calculated for items. Inventory policy is defined at the **Policy Control Group** and stockkeeping-unit levels. The elements that make up inventory policy are order quantity, safety stock, **Reorder Point**, and minimum and maximum policies.

**Inventory Transaction**

An event that moves inventory into, within, or out of the inventory business unit. Examples include material transfers, inventory adjustments, and standard issues.

**Inventory Transaction Group**

An identifier that categorizes transactions by type for costing purposes. For example, you can group all types of interunit transfers together.

**Invoice Format Identifier**

An identifier for the formatting options that determine the sorting and summarization levels of invoice information.

**IRC 423 (Internal Revenue Code 423)**

The section of the IRC that defines a Qualified Employee Stock Purchase Plan.

**IRR Fiscal Data Accumulation**

This report accumulates all retirement deductions for employees, as well as any LWOP and any basic pay that was received when an employee was not covered by the CSRS or FERS retirement plans.

**IRR Remarks**

Special remarks that are documented on an employee's IRR. IRR Remarks can be set up ahead of time and can be system-entered text or employee-specific.

**IRR Status**

IRRs can be in pending or final status. Those in pending status can be updated and corrected. A final status indicates that the IRR has been processed and can't be updated or corrected except through a Correction IRR or a Supplemental IRR.

**IRR Worksheet**

A preliminary IRR form that enables an agency to print a pending IRR for a separated employee, review it and make corrections, if necessary. Agencies can also use the IRR Worksheet to view a current IRR for an active employee.
**ISO IRS $100K Limit**

The limit the IRS places on the exercisable value of Incentive Stock Options (ISOs) of $100K per calendar year based upon the fair market value at the time of grant (Section 422 of the Internal Revenue code).

**ISO to NQ Grace Period**

The period of time after which an Incentive Stock Option is treated as a Non-Qualified Stock Option for tax purposes upon the termination of employment according to Internal Revenue Code Sections 421 and 422. Depending on the termination reason the option is treated:

- If the termination reason is for any reason other than death or disability, and an exercise occurs more than three months from the termination date, the system withholds taxes as if the option is a non-qualified stock option.
- If the termination reason is disability, the system withholds taxes if an exercise occurs more than twelve months from the termination date.
- If the termination reason is death, the system always treats the option as an ISO.

**Issue**

See **Material Issue**.

**Issuer**

A legal entity that has the power to issue and distribute a security.

**Item**

See **Inventory Item Planning Item** or **Receivables Item**.

**Item Content Provider**

Third-party software consisting of web-based catalogs of item and price information. These systems benefit the design and purchasing of new products by accelerating item location, maximizing design reuse, and reducing acquisition costs. PeopleSoft Purchasing, Engineering, and Inventory integrate to Item Content Providers, and the information is used by many other PeopleSoft applications.

**Item Rounding Rules**

A set of rules determining how fractional values are rounded so that calculations result in whole numbers. Rounding rules are used in conjunction with **Quantity Precision Rules**.

**Item Simulation**

In PeopleSoft Demand Planning, a process that enables you to interact with the forecast in a manageable manner and perform "what-if" analysis by comparing the effects of different forecast models.
**Item Type**
An identifier that defines inventory items at a very high level, and may include sets of Item Families. For example, the families Computer Items and Office Furniture might be categorized by types like Outside Manufacturing, Finished Goods, and Work In Progress.

**Item-Specific Conversion Factor**
A conversion between the same two units of measure when the measurements have a different value for an item. For example, a conversion between packaging unit and stocking unit.

**Iterative Processing**
Refers to a concept on only re-calculating those payees who have had changes and need to be recalculated (if you choose to run your payroll multiple times before actually finalizing it). This concept saves you a lot of time as you only have to recalculate those payees who have had a data change or who you indicate you would like to be recalculated.

**Java Server Handlers (JSH)**
The JSH manages network connectivity, making service requests from the Jolt Repository, and translating Tuxedo buffer data into the Jolt buffer.

**Java Station Listeners (JSL)**
The JSL handles the work of the client connection, tracking client messages, and session handoff.

**Job Code**
An ID for a job as defined on the Job Code table.

**Job Code Components**
The pay components assigned to a job code by associating rate codes with job codes on the Default Compensation page or the Non-Base Compensation page of the Job Code table.

**Job Code Cost**
Evaluation of salaries for specific job codes.

**Job Compensation Rate**
The compensation rate of the corresponding job row.
**Job Events**
Acts relevant to an employee’s employment—such as a hire, transfer, or termination—that can affect benefit program or plan eligibility. Used by PeopleSoft Benefits Administration. See Event Class.

**Job Order Cost Accounting**
A cost accounting method that attempts to develop a discrete cost for each job performed or product produced. Only the material, labor, and overhead required to complete the job are attributed to the job cost.

**Joint and Survivor Payment Option**
A form of pension payment in which benefits are paid for the life of the participant and a beneficiary. Should the beneficiary outlive the participant, the benefit continues (often in a reduced amount) for the life of the beneficiary.

**Joint Staffing Report**
In the United Kingdom governmental agencies are required submit the Joint Staffing Report. Although it is mainly designed for government sector organizations, commercial organizations may also use this SQR to provide a summary of their staffing by department, job code, gender and full/part time employment status.

**Jolt**
A BEA/Tuxedo companion product that runs on an application server domain and is used to listen for Web Client Java requests and transfer them to Tuxedo.

**Journal Code**
The second highest level of three categories for defining a financial transaction (or document), necessary when using document sequencing. Examples of journal code are domestic sales and export sales. This category is preceded by journal type and followed by document type.

**Journal Generator Template**
A table containing defaults to be used in journal generation. PeopleSoft Asset Management and Billing require one journal generator template for each transaction type.

**Journal Line**
A record storing a double-sided, balanced entry for a given journal. A single journal usually includes multiple lines. The sum of the monetary amounts for the journal lines in one journal totals zero (debits = credits).

**Journal Template**
A list of the characteristics of the general ledger journal entries that will be created from your PeopleSoft Receivables system.
Journal Type
The highest level of three categories for defining a financial transaction (or document), necessary when using document sequencing. Examples of journal types are sales journal and purchase journal. This category is followed by journal code, then document type within the journal code.

Journal Voucher
A PeopleSoft Payables voucher that enables you to make accounting entry modifications while keeping your PeopleSoft General Ledger and Payables systems in sync. Like the adjustment voucher, the journal voucher is linked to an existing voucher.

K

Kanban ID
A unique identifier used to track Kanban cards and replenishment requests when using PeopleSoft Flow Production.

Keep Ledgers in Sync
An option in PeopleSoft General Ledger that defines how a transaction should be posted—to all ledgers in a ledger group as opposed to only a single specified ledger.

Key
See ChartKey.

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

Key Performance Indicator (KPI)
KPI is used by the PeopleSoft Performance Management analytical applications. KPIs are high-level measurements of how well an organization is doing in achieving critical success factors. A KPI defines the data value or calculation from the Data Warehouse tables upon which an assessment is determined.

KPI (Key Performance Indicator)
See Key Performance Indicator.

Knowledge, Skills, And Abilities (KSA)
Also known as Competencies, these are attributes required to perform a job and are generally demonstrated through qualifying experience, education, or training. Knowledge is a body of information applied directly to the performance of a function. Skill is an observable
competence to perform a learned psychomotor act. Ability is competence to perform an observable behavior or a behavior that results in an observable product.

L

Labor Costs
Actual expenditures associated with salary portion of time reporter expense.

Labor Dilution
A process that occurs after the Labor Distribution process in PeopleSoft Time and Labor. The labor dilution process takes the costs that the payroll system has calculated for payable time, determines an average or rate per hour, and applies the average amount evenly across all reported hours for the day.

Labor Distribution
The process of distributing payroll expense to the corresponding payable time entries generated in PeopleSoft Time and Labor.

Labor Distribution Amount
An actual labor cost associated with reported time.

Last Equivalent Increase (LEI)
Reflects the effective date of the last step received in grade or the last promotion, whichever is most current (does not include QSI). Used as the basis to establish an employee's WGI due date.

Last Physical Counting Event
The last date the inventory item was counted. This information is stored with each inventory item.

Last Purchase Date
The item's most recent purchase date in the inventory business unit.

Last Putaway Date
The item's most recent putaway date in the inventory business unit.

Last Putaway Document Number
The item's most recent putaway document identification number in the inventory business unit.
**Last Receiving Date**
The item's most recent receipt date in the inventory business unit.

**Last Shipping Date**
The item's most recent ship date in the inventory business unit.

**Last Shipping Document Number**
The item's most recent shipping document identification number in the inventory business unit.

**Law Enforcement Officers (LEOs)**
Positions within the Federal government involving law enforcement. Under FEPCA, many of these positions are entitled to additional special pays.

**Lead-Time Estimated Usage**
An inventory planning method for calculating historical usage of an item. The historical demand is prorated on a daily basis and then multiplied by the number of days lead time for each effective historical period. The maximum period value is then used as the safety stock or minimum stock level. This method should be used for items that have a steady demand pattern throughout each period.

**Lead-Time Period Usage**
An inventory planning method for calculating historical usage of an item. The purchase lead time is rounded up to a specified number of periods. The historical demand is calculated as the maximum usage during these periods and the safety stock or minimum-stock level is set to this value.

**Leave**
Time entitled to an employee as a benefit, such as Sick, Vacation, STD, and LTD. This process is managed by HRMS (see Time Reporting).

**Leave Accrual Processing**
Processing of leave accruals is used to maintain employee leave balances. All leave benefit plans accrue leave by length of service or number of hours worked. Leave accrual processing is used to determine the employee’s leave accrual award and resulting leave balance.

**Leave Accruals**
Hours that employees earn to use at another time, such as annual leave and sick leave.

**Leave Plan**
A method for earning and managing leave time.
**Leave Without Pay (LWOP) Total (Cumulative)**
An employee's cumulative number of hours of leave without pay (LWOP).

**Ledger Group**
In PeopleSoft General Ledger, a group of ledgers consisting of one primary ledger and secondary ledgers.

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

**Ledger Template**
A table containing records and fields common to all ledgers that ensures that all ledgers specified in a ledger group share the same physical layout.

**Ledger Type**
The unique combination of a single ledger, scenario, and fiscal year. Multiple ledger types make up a ledger type set.

**Ledger Type Set**
A collection of ledger types, the members of which will represent the members of your ledger type dimension.

**Legend ID**
A way of recording information that is displayed upon the Issuance Instruction Report. Can be used to record a notice that should appear on the back of a stock certificate indicating that the shares represented are "Restricted Securities." Can also be used to indicate how shares should be processed, as in the case of Swaps, Trades, Repurchases and SAR Exercises.

**Level**
A section of a tree that organizes groups of nodes.

Defines a set of **Forecast Item** with a common key structure. Each level is related in a hierarchical definition with other levels in the view. A level definition contains descriptive and control data that relates to the operation of the forecast at each level within the view.
**Level**
The section of a tree that organizes groups of nodes.

**Level Income Payment Option**
An annuity form of pension payment in which payments are increased in early years (prior to eligibility for Social Security benefits) and decreased in later years when Social Security benefits are also received. The goal is to provide a relatively constant total retirement income both before and after Social Security eligibility.

**Life Profile**
In PeopleSoft Demand Planning, a feature that enables you to establish product forecasts based on predefined patterns in an item's life cycle.

**Lifecycle (of Reported Time)**
A representation of time through the various stages of Time and Labor; includes processing of current, future, and previous period time from scheduling and time capture through Time Administration and distribution.

**LIFO (Last In First Out)**
Method used by companies to record Disqualifying Disposition Income. If a company uses this method they record the optionees disposition of shares by attributing the shares to the most recent exercise, purchase or release dates for which shares remain available for sale.

**Line-Item Budgets**
The budget amounts associated with ChartField distributions that make up an organization’s budget. Line-item budgets include personnel costs as well as operating and maintenance costs. They also include revenue estimates. PeopleSoft Budgeting-specific.

**Line Schedule Editor (LSE)**
PeopleSoft Production Planning utility or tool that displays production tasks for multiple products on multiple resources across multiple periods of time.

**Literal Mapping**
In PeopleSoft Demand Planning, a mapping option for formatting data that is common to all records being imported. This enables you to set an available field value for all the loaded rows.

**Load**
The feature that initiates a process to automatically load information into a PeopleSoft application—for example, populating the PeopleSoft Benefits database with plan-level election information.
**Load Activation**

Load Activation enables you to specify exactly which part of your Data Mart to build, including security. You set up load activation on the Load Activation page.

**Load Planning**

The PeopleSoft Inventory feature that picks, packs, and ships orders by Load ID. Load Planning is also used to estimate shipping weight, volume, and charges.

**Loader Table**

Any table in PeopleSoft Asset Management used to store load lines before they are loaded into the system as open transactions. The loader tables comprise INTFC_FIN, INTFC_PHY_A, and INTFC_PHY_B.

**Loan Exercise**

A form of cash exercise, typically requiring a loan agreement and a promissory note.

**Local Code**

In PeopleSoft Demand Planning, a type of validation used for a user-defined field code. If a user-defined field is marked to require local table validation, **User-Field Code** are used to determine the list of valid values for the field.

**Local Functionality**

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

**Location Accounting**

An accounting method that captures and records material movement within the warehouse, providing accounting visibility based on where the inventory resides. You can designate certain **Storage Area** as raw material, WIP, or finished goods by assigning the corresponding account ChartField (account, department, product, and project ID) to the storage area. All inventory locations in a storage area use the storage area account.

**Location Code**

Locations enable you to indicate the different types of addresses a company has—for example, one to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each of these addresses has a different location number. Every customer role must have a primary location, which will be used throughout the system on all panels that display a customer address. The primary location—indicated by a **1**—is the address you use most often when contacting the customer, and may be different from the customer's main address.
Location Summary
A Picking Plan option that sorts the picking plan according to the highest-level sort options defined and prints the order lines and the total item quantity to pick from each Storage Location. Because the layout of the printed report reflects the actual positions of stock to be picked, personnel can follow a serpentine path through the warehouse, fulfilling all orders on the picking plan without revisiting locations.

Lock for Confirm
A flag on the Pay Line record that enables users to access the database 7 days a week, 24 hours a day, without affecting or interrupting payroll processing. Issues a warning message “A payroll is currently in process for this employee. This data will not be processed until the next payroll.”

Log file
One way that you can monitor the build process is to review the log files that the build process automatically generates. Keep in mind that the log file is entirely separate from the script file; do not confuse the two. How much information that the log file contains is up to you. You can set up your logging so that all status (both good and bad) appears in the log, or you can specify that just the errors or warnings appear in the log. This section describes the options you can specify in regards to the Build log file.

Long-Term Variable Compensation
In PeopleSoft Workforce Analytics, a component of direct compensation that consists of long-term payments to an employee in the form of stock programs, and deferred compensation.

Lookup Codes
In the financial services industry, these are user-defined codes that enable the system to define and categorize incoming Instrument table information. They also provide a means for you to report on specific data, such as treasury position, balance type, and ledger account.

Lot Status
The status assigned to a lot. In PeopleSoft Inventory, a lot’s status can be Hold, Open, Rejected, or Restricted.

Lump Sum
A tax method that determines withholding based on the Canadian Lump-Sum tax table.

Lump Sum Payment Option
A form of pension payment in which some or all of a participant's benefit is paid as a single sum.
**Lump Sum Reporting**

A Time and Labor process that enables you to report time in a lump sum of hours or units for a single Time Reporting Code, and quantities of time. The system uses a batch process to gather the information you enter, perform edits, and update the daily time tables. The system uses the default assignments you establish for workgroups, taskgroups, shifts and so on.

**Maintenance Worksheet**

A work space for creating write-offs, matches, or adjustments to clean up posted items.

**Manage Base Pay Structure**

*See* Base Pay Structure

**Manage Compensation Planning**

A PeopleSoft Workforce Rewards module that facilitates modeling and analysis of compensation costs across organization units, specific job classifications, or groups. You can focus on the impact of changes to workforce size, or on changes to fixed and variable compensation elements, and determine their effects on current and future payroll costs.

**Manage Market Compensation**

A PeopleSoft Workforce Rewards module you use to match your company’s jobs to similar jobs found in published market compensation surveys. You then calculate a target market rate based on a weighted average from multiple surveys. This market rate is then used to assess your company’s gap to market and to perform cost impact analysis.

**Manage Retention Planning**

A PeopleSoft Workforce Rewards module that enables organizations to analyze the factors that lead to employee turnover, and how retention of key employees affects business performance and goals.

**Manual Checks**

Any checks calculated and prepared outside of the PeopleSoft Payroll system that you must enter into the system manually.

**Manual Count**

A PeopleSoft Inventory procedure in which you enter the actual count data and then create the counting event with its header, item records, and count quantities.
**Manual Events**
Events that are inserted by the user manually through the BAS Activity table. Events are actions that occur, which potentially change employee benefit coverage eligibility—see Event Class for more information. Used by PeopleSoft Benefits Administration.

**Manufacturing Cost Element**
A particular category of an item's cost. For example, when you produce a subassembly that has a cost of $100, the cost can be broken down further into material costs, labor costs, and overhead costs.

**Manufacturing Execution Systems (MES)**
Third-party system that enables detailed planning and execution of production activities from production order release to completing finished goods. PeopleSoft Manufacturing integrates to MES.

**Manufacturing Task**
Any job that can be performed within your manufacturing facility. A manufacturing task is associated with the work center in which the task is completed.

**Map File**
A file that defines the relationship between fields in a third-party system and PeopleSoft Demand Planning tables.

**Mapper Type**
This defines whether you are mapping actual or budgeted general ledger line items to resource ID within PeopleSoft Enterprise Performance Management.

**Marginal Tax Rate**
The tax rate that applies to the next dollar of income generated.

**Market Compensation**
A compensation review process in which you match your company’s jobs to similar jobs found in published market compensation surveys, for the purpose of establishing new target market rates. Also referred to as Market Based Pricing or Market Analysis.

**Market Capitalization**
The value of a corporation as determined by the fair market value of its issued and outstanding common stock. It is calculated by multiplying the number of outstanding shares by the current fair market value of a share. Analysts look at market capitalization in relation to book, or accounting, value for an indication of how investor’s value a company’s future prospects.
**Market Rate**

Compensation rates, usually for regular base compensation or total cash compensation, found in published salary surveys. You use the Market Compensation module in PeopleSoft Workforce Rewards to age and weight this data, to create market rates you can compare against your organization’s current pay rates.

**Mark-to-Market (MTM) Model**

In the financial services industry, the reevaluation of a portfolio’s position at current market levels.

**Market Variance**

A comparison of the difference between an individual's, or group's, actual compensation, and available market compensation data for a comparable population in industry. Market compensation data is usually tied to job codes, and comparisons are usually made between similar jobs. Although the variance to market can be evaluated for any of the compensation components in the Compensation tree hierarchy (such as Total, Direct, or Base), market compensation data is most typically available for, and used in evaluating Base Pay (Base Salary). The main point of reviewing the market variance is to evaluate how well your workforce is paid in comparison to both prevailing compensation in industry, and your own organization's compensation strategy.

**Mass Adjustment**

A process of applying an amount or percentage change to one or many line item budgets at once. PeopleSoft Budgeting-specific.

**Mass Cancellation of Requisitions and Purchase Orders**

A utility that allows you to select and cancel groups of requisitions and purchase orders. You can use this utility during the year as well as at year-end in preparation for closing. The utility enables you to specify ChartField criteria for selecting documents for cancellation. For example, you can select all requisitions or purchase orders for a particular fund and organization, which have a remaining balance. Then you may select a subset of those records to approve for cancellation.

**Mass Change**

A user-configurable entity that defines the movement of data between the tables that store your business information. Mass Changes enable you to define the criteria by which you move or replace data in your tables. Based on the configuration of your system, Mass Change dynamically builds data access and gives you complete control over your system processing.

**Mass Change Template**

The foundation for defining mass changes. Mass change templates enable you to control which fields will be available for the operator to specify when defining a mass change, and whether those fields will be used as selection criteria or defaults.
**Mass Change Type**

The building blocks used in defining mass change templates. Mass change types specify which records the resulting mass change will select from the database, alter, and subsequently write back to the database. They also set up system field defaults that run behind the scenes to ensure that this mass change is processed correctly.

**Mass Validate Metadata Utility**

A PeopleSoft Enterprise Warehouse utility that enables you to validate, but not compile, Metadata objects. Mass Validate certifies all “as of dates” created for Filters, Constraints and DataSets for the specified run date. This utility helps ensure that your Metadata is valid at run time and increases your chance of a successful engine run.

**Match**

A process in PeopleSoft Workforce Planning, by which the system compares the roles, competencies, and accomplishments in the current competency inventory, with the requirements of a given competency strategy.

**Matched Punches**

A period between two consecutive punches during which some activity happens measured intervals.

**Match-Funding**

In the financial services industry, Match Funding refers to funding an asset with a like (term to maturity) liability. This helps an organization apply the appropriate funds transfer price. Although the actual asset might be funded with shorter-term liabilities, it does provide a better measure of financial performance for that asset, such as Risk Adjusted Return on Capital.

**Material Costing**

An inventory accounting method that assigns a cost to items in inventory. These costs can be assigned equally across all items or tracked individually for each item.

**Material Issue**

An event that triggers stock fulfillment requests for items in inventory.

**Material News**

Company news that could be expected to affect the value of a company's securities or influence investors’ decisions. Material news includes information regarding corporate events of an unusual and non-recurring nature, news of tender offers, unusually good or bad earnings reports, and a stock split or stock dividend.

**Material Release**

A PeopleSoft Manufacturing process that—after material has been picked—decrements on hand inventory balances for the inventory storage areas and increments inventory to the WIP
locations defined by the routing or production area. The process also changes the production ID's or production schedule's status from Released to In Process.

**MAX Method**

See Maximum Method Policy.

**Maximum Compensation Hours**

The greatest number of hours to be paid for a specified TRC (see Time Reporting).

**Maximum Lead-Time Usage**

In PeopleSoft Inventory Planning, a policy control value that sets the safety stock level to the maximum quantity required during the lead time. This method is normally used when the demand for an item is low or intermittent but sufficient stock must always be available.

**Maximum Method Policy**

In PeopleSoft Inventory Planning, a policy that controls the way in which the system determines a reasonable high limit for the maximum inventory level of an item. The system provides warning messages when the inventory level exceeds the maximum level.

**Maximum Taxable Wage Base**

An annual earnings threshold used for Social Security purposes. Pension plans sometimes provide different levels of pension benefits for earnings above and below the Maximum Taxable Wage Base.

**Measure**

A measure represents the amounts brought into a cube—the numerical data.

In data warehousing, a Measure is a field type used interchangeably with fact. Measures are types of amounts. Any numeric field you want to apply a Data Manager rule against should be a measure.

**Measure ID**

In the Define Market Compensation module of PeopleSoft Workforce Rewards, a Measure ID is the identification code for a measure. For market compensation surveys, the Measure ID describes the percentile for each type of pay, as well as the regression statistic type. In PeopleSoft Workforce Analytics, for Benchmark Surveys, the Measure ID describes the type of benchmark.

**Measure Value**

In PeopleSoft Workforce Rewards, Measure Value is the calculated market rate value from market compensation surveys for a given percentile of a market rate, and for a given scenario and job code. This is the annual rate you compare against the compensation paid for similar jobs in your company. The Measure value can also be the regression statistic value used for
Regressing Market rates. In PeopleSoft Workforce Analytics, for Benchmark Surveys, the Measure Value is the delivered Benchmark Ratio.

**Member**

A member is the OLAP equivalent of a node or detail value on a PeopleSoft tree. A member is a single item within a dimension, such as a single product name, department ID, or part number. Member names must be unique, even across dimensions. Cube Manager uses the term Dimension Field Mapping to identify members, dimension parents, and label mappings.

**Merchant**

In PeopleSoft eStore and Mobile Order Management, a level of online (web or wireless device) display and order processing controls set by the seller. See also Merchant Variant.

**Merchant Variant**

Associated with a user ID, a subordinate level of merchant controls that enable customers to access different variations of the same PeopleSoft eStore website. In PeopleSoft Mobile Order Management, variations are primarily used to differentiate order processing options and fulfillment methods or locations.

**Merit Matrix**

In PeopleSoft Workforce Analytics, a matrix used to define the amount rules for base compensation increases for your workers. A Merit Matrix provides the salary increase parameters for each review rating in a rating scale. The salary increase parameters are expressed in terms of a percentage. The percentage increase amounts are usually structured to express the company’s pay strategy relative to employee performance, and the employee’s degree of range penetration in their salary range.

**Merit Matrix Increase**

In PeopleSoft Workforce Analytics, an increase to an employee’s base pay awarded based upon a Merit Matrix.

**Message definition**

The object definition specified in Application Designer which contains message information for PeopleSoft’s Application Messaging system.

**Metadata**

Information about data. Metadata is the information a database or application stores to describe your business data. At its simplest, metadata defines the structure of a data field—its data type and size, for example. Metadata can also describe more complex data relationships, such as the rollup structure for a chart of accounts. Reporting and analysis tools should be able to use this metadata to let users access data just as they would from within the application, without having to understand how it is stored.
For Enterprise Performance Management, metadata is used to describe the data stored in the PeopleSoft Enterprise Warehouse. There are different types of metadata, for example, TableMaps, DataMaps, and constraints. You typically define these when you set up the warehouse; however, Metadata (particularly constraints and DataMaps) is used to develop business rules that manage aspects of the dimensional models. Metadata enables technical users to define relationships between warehouse tables and enables business users to easily identify the data that interests them without having to know the database structure.

**Meta-SQL**

Meta-SQL: Meta-SQL constructs expand into a platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, Application Engine programs, and so on.

**Metastring**

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

**Method**

A method can only be executed from an object, using dot notation. You have to instantiate the object first, before you can use the method.

For Enterprise Relationship Management, a method is the algorithm or formula that defines how the budget amount for a line-item budget is calculated or how it is derived if a calculation is not necessary. Types of methods include amount per FTE, itemization, annual percent growth rate based on a historical figure, and number of units multiplied by cost per unit. PeopleSoft Budget Planning-specific.

**Method Amount**

The amount for a line item budget resulting from the application of a method. It represents the budget amount after the method is applied to a line-item budget but before any adjustments or allocations are applied. PeopleSoft Budgeting-specific.

**Method Base**

The defined value to which a method is applied, if applicable. Not all methods require a base. PeopleSoft Budgeting-specific.

**Method Driver**

The factor used in a method’s algorithm. For the method, amount per FTE, FTE is considered the driver. PeopleSoft Budgeting-specific.

**Method of Payment**

In PeopleSoft Grants, designates whether a payment is to be through a cost invoice or a Letter of Credit.
Method Parameter
A defined and derived value within a method, which drives an expense or revenue calculation. For the method, Amount per FTE, the number of FTEs is considered the driver parameter. PeopleSoft Budgeting-specific.

Metric
A metric is a calculation of facts. A metric is usually a number, but can be anything you want to measure.

Metric Object Security
Metric Object Security determines whether an individual can see a metric object in a Data Mart.

Midpoint (Pay Range Midpoint)
In PeopleSoft Workforce Analytics, the middle value in a pay range, halfway between the minimum and the maximum, calculated as (Minimum + Maximum)/2.

Midpoint Progression
In PeopleSoft Workforce Analytics, the percentage difference from one grade midpoint to the next higher-grade midpoint, calculated as (Midpoint2 – Midpoint1)/Midpoint1.

MIN Method
See Minimum Method Policy.

Minimum Benefit
See Grandfathered Benefit.

Minimum Compensation Hours
The lowest number of hours to be paid for a specified TRC (see Time Reporting).

Minimum Method Policy
In PeopleSoft Inventory Planning, a policy that controls the way in which the system determines a reasonable low limit for the minimum inventory level of an item. The system provides warning messages when the inventory level drops below the minimum level.

Missed Punch
A punch that is not entered at the scheduled time (see Time Reporting).
**mkvdk**
Verity’s command-line tool used to index a collection, insert new documents, perform simple maintenance tasks like purge and delete a collection, and control indexing behavior/performance.

**MLS**
Multilingual support.

**Modal transfer**
Modal transfers allow you to transfer an operator from one component to another component (the modal component) modally; that is, requiring the operator to OK or Cancel the modal component before returning to the originating component.

Modal transfers give you some control over the order in which the operator fills in pages. They are useful for finite tasks related to the main transaction. They are particularly useful in cases where data in the originating component can be derived from data entered by the operator into the modal component.

**Model Equivalency Factors**
In PeopleSoft Demand Planning, factors that adjust model errors to allow a fair comparison. During the Model Reset process, the errors associated with each of the models are multiplied by their associated factors. The factored errors are then compared to select the model with minimum errors.

**Models**
In the PeopleSoft Enterprise Warehouse, Models enable replication of an organization’s business processes for analysis of cost flow through customers, departments, and channels.

**Model Recalculation**
In PeopleSoft Business Planning, users may checkout slices of the entire model for their appropriate role. This requires the entire model to be periodically recalculated to incorporate the users changes for dependencies in other areas of the model.

**Morphing**
Morphing is a technique of automatically transforming the look and feel of an interface based on the needs of an active object. The Application Designer toolbar and menus dynamically transform based upon the type of object definition that is active.

**Mortality Table**
A table showing rates of death by age. Mortality tables are part of a pension plan’s actuarial assumptions.
**Moving Average**

In PeopleSoft Demand Planning, a model that averages a selected number of the most recent demand periods and creates a forecast of demand for the next and subsequent periods.

**Multibook**

A functionality supporting the requirement of a company to carry one set of books in their local currency (functional currency) and another set of books in the currency of their parent company (reporting currency). In PeopleSoft General Ledger, multibook functionality is multiple ledgers having multiple-base currencies defined for a business unit, and the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers). Also commonly known as dual-book.

Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.

**Multicurrency**

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

**Multidimensional Analysis**

A type of analysis that enables you to look at data from many different dimensions, or attributes. You identify the dimensions of the data, then combine the dimensions in various ways. For example, you might identify five dimensions of your sales data: sales, region, channel, product line, and time. Once you’ve identified the dimensions, you can “slice and dice” the data based on combinations of these dimensions, such as sales in the Western region for the last quarter.

**Multidimensional Database (MDDB)**

A database that stores data for multidimensional analysis in a proprietary multidimensional format. Users access MDDBs exclusively for reporting and analysis, never transaction processing, so they are optimized for retrieval speed.

For Enterprise Performance Management, a Multidimensional Database stores data for multidimensional analysis in a proprietary multidimensional format. These databases are used exclusively for reporting and analysis, and never transaction processing, so they are optimized for retrieval speed.

**Multiple Jobs**

Multiple jobs allow you to hire an employee into more than one concurrent job and have them processed through Payroll, Benefits, and Pension. In order to enable this feature, the Multiple Jobs check box must be selected in the PeopleTools Options page.

**Multiple-table dynamic tree**

The user drills down through a hierarchy of parent and child records.
**Multivariate Forecasting Techniques**

In Enterprise Planning and Simulation, this is a forecasting method that uses both the recorded history for the target value and the history and forecasts for other variables (causal factors) to infer, not only a forecast for the target value, but also a functional relationship between the causal factors and the target value.

**National Association of Securities Dealers, Inc. (NASD)**

Self-regulatory organization of the securities industry responsible for the regulation of The NASDAQ Stock Market and the over-the-counter markets. The NASD operates under the authority granted it by the 1938 Maloney Act Amendment to the Securities Exchange Act of 1934.

**National ID Number**

Different countries track some form of National ID for payroll, identification or benefits purposes. For example, German workers are assigned a Social Insurance Number, UK workers have a National Insurance Code, and US laborers have a Social Security Number. Each of these different types of National IDs has unique formatting requirements associated with them as well.

**Nature Of Action (NOA) Code**

Indicates the type of personnel action being processed.

**Nature Of Action Description**

Describes the NOA code.

**Nature Of Action Effective Date**

The date the personnel action is effective.

**Negative Amortization**

Occurs when a loan payment does not cover the interest due on the loan payment, resulting in an increase of the principal amount.

**Net-To-Zero Adjustment**

A prior period adjustment where no compensation affecting fields on the pre-existing (original) record are changed by the adjustment.
New Hire Report
In the United States the Personal Responsibility and Work Opportunity Act of 1996 (the so-called Deadbeat Dads law) requires employers to report new hires to specified agencies within a pre-determined number of days from the hire date.

Next Level Item
In PeopleSoft Demand Planning, the Forecast Item at the next level that contains the current item as a child. This is the key of the group item at the next level up and is always within the same view.

Next Year
PeopleSoft Benefits term referring to the next open enrollment processing year.

NIC (Numéro Interne de Classement) Code
In France NIC numbers identify the entities inside the same enterprise, and represent an Internal Filing Number.

No Control
A target control that allows the user to submit a budget even if it is not within the planning target and the tolerance levels. The system tracks the budget against the defined planning targets but does not generate any warnings or validations. Users can still compare their planning targets against their budget amounts on the Planning Targets page in Line Item Budgeting.

Node
An individual item on a tree. Nodes summarize detail values or other nodes, and may or may not roll up into other nodes or levels.

Node
A node is a name that you can use to refer to some source of HTML content. In more practical terms, a node is a URI string that defines the database and server to be used when the portal servlet attempts to retrieve content, proxy addresses, and assemble pages.

Non-Base Pay
A pay component not included in the job comp rate calculation. It is used by payroll only in the paysheet calculation. For example, non-base pay can be set up for additional work, holiday pay, bonuses, and so on.

Non-Benchmark Jobs
See Benchmark Jobs.
**Noncompetitive Action**
An appointment or placement in a position in the competitive service that is not made by selection from an open competitive examination, and that is usually based on current or prior Federal service. A noncompetitive action includes:

- All of the types of actions described under inservice placement, above
- Appointments of non-Federal employees whose public or private enterprise positions brought into the competitive service under Title 5 CFR 316.701; and
- Appointments and conversions to career and career-conditional employment made under special authorities covered in 5 CFR 315, Subpart F.

**Nondiscrimination Tests (NDT Tests)**
Tests used to help employers ensure that their organization’s 401(k), 401(m), and Section 129 dependent care reimbursement plans do not discriminate in favor of highly compensated employees. See Highly Compensated Employees.

**Non-Employee**
Those workforce resources hired to perform a specific job and/or hired for a specific period of time. Although non-employee time will be entered into Time and Labor for the purposes of managing their Task time, non-employee earnings will not be updated to Payroll and they will not be paid through the Payroll system.

**Non-HR Employee [Time and Labor]**
An individual employed by the corporation who is administered outside of the PeopleSoft Human Resources system.

**Non-Job Event**
Actions which result in changes to an employee’s personal or demographic information that also affect benefit program and plan eligibility—such as an a state or postal code change, a family status change like a divorce, or a birthdate change. Used by PeopleSoft Benefits Administration. See Event Class.

**Non-Productive Time**
Any employee scheduled work time spent on tasks (or non-tasks) other than those which the employee was hired to perform. This could include time spent in training, time spent in meetings, travel time, and time spent reporting time.

**Non-Qualified Dependent**
Dependents such as domestic partners, their children, and other people who do not meet the definition of qualified dependents as presented in IRS Section 152. PeopleSoft Benefits applications enable the creation of benefit programs that offer health and life coverage to non-qualified dependents.
Nonqualified Plan
A plan that doesn't conform to ERISA rules. Employers cannot take a tax deduction for contributions to a nonqualified plan; instead, plan benefits are generally paid directly from the employer's assets.

Nonqualified Stock Option (NQ)
Any option that does not satisfy the conditions of a statutory stock option under the Internal Revenue Code and therefore does not qualify for preferential tax treatment. Generally, companies can design nonqualified options in almost any way they like. Features are:

- The grant price may be less than fair market value (with some exceptions under state law).
- Grants are not limited to employee of the company or subsidiary.
- No taxable income is recognized at the time of grant.
- Options can be granted to anyone (Employees, Consultants and Board of Directors).
- Difference between the fair market value on the date of exercise and the grant price is treated as compensation income.
- In the U.S., withholding tax obligation arises at the time of exercise.
- Company receives a tax deduction equal to the compensation income recognized.

Nontaxable Benefits
Any employer contributions that are not subject to Federal Withholding Tax, such as an employer's portion of a 401(k) plan.

Normal Form of Payment
The payment form associated with the amount calculated by the benefit formula. Pension Administration uses it as a basis for converting to optional forms of payment.

Normal Hours
The hours an employee is normally expected to be at work for any given workweek.

Normal Line Of Promotion (Career Ladder)
The pattern of upward movement from one grade to another for a position or group of positions in an organization.

Normal Retirement Date (NRD)
The date on which an employee is eligible to retire and begin receiving pension benefits. Eligibility for normal retirement is typically based on age only.
**Normalized database**

A normalized table adheres to certain standards designed to improve the productivity of the database user. Normalization makes the database much more flexible, allowing data to be combined in many different ways.

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

**Normalized Loss**

In the financial services industry, Normalized Loss is the expected loss on a loan and is netted out of the profit and loss statement for management accounting or profitability measurement purposes. Similar to the bank’s loan loss reserve, it enables the institution to analyze and account for expected losses on a more detailed level, by financial product.

**Northern Ireland Report**

In the United Kingdom the Fair Employment (Northern Ireland) Act of 1989 requires private sector employers with more than 10 employees to submit the Northern Ireland report to the Fair Employment Commission annually. The report indicates the religious composition (referred to as Community Background—Catholic, Protestant, Other) of the workforce, job applicants and appointees.

**Not To Exceed (NTE) Date**

Types are as follows:

- Appointment NTE Date: Indicates the length of time a person may serve in a position.
- Classification Temporary NTE Date: Established temporary date that is used for a temporary classification of a unique position.
- Hospitalization coverage.
- LWOP NTE Date: NTE date is the last day the employee is in leave without pay status. The employee is scheduled to return to duty the next workday.
- Position NTE Date: Indicates the length of time a position is available for use.
- Promotion NTE Date: Specific NTE Date: Specific time for an increase in grade on a temporary basis.
- Suspension NTE Date: Specific time an employee is to be on suspension. No salary is paid for the period.

**nPlosion**

A PS/ nVision feature that enables you to expand rows and columns in your spreadsheet to underlying details, as in drilldown.
**Numeric constant**

Numeric constants are any decimal number used in PeopleCode.

**Object-Based Modeling**

Object-Based modeling technology enables you to create parent and child models. In the PeopleSoft Enterprise Warehouse, you set up such models using the Scenario Manager.

**Object reference**

An object reference is one that uses the current object. For example, in the case of a component, pages within the component are related objects. The menus that use the component are its object references.

**Occupant Of Position/Vice**

Indicates new position or former occupant of a position.

**Occupational Series Code**

Designates a grouping of positions similar in work and qualification requirements. They are designated by a title and four digit number (e.g., the Accounting Series, GS-0510).

**Off Date**

A specific date that is defined as an off day (see Scheduling).

**Off Day**

A 24-hour period rounded by daybreaker with no associated shifts (see Scheduling).

**Off Day Type**

A classification of off days (i.e. holiday, plant shutdown) (see Scheduling).

**Off-Cycle Processing**

The process of calculating and creating a paycheck for one or more employees aside from the normally-scheduled (on-cycle) payroll run for their pay group. You typically use off-cycle payroll processing for employees who are being terminated, new hires who weren't entered into the system in time for the last on-cycle payroll run, and employees who received an incorrect paycheck during a normal on-cycle payroll.

**Offer Period**

This is the period of time in which an employee’s ESPP share price is determined.
**Officer**
An insider who sits on the Board of Directors and who is also an employee of the corporation. Examples include CEO, CIO, CTO, CFO, COO, Corporate Secretary, and Treasurer.

**Official Forwarding Address**
An employee's mailing address following separation.

**Official Languages Act (OLA)**
Canadian federal institutions are required to report on the official languages used in their departments, in accordance with the Official Languages Act (OLA).

**Official Personnel Folder (OPF)**
The repository of a Federal employee's official documents related to Personnel history.

**Official Personnel Folder (OPF) Address**
Indicates the address where the Official Personnel Folder is maintained.

**Off-Invoice Discount (OI)**
A per unit discount deducted from the customer invoice and given by a manufacturer for promotional activities. Off-invoice discounts can originate from a National Allowance or Customer Promotion, and are passed to PeopleSoft Order Management so the discounts are applied correctly during order entry.

**Offset Plan**
A pension plan where the benefit formula includes an offset of a portion of the participant's Social Security benefits.

**OLAP**
Online Analytical Processing. OLAP is the multidimensional analysis of application data, performed interactively. The acronym contrasts with OLTP (Online Transaction Processing), which is what most production business application systems do.

**OLTP (Online Transaction Processing)**
OLTP refers to the applications that perform the business transactions that keep your company running, such as processing invoices or enrolling employees in benefits programs.

**Ontario Employment Equity Commission (OEEC)**
The OEEC requires employers in Ontario to complete workforce surveys.
**Open Enrollment**
The scheduled annual re-enrollment of plan participants into appropriate benefit programs and, within those programs, benefit options.

**Open Price**
The price at which a security starts a trading day.

**Open Season**
A time period during which Federal employees are open to re-enroll in a specific benefit plan and option. Open Seasons can be scheduled at varying times throughout the year and multiple Open Seasons can occur concurrently with each other. For FEHB processing, it is generally the time period from mid-November through mid-December. For Thrift Savings Plan (TSP) processing, these are semi-annual and are generally held from May 15 - July 31 and November 15 - January 31. Open seasons for FEGLI are infrequent and special notification from the OPM would be issued to all Federal employees should they occur.

**Open Transaction**
A transaction that has not yet been processed in PeopleSoft Asset Management.

**Operation**
In PeopleSoft Manufacturing, a job or task performed in a specified amount of time, done in one work center, and using one or more resources.

**Operational Data Store (ODS)**
A staging area in PeopleSoft Enterprise Warehouse for source application data and pre-processed data for tables optimized for reporting.

**OPF Code**
Indicates where the OPF is maintained.

**OPM**
Office of Personnel Management.

**Optimization**
In PeopleSoft Demand Planning, the process of evaluating and improving forecast model parameters.

**Optimize**
The process of creating a new PeopleSoft Planning schedule by repairing the violated constraints in a schedule automatically. The Optimizer can be prioritized for meeting due dates, for minimizing overtime costs, and so on.
**Option**
A contractual right that gives the individual the option to purchase a specified number of shares of stock through an Equity Compensation Plan. Also known as a grant. Regulatory agencies also refer to an option as the right to purchase stock in an employee stock purchase plan. These options are considered granted on the offering begin date.

**Option Adjusted Cost (OAC)**
In the financial services industry, the difference in the average expected return between an instrument without embedded options that are otherwise identical to the fully loaded instrument and the instrument fully loaded with embedded options.

**Option Adjusted Spread (OAS)**
In the financial services industry, the average return expected for an instrument, over the short-term risk-free rate, for all projected interest rate paths generated using Monte Carlo simulation.

**Option Types**
Types of stock options. PeopleSoft Stock Administration supports the following stock option types. Incentive Stock Options (ISO), Nonqualified Stock Options (NQ), Tandem Incentive Stock Options/Stock Appreciation Right (ISO/SAR), Tandem Nonqualified Stock Option/Stock Appreciation Right (NQ/SAR), Restricted Stock Award (RSA).

**Optional Forms of Payment**
Any alternative forms of payment available to a participant retiring under a pension plan. These can include: annuity options paid over the participant’s (and possibly a beneficiary’s) lifetime; certain term options paid over a specified number of years; and lump sum options paid out in a single payment.

**Options Outstanding**
The total number of option shares held by optionees. It is the number of Grants less the number of Exercises, Cancellations, and Expirations.

**Order Group**
Order groups link order terms that default into sales orders and quotes when you select an order group code.

**Order Line Number**
The line associated with an order identification number. The order line identifies an item and the requested quantity.
**Order Quantity Policy**

In PeopleSoft Inventory Planning, a policy that determines how replenishment order quantities are calculated for an item. For example, you can use a static number, provide upper and lower limits, or use an economic order quantity calculated by the system.

**Ordinary Income Tax**

An individual’s tax on earnings from wages, tips, and all other sources except capital gains. Includes option profits upon exercise of non-statutory options.

**Origin ID**

A code that identifies the location of a payment deposit in PeopleSoft Billing. Origin ID also distinguishes the method of the payment’s entry: online, external, or lock box interface. Billing origin ID identifies the remit to origin for billing. This function is mainly used for specifying where the customer should send payment.

**Original Option**

A stock option that is eligible for repricing. This option has a grant price greater than the current FMV.

**OSHA 200 Occupational Injury and Illness Recordkeeping Log**

In the United States this record-keeping logbook meets reporting requirements for reporting occupational injuries and illnesses to the Occupational Safety and Health Administration (OSHA). It lists the case numbers and details of each injury and illness that occurred during a calendar year.

**Out Punch**

Indicates the end of a shift.

**Out-of-the-Money**

A term used to describe an employee stock option when the current market price is below the option grant price. When an option is out-of-the-money, it costs more to exercise than the underlying stock is worth. Such options are also described as being "underwater."

**Output Result Tables**

Refer to the database tables that are populated with information at the end of each pay calculation.

**Output VAT**

VAT collected on sales or outputs.
Outside Scope of VAT
A transaction determined as not subject to VAT. No VAT code is associated with this type of transaction. The transaction is still logged in the VAT transaction table, but no tax is applied.

Outside The Register Appointment
An appointment in the competitive service made under an agency's applicant supply system because either there is not a sufficient number of eligibles on the appropriate register or no competitor inventory exists. Agencies are also authorized to make temporary limited appointments outside the register at grades GS-12 and below.

Outstanding Option
A stock option that still has unexercised (vested or unvested) uncancelled or unexpired shares. Options with a “pending” status are not included. Only options with a status of ‘active’ or ‘suspended’ are considered outstanding.

Overlapping Promotions
Multiple customer promotions related to the same customer, and the same product, at the same time.

Override Rate
Cost per hour or unit reported with time used to replace the time reporter’s default rate. (see Time Reporting)

Override text
Text not derived from field descriptions.

Package level
The top level of organization is the package level. The package is the entire transaction set file, addressed to your company much as a mail package would be.

Page
A page defined in Application Designer as part of a PeopleSoft Internet Architecture application.

Page Assembly
Page assembly is one of the functions of the portal servlet. Page assembly involves intercepting the user’s content request, retrieving the content, and properly formatting it using a pre-defined portal template. To complete the page assembly process, the portal servlet merges content from any HTML documents that it retrieves along with the defined template
HTML. The assembled page is then sent back to the user’s web browser as a single HTML document.

**Page buffer**
Consists of rows of buffer fields that hold data for the various records associated with page controls, including the primary records, related display records, derived/work records, and translate table records.

**Pagelet**
A page designed to appear on a customized homepage. A pagelet is smaller than the typical page dimensions in many PeopleSoft applications. It can be based on either a page designed in Application Designer or on an iScript.

**Paired Punches**
Two punches for the same employee in chronological order that exists for the purpose of determining the duration between the punches.

**Par Value**
The nominal or face value of a security. It establishes a price floor below which shares may not be issued. With common stock, the company issuing the stock sets par value. Par value has no relation to fair market value. Some companies issue no par value stock.

**Parallel Processing**
In the PeopleSoft Enterprise Warehouse, parallel processing is a system function that "locks in" the information you use for processing. This enables the system to run identical or similar processes at the same time without impacting your results. Running concurrent processes greatly reduces the amount of time it takes to run within the system.

**Parent Budget**
In commitment control, you can build a hierarchy between different budgets, such as summary and detail budgets. Specifying a relationship of parent and child between a summary and a detail budget for purposes of budget inquiries enables you to retrieve information about either budget through the other.

**Parent/Child Models**
Object based modeling technology enables you to create parent and child models. In the PeopleSoft Enterprise Warehouse, you set up such models using the Scenario Manager.

**Parent node**
A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
**Parent Task**
A higher-level Planning task in a schedule's hierarchy that drills down into subtasks. Its start time is the start time of its earliest subtask, and its end time is the end time of its latest subtask. Planning tasks are distinct from Manufacturing tasks.

**Partial Pay**
The pay processed whenever a job record has an effective date in the middle of a pay period. Typically, this happens whenever you hire, terminate, transfer, or change the rate of pay for an employee mid-period.

**Participants**
Individuals who elect to participate in the stock purchase plan.

**Participation**
The PeopleSoft Pension Administration function that determines whether an eligible employee has met the plan's rules for joining the plan. Generally, these rules are based on age and service criteria.

**Participation ID**
In the financial services industry, this is a lookup code used by the financial analytic applications to identify the participants (syndicators) involved in, or responsible for, a financial instrument or group of instruments.

**Passive Control**
A target control allowing the user to submit a budget even if it is not within the planning target and tolerance rules. The system responds by sending an email to the user of the next budget center level indicating that the budget exceeded planning target tolerance levels.

**Passive Events**
Events that are initiated by a change that has taken place over time, rather than by a direct data entry action. Events are actions that potentially change benefit coverage eligibility. Examples of passive events include an employee’s reaching the age of retirement. See Event Class for more information.

**Pattern Reporting**
A Time and Labor process that enables you to report a start and stop date, a pattern of one or several time reporting codes, associated hours, amounts, or units and task information once for an employee. The system transforms the information into instances of daily time for each scheduled employee work day based on the employee’s schedule.

**Pay**
Types of "pay" are as follows:
• Basic Pay: generally, the total amount of pay received during any one calendar year at the rate fixed by law or administrative action for the position held by the employee or judicial official prior to any deductions and not including any special payments or premium pay.

• Gross Pay: total compensation earned by an employee, annuitant, or survivor of a judicial official prior to any deductions. Includes basic pay plus locality pay; availability pay (if any) for LEOs; special payments (if any); an annuity (if any); plus awards (if any).

• Premium Pay: pay provided to an employee as a regular addition to basic pay (e.g., administratively uncontrollable overtime (AUO), availability pay, overtime, night differential, holiday pay, etc.).

**Pay Basis**
A code indicating the principal condition in terms of time, procedures or criteria, that serves as a basis for computing an employee's pay.

**Pay Calculation**
Formula that calculates an employee's gross to net.

**Pay Calendar**
Payroll processing cycle for a given pay group.

**Pay Components**
Rows in the compensation record. They build the compensation packages in the compensation record.

**Pay Confirmation**
Process in which the system updates all to-date totals on the database for earnings, deductions, and taxes for pay groups assigned to a given Pay Run ID.

**Pay Entity**
A pay entity is the organization responsible for making payments to payees. You can also use a pay entity to define the type of currency to be used when processing calculations. The pay entity is a legal definition of an organization from a payroll perspective. In many cases, an organization and a pay entity are the same. However, PeopleSoft Global Payroll does not define a relationship between an organization and a pay entity.

**Pay Frequency**
Defines how often employees in a pay group are paid—weekly, biweekly, monthly, and so on.
**Pay Group**
A set of employees grouped together for payroll processing. It’s a way of “bundling” payees for more efficient processing. A pay group is made of payees that the system processes at the same time during a pay run.

**Pay Period**
The established time segments for which employees in a pay group are paid. Pay Periods are defined by their beginning and ending dates.

**Pay Plan**
A code that denotes the pay schedule under which an employee is paid, e.g., JS, UG, UJ, etc.

**Pay Slip**
Either an actual check or an advice notice of a direct deposit. You build these to match your organization’s needs. A pay slip is the details of a payment you’ve made.

**Pay Structure**
In PeopleSoft Workforce Analytics, Pay Structure consists of a series of pay ranges or grades, each with a minimum and maximum. You develop pay structures to support and reinforce your company’s pay strategy (for example, to target the market 50th percentile).

**Payable Date**
The date that a corporate distribution, such as a dividend, is payable to the record holders of a corporation’s securities.

**Payable Time**
Time that is ready to be collected by the payroll system (see Time Reporting).

**PayCycle**
A set of rules that define to PeopleSoft Payables the criteria by which it should select scheduled payments for payment creation.

**Payee**
Any payroll recipient. A payee can be an employee or a non-employee of an organization.

**Payee Process Stat Record**
A record created for each payee during the payroll process. The system creates one Process Stat record per payee for each calendar.
**Payee Section**
Type of section that can be added to a process list. A payee section defines a set of elements that is to be resolved for a particular payee.

**Payline**
Record containing standard payroll information for an employee, such as the amount of regular pay, number of regular hours, additional pay (if any), and tax information and job data.

**Payment Interface**
An Application Engine process that loads payment information from the Banks Statement tables and the Staging tables to the Application tables and performs various checking and default operations.

**Payment Predictor**
PeopleSoft Receivables' automatic cash application feature that pairs open items with unapplied payments based on predefined algorithms.

**Payment Schedule**
A schedule of payment dates for leased assets.

**Payment Selection**
A process by which PeopleSoft Payables selects scheduled payments that are eligible to be paid in a pay cycle.

**Payment Worksheet**
The work space in which open items are paired with unapplied payments.

**Payroll Certifying Officer**
The individual with the delegated authority for approving all items relating to payroll for those employees under his/her authority.

**Payroll Process Tables**
Records holding data necessary to process a payroll, such as employee, company, and tax information.

**Paysheets**
Repository for the raw data necessary to calculate pay for employees, including earnings, hours, deductions, taxes, and accounting data.
**PBGC Rates and PBGC Grading**

The interest rates published monthly by the Pension Benefit Guaranty Corporation. There is an "immediate" rate that applies once benefits commence as well as a series of "graded" rates—calculated based on the immediate rate—that are used during the time between benefit determination and a deferred benefit commencement.

**Pegged Chain**

A method the PeopleSoft Enterprise Planning and Production Planning solvers use to determine feasible plans. The method ties tasks together in order to explicitly record which supplies are being used to satisfy which demands. Through this process, the Planning engine first determines which independent demand has the highest priority. Then, it determines the lateness preference ranking for dependent demand tasks.

**Penalty**

A user-assigned value for constraints that can be violated, determining how the schedule's score will be calculated. Setting the penalty configures the constraint to your priority. Use the Control Page to assign a higher penalty to violations that are more critical to your schedule or a lower penalty to constraints that you can deal with externally.

**Pending Exception**

Any known exception to an employee's scheduled workday. Pending Exceptions are future dated (future is defined to be for a date under report beyond the last date of the employee's current pay period).

**Pending Item**

Information in PeopleSoft Receivables that has been entered in or created by the system, but hasn't yet been posted. During the Receivable Update process, the system uses the pending items to update customer balances—either by creating new items or by adding item activity lines to existing items.

**Pending Time**

Time that has been reported or is assumed to have been reported (based on employee work schedule and calendar date) that has not been used by the business entity. Pending Time may be for past, current, and future pay periods. It is the label for those time transactions that are waiting to be used by the business (for example, approved and unapproved time not yet updated to Paysheets).

**Pension Status**

An employee’s standing with regard to a particular pension plan. For example, employees can be active participants, terminated deferred vested, or in pay status.

**PeopleCode**

PeopleSoft's proprietary language; it is executed by the PeopleSoft Application Processor. PeopleCode generates results based upon specific actions, based upon existing data or the
actions of a user. Business Interlink Objects are executed by calling the execute() method from PeopleCode. This makes external services available to all PeopleSoft applications wherever PeopleCode can be executed.

**PeopleCode Event**

An action that an end-user takes upon an object, usually a Record Field, that is referenced within a PeopleSoft page.

**PeopleSoft Activity-Based Management (ABM)**

A PeopleSoft Analytic Application that aligns organizational costs with operational activities, enabling a coordinated approach to expense and PeopleSoft Activity-Based Management. PeopleSoft Activity-Based Management identifies and assigns operational activities to products, customers, or services.

**PeopleSoft Balanced Scorecard (BSC)**

PeopleSoft Balanced Scorecard converts an organization’s vision and strategy into a comprehensive set of performance and action measures that provide the basis for a strategic management system.

**PeopleSoft Asset Liability Management (ALM)**

PeopleSoft Asset Liability Management provides financial service institutions with the analytical tools to define, measure, monitor and manage interest rate risk, liquidity risk, options risk, and to some extent exchange rate risk. The primary audience for PeopleSoft Asset Liability Management is the financial institution’s Asset/Liability Committee (ALCO).

**PeopleSoft Budgeting**

A budgeting application that is a combination of Education and Government (E&G) Budget Planning and Budgets (commercial). This application resides on the EPM database, primarily using the ODS layer of the PeopleSoft Enterprise Warehouse for its data.

**PeopleSoft Business Analysis Modeler (BAM)**

A multi-dimensional modeling tool used to support several analytic applications.
**PeopleSoft Business Planning**
A planning application that enables financial executives to model various alternatives and set corporate financial targets to achieve their strategic goals. PeopleSoft Business Planning integrates with PeopleSoft Analytic Forecasting, PeopleSoft Activity Based Management, PeopleSoft Workforce Analytics, and PeopleSoft Budgeting applications.

**PeopleSoft Customer Behavior Modeling**
A PeopleSoft application that enables you to: a) create a customer profile by extracting customer data from the Enterprise Warehouse; b) create segments and samples from the profile to efficiently target marketing campaigns and further analyze customer behavior; c) append to it additional data from external sources such as demographic, credit or psychographic information; d) use a data mining tool to create a predictive model; e) score the customers in your profile using the predictive model. You can then publish the results to another transactional application.

**PeopleSoft Customer Scorecard**
A product that provides a pre-defined set of customer-oriented key performance indicators (KPIs), to help you build a scorecard specific to your organization. This scorecard facilitates the measurement and communication of customer satisfaction, customer activity, and objectives across your organization.

*See also* PeopleSoft Balanced Scorecard

**PeopleSoft Enterprise Performance Management (EPM)**
Enterprise Performance Management is a comprehensive, integrated analytic business solution designed to increase the value of organizations by enabling people to make better decisions. The PeopleSoft Enterprise Performance Management product line consists of the PeopleSoft Enterprise Warehouse and optional analytic applications and Data Mart products.

**PeopleSoft Enterprise Warehouse (EW)**
PeopleSoft's data warehousing solution. The PeopleSoft Enterprise Warehouse provides the tools necessary to query, analyze, and present information to provide the optimal environment for business intelligence. It is the central repository for data that will be used with the analytic applications in the Enterprise Performance Management product line, and can also serve as a standalone data warehouse. The PeopleSoft Enterprise Warehouse consists of dimension, fact, reference, and error tables, reporting and ETL tools (Informatica PowerMart), as well as the Operational Data Store (ODS). The tables in the PeopleSoft Enterprise Warehouse are maintained separately from your transaction-based systems to allow for comprehensive analysis of data originating from any Online Transaction Processing (OLTP) or legacy system.

**PeopleSoft Funds Transfer Pricing (FTP)**
A PeopleSoft Analytic Application that enables an institution to accurately measure and tune profitability. PeopleSoft Funds Transfer Pricing is an interest rate that represents the value of an asset or liability to the institution. PeopleSoft Funds Transfer Pricing is based on market rates, adjusted for risk and cost variables, specific to the institution. By assigning PeopleSoft Funds Transfer Pricing to each item on the balance sheet, the institution can remove the
effects of interest rate volatility from business units, so that profitability measurements are based on factors within their control, that is, credit quality, pricing and product strategy.

**PeopleSoft Operations Data Stores (PODS)**
See Data Warehouse Tables

**PeopleSoft Marketing Insight**
A tool that helps you analyze your marketing campaigns and activities. It helps you determine the effectiveness of marketing events based on factors such as number of leads generated, profiles of respondents, campaign return on investment, and campaign forecasted costs to complete.

**PeopleSoft Risk Weighted Capital (RWC)**
A PeopleSoft Analytic Application that enables the financial services industry to accurately measure capital that has accounted for risk. RWC allocates capital to various levels within a financial institution according to risk, providing the opportunity to measure performance based on how well each business unit, product, customer, or transaction generates income given its perceived level of risk as quantified by the allocation of capital.

**PeopleSoft Sales Activity Insight**
A tool that helps you analyze key components of the sales process, such as pipeline status, discount analysis, and sales process.

**PeopleSoft Support Insight**
A tool that helps you determine the effectiveness of your customer service organization. It helps you answer questions such as: Are we effectively handling customer issues? Has contact center performance changed from last year to this year? Which product quality issues are most prevalent?

**PeopleSoft Workforce Analytics (WFA)**
PeopleSoft’s complete workforce analysis solution, which includes the PeopleSoft Workforce Rewards analytical application and the PeopleSoft Workforce Analysis Insight. The complete solution set includes the PeopleSoft Enterprise Warehouse and PeopleSoft Balanced Scorecard products. It helps to manage strategic employee compensation, goals, and competencies, as well as retention.

**PeopleSoft Workforce Rewards**
PeopleSoft Workforce Rewards is an analytical application you use to align your workforce compensation and retention initiatives with the strategic objectives of your organization. Modules include Market Compensation, Base Pay Structure, Compensation Planning, Workforce Simulation, and Retention Management. You integrate data from multiple internal and external sources, enrich it using rules you define based on any data in your PeopleSoft Enterprise Warehouse, and simulate multiple scenarios of future workforce compensation and
retention activity. You then analyze and evaluate your scenarios, and make actionable
decisions you can communicate back to your PeopleSoft ERP systems for execution.

**PeopleSoft Portal**
The portal bundled with every PeopleSoft 8 application. It provides a simple navigation
system, based on existing menu definitions that have been imported into the portal registry.
Navigation to content outside of PeopleSoft applications is not provided.

**Percent Cycles Without a Shortage**
In PeopleSoft Inventory Planning, a method used with safety stock policies. The value is
derived from the percentage of replenishment cycles that will complete without a stockout.

**Percent Demand Fill**
In PeopleSoft Inventory Planning, a method that can be used with safety stock policies. This
method defines the percentage of the total quantity ordered that must be filled without a
backorder.

**Percentage Tolerance**
The acceptable percentage difference between expected cycle count quantities and actual
quantities counted in PeopleSoft Inventory. This value provides a margin of error for an item
during cycle count reconciliation count quantities.

**Performance Appraisal Code**
Indicates the level of performance of an employee.

**Performance Appraisal Due Date**
Date established based on the WGI or LEI for the yearly appraisal of an employee.

**Period Closing Offset**
In Time and Labor, the closing date beyond which this pay period is not considered current
any longer, if the period’s closing date is different from its end date. You can enter a positive
or negative number of days.

**Period Method**
In PeopleSoft Inventory Planning, a method used to determine how a single static policy value
is to be calculated from time-phased results with static policies.

**Period of Interest**
The maximum period of time containing the data needed to run all the rules in a rule program
(see Batch Processing)
**Period Segmentation**  
When an element (like compensation rate) changes mid-period, requiring all other elements in the process list to be calculated multiple times on either side of the date on which the change took place, period segmentation is used. The system calculates each element more than once, using the components that were effective during the different time slices. The system keeps the results of these calculations separate with the object of creating two gross-to-net result sets.

**Periodic Processing**  
In PeopleSoft Pension Administration, any of several batch processes that a plan administrator must run on a regular basis—for example, consolidation of payroll data.

**Personal List**  
A user-created list of products defined in PeopleSoft eStore, used to quickly populate the shopping cart when creating a new order in either PeopleSoft eStore or Mobile Order Management.

**Personal Register (Registre Unique du Personnel)**  
In France, companies are required to be able to produce, at any given time, a Personal Register. For a given establishment, this report lists current employees and employees who left up to 5 years ago.

**Personnel Action**  
Personnel actions are changes to employee data or status resulting from such activities as promotions, transfers, terminations, salary increases, and leaves of absence.

**Personnel Representatives (Délégués du personnel)**  
In France it is mandatory for companies with more than 11 employees to elect personnel representatives who will represent all of the employees before management.

**Perspective**  
In PeopleSoft Balanced Scorecard, a category for organizing critical success factors and key performance indicators. Usually there are four: financial, customer, internal process, learning and growth.

**PF Ledger**  
The PF Ledger (PF_LEDGER_F00) is an important fact table within the PeopleSoft Enterprise Warehouse. The primary function of the PF Ledger table is to support PeopleSoft Enterprise Performance Management reporting. The data that gets posted to the PF Ledger must be accurate and clean.
**PF Business Unit**

PF Business Units differ from other PeopleSoft Business Units in that they represent functional or strategic areas of an organization, rather than separate legal entities.

**Phase Type**

A label for the different phases you want to define for a project. Costs can then be calculated by project phases. Examples include planning, startup, construction, and cleanup.

**Physical Accounting**

The PeopleSoft Inventory feature that updates tables based on count result input, regardless of how the count was created or the data collected.

**Physical Inventory Process**

In PeopleSoft Asset Management, the process by which you extract asset data from the Asset Management database to load into your bar code scanning device. You then scan the assets and load the data gathered during the actual physical inventory into Asset Management, enabling you to generate physical inventory results for review. You perform matching and generate transactions to reconcile the data in Asset Management with the results of your physical inventory.

**PIA**

PeopleSoft Internet Architecture. This is the fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a web server, and a browser.

**Piece Work**

Method of compensating time reporters based on units completed rather than hours worked.

**PIN**

Technical term for an element. In PeopleSoft Global Payroll, PIN is often referred to in the online object names and within the batch code. PIN stands for Pay Item Name.

**Placeholder**

A temporary location designator in an engineering bill of material for a component item that has yet to exist. These temporary placeholders have to change into approved items before transferring engineering bills of material (EBOM) to manufacturing bills of material (MBOM).

**Plan Administrator**

The person selected by the employer to perform the administration of a plan under PeopleSoft Pension Administration.
**Plan Eligibility**

The PeopleSoft Pension Administration function that uses job data to determine whether an employee may participate in a pension plan. An employee can be eligible based on job data but not be participating because of an unmet service or age requirement.

**Plan Type**

A unique range of codes used during payroll calculation to determine deduction processing rules. See also Benefit Plan Type.

**Plan Year**

The annual period that a pension plan uses to measure service, earnings, and benefits. Generally, the pension plan year will match the fiscal year of the plan sponsor.

**Planning Item**

A non-inventory item designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material or planning routing, and can exist as a component on a planning bill of material. A planning item cannot be specified on a production or engineering BOM or routing, nor used as a component in production. Quantity on hand will never be maintained.

**Planning Level**

The level on a dimension’s tree used for planning. Typically, a customer will choose not to plan at the lowest level of available detail, such as the individual product level. Instead, the individual products are mapped to their corresponding product group and the planning is done at the product group level.

**Planning Targets**

The amount the budget must equal, such as a budget spending limit or cap for expenses where users can not exceed the amount. Planning Targets are presented at a summary level. This term is interchangeable with Spending Limits.

**Planning Target Tolerance**

The percentage and/or amount a user can be over or under the planned budget target.

**Planning Target Control**

Values set at the user role level, including no control, active control, and passive control. For more information see no control, active control, and passive control.

**Planning Task**

Any activity in PeopleSoft Planning that creates a schedule.
PODS (PeopleSoft Operations Data Stores)
See Data Warehouse Tables

POI. Personnel Office Identifier.
Also known as Submitting Office Number (SON). These are codes assigned by the OPM to the office(s) delegated authority within an agency to process personnel actions on Federal employees.

Pointers
A pointer is an "address" of a driver quantity, or value, within the Enterprise Performance Management product line. Pointers are used as a means of defining where driver quantities exist in tables that reside in the PeopleSoft Enterprise Warehouse. Pointers enable you to extract values from any location in the warehouse and then use these values as driver quantities. There are three different kinds of pointers: explicit, implicit, and multidimensional.

Policy Control Group
In PeopleSoft Inventory Planning, a feature for setting up order quantity, safety stock, reorder quantity, and maximum and minimum policies. The Control Group is assigned to a set of Planning Item. The policies of the associated planning items can be set explicitly or defaulted from the policies on the policy control group.

Policy Generation
In PeopleSoft Inventory Planning, a set of run options used to control the functions and behavior of the Policy Generation program.

Policy Item
An item record which is related to a location and for which Inventory Policy is held. A policy set, Planning Item ID, and Location ID uniquely identify a policy item. The combination of an item and a location is called a stockkeeping unit.

Policy Set
Defines a set of the items for which Inventory Policy is to be calculated. Each policy set is assigned a unique ID and includes information that defines, for example, the associated Forecast View, time periods, and planning horizon.

Policy Simulation
In PeopleSoft Inventory Planning, a feature that simulates the effects of various stocking scenarios, compares current policy with simulated policy, and determines the best inventory investment strategy.

Population
A Population is defined on top of DataMaps created using Enterprise Warehouse metadata. The Population builder allows you to easily format a SQL statement, using filters, to select
rows from one or more tables joined together in a DataMap. You can view the results of a Population directly from the browser.

**Pop Up Payment Option**
A variation on a joint and survivor payment option under which the benefit payable to the participant is increased if the beneficiary should die prior to the participant.

**Portal**
A portal is a web site that helps you navigate to other web-based applications and content. Users often consider a portal their “entry point”—the place they typically visit first after launching their web browser.

**Portal Registry**
The portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of “folders” useful for organizing and securing content references.

**Portal Registry API**
The Registry API is provided for accessing each portal registry from PeopleCode, COM, Java, or C programs. Providing the same kind of registry management capability as the online administration pages, it can be used by external systems to update the registry to reflect changes in the content reference URL, taxonomy, and effective dates. The Registry API is fully described in the PeopleCode documentation.

**Portal Servlet**
A Java servlet that runs on a web server. The portal servlet intercepts user requests for content, retrieves content, and builds a single HTML document to be displayed in the user’s browser.

**Portal Solutions**
Portal Solutions are separate product offerings from PeopleSoft that consist of pre-built, packaged solutions focused at different audiences (customers, suppliers, and employees). Because they are both pre-built, supported application products, Portal Solutions can be deployed swiftly and easily, saving significant resources when compared to other custom-built solutions.

**Position**
The officially assigned duties and responsibilities that make up the work performed by an employee. Positions are linked to Job Codes, which can be considered the electronic version of the Position Description. There can be a many-to-one relationship between the Position and Job Code.
**Position Budgeting**
The budget amounts (salary, benefits, and earnings) associated with positions within an organization. Position budgeting can be calculated based on position information loaded from a human resource system. Position budgets are used to generate line-item budgets for personnel costs. PeopleSoft Budgeting-specific.

**Position Change**
A move by an employee to another position during the employee's continuous service under the same appointment within the same agency.

**Position Date Created**
Date the position was created for use in the agency.

**Position Description (PD)**
In accordance with OPM guidelines, an official description, authorized and approved by an agency official, describing duties and responsibilities to be performed. Position classification standards are used to describe the work, classify the work components by occupational series, and factors (e.g. supervisory control, scope, complexity, competencies required) are used to determine the grade level (i.e., salary range) for the position.

**Position Description Number**
A number assigned to identify various types of Position Descriptions.

**Position Description Required**
Identifies those positions for which a position description must be maintained.

**Position Number**
A number that identifies an authorized Position.

**Positive Input**
Data such as hours worked or a bonus amount entered for elements that change each pay period. Positive input can be entered manually, generated by the system, or received from other applications.

**Positive Task Reporting**
A method of time reporting in which all required task elements must be provided (see Time Reporting)

**Positive Time Reporting**
A method of time reporting in which all elements of time must be provided (see Time Reporting)
**Post Differential Percent**
Additional compensation that may be paid to certain employees who work in Guam or the Northern Mariana Islands.

**Post Differential, Non-Foreign**
A differential payable to an employee at a location in a non-foreign area if conditions of environment differ substantially from conditions of environment in the contiguous United States and warrant its payment as a recruitment incentive.

**Post-56 Military Deposit**
The OPM provides guidelines to Federal agencies on how to calculate and process these voluntary employee deductions from pay toward the employee's current retirement fund for those periods of eligible military service.

**Posting**
In PeopleSoft the process by which accounting entries are created or updated based on user transaction input and accounting entry templates. In PeopleSoft Receivables, posting is also known as Receivable Update.

These posted accounting entries in the feeder systems, such as accounts receivable or accounts payable, must be further processed by the Journal Generator to create journal entries before posting to the General Ledger occurs.

**Post-Tax Deductions**
See After-Tax Deductions

**Pre-encumbrance**
An encumbrance that occurs before an employee/employer relationship exists. You encumber funds for an employee you have on staff; you pre-encumber funds for an employee that you anticipate hiring. For example, you would pre-encumber funds for a new position that has just been approved but not filled.

**Pre-encumbrance Ledger**
Stores pre-encumbrance amounts. Updated by posting pre-encumbrances, such as purchase- or hiring-requisition source transactions (including journal entries).

**Premium**
Any additional compensation for extra hours worked, often expressed in terms of factor-above-normal-per-hour pay, such as time and a half (where one-half is premium pay), double time or triple time. Also, any additional pay provided to a time reporter based on compensation rules (see Time Administration in your PeopleSoft Time and Labor PeopleBook).
**Prenote**
A prenotification or waiting period requested by banks before processing payroll direct deposits.

**Pre-Retirement Survivor Annuity (PRSA)**
A benefit paid to a beneficiary if a pension plan participant dies before commencing benefits. Qualified plans must offer a pre-retirement survivor annuity, although the employee can be required to pay for the coverage with a reduction in the benefit.

**Pre-Tax Deductions**
See Before-Tax Deductions

**Previous Day's Close**
The previous trading day's last reported trade.

**Price Break**
Defined in PeopleSoft Order Management, and linked with price sets, a price break defines the actual adjustments that are made to the list price. They are valid only within a time frame you establish.

**Price Rule**
Used in conjunction with price sets, rules are essentially a decision tree that establishes the search order the system uses in reviewing sets for a match on the variables they reference for price adjustments.

**Price Set**
Linked with price breaks, a price set specifies the parameters for your price adjustment. It establishes selection criteria, determines whether the break is based on quantity or price, and defines how the adjustment is applied.

**Price Source**
A service provider or publication that reports the trading activity for a stock traded on stock exchanges. Examples include Wall Street Journal and Bloomberg.

**Primary event code**
Primary event codes, also called purpose codes, specify the status of the transaction: whether it's a new transaction, a cancellation, a duplicate, a status request, and so on. Every transaction has a primary event code assigned to it.

**Primary Insurance Amount (PIA)**
The benefit amount calculated under the Social Security benefit formula.
**Primary scroll record**

Primary scroll records are the principal SQL table or view associated with a page scroll level. A primary scroll record uniquely identifies a scroll level in the context of its page: each scroll level can have only one primary scroll record; and the same primary scroll record cannot occur on more than one scroll at the same level of the page.

**Prior Period**

In Time and Labor, any payroll period before the current one.

**Prior Period Adjustment**

A change or correction to previously reported time or task information, or an insertion of time or task information. Often requires the original report to be offset (reversed) and the correct information to be recorded. (see Time Reporting)

**Priority Rank**

The numeric value assigned to inventory Demand Priority Rules. The lower the number, the higher priority of the rule and the orders matching that rule.

**Private**

A tracking method used by a privately held company to track their daily prices. The Board of Directors typically establishes a price for a period of time. Stock of a privately held company is not traded on an exchange.

**Private Views**

User-defined views available only to the user who created them. For more information, see Budget Views.

**Process**

See Batch Processes.

**Process Definition**

Process Definitions are created in the Process Scheduler Manager pages to define each specific run request. A Process Definition is comprised of a variety of variables including panels associated with a request, Process Groups, output parameters, run locations, and many more.

**Process Group**

Used to associate specific Process Definitions with a Class Profile in Security Administrator. This allows administrators to restrict an operator's ability to initiate requests.
**Process Instance**
A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

**Process Job**
Multiple Process Definitions can be logically linked into a job request to process each request serially or in parallel, and optionally initiate subsequent processes based on the return code from each prior request.

**Process List**
The set of instructions the system uses during a payroll process to determine which elements to resolve. A process list is comprised of sections that identify the sets of elements to be resolved. You build process lists and attach them to calendars.

**Process List Manager**
The program used during batch processing that reads the Process List and calls the PIN Manager to resolve elements on the list.

**Process Request**
A single "run request," such as an SQR, a COBOL program, or a Crystal report that you run through Process Scheduler.

**Process Run Control**
A PeopleTools variable used to retain Process Scheduler-defined values needed at runtime for all requests referencing a run control ID. This is not to be confused with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

**Process Scheduler**
A PeopleTool that performs tasks behind the scenes of your application. It can run several kinds of processes, such as COBOL, SQR, and Application Engine programs. You can schedule processes to run on a regular schedule or at your request. Processes can run on your workstation or on a server.

**Process Scheduler Server Agent**
The server-based program (PTPUPRCS) that manages the selection, validation, and initiation of all queued requests for each defined server within your batch environment (Process Scheduler).

**Process Type**
A global process definition under which related process definitions are grouped. This allows for easy maintenance of Process Definitions that share common parameters.
**Processing group**
In order to partition application processing between the client and the application server, it is necessary to define units that, as a whole, run in one location or the other. We call these units processing groups.

Processing groups can encompass one or more PeopleCode events. Some processing groups can run either on the client or on the application server, such as Component Build and Component Save.

**Product**
A commodity primarily defined in PeopleSoft Order Management. It may be: 1) The Order Management view of an inventory item that has attributes the same as or different from those of its inventory counterpart. 2) A commodity that is not a stocked inventory item such as a product kit or a service. 3) A tangible commodity that is drop shipped from another vendor and is never stocked in inventory.

**Product Alternate**
Alternative products that can replace the product ordered when it’s out of stock or a problem with a particular product temporarily prevents shipment.

**Product Catalog**
A configurable list of available products that may be of interest to a specific customer. You can create two types of catalogs—inclusive catalogs that contain all the products you want made available to a customer and exclusive catalogs that contain the products you want to withhold from your customer. By attaching product catalogs to a Sold To customer, you define the products they can buy.

**Product Definitions**
This support module describes how other support modules process the instruments that belong to a particular product. For example, different products have different cash flow characteristics and may be stratified differently, or may react differently to changes in interest rates. This module enables you to specify each of these actions for each instrument.

**Product Kit**
A commodity that consists of a fixed set of components that are sold together. It appears as a single line on an order, but is represented by multiple lines on shipping documents. Product kits may comprise inventory items, non-stockable products, or a combination of both.

**Product Kit Component**
A commodity that is part of a product kit. It may be an inventory item or a non-stockable product such as a service.
**Product Pricing Model**

In the financial services industry, this defines models that describe indices upon which future rates are paid or charged for an individual product.

**Product Tree**

A user-defined graphical representation of a company’s product structure. A product tree defines how products are promoted and determines what users have authority to promote those products.

**Production Maintenance Spreadsheets**

A set of spreadsheets generated by an nVision process, containing production ID and production schedule data extracted from PeopleSoft Production Management. You can add and maintain production quantity data using these spreadsheets and then import the data back to Production Management.

**Production Option**

Effective-dated combinations of BOM codes and routing codes. You can create multiple effective-dated BOM code/routing code combinations (or production options) for an item. These combinations can be extracted to PeopleSoft Production Planning. They enable the specification of multiple production variations for an item and provide control of seasonal variations by effective date.

**Production Option Cost**

A cost based on a specific BOM/routing combination (also known as a production option). The Production Option Cost utility rolls up production options costs based on specific BOM/routing combinations, enabling you to cost individual production options and later to have the DataLink pass this cost to the Planning engine. If this utility isn’t run, the Planning engine will use the standard item cost based solely on the primary BOM and routing instead.

**Productive Time**

Employee scheduled time spent performing any task for which a position was created; work performed on behalf of a business entity that is required for that entity to fulfill its business purpose. Employees doing the work they or someone else was hired to do.

**Productive Unit**

In Italy employers organize employees into productive units based on agreements between the unions and the employer.

**Profile**

A data set that you aggregate from the Enterprise Warehouse, according to the filters you specify, the Key Performance Indicators you select, and the 3rd party demographic data you include.
**Profile Factor**
In PeopleSoft Demand Planning, the weight index assigned to each *Forecast Period* to take into account seasonal fluctuations in demand. The factor or index typically measures the percentage of difference between the base demand and the expected actual demand in the period.

**Profiles**
Group of employees defined according to a list of job codes and departments. You can use these profiles to ascertain training demands within your organization based on set criteria.

**Profit Manager**
The Profit Manager is a set of integrated tools that enable true profitability reporting. Profit Manager features are tightly integrated with the PeopleSoft Analytic Applications and provide you with ways to ensure data integrity, edit data, and post data to the Performance Ledger table.

**Project**
The highest level of hierarchical organization within PeopleSoft Projects. Projects provide the structure to which activities and resources are added. Each node on a Projects tree represents a project. Projects can contain other projects as well as activities and resources. This provides a hierarchical relationship between projects and facilitates cost roll-ups.

In Enterprise Performance Management you use a Project to create or modify a Profile. A Project contains pointers to data elements that you include in a Profile.

**Project ID**
The name or number by which a project is to be identified in all tables and pages.

**Project Type**
A user-definable grouping of projects. Project types are optional.

**Projected Run Date**
In PeopleSoft Demand Planning, a calculation made that projects a life volume for a period based on a calculated run rate or performance ratio.
**Projection.**
An estimated pension benefit calculated as of a future date or any estimated data used as the basis for such a calculation.

**Promotion**
- For positions under the same type job classification system and pay schedule, a promotion changes the employee to a higher grade level or makes permanent a Promotion NTE;
- When the old and new positions are under different job classification systems and pay schedules, a promotion changes the employee to a position with a higher rate of basic pay or makes permanent a Promotion NTE.

**Promotion Pattern**
In PeopleSoft Demand Planning, an Event function that enables you to apply weights to promotions across a range of Forecast Period.

**Prompting Profile**
A task profile usually used by account managers as a way of creating task profiles for employees who report task time differently by customer. For example, you might have an account manager who has fifty customers; when the account manager comes in each day to report time, the system will display all the customers, and indicate which customers it will use as a default if she doesn’t manually report time.

**Prorated**
In Enterprise Planning and Simulation, prorated is when the computed forecast and the summarized forecast are two different versions of the statistical forecast. In addition, the forecast at the product family level can be allocated down to the individual products. Usually this allocation is done in proportion to the calculated product forecasts at that level. This version of the (statistical) forecast is called the allocated or prorated statistical forecast.

**Pro-Rate Purchase**
A purchase in which the number of shares to be purchased is prorated according to a specified factor. This may occur when the total number of shares to be purchased is greater than the number of shares allocated to the stock plan from the treasury.

**Prorated Forecast**
In PeopleSoft Demand Planning, a forecast developed by factoring the group forecast down one level at a time to make the sum of the item forecast equal to the aggregate forecast. The prorated forecast tends to be more accurate than the Statistical Forecast.
**Proration Rule**
Element that defines how you want to prorate an item. You use proration rules in numerous places—for instance you could prorate an earning, deduction, or many of the elements that make up an earning or deduction.

**Proration Threshold Ratios**
In PeopleSoft Demand Planning, the upper and lower ratios used as thresholds for **Reasonableness** checks when a forecast is developed using proration.

**Provider**
An entity, such as an insurance company, that provides one or more of the benefits your company offers. For example, Metropolitan Life Insurance Company is a provider to companies that use a Metropolitan life plan.

**Proxy Person**
A highly compensated executive. Corporations must include information regarding the most highly compensated executive officers in their proxy reporting.

**Proxy Statement**
The document that must accompany a solicitation of proxy appointment under SEC regulations. The purpose of a proxy statement is to provide shareholders with the appropriate information to make an intelligent decision.

**PSADMIN**
A PeopleSoft utility providing a menu interface to create, configure and administer application server domains and the Process Scheduler Server Agent (Batch Server).

**PSAPPSRV**
PSAPPSRV is the main server process running within a domain. PSSAPPSRV performs the functional requests, such as building and loading components. It also manages the memory and disk-caching for PeopleTools objects on the application server. Each PSAPPSRV process maintains its own memory and disk cache.

It provides authentication services for incoming users. For instance, it checks the PeopleSoft OPRID against the directory server or PSOPRDEFN table.
PSQCKSRV
Essentially, PSQCKSRV is a copy of the PSAPPSRV. It performs quick, read-only SQL requests. It is an optional Server Process designed to improve performance by handling items in the PSAPPSRV transaction request queue.

PSQRYSRV
Like the PSQCKSRV server process, PSQRYSRV is designed to alleviate the workload of PSAPPSRV. PSQRYSRV is designed to specifically handle all user-generated queries submitted by PeopleSoft Query (PSQED.EXE). This server process is designed to improve overall application server performance whether or not you have PSQCKSRV configured. It is specifically, and exclusively designed to process PeopleSoft Query transactions, which can be very SQL intensive.

PSSAMSRV
It processes conversational SQL transactions primarily for Application Designer.

Public Company
A company that has held an initial public offering and whose shares are traded on a stock exchange or in the over-the-counter market. Public companies are subject to periodic filing and other obligations under the federal securities laws.

Public Views
Coordinator-defined views, available to anyone using the application. For more information, see Budget Views.

Publish/Subscribe
Publish/Subscribe type messaging is performed with PeopleTools Application Messaging technology. You can send data from one PeopleSoft system to another in an asynchronous mode—meaning the two systems don’t have to be sending and receiving at the same time. This is possible because the message transfer is accomplished through a Web server with an “http: gateway.”

Pull List
Similar to a pick list, a pull list contains multiple replenishment requests, including the location, quantity, and item quantity required in a specific sorting sequence. You use pull lists in PeopleSoft Flow Production with Inventory replenishment.

Pull Ticket
A document containing the details of a single request replenishment request, including Kanban ID, item, quantity, source, and To locations. You use pull tickets in PeopleSoft Flow Production with Inventory replenishment.
**Punch**
Precise instances of date and time recorded for a user and measured in seconds, minutes, hours, day, month and year and time zone (see Time Reporting)

**Punch Duration**
Length of time between two punches in increments of hours or partial hours (see Time Reporting)

**Punch Matching**
Area of the application which converts paired punches to punch duration by processing rounding rules and assigning the tasks to the appropriate logical day based on rules established by the user

**Punch Restriction**
The facility to constrain a time reporter’s ability to create a punch that deviates from the schedule (see Time Reporting)

**Punch Type**
A user defined classification of punches, i.e. In, Out, Start, Stop (see Time Reporting)

**Purchase**
The issuance or purchase of shares through a stock purchase program. The purchase is made using current contributions from a participant and any carry-forward remaining for the participant from previous purchases.

**Purchase Price**
The discounted price paid for the shares at the end of a purchase period.

**Purchase Price Variance**
A PeopleSoft Payables matching feature that compares purchase order and inventory prices for any variance in the prices.

**Purge Rules**
The rules that define criteria to clear data you no longer need from previous open enrollment processing cycles in PeopleSoft Benefits Administration.

**Pyramiding**
A computer calculation enabling an individual owner of one share of stock to use the stock-swap technique to exercise a stock option of any size without using cash. Not many corporations permit pyramiding.
QDRO
See Qualified Domestic Relations Order.

QDRO Alternate Payee
A former spouse who is entitled to a portion of a participant’s pension benefits as a result of a court order.

QJSA (Qualified Joint and Survivor Annuity)
A post-retirement death benefit for a spouse. Plans subject to this requirement must provide an annuity for the life of the participant with a survivor annuity for the life of the participant’s spouse.

QMCSO (Qualified Medical Child Support Order)
A QMCSO is a court order that requires a group health care plan to provide benefits to the child of a participant as part of a child support arrangement on the behalf of that participant. Base Benefits enables the tracking of QMCSOs for dependents.

Qualified Domestic Relations Order (QDRO)
A court order ordering a division of a participant’s pension benefits. This is normally the result of a divorce and gives a portion of the pension benefits to the former spouse.

Qualified Plan
A pension plan for which the employer can take tax deductions for contributions to the plan. Investment income of the plan trust fund is not taxable to the employer. Tax law places restrictions on the plan rules.

Qualifying Dispositions
A transaction whereby a participant sells shares acquired through a stock purchase plan two years after the grant date and one year after the purchase date.

Quality Function
A level of configuration that enables you to define the fields and attendant information that provides a base level for inspection plan and integration. Quality functions enable you to map process-specific field information into PeopleSoft Quality for identification, tracking, and analysis.

Quality Ranking Factors
Knowledge, skills, and abilities that could be expected to enhance significantly performance in a position, but are not essential for satisfactory performance. Applicants who possess such
KSAs may be ranked above those who do not, but no one may be rated ineligible solely for failure to possess such KSAs.

**Quality Server**
A PeopleTools-based analysis and graphing program.

**Quality Step Increase (QSI)**
A step increase awarded to an employee for sustained high quality performance.

**Quantity Allocation Method**
In PeopleSoft Inventory, the method used to determine how available quantity will be allocated to prioritized demand lines when using the online reservations page.

**Quantity Precision Rules**
A set of rules specifying whether item quantities for a given unit of measure are expressed as whole numbers or as decimals. Quantity precision is set at the inventory `SetID` and item-UOM levels.

**Query**
A set of data members that are selected from a Class catalog (provided by the Business Interlink Plug-in) as well as a generic form of Criteria. The criteria are composed of `<left-hand-side> <Relational Operator> <right-hand-side>` statements that can be concatenated using a set of logical operators. All operators and class catalogs are dynamically provided through the Business Interlink Plug-in.

**Race And National Origin Code**
A code that identifies the employee's basic racial and national origin category.

**Range of Dates Reporting**
A Time and Labor process that enables you to report a start and stop date, a time reporting code and task information for a single employee. The system transforms the information into instances of daily time based on the employee’s schedule or default work schedule, replacing the scheduled time with the entered Time Reporting code and the number of scheduled hours on a day-to-day basis.

**Range Penetration**
In PeopleSoft Workforce Analytics, Range Penetration is the degree to which an employee’s actual pay has progressed through their salary grade, and is expressed as a percentage. The calculation is:

**Range Width**
In PeopleSoft Workforce Analytics, the difference between the maximum and the minimum values of the pay range calculated using the following formula (and expressed as a percentage):

$\frac{(\text{Maximum} – \text{Minimum})}{\text{Minimum}}$.

**Rapid Time Entry**
The process that enables you to enter daily time for single employees without the system editing your field entries. The system populates temporary tables, which are used by a batch process that reads, edits and moves the data into the appropriate time and labor tables. You cannot prompt for valid values in any of the fields, and the online system does not edit any of the data you enter against other tables.

**Rate Code**
Alphanumeric reference to the cost per hour or unit of time reported to a specific TRC.

**Rate Code [Global Payroll]**
IDs for pay components. Rate codes define rates of pay and are set up in the Comp Rate Code table. Rate codes are then used to represent pay components in pages and when you configure compensation packages in the compensation record.

**Rate Code Group**
A rate code group is a number of pay components (represented by rate codes) bundled into a subset of a compensation package. The rate code group is used to calculate percentage-based components that do not apply the percentage to all pay components in the compensation package. Rate code groups are constructed on the Rate Code Groups page.

**Rate Code Type**
Defines how the monetary value of the rate code is calculated. The compensation rate code type is defined on the Comp Rate Code table. Valid values are Flat Amount, Hourly Rate + Flat Amount, Hourly Rate, Percent, and Points.

**Rate Combinations**
The combination of rate types and conversion rates with account types that is linked to your budgeting model. Typical rate types are current, commercial, floating, average, and historical. Effective dates define different rates for different budget periods. There are several conversion rates for any pair of currencies including not only the current rate, but others rates such as average, historical, asking, and so on. These different types of rates are appropriate for different types of accounts.
Rates
The arrays of values used to calculate the cost of a plan to an employee. Rates can be age-
graded, service-related, or general, depending upon the benefit plan type. Any number of
benefit program and benefit plan combinations can use each set of rates.

In Enterprise Performance Management, a rate is determined by the user and specifies the
dollar amounts to be calculated for each model. This is a financial services industry term.

Rating Model
The scale used by your company to measure competency proficiency. The default rating
model is the PSCM (PeopleSoft Competency Management) Rating Model that PeopleSoft
delivers with your PeopleSoft Human Resources System.

Raw Punches
See Actual Punch; typically this is distinguished from a rounded punch (see Time Reporting).

Reason Code
Reason Codes provide explanations for occurrences such as returned stock and changes to
order headers, lines, or schedules.

Reason Code
A code describing employee time such as comments for sick time or travel time.

Reasonableness
In PeopleSoft Demand Planning, a technique that checks the trend and projected annual
growth to make sure that a forecast is realistic. If a forecast falls outside either boundary, the
system automatically adjusts it and sends a warning message.

Reassignment
Change of an employee from one position to another without promotion or change to lower
grade.

Recalculate Forecast
In PeopleSoft Demand Planning, a forecasting feature that uses the existing model and its
associated parameters to create a new forecast.

Recalculate VAT at Payment
Allows the VAT amount to be adjusted at the time of payment if an early payment discount is
taken. This calculation option is only valid when VAT is calculated at Gross.
**Receipt Cost Method**
Determines how you cost receipts. Receipt cost methods include Actual, Non-Cost, and Standard.

**Receipt Line**
A line associated with a Receipt ID that identifies an item and quantity. If the respective tracking is activated, the lot, lot suffix, and serial number are also identified.

**Receivable Update**
See Posting

**Receivables Item**
An individual receivable. An item can be an invoice, credit memo, or debit memo. Items and payments combined comprise a customer's balance.

**Reconciliation**
Within PeopleSoft Enterprise Performance Management, reconciliation differs slightly when it is performed within the PeopleSoft Enterprise Warehouse and when it is performed within the PeopleSoft Analytic Applications.

In PeopleSoft Funds Transfer Pricing (FTP) and PeopleSoft Risk Weighted Capital (RWC), reconciliation identifies differences between Performance Ledger balances and the instrument or position balances, which are risk weighted according to the basis rules you have assigned. The first step in reconciling basis rule balances is to reconcile the individual balances for accounts, instruments, and positions. Reconciling the total balances is the second step. This means that you reconcile the difference between Account/Instrument balances, and the difference between Account/Position balances.

In the PeopleSoft Enterprise Warehouse, reconciliation is a period-end process that posts journal entries to the Performance Ledger for the discrepancies found when you reconciled the individual balances. Typically, you’ll run the PF Reconciliation engine after a period to compare “to and from amounts” between tables such as REVENUE_F00 and PF_LEDGER, or the GL_LEDGER and the PF-LEDGER.

**Record Date**
The date a stockholder must officially own shares in order to vote at the meeting or to derive an adjustment resulting from a stock split or a stock dividend. The Board of Directors sets the Record Date.

**Record Definition**
A logical grouping of data elements.
**Record field**

Once a field is inserted into a record definition it becomes known as a Record Field within the record.

**Record Group**

A set of logically and functionally related control tables and views. Record groups exist for two basic reasons:

- To save you time—with Record Groups, TableSet sharing can be accomplished quickly and easily, eliminating an enormous amount of redundant data entry
- To act as a safety net—Record Groups ensure that that TableSet sharing is applied consistently across all related tables and views in your system.

**Record Input VAT Flag**

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

**Record Output VAT Flag**

For certain transactions within PeopleSoft Purchasing, Payables, and General Ledger, it may be necessary to record both input VAT and output VAT on the same transaction. Generally, this would be a situation where the purchaser was required to self-assess VAT. Within these situations, this flag indicates that you are recording output VAT on the transaction. This flag, in conjunction with the Record Input VAT Flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. This flag is not used in Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in Employee Expenses, where it is assumed that you are always recording only input VAT.

**Record Owner**

The "Stockholder of Record" of the stock. This may be different from the "Beneficial Owner" of the stock.

**Record Suites**

Record suites are temporary tables that enable the system to track how many processes are running. These temporary tables leave the fact tables accessible for processing other jobs simultaneously without impacting your processing.
Reduction In Force (RIF)
Method used to reduce the number of government workers in an agency.

Reemployed Annuitant
An employee who has retired from Federal employment and is receiving an annuity. His/her salary is reduced by the amount of the annuity.

Reference Designators
A user-defined alphanumeric identifier that determines where a component is placed in an assembly.

Reference Transaction
In People Soft commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction’s budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

Referential Integrity
Issues that occur when an update to an instance of one object invalidates one or more instances in a related object. In other words, when you make a change to one area of the application, referential integrity makes sure the changes do not adversely affect another area of the application.

Refresh Time
The process that retrieves the appropriate current version of objects related to employee time (such as task profiles or work schedules) and associates them with that time.

Region Codes
Regions may or may not be physical entities, they may simply be another way to geographically categorize an area. When a region does represent a physical entity, the region code has the same characteristics as a business, that is, an address and a language spoken.

Register of Separations and Transfers (ROST)
The ROST is a regulatory compliance document used by federal agencies to summarize the information in an employee's Individual Retirement Record (IRR). The ROST is a one-page cover sheet that accompanies a batch of IRRs being submitted to the Office of Personnel Management (OPM) at the time of an employee's separation from a federal agency. Employees covered by the CSRS retirement plan require SF-2807. Employees covered by the FERS retirement plan require SF-3103.
Registration
The name or names that appear on the stock certificate to indicate who owns the stock.

Registration Statement
The document that must be filed to permit registration of an issue of securities under the Securities Act of 1933. A major component of the registration statement is the prospectus that is to be supplied to prospective purchasers of securities.

Regression Analysis
A statistical technique that determines the relationship between two or more variables. Regression predicts the value of one variable (the dependent variable) based on one or more independent variables.

Regular Base Compensation
In PeopleSoft Workforce Analytics, the annualized, quoted, compensation rate for a job. Consists of fixed compensation, does not include variable compensation.

Regular Time
An employee's normal (scheduled/shift) work hours.

Regular Time
In PeopleSoft Workforce Analytics, an employee's normal (scheduled/shift) work hours.

Regulation T
Federal Reserve Board regulations governing the extension of credit by brokers or dealers, including their participation in same-day sale transactions and sell to cover exercise.

Regulatory Region
The Regulatory Region functionality in PeopleSoft HRMS is designed for use in performing regulatory and regional edits. You’ll use Regulatory Region to drive PeopleCode edits, perform set processing, and control what codes and values the operator sees. A Regulatory Region can be any country (or province or state) where there are specific laws and regulations addressed by functionality in PeopleSoft HRMS.

In Enterprise Performance Management, a Regulatory Region is a region with a common regulatory framework; such as a country (CAN for Canada), or a smaller state or provincial entity (CANBC for British Columbia).

Related Education
Education above the high school level that has equipped the applicant with the KSAs to perform successfully the duties of the position being filled. Education may relate to the duties of a specific position of to the occupation, but must be appropriate for the position being filled.
**Release**
An industry standard term associated with the lifting of a company’s Repurchase Option from a portion or all shares from a Restricted Stock Award (RSA). RSA’s are subject to release schedules, similar to vesting schedules.

**Relevant Constraint**
A constraint PeopleSoft Planning considers when it calculates a score and when it optimizes the schedule. See also Scorecard and Optimize.

**Reloads**
Some stock option plans provide for the grant of a “reload” stock option in connection with stock option exercises, typically by means of stock swaps. A reload option feature provides that upon a stock exercise, the employee will receive an automatic grant of a new stock option at the then-current fair market for the shares that they exercised or for the shares that they used to swap.

**Remark Codes**
Codes that cause the printing of pre-set text passages on a notice of action form. Some passages are general purpose and others are specific to the personnel action being processed.

**Remit From Customer**
A customer who is responsible for payments billed to other customers. During cash application, it’s useful to look at open items for the Remit From group.

**Remittance Worksheet**
A work space in PeopleSoft Receivables used to select drafts for remittance to the bank.

**Reorder Point**
The identifier that automatically locates a replenishment need for an inventory item. When the physical quantity in a location falls below the reorder point, a replenishment request can be created.

**Reorder Point Policy**
In PeopleSoft Inventory Planning, a policy that determines when a replenishment order is launched for an item. The policy has several methods that include days supply, lead time demand, and Fixed Quantity.

**Replacement Option**
The “new” “replacement” stock option that will replace the original stock option. This option will have a grant price lower than the original stock option.
**Replenish**

A process that indicates when items need to be resupplied from external sources. In PeopleSoft Inventory, the process can occur on an ad hoc basis or at predefined reorder points.

**Replenishment Request**

In PeopleSoft Flow Production, an online request for material made when the material is needed. You can generate replenishment requests manually or automatically using backflushing. You can communicate that request using pull lists, pull tickets, or Workflow notifications.

**Report Scope**

A feature that creates multiple instances of an nVision report using a single report request. Each instance contains data specific to an individual ChartField, such as a business unit or department, or for a group of ChartFields, such as all sales departments. Using Scope, each report instance can share the same layout while containing data unique to these particular ChartFields.

**Reported Time**

Clock time or elapsed time provided to the system by the user (see Time Reporting)

**Reporting Person**

An insider that is regularly considered by the SEC to have material information and policy-making authority for the corporation. These individuals are subject to the reporting requirements promulgated by Section 16 of the Securities Exchange Act of 1934. Reporting Persons typically include Directors, Officers, and shareholders with 10% holding interest in the equity of the registrant’s securities.

**Repricing**

An agreement between the corporation and the optionee that allows the optionee to cancel an outstanding high-priced, usually "Out-of-the-Money" stock options for lower-priced options.

**Repricing Election**

Eligible optionees can choose (elect) to accept the corporation’s repricing offer or choose to decline the offer.

**Repurchase**

The reacquisition of shares of stock from an individual by a corporation. This usually occurs when an individual fails to meet the vesting requirements on a RSA or option that is exercised before it vested. The corporation might pay the original cost of the shares to the individual or the fair market value of the shares at the time of repurchase.
**Repurchase Option**

An irrevocable, exclusive option to repurchase up to the number of shares that constitute Unreleased Shares at the original purchase price per share. The Company shall exercise said option. The repurchase of outstanding shares is regulated under the laws of all states (except Massachusetts). Under some laws, as under the Model Business Corporation Act, the repurchase is prohibited unless the corporation remains solvent, in both the equitable and bankruptcy senses of insolvency and after taking any liquidation preferences of other outstanding stock into account.

**Repurchase Right**

A company's contractual right to buy back from an employee any stock resulting from the exercise of the option. The buy back can be at fair market value, book value, or the original purchase price.

**Reservation Method**

The method used to reserve soft reservation items — either batch COBOL reservations or online allocation and reservation.

**Reserved**

A flag indicating that the inventory item is reserved for stock fulfillment in the inventory business unit.

**Reserved Orders**

Orders that have been reserved against on-hand available quantity at the business unit-item level. Reserved orders are found in the DEMAND_INV table.

**Reset**

In PeopleSoft Demand Planning, a function of the **Forecast Calculation Process** that determines which forecast model will produce the best forecast, meaning the model with the lowest ratio of error.

**Resolution**

An activity that closes or partially closes a deduction, such as matching it to a deduction authorization, writing it off, or sending it back to PeopleSoft Receivables.

**Resolution Entry Type**

Code that identifies how to process activities for items in PeopleSoft Deduction Management and how to create accounting entries.

**Resolution Method**

A set of rules that defines how to automatically match or write-off deductions in PeopleSoft Deduction Management.
**Resolution Worksheet**

The workspace in which deduction items are paired with offset items and resolved or written off in PeopleSoft Deduction Management.

**Resource**

In PeopleSoft Manufacturing, any crews, machines, and tools that can optionally be used at work centers to complete tasks. In PeopleSoft Performance Measurement, any homogeneous grouping of general ledger line items.

**Resources**

Resources are the economic elements that are required to perform the activities associated with your business. Resources are consumed in the performance of these activities, and thus denote operating costs. In PeopleSoft Activity-Based Management, resources are typically regarded as the groupings of one or more general ledger accounts. In a service business, resources might include salaries, office rentals, and costs of capital such as information systems, depreciation, real estate taxes, and other associated costs.

**Resource Amount**

The monetary amount of a single, specific resource transaction. The Resource Amount maps to the Posted Total Amount when posted to the general ledger.

**Resource Category**

A field for defining individual resource types more specifically. For example, if you have a resource type of labor but want to break it down further for tracking purposes, you might define resource categories of architect hours, carpenter hours, plumber hours, and electrician hours. Resource categories are optional.

**Resource Driver**

In Activity-Based Management, a Resource Driver defines the quantity of resources used by an activity.

**Resource Group**

A category of resource types. You can define relationships between the resource types within a resource group to facilitate analysis of project costs. For example, if you had resource types for standard labor and overtime labor, you could group them together in a resource group to calculate total labor.

**Resource Planning**

In PeopleSoft Activity-Based Management, Resource Planning focuses on resources allocations that create expected results like driver rates and cost object costs.
**Resource Quantity**
A field on each resource transaction that identifies nonmonetary quantity. For example, on a resource line for 12 ball valves the quantity would be 12.

**Resource Source**
A field on each resource transaction that identifies the system in which the cost originated. For example, PeopleSoft Payables would be the resource source for a resource transaction created from a voucher in that system.

**Resource Subcategory**
A field for defining individual resource types and categories more specifically. For example, if you have a resource type of labor, and resource categories of architect hours, carpenter hours, and plumber hours, you might want resource subcategories of regular hours and overtime hours. Resource subcategories are optional.

**Resource Supplied**
An attribute that enables you define a resource as committed or flexible. A committed resource is one that will not likely change in the short term. A flexible resource is more likely to change within the short term.

**Resource Transaction**
An individual cost line within PeopleSoft Projects. It is through resource transactions that individual costs and types of costs are tracked. Each resource transaction contains a cost and a quantity and as many identifiers of that cost as necessary. Resource transactions are created when you receive information from other systems, run allocations with project resources as the target, or perform internal transactions such as billing, project closure, or adjustments.

**Resource Type**
The resource transaction field in PeopleSoft Projects that identifies the resource associated with a given cost. Resource types may be very general or very specific depending on your needs; they are used in conjunction with resource categories, resource subcategories, and resource groups.

**Resource Use**
Resource Use defines the behavior of a resource within PeopleSoft Enterprise Performance Management. An intermediate resource is a grouping of general ledger line items that may be allocated to another intermediate resource or to a primary resource.

**Restricted Punch**
A punch which is not accepted because it occurs outside of the predefined number of hours and minutes before or after a scheduled (Understanding Time Collecting Device)
**Restricted Securities**

Securities issued privately by the company, without the benefit of a registration statement. Restricted securities are subject to a holding period before they can be sold under Rule 144.

**Restricted Stock Awards (RSA)**

An award of shares of stock to an individual, typically granted at the par value or for no consideration. The shares are awarded on the basis of some future performance goal, either the passage of time (vesting) or the attainment of a specific goal. When the goal is achieved, the vesting occurs. The individual, typically, has all other shareholder rights over these shares such as, voting and dividend rights. The shares are issued in the name of the individual at the time of the award and are held in escrow until vesting occurs. If an employee terminates prior to the vesting of the shares then the company normally repurchases the unvested shares.

**Retained Grade Effective Date**

Date employee became eligible or began receiving a retained grade and pay.

**Retained Grade Expiration Date**

Expiration date of an employee's retained grade and pay.

**Retest Date**

In PeopleSoft Inventory, the date a lot should be inspected to determine whether it is still acceptable for fulfillment or consumption. (Retest Date = Creation Date + Retest Lead Time)

**Retirement**

Types of retirement are:

- Mandatory Retirement.
- Disability Retirement.
- Voluntary Retirement.
- Special Option Retirement.
- ILIA (In Lieu of Involuntary Action) Retirement.

**Retirement Coverage Code**

A code used to denote an employee's retirement coverage. The major ones include the following:

- Civil Service (CSRS)
- Federal Employees Retirement System (FERS) and FICA
- Foreign Service (FS)
• CSRS Offset
• CSRS - Special (for LEOs)
• FERS and FICA - Special (for LEOs)
• Social Security System
• None

**Retroactive Benefits/Deductions**

Deductions taken or benefits granted due to a recalculation of previous benefits and deductions. Late or modified union contracts, late paperwork, and delays in benefit enrollment processing may all result in a need for benefit/deduction recalculation.

**Return Type Code**

A designator on returned material authorizations (RMAs) that indicates what actions the return initiates. This may include replacement of the product or the creation of a credit memo in PeopleSoft Billing.

**Reverse Split**

A reduction in the number of outstanding shares of a corporation’s stock, with a corresponding increase in the stock’s value.

**Reversionary Annuity**

A form of pension payment where the retiree foregoes all benefit during his or her lifetime so that the entire benefit is paid as an annuity to a beneficiary after the retiree’s death. If the beneficiary predeceases the retiree, the benefit is forfeited.

**RIDDOR (Reporting of Injuries, Diseases, and Dangerous Occurrences Regulations)**

Health and safety regulations in the United Kingdom requiring employers to report certain types of health and safety incidents to the Health and Safety Executive (HSE).

**Rider**

A special court-ordered or regulatory provision that may be applied to an enrollment to expand or limit any dependent or beneficiary coverage.

**Risk Function**

In Risk Weighted Capital, this is a user-defined formula that the system uses to derive risk weights.
**Risk RuleSet**

Used to assign a number of rules to a basis, for processing by the PeopleSoft Risk Weighted Capital Application. Used to group together a number of rules that frequently apply to the same type of balance.

**Risk Type**

In Risk Weighted Capital, this defines the types of risk associated with your business or activity. For example catastrophic, credit, legal, operational, regulatory, foreign exchange, market, interest rate.

**Risk Weight**

In Risk Weighted Capital, the risk weight is assigned by risk type, and is used to calculate capital allocation or normalized loss for the account or activity.

**Risk Weighted Capital (RWC)**

*See* PeopleSoft Risk Weighted Capital

**RIZIV Code**

This code is for Belgian employers to track the Federal Institute for Illness and Disability Insurance category.

**ROE (Record of Employment) Reason Codes**

ROE codes are defined by the Canadian government for employers to record employment actions such as Return to School or Pregnancy Leave.

**ROLAP (Relational Online Analytical Processing)**

ROLAP refers to the analytical processing and analysis of a relational Data Mart cube. ROLAP, is a form of OLAP that leverages the power and flexibility of relational databases.

**Role**

A role consists of a designated set of tasks, competencies and accomplishments required for a job code or a position.

**Role user**

A PeopleSoft Workflow user. A person's Role User ID serves much the same purpose as their Operator ID does in other parts of the system. It allows the system to uniquely identify the user and to determine what data the user has access to.

PeopleSoft Workflow uses Role User IDs rather than Operator IDs because it needs different kinds of user information than the rest of the system does. Specifically, it needs to know how to route work items to the user—-an email address, for example—and what role the user plays in the workflow. Plus, you can include role users in your workflow who aren't PeopleSoft application users and who don't have Operator IDs.
**Roles**

Roles describe how people fit into the workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

**Roll Forward**

In commitment control, rolling budget balances forward from the budget ledger you are closing (the source budget ledger) into the new (target) budget ledger.

In PeopleSoft Enterprise Planning and Production Planning, a utility that moves tasks from the past to a valid point in the future using time periods rather than fixed dates.

**Roll Up**

The act of totaling sums based on information tree hierarchies. You can roll up data for any group of details that you have defined as dependent with the Tree Manager.

**Rolling Plan**

An ESPP offering period where the purchase date is measured from the offer start date. If at the purchase date, the current stock price is lower than the last stock purchase price, you may elect to reset your employees to the new lower purchase price. The offering period is now based on the new purchase date.

**Rollup**

In PeopleSoft Demand Planning, the process of adding up the demand and forecast Array from one level to the next from child to parent. Information such as caption, description, and unit of measure can also be rolled up. The process is also referred to as summarization.

**Rounded Punch**

A punch that has a company’s rounding requirements applied to it (see Time Administration)

**Rounding Rule**

Defines a rounding rule. You use rounding rules in numerous places—for instance you could round an earning, deduction, or many of the elements that make up an earning or deduction.

**Routing (Manufacturing and Engineering)**

A set of information detailing the method to manufacture a particular item. It consists of sequentially numbered operations that reference the task to be performed, the work center in which the task is to be performed, the resources to be used, and the time required to complete the task. Engineering Routings differ from Manufacturing Routings in that they are not visible within Production Planning or Production Management and are isolated from Manufacturing.
Routing Option
In PeopleSoft Planning, a valid method for replenishing supply for an item. There are two types of routing options: build options and purchase options. An item may have more than one routing option.

Routing Transit Number (RTN)
A number that identifies the financial institution to which an electronic payment should be sent for deposit.

Routings
Routings connect the activities in the workflow. They are the system's means of moving information from one place to another, from one step to the next. Routings specify where the information goes and what form it takes—email message, electronic form, or worklist entry.

RSZ (Rijksdienst Sociale Zekerheid) Category Codes
These government defined Social Insurance category codes are used to maintain social security records for your Belgian employees. RSZ Categories are associated with a Contract Type, Statute and Substitute for Claeys Formula calculations.

Rule
Representation of a company’s compensation, task allocation, or exception requirements (see Creating Rule)

Rule 10b-5
A SEC rule that prohibits trading by insiders on material non-public information. This is also the rule under which a company may be sued for false or misleading disclosure.

Rule 144
A SEC rule that applies to public re-sales of restricted securities as well as all sales by affiliates. The requirements include (1) current public information about the issuer, (2) a one-year holding period for "Restricted Securities," (3) unsolicited brokers' transactions, (4) an amount limitation, the greater of 1% of the outstanding stock or the average weekly trading volume may be sold during any three-month period, and (5) a Form 144 filing.

Rule Actions
Functions that can be used in the creation and application of a rule (see Time Administration)

Rule Elements
Customer defined pieces of information which are passed to Time Administration in order to apply and evaluate rules (see Time Administration)
**Rule Period**
A Time & Labor period used in the evaluation and application of a rule (see Time Administration).

**Rule Program**
Specifies the set of rules the Time Administration process will execute and the order in which it will execute the rules.

**Rule Results**
Net effect of the application of a rule; for instance, the creation of time, initiation of workflow, modification of reported tasks (see Time Administration)

**Rule Templates**
Templates used to quickly create a variety of rules for the Time Administration program to execute when processing reported and/or scheduled time. Some examples are compensation rules for overtime and holidays, notification rules for irregular attendance, and rules for just about any other time-reporting situation that requires special processing.

**Rules**
Rules are your company's business practices captured in software. Rules determine what activities are required to process your business data.

**Rule Set**
Rule Sets enable you to apply basis rules to your PeopleSoft Analytic Application in the sequence that you prefer. This is particularly helpful if there are multiple basis rules for the same account node, product node, or position source code. Rule Sets can control the execution sequence of your rule combinations, filter combinations, or both. The first occurrence on the node will be applied and any other occurrence will be ignored. Rule Sets are also used with the Data Manager, and with the Currency Conversion engine.

**Rules/Time Administration**
A physical implementation or execution of a company’s compensation, exception and task rules (see Time Administration)

**Run Control**
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start some type of program that manipulates data in some way.

**Run Control ID**
A unique ID to associate each operator with their own run control table entries. Process Scheduler.
**Run ID**
Code that uniquely identifies a Run Control for batch processes.

**RWC (Risk Weighted Capital)**
*See* PeopleSoft Risk Weighted Capital

**Safety Stock Policy**
In PeopleSoft Inventory Planning, a policy that determines how safety stock quantities are calculated for an item. The policy has several methods that include days supply and percentage of demand fill.

**Salary**
Rate of compensation received by an employee.

**Salary Group**
Part of a group of defaults assigned to job codes. A salary group may include items such as steps and grades dependent on individual company parameters.

**Salary Plan**
A plan of salary defaults, grades, and step components

**Salary Step Components**
Pay components assigned to a salary step by entering the corresponding rate codes on the Salary Step Components page.

**Salvage Value**
An estimate of the amount of money one might receive upon selling an asset once that asset reaches its useful life. Salvage value is used in several depreciation calculations, including Straight Line.

**Sales Order Rebate and Penalties**
Rebates or penalties that are calculated against sales orders independent of *Buying Agreement*.

**Sales Person**
A required field used in PeopleSoft Receivables, Billing, Order Management, and Deduction Management when working with items. Each item must be assigned to a credit analyst. If no
credit analyst is assigned to an item, the credit analyst assigned to the customer is used as the default.

**Sales UOM**

The only units of measure that can be referenced on sales orders and quotes. You establish them on the Product Attributes by UOM page.

**Same-Day Sale**

An exercise and sale occurring on the same day. The exercise of the option and sale of the underlying shares take place simultaneously. The broker uses the proceeds of the sale to pay the company the exercise price and any tax withholding and the optionee the net cash (less any brokerage commission/fees).

**Sample Method**

One method of entering characteristic readings for a quality control plan. Using this method, for one given control plan you inspect all the characteristics for the first sample, then all the characteristics for the next sample and so on.

**Scale**

On a Goals Matrix (In PeopleSoft Workforce Analytics), a scale that defines the lowest, middle, and highest levels of performance needed to achieve associated minimum, midpoint, and maximum levels of compensation pay out. These are referred to as the Threshold, Target, and Stretch levels, respectively. The scale can be used to standardize multiple performance goals to a common scale of measurement.

**Scenario**

A scenario is a particular outcome you are analyzing when you run in Scenario Manager. Scenarios enable you to study various changes in organization models you created. For each parent and child model you want to study, you create a scenario ID that you use with all run controls.

There are two types of scenarios defined in the Scenario Manager: Historical and Forecast. In the case of an Historical Scenario all future looking fields will be display only and the Scenario Manager component serves as a wrapper to run any analytic engines. In the case of a Forecast Scenario, the Scenario Manager refers to all the business rules, forecasts, and economic assumptions that make up the scenario.

In PeopleSoft Budgeting a scenario is a ChartField used in PeopleSoft Budgeting to identify different budget iterations that use different assumptions.

**Schedule**

Specific task, date, and time to be worked by a Time Reporter (see Scheduling)
Schedule 13D or 13G
Disclosure forms required to be filed with the SEC and the company by a shareholder (or shareholders) that own(s) more than 5% of a public company. Schedule 13G is a short-form version of the 13D and may generally (but not always) be used only by institutional investors.

Schedule Group
A category of employees or employee groups associated for purposes of time scheduling.

Schedule Line Number
The line associated with an Order ID. The schedule line identifies an item and scheduled ship quantity that may be different from the requested quantity due to item availability.

Schedule Number
A number identifying the salary table form that an employee's pay is computed. Also has a second meaning related to the Payment Voucher processing for the ECS.

Schedule Reconciliation
In PeopleSoft Payables, the process of reconciling scheduled payments by Payment Schedule ID. Schedule Reconciliation helps U.S. federal agencies meet their requirement to schedule or group together payment orders for submission to the Treasury Disbursing Office.

Schedule Template
An ordered pattern of workday(s) and/or off day(s) used in scheduling (see Scheduling)

Schedule Type
In PeopleSoft Payables, an indicator of the nature of items purchased with a Payment Schedule.

Scheduled Punch.
A time reporter’s expected punch (see Scheduling)

Scheduling
A function of PeopleSoft Time and Labor and PeopleSoft Global Payroll that enables you to create work schedules and assign them to employees.

Scorecard
A weighted sum of constraint violations in a schedule that evaluates the schedule's validity (that is, acceptability). The score is calculated by adding the value for each relevant violated constraint. See also Penalty, Weight and Relevant Constraint.

In PeopleSoft Balanced Scorecard, views of a strategy tree’s components and Key Performance Indicators with red, yellow, or green scores that show its assessments.
Scrap
Any material outside of specifications and possessing characteristics that make rework impractical.

SearchIndex
A set of objects that give the programmer the ability to create, delete, insert, and update a search index and the items within it. Search index items contain a set of statistics about the document that has been indexed (keywords, number of occurrences, proximity to other words, and so on) as well as a key that can be used to point to the document (a URL, database key, or file path).

SearchQuery
A set of objects that allow the programmer to pass a query string and operators to the search engine and receive a set of matching results with keys to the source documents from the search index in return.

Seasonal Index
In PeopleSoft Demand Planning, measures the amount by which a forecasting period is influenced by seasonal effects. The index typically measures the percentage of difference between the base demand in the period and the expected actual demand in the period. An index of 100 indicates an average period in a seasonal cycle.

Seasonal Profile
In PeopleSoft Demand Planning, identifies the weight index assigned to a forecast time period to take in account seasonal fluctuations in the demand.

Seasonality Group
In PeopleSoft Demand Planning, a group of Forecast Items with a repetitive pattern of demand from year to year where some periods are higher than others. Typically a group of items is designated as a contributor to the seasonality group. Contributors are chosen because they are representative of the group, are stable, and have at least two years of demand history. The seasonality group profile is more stable than individual profiles of the contributors because the Aggregation process smoothes out random errors.

In Enterprise Planning and Simulation, a Seasonality group is a group of items with similar seasonal patterns. To determine if a forecast element is seasonal or nonseasonal, by averaging their history values over a year and determining where they were above and below average. Seasonality groups capture means seasonal behavior among related products.

Secondary COBRA Events
COBRA qualifying events that extend the amount of time a participant is eligible for COBRA coverage. For an event to qualify as a secondary COBRA event, it must fulfill the following qualifications: The participant must already be enrolled in COBRA coverage as a result of an initial COBRA event, the initial COBRA event must be one that is associated with a change to the employee’s job status (such as a reduction in hours, termination, or retirement), and the
secondary event must be one of the COBRA event classifications that involves loss of coverage for the dependent (such as divorce, marriage of dependent, or death of employee). See COBRA and Initial COBRA Events.

**Secondary event code**
Secondary event codes, also called transaction codes, specify the type of transaction in detail. For example, a transaction's secondary event code could say that the transaction is a catalog order, a rush order, or a request for a sample. Not all transaction types include secondary event codes.

**Section**
A set of logically related elements that are to be resolved during the payroll process. You define your payroll process by creating sections and adding them to process lists. You can create four different types of sections: standard, generate positive input, sub-process, and payee.

**Section 16(a)**
Provision of the Securities Exchange Act of 1934 that requires company insiders to file changes in beneficial ownership of the company’s equity securities and periodic reports disclosing their holdings.

**Section 16(b)**
Provision of the Securities Exchange Act of 1934 that requires that any profit realized by a company insider from the purchase and sale, or sale and purchase, of the company’s equity securities within a period of less than six months must be returned to the company. It is also known as the "short-swing profit" rule.

**Section 423**
The Internal Revenue Code section that regulates Employee Stock Purchase Plans.

**Section 83(b) Election**
A tax filing within 30 days of grant that allows employees granted restricted stock to pay taxes on the exercise date, rather than the date when restrictions lapse. If an employee files the election, taxes are based on the fair market value on the exercise date, with any future appreciation taxed as a capital gain. If the employee does not file an election, taxes are based on the fair market value on the date the restrictions lapse, which will be higher assuming the stock has appreciated in value.

**Securities Act of 1933**
Often referred to as the "truth in securities" law, the act requires that investors receive financial and other significant information concerning securities being offered for public sale; and prohibits deceit, misrepresentations, and other fraud in the sale of securities.
Securities Exchange Act of 1934

The Congressional act that created the Securities and Exchange Commission. The Act empowers the SEC with broad authority over all aspects of the securities industry. This includes the power to register, regulate, and oversee brokerage firms, transfer agents, and clearing agencies as well as the nation's securities self regulatory organizations (SROs). The various stock exchanges, such as the New York Stock Exchange, and American Stock Exchange are SROs. The National Association of Securities Dealers, which operates the NASDAQ system, is also an SRO. The Act also identifies and prohibits certain types of conduct in the markets and provides the Commission with disciplinary powers over regulated entities and persons associated with them. The Act also empowers the SEC to require periodic reporting of information by companies with publicly traded securities.

Security Clearance

Security Clearances (Classified, Secret, Top Secret) are granted to employees by government agencies and are usually associated with jobs that bring employees into contact with classified government projects or sensitive technologies.

Security Event

In commitment control, events that trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

Segmentation

You can “segment” components of pay based on such events as changes in compensation, employee status, or job changes during a pay period. For example, if an individual changes jobs in the middle of a pay period and your organization has a practice of separating components earned in the first job from those earned in the second job, you can set up your system to trigger segmentation of earnings results on the pay slip when there is a change to the job change action/reason field.

Selective Factors

Knowledge, skills, abilities or special qualifications that are in addition to the minimum requirements in a qualification standard, but are determined to be essential to perform the duties and responsibilities of a particular position. Applicants who do not meet a selective factor are ineligible for further consideration.

Selective Merge

In PeopleSoft Enterprise Warehouse the selective merge allows for an additional WHERE clause when you delete a merge.

Self-Service Application

Another name for PeopleSoft's HRMS and ERP applications accessed using a browser.
Sell to Cover Exercise
When an optionee sells a portion of the option shares to cover the exercise cost and any applicable taxes.

Seniority Pay
A premium paid for seniority or for the length of time an employee works for an organization.

Seniority Pay Components
Pay components whose rate codes are assigned to the seniority rate code class SENPAY (provided by PeopleSoft) on the Comp Rate Code page, allowing you to access the seniority pay functionality.

Seniority Rate Codes
A premium paid for seniority or for the length of time an employee works for an organization.

Separate Debit and Credit
A feature in PeopleSoft General Ledger that captures and reports in greater detail the accounting information that resides in balance sheet accounts. It shows the gross debit/credit balances in addition to the net balance for each account stored in the ledger. This feature also supports reversing—debit and reversing—credit journal entries for error correction.

Server Process
A server process is executable code that receives incoming client requests on the application server. The server process carries out a client request by making calls to a service that executes SQL against the database.

Service
A service performs a particular task of an application. Examples of services are MgrGetObj, SQLAccess, RemoteCall, and so on. When a client workstation sends a request to the application server, it sends a service name and a set of parameters, such as "MgrGetObject + parameters". The application server associates the service request with the appropriate server process to complete the transaction.

Service
The PeopleSoft Pension Administration function that determines how much service credit an employee has accrued.

Service Buy Back
The process by which an employee repays a pension plan in order to restore service credit that was forfeited when the employee withdrawal previous contributions. Typically, employees withdraw contributions upon termination and initiate service buy back processing upon rehire.
Service Purchase
The process by which an employee gets additional pension service credit for periods not normally considered eligible. The employee “purchases” this service by paying into the plan.

Service Schedule
A table showing how much service an employee earns based on the number of hours the employee worked during the year or month.

SetID
The label that identifies a TableSet.

Sex Code
Used to indicate gender.

Shape
For a transaction, the set of inputs and outputs for that transaction. For a class, the data members of that class.

Share
A share of a company's stock. Stock options give you the option to purchase a certain number of shares of company stock.

Share Price
The price per share of a company's stock. See, also, "stock price."

Shareholder
Owner of one or more shares of stock in a corporation. Also known as a stockholder or investor.

Shares Available to Issue
The total number of shares authorized, less shares granted, plus cancellations that revert to the Plan pool.

Shares Cancelled
This is usually triggered by a specific event, such as termination of employment in which the unvested shares as of the date of termination are no longer available for future vesting and exercise. These shares are therefore canceled from the option and can be returned to the plan, retired to treasury or allocated back to a group.

Shares Exercisable
The number of shares that are vested and available for exercise.
**Shares Exercised**
The number of shares purchased upon exercise of a stock option.

**Shares Expired**
Option shares that no longer are exercisable at the end of the option term. The length of the option term is defined in option agreement. This date is usually the earlier of the exercise period for vested shares after termination of employment or the full length of the option term.

**Shares Outstanding**
The number of company shares currently held by shareholders, as tracked by the transfer agent.

**Shift [Time and Labor]**
The block of hours that an employee works in a day, such as nine to five, four to eleven, or ten to six. In PeopleSoft Time and Labor, Shift is used as a template of clock hours for scheduling an employee or group of employees to be at work or available to work (on call). Shifts may be constant, rotating, repeating, and/or split; any given shift may or may not have an associated Shift Differential or Bonus. A shift is always associated with a Work Schedule, and consists of clock hour Start and Stop times (two to allow for split shifts), meal periods (two) and relief periods (two).

In PeopleSoft Workforce Analytics, the block of hours that an employee works in a day such as nine to five, four to eleven, or ten to six.

**Shift Bonus**
A fixed amount (either a flat dollar figure or stated in terms of an employee's rate) paid for working a particular Shift.

**Shift Code**
A numerical shift identifier that is unique within a SetID.

**Shift Differential**
Additional compensation paid an employee for time worked during certain shifts. Typically, shift differential is administered as a flat amount per shift, hour worked, and/or as a percentage of the amount paid per shift hour or shift worked.

In PeopleSoft Workforce Analytics, a premium paid for work over regular pay, for which employees on certain shifts may be eligible, such as double-time for late night shifts. Shift differentials are usually stated as an additional rate or factor.

**Shift Elements**
Individual components of a shift such as TRC start and stop time, duration (see Scheduling)
**Shift Name**
Customer defined nomenclature for a shift (see Scheduling)

**Shift Type**
A customer-defined classification associated with a shift. The shift type can be used in the evaluation of rules or exceptions (i.e. On Call) (see Scheduling)

**Shift Type [Time and Labor]**
Time and Labor defined classification of shifts. Valid shift categories include Flex, General and Elapsed. Shift categories are used in the creation of time reporter schedules (see Scheduling)

**Shipping Priority Code**
Shipping Priority Codes act as tie breakers during order reservation in PeopleSoft Inventory when different orders are scheduled for the same delivery date and time. When the reservation process in Inventory encounters a situation where there are more orders than available stock, the system reserves the order with the highest priority. If schedules are encountered with the same priority, orders are then considered by order date.

**Short Sale**
The sale of a security that is not owned or is not delivered at the time of the trade, necessitating its purchase or delivery some time in the future to "cover" the sale. A short sale is usually made with the expectation that the stock value will decline, so that the short seller can eventually cover at a price lower than the original sale, thus realizing a profit. At the time of the short sale, the broker borrows stock to deliver on the settlement date. A short sale can be "naked," in which case the seller does not deliver the shares being sold short and must provide the broker with collateral. Or the short sale can be "against the box," in which case the seller delivers the shares being sold short for the broker to hold "in the box" until the seller chooses to close out the short position.

**Short-Swing Transaction**
A purchase and sale, or sale and purchase, of the issuer's equity securities by an insider within a period of less than six months. See "Section 16(b)" above.

**Short-term Variable Compensation**
In PeopleSoft Workforce Analytics, this is cash compensation paid to a worker that is not fixed; includes bonuses and commissions.

**Sibling**
A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
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A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

**Sibling**
A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

**Sick Leave**
Sick leave is accrued by full-time permanent/seasonal employees at the rate of 4 hours every biweekly pay period; for part-time permanent/seasonal employees, it is accrued at one hour for every 20 hours worked.

**Simulated Workforce**
In the PeopleSoft Workforce Rewards product, Manage Compensation module, the calculated Simulated Workforce = Existing Employees + New Simulated Employees + Reduced-Employees.

**Single Life Annuity**
A benefit payable during the lifetime of the participant, with no payments made after the death of the participant. Also referred to as a “life only annuity” or a “straight life annuity.”

**Single Signon**
This refers to the process by which a user can, after being authenticated by one PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

**SIREN Code (Système Informatique pour le Répertoire des Entreprises)**
This stands for the Electronic List of Enterprises. The SIREN code is assigned to a company when it registers as a business with the French government, and identifies the purpose of the establishment for regulatory reporting purposes in France.

**SIRET (Système Informatique pour le Répertoire des Établissements)**
This stands for Electronic List of Entities. In France the SIRET is an identifying number given to a French business by the INSEE, an official statistics and economics organization in France. The SIRET number is a combination of the SIREN and NIC numbers. This number is used by the tax and social security authorities to identify a business enterprise and its entities.
**Site Tree**

In PeopleSoft eStore, a hierarchical structure that controls navigation, as well as content and behavior within the header, footer, and left margin areas of the web page template.

**Slice**

The span of time into which an element is segmented as a result of element segmentation. Unlike a segment (or period), a slice does not represent a separate gross-to-net process since it affects only a limited set of elements within a period or segment. Like segments, slices have their own begin and end dates.

**Slice Dimension**

A model dimension used to restrict user access to the system. For example, a product manager’s access to the system can be restricted to only the products he or she is responsible for by defining “Products” as a slice dimension, and assigning this person the members of the “Products” dimension he or she can access.

**Slice and Dice**

Another term for multidimensional analysis. When your data has three (or more) dimensions, you can think of it as being arranged in a cube (or hypercube), with each side representing a dimension. When you analyze the data, you “slice” off part of the cube or “dice” it to get to an individual cell.

**Slotting**

In PeopleSoft Workforce Rewards, a process by which the system establishes the target market compensation rates to use for compensating workers in non-benchmark jobs.

**Social Security Number**

Nine numeric digits assigned to an individual by the Social Security Administration. Also known as a Taxpayer Identification Number (TIN).

**Source**

The Source table stores valid journal entry and posting sources. These can include job titles (such as CFO), user IDs (such as CLERK123), PeopleSoft General Ledger processes (such as Consolidations), or other applications (such as PeopleSoft Payables).

**Source Transaction**

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

A multi-dimensional concept of whether data exists at intersections of dimensions. If a cube has many dimensions, but little or no data in some of those dimensions, the cube is considered sparse. Sparse cubes take up unnecessary disk space and reduce calculation performance. The goal is to create dense cubes and only use dimension intersections where data actually exists.

**Special Accumulator**

A device that accumulates earnings from different sources for a specific purpose. 401(k), pension and retirement plans use special accumulators. A 401(k) plan might use a special accumulator to calculate a deduction using regular, vacation, and overtime earnings. Special accumulators can add to or subtract from a pool of earnings.

**Special Payments**

A payment that occurs once or under special circumstances (e.g., back pay interest, lump sum leave, bond refund, longevity bonus, compensatory time reimbursement, death payment, severance pay, separation bonus, etc.).

**Special Rates**

Higher salary rates for specific grade levels and occupational groups determined by OPM for employees working in specific geographic areas. Each area is assigned a separate Schedule Number.

**Specialist**

A member of a stock exchange who maintains a fair and orderly market in one or more securities. A specialist or specialist unit performs two main functions: executing limit orders on behalf of other exchange members for a portion of the floor broker's commission, and buying or selling for the specialist's own account to counteract temporary imbalances in supply and demand, preventing wide swings in stock prices.

**Specialized Experience**

Experience that has equipped the applicant with the particular knowledge, skills, and abilities to perform successfully the duties of the position and is typically in or related to the work of the position to be filled.

**SpeedChart**

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

**SpeedType**

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

See Planning Targets.

**Split and Join**

In PeopleSoft Demand Planning, the process of subdividing a forecast so that multiple users can make changes to their portions of the forecast. After changes are complete, the portions are joined back into a single forecast.

**Split Deduction**

Deduction that you create by splitting an existing deduction into two deduction items. The new deduction retains the original item ID with an added suffix number.

**Split Shift**

Periods of productive time split up by period of non-working time; example. a time reporter comes to work as a busboy for the lunch shift from 12-2 p.m. and then returns to work from 6-8 for the dinner shift (see Scheduling)

**Split Stream Processing**

The matching of a payment’s cash information with the payment advice information when they have been received as separate transmissions through EDI and lockbox.

The uniting of the payment cash with the payment advice when they have been received as separate information through EDI.

**Spokesmen Committee (Sprecherausschusse)**

In Germany the Spokesmen Committee represents the interest of the management in your company before the ownership. The Spokesmen’s Committee is consultative in nature, although they play a co-determination role on individual employment contracts, hiring, and dismissals. They also play a role in monitoring employment fairness, equity, and non-discrimination in terms of nationality, race, religion, sex, and age.

**Spouse Demonstration J&S**

In the PeopleSoft Pension Administration system, an informational-only form of pension payment that tells what the spouse’s total benefit would have been if the retiree had chosen the spouse as the beneficiary rather than a nonspouse beneficiary. You cannot pay pension benefits based on this form because it is informational only.

**Spouse Eligibility Alias**

In PeopleSoft Pension Administration, a Custom Statement that defines any criteria that must be met before the plan will provide an Automatic Spouse Benefit. For example, the plan may require that the employee and spouse be married a full year before they are eligible for an automatic spouse benefit.
**Spouse Eligibility Statement**
See Spouse Eligibility Alias.

**Spread**
Depending on the context, either (1) the difference between the bid and asked prices for an over-the-counter stock, or (2) the difference between an option’s exercise price and the market price at the time of exercise (i.e., the profit component of the exercise).

**SQL Objects**
Used to create rules that are more complicated than templates or actions and conditions allow—select statements, insert statements, table joins, and sub-queries

**ST (Strategic Trust)**
See Strategic Thrust

**Staged Date**
The date an item was received into the inventory business unit.

**Staging ID**
An identifier for a putaway plan. The inventory system sequentially assigns Staging IDs when it creates the putaway plan.

**Standard Cost**
A predetermined, fixed cost associated with an Inventory Item or Forecast Item, representing detailed estimates of each element of cost entering into the purchasing or manufacturing of an item. Standard cost is used when minor variations in an item's cost are not needed. The use of standard costs also enables management to determine how much an item should cost (Standard), look at how much it does cost (Actual), analyze the differences between the two and their causes (Variances), and compute economic order quantity.

**Standard Form (SF)**
A standardized form for interagency use by the Federal government. The SF prefix is the most common but not exclusive one in usage.

**Standard Price**
In PeopleSoft Demand Planning, the standard selling price associated with a Forecast Item. The price can be introduced into the system directly in forecast item maintenance or indirectly using the demand transfer interface. At higher levels in the view where there is no standard price available, the summarization function can be set up to develop one.

**Standard Unit of Measure**
The smallest unit of an item that a PeopleSoft application tracks.
**Startup Data**
In PeopleSoft Pension Administration, accrued Service, Cash Balance Account, or Employee Account data loaded into the system in the form of an opening balance and “as of” date. The alternative would be to load the entire accrual history.

**State Record**
The State Record is a PeopleSoft record, keyed by process instance, that must be created and maintained for each Application Engine program. The State Record defines the fields that an Application Engine program uses to pass values from one SQL statement to another.

**Static Group**
An employee group in Time and Labor that enables you to control its creation and maintenance. The group remains the same at all times until you change it.

**Static Policy Controls**
Determines how a static (versus time-phased) Inventory Policy is to be calculated. Static controls use period and average methods and their arguments.

**Statistical Account**
An account that has an associated unit of measure, used for tracking and monitoring statistical data. For example, the Workstations account uses EA (each) as a generic unit of measure, while the Floor Space statistical account might use square feet and the Work Days account would use days.

**Statistical Code**
The unit of measure used for tracking and monitoring statistical data. For example, using a statistical code of WS may represent the number of Workstations.

**Statistical Forecast**
In PeopleSoft Demand Planning, a forecast developed at each level of the forecast pyramid and that considers the item’s history in isolation.

**Status Checking**
In PeopleSoft Projects, a control feature that can be applied to transactions coming into Projects from cost feeder systems. If the incoming transaction does not conform to predetermined status and analysis conditions, an online warning will display or the transaction will be rejected.

**Status Position Code**
A code that identifies the various conditions of a position, e.g., frozen, classified, etc.
**Statutory Account**
Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

**Step**
A secondary level or subcategory within the primary pay level (depending upon pay plan, different employees may have a different number of steps within their primary pay level).

**Step Progression**
In PeopleSoft Workforce Analytics, a pay increase granted to an employee or group whose salary plan includes steps within grades. Each step increase is a step up the pay range for the employee.

**Stock**
In corporate finance, the form in which an owner's interest is represented, distributed in units known as shares.

**Stock Administrator**
An individual who administers and manages the corporation’s benefits and/or equity compensation plans. This individual serves as the contact for transfer agent and broker inquiries. Stock Administrators manage Stock Option Plans, Employee Stock Purchase Plans, Restricted Stock Award Plans, and Stock Bonus Plans.

**Stock Appreciation Rights (SAR)**
A contractual right to receive, either in cash or employer stock, the appreciation in the value of the employer’s stock over a certain period of time. A SAR can be used alone or in tandem with Incentive Stock Options (ISO/SAR) or Nonqualified Stock Options (NQ/SAR). PeopleSoft Stock Administration supports only tandem SAR’s.

**Stock Awards**
Stock allocations that are processed in the Manage Variable Compensation business process. Stock Administration creates stock grants from finalized stock awards.

**Stock Exchange**
An organized marketplace in which bonds, stocks, and common stock equivalents are traded by members of the exchange, acting as agents (brokers) and as principals (dealers or traders). Such exchanges have a physical location where brokers and dealers meet to execute orders to buy and sell securities. Each exchange sets its own requirements for membership.

**Stock Option**
A contractual right granted by the company, generally under a stock option plan, to purchase a specified number of shares of the company’s stock at a specified price (the exercise price) for a specified period of time (generally five or ten years). Assuming that the exercise price is the
same as the fair market value on the grant date, the option will become more valuable if the fair market value goes up, because the option effectively gives the optionee the right to buy stock in the future at a discount.

**Stock Price**
The price per share of a company's stock. See, also, "share price.

**Stock Purchase Participant**
An individual who participates in the corporation’s Stock Purchase Plan.

**Stock Purchase Plan**
A type of broad-based stock plan that permits participants to use payroll deductions accumulated over a period of time to acquire stock from the company.

**Stock Split**
A change in the capitalization of an issuer that increases or decreases the number of securities outstanding, and adjusts the value of the securities accordingly, without a corresponding change in the assets or capital of the issuer. For example, if an employee has options to purchase 25 shares at $10 per share and the company has a 2-for-1 stock split, the employee thereafter has the option to purchase 50 shares at $5 per share.

**Stock Swaps**
A payment method that can be used to cover the cost of the exercise price and taxes depending on whether it is allowed by the plan. When an employee elects to exercise a stock option by means of a stock swap, they surrender already-owned shares of stock to pay the total required option exercise price and/or taxes for the option being purchased. The surrendered shares are usually valued at the fair market value of the company's stock on the date of exercise.

**Stock Trading Symbol**
The three or four letter symbol used to identify a company's stock on the stock exchange where it trades. Also known as a "ticker symbol".

**Stock Withholding**
A cashless method of satisfying the withholding taxes due upon the exercise of a stock option by authorizing the company to withhold from the shares being exercised a number of shares equal to the taxes.

**Stockholder of Record**
Person or entity, often a broker or the Depository Trust Company, named on the issuer's or transfer agent’s stock record books as the owner of shares held in "street name." The stockholder of record acts in part as a way of safekeeping stock certificates that might otherwise be lost by the beneficial owner, and also in order to keep the identity of the beneficial owner confidential from the company.
**Stock-In Probability**
A replenishment option for defining transfer parameters for PeopleSoft Demand Planning or Inventory Planning upload files. The option is the percentage of time you want to have the item on hand for the Business Unit and is used to calculate safety stock.

**Stop Time**
Out punch

**Storage Area**
A division of a Business Unit used to store material and to track Inventory Transaction. Storage areas might include shipping and receiving docks, staging areas, warehouse zones, and inspection and quality control departments. Each storage area can be divided into a maximum of four levels, with each level representing a physical subdivision of the area.

**Storage Level**
A hierarchical subdivision of a storage area.

**Storage Location**
The combination of a storage area and that area's most detailed storage level. This is the smallest definable physical space within an Inventory Business Unit.

**Strategic Initiatives**
In PeopleSoft Balanced Scorecard, actions the organization must take to implement strategy. May be temporary or short-term in nature.

**Strategic Thrust (ST)**
In PeopleSoft Balanced Scorecard, four to five statements or paragraphs that summarize the core components of an organization’s strategy. Strategic thrusts describe the key areas across which a scorecard is balanced. They are themes or goals your organization is striving to achieve; more specific descriptions of what you must do to achieve that goal are defined by critical success factors. Key performance indicators may be attached to strategic thrusts as long as there aren’t critical success factors below them, but typically strategic thrusts aren’t directly associated with key performance indicators.

**Strategy Tree**
In PeopleSoft Balanced Scorecard, the hierarchical relationships of the objectives your organization is striving to achieve. Used as the foundation for a scorecard, and typically balanced across four major categories: Financial, Customer, Learning and Growth, and Internal Processes. These are made up of Vision, Strategic Thrusts, and Critical Success Factors.
Stratification Engine
A support module that structures the volume of financial accounts and balances at a large financial institution to a manageable scale for processing by the PeopleSoft Funds Transfer Pricing (FTP) and PeopleSoft Risk Weighted Capital (RWC) applications. It categorizes data by a range of values and summarizes data based on rules you define for FTP and RWC.

Stratification Wizard
Stratification Wizard is a tool you can use to quickly create new stratification rules or update the existing rules. Stratification Wizard prompts you for each of the possible source and destination fields, grouping operations, and summarization actions to be performed. Stratification Wizard enables you to stratify your data according to tiers, discrete values, periodic increments, and numeric increments. It also enables you to leave the data aggregated.

Streams
An optional feature that enables you to reduce processing time by processing groups of payees simultaneously.

Street Name
See "Stockholder of Record".

Stretch
In a Goals Matrix performance scale (In PeopleSoft Workforce Analytics), this is the level of performance for which an employee achieves maximum pay out. Performance above this level receives no greater pay out.

Strike Price
The price per share which must be paid in order to exercise the stock option. The strike price is typically the fair market value of the stock on the grant date. Also known as the "exercise" or "grant" price.

String constant
String constants are delimited in PeopleCode by using either single (’) or double (") quote marks.

Strip Funding
One of several methodologies used by PeopleSoft Funds Transfer Pricing (FTP) to derive maturity when calculating FTP rates based on matched maturity funding. This approach matches the projected cash for the instrument in each time period, with a specific cost of funds rate for that cash flow. The FTP rate for the instrument is then calculated by weighting the cost of funds rate for the cash flow in each time period by the term of the cash flow.
**Structured Query Report (SQR)**

A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.

**Style File (Verity)**

Collection style refers to a set of configuration options that are used to create the indexes associated with a collection. A collection has one collection style and it is defined in a set of style files before creating the collection.

**SubCustomer Qualifier**

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

**Sub-Process Section**

A type of section you can add to a process list. Sub-process sections are especially useful for performing iterative processes such as gross ups (calculating the gross amount for a given net amount). You can include conditional logic within a sub-process section.

**Subscription**

The process of mapping fields, selecting data parameters and submitting the information to an outside vendor.

**Substitute Item**

In PeopleSoft Manufacturing, an item that can be used when there are no primary components available in inventory or when there is a long-term shortage of the original item. The substitute item can be defined at three levels: setID, business unit/item, and bill of material/engineering bill of material.

**Subtask**

A lower-level Planning task in a schedule's hierarchy that rolls up into a parent task. For example, an operation performed on a production ID would be a subtask of the production order.

**Summarization Process**

See Rollup.

**Summary ChartField**

A feature for creating summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
**Summary Forecast**
In PeopleSoft Demand Planning, a type of forecast that results from adding up the adjusted forecast totals from the next lower level, meaning the sum of the children's forecasts for the parent. The summary forecast at level one (1) is always zero since there is not a logical lower level.

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

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

**Summed Adjustment Type**
When the system finds multiple summed discounts, they are added together, and applied once.

**Super Tree Utility**
A PeopleSoft Enterprise Warehouse utility that enables you to combine multiple effective dates of a tree into one. This super tree contains all tree changes for a certain period of time enabling you to analyze effective dated trees more easily.

**Supplemental IRR**
An IRR type used when a federal employee's retirement deductions were originally under-reported. An agency can create a Supplemental IRR to report the difference in the retirement deduction amount to the Office of Personnel Management (OPM).

**Supplemental Tax Method**
A payroll tax calculation method that uses a straight percent rather than allowances. The percentage depends on state requirements.

**Supply Chain Warehouse**
See Warehouses.

**Support Costs**
Activity costs not directly connected to production.
**Support Modules**

The support modules are a collection of engines and analysis models that derive values, rates, financial calculations, and prices. PeopleSoft Analytic Applications take this data and use it for further processing. The support modules perform processes that are used in the financial services industry. They are only utilized by two of the PeopleSoft Analytic Applications: Risk Weighted Capital (RWC) and Funds Transfer Pricing (FTP).

**Support Team**

A group of people working together to sell to and/or support a customer. You can assemble support teams and associate them with ship to customers, quotes, sales orders, and Buying Agreement.

**Supporting Element Overrides**

Provide a mechanism to override various supporting element types, such as brackets, dates, durations, formulas, and variables, at various different levels.

**Supporting Elements**

Supporting elements are building blocks for other elements. In PeopleSoft Global Payroll, they are used in combination with other elements to create rules. They are not stand-alone. Typical supporting elements are arrays, brackets, rounding rules, and fictitious calculations.

**Suspend Exercise**

As a condition of a leave of absence, a company may stipulate to restrict the exercise of shares during the leave or for a period of time. Only applicable if the Stock Action is LOA.

**Suspend Vesting**

As a condition of a leave of absence, a company may stipulate to suspend vesting of shares. Only applicable if the Stock Action is LOA. If a company does not Suspend Vesting then the Vest Deferral Grace Period and Service Rule are not applicable.

**Suspended Item**

In PeopleSoft Demand Planning, an item suspended by the system. The suspension is due to the lack of demand for the number of periods defined for the item's Control Group.

**System Element**

In PeopleSoft Global Payroll, system elements are delivered and maintained by Peoplesoft. There are two types of system elements: database system elements and system-computed elements. Database system elements contain payee-related data that can be used frequently in a calculation, such as department ID, location, and personal data. System-computed elements are automatically populated by the payroll process.
System Functions
A list of all activities that the system supports, along with their associated General Ledger distributions.

System-Defined Count
The PeopleSoft Inventory feature that employs user-defined criteria to begin the count creation process.

System-Defined History
Any statistical information updated by the posting and aging programs, maintained to reflect customer credit standing.

T+3
The obligation in the brokerage business to settle securities trades by the third day following the trade date. "Settlement" occurs when the seller receives the sales price (less the broker’s commission) and the buyer receives the shares.

Table
The underlying format in which data is stored by columns (fields) and rows (records, or instances).

Table Lookup
A utility in PeopleSoft Pension Administration that finds an unknown value based on a known one in your data set. For example, you can look up an interest rate based on a year, or an actuarial factor based on an employee’s age.

TableMaps
In the PeopleSoft Enterprise Warehouse, TableMaps define the physical relationships between related tables. TableMaps allow you to define “families” of related tables and the columns that define the key relationships between the tables.

TableSet
A group of rows across control tables identified by the same SetID.

TableSet Sharing
Specifying the control table data for each business unit so that redundancy is eliminated.
**Tardy**
The circumstance when a time reporter reports for work after the scheduled start time

**Target**
In a Goals Matrix performance scale (In PeopleSoft Workforce Analytics), this is the performance level your organization establishes as the norm for performance and pay out.

**Target Cost**
A desired target cost (for production, engineering or marketing) is found by subtracting the desired profit margin from a competitive or estimated price.

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

**Target End Date**
The intended end date for employee schedules in Time and Labor reporting. You establish a target end date, and depending on the work schedule templates, the application determines what the actual end date should be.

**Target Grade**
Highest obtainable grade for a position.

**Target Matrix**
In PeopleSoft Workforce Rewards, the Target Matrix defines the level of award to be paid based upon a predetermined level of performance that a defined measure is evaluated against.

**Target Plan**
In PeopleSoft Workforce Rewards, a plan for distributing compensation awards, in which the level of the award is linked directly to a predetermined level of performance that a defined measure is evaluated against. For example, a Target Plan for a Sales group might be as follows: “As a group, increase the business unit’s net income by 10% and each member of the group will be eligible for an award equal to 5% of base pay.”

**Target Rate**
In PeopleSoft Workforce Rewards, calculated market rates you choose to use as new target pay rates for the jobs in your organization. Think of these target rates as pay guidelines, in support of your company’s overall pay strategy.
**Target View**
In PeopleSoft Demand Planning, the of the views being reconciled during the Cross-View Reconciliation process. During the process, fields for reconciliation are defined for both a source and target view.

**Tariff**
In Germany a Tariff is a contract between the employee’s unions and the employers' association, defining labor agreements on issues such as standard working hours, income, and vacation. This contract is valid for all of Germany for the business or industrial sector the company is working in (such as Banking or Metal).

**Tariff Area**
In Germany, additional labor agreement terms beyond those in the Tariff, such as salary plans or employee reviews, can also be applied based upon the Tariff Area. The Tariff Area is often split along regional lines (such as Bavaria or Berlin).

**Task**
See Manufacturing Task and Planning Task

**Task**
A piece of work assigned to or demanded of a person; a unit of work (see Time Reporting)

**Task Entity**
Individual component of a task; for example, Project ID, Activity ID, Work order, Department, Company, Business Unit (see Time Reporting).

**Task Profile**
A way of viewing or establishing where to allocate employee task information for a day and time. The task profile fields that appear on the page are established by the Task Profile Template.

**Task Profile**
Entity that establishes the default values for optional and required task elements. This can be for single or multiple tasks. (i.e. default values based on hours allocation, percentage distribution, equally distributed or by prompt) (see Time Reporting)

**Task Rules**
A methodology that is applied to scheduled, reported and payable time to allocate or redistribute task assignments (see Time Administration)

**Task Transfer**
Department transfer
**Task Values**  
The customer defined value for a specific task element i.e. Customer 1, project 1, etc (see Time Reporting)

**Taskgroup**  
Identifies the default time reporting templates, task template, and task profile(s) for time reporters that share the same task reporting requirements.

**Taxable Benefits**  
Any employer contributions that are subject to Federal Withholding Tax.

**TDS (Transfert de Données Sociales)**  
In France the TDS is a social security transfer report, submitted on magnetic media to the government.

**Team Member**  
An individual who is part of a support team. Each team member may be in a commissionable or non-commissionable role.

**Technical Scenario**  
In PeopleSoft Enterprise Warehouse technical scenarios allow you to set up the object type values that the Resolver uses to chunk the record/TableMap you’ll resolve. Technical scenarios allow technical users to define chunking criteria that enable chunks to run in parallel. This allows for parallel data processing.

**Template**  
A portal template is simply HTML code, associated with a web page, to define the style and layout of the page. Templates allow a developer to build an HTML page by combining HTML from a number of sources. Templates do two basic things: define the layout of the page, and define where to get HTML for each part of the page.

**Template Pagelet**  
One piece of an overall template. For example, in a given template, there may be one template pagelet for the universal navigation header and one template pagelet for the target content.

**Temporal Constraint**  
A relationship between Planning tasks that defines their sequence and timing in a schedule. Temporal constraints cannot be violated by the Optimizer. PeopleSoft Planning constraints include finish to start, start to start, finish to finish, start to finish.
**Temporary Continuation of Coverage (TCC)**

The TCC program, as prescribed by the OPM, requires Federal agencies to provide to separating Federal employees the opportunity to temporarily continue their FEHB coverage for up to 18 months (unless involuntarily separated because of gross misconduct), provided the individual pays the full cost of coverage, including both the employee and government share and a two percent administrative charge. Agencies may elect to provide this service in-house or enter into cross-servicing agreements with another Federal agency.

**Tenor**

Used by the PeopleSoft Funds Transfer Pricing (FTP) application to refer to the maturity of an instrument. It represents the length of time an instrument is available as either a source or use of funds. The FTP application calculates the transfer price for an instrument, based on the marginal cost of funds of similar liquidity and tenor.

**Term Certain and Continuous Payment Option**

See Certain and Continuous Payment Option.

**Term Certain Payment Option**

See Certain Only Payment Option.

**Termination**

A transaction in which an employee ceases to be an employee of the corporation.

**Threshold**

In a Goals Matrix performance scale (In PeopleSoft Workforce Analytics), this is the minimum threshold for adequate performance, the designated level of performance below which it is inappropriate to pay incentives.

**Think-time process**

Think-time functions suspend processing either until the user has taken some action (such as clicking a button in a message box), or until an external process has run to completion (for example, a remote process).

**Three-Tier**

A three-tier architecture introduces an intermediary application server between the client workstation and the database server to improve performance. Within PeopleSoft, the application server sends the SQL to the database and then returns results to the client in the form of lightweight Tuxedo messages.

**Threshold Checking**

In PeopleSoft Projects, a control feature that can be applied to transactions entered directly into Projects or integrated into Projects via the INTFC_PROJ_RES table. If the transaction exceeds a predefined tolerance, a warning will display or the transaction will be rejected.
**Thrift Savings Plan (TSP)**
A voluntary retirement savings and investment plan for Federal employees administered by the Federal Thrift Investment Board.

**Ticker Symbol**
The three or four letter symbol used to identify a company's stock on the stock exchange where it trades. Also known as a "stock trading symbol".

**Tiers**
In the financial services industry, Tiers are ranges that you set up for stratifying your instrument data (such as amounts, rates, and numbers) into specific groups. You define Tiers within Stratification Engine.

**Time Administration**
A process which provides four [separate] different online tools for creating, maintaining, and applying an organization’s compensation, task, and exception rules to both reported and scheduled time. templates, actions and condition, SQL objects, and user exits.

**Time and Labor Period**
A distinct, configurable period of time used by all the PeopleSoft Time and Labor processes (see Time Reporting).

**Time and Labor User**
Either a Time Reporter or a Time Manager.

**Time Capture Device**
Third party system or methodology for collecting elapsed or time capture device time, i.e., time capture device, IVR, Fax, etc. (see Time Reporting).

**Time Collection**
A Time and Labor feature that collects positive and exception time reports, applies appropriate business rules and edits to the reported time to ensure validity and reasonableness, and returns errors and questionable items to the time reporter for correction or scrutiny. Time collection is also responsible for scrutinizing future (previously) posted time information for correctness when those reports are ready for use.

**Time Collection Device**
A group of time collection device lumped together and named for ease of assignment to employees. In other words, clock group 1 is made up of clock 1, and clock 2. Employee 123 is assigned to clock group 1 and can then punch in at either clock 1 or clock 2. (see Understanding Time Collection Device)
**Time Collection Device time**
Reporting time by recording actual starts and stop times (see Time Reporting)

**Time Dimension**
Determines how date-related information is presented in a **Cube View**. This dimension defaults to a two-level hierarchy consisting of the **Inventory Policy** year and a standard period, such as monthly.

**Time Fence**
In PeopleSoft Planning, a user-defined parameter that specifies the business rules to be used in the generation of the plan. PeopleSoft Planning time-fence types include start of time, end of time, planning close date (demand time fence), purchase order fence, leveling fence, action message cutoff, and planning time fence.

**Time Manager**
An individual who supervises Time Reporters

**Time Period**
A period of Time used in Time and Labor rules processing. You can categorize time periods in terms of days, weeks, or months. You establish day, week, or month-type periods for use when you apply rules for compensation, holidays, and so on.

**Time Report**
A payroll time and/or labor distribution time report for an employee for any date within the employee’s current period.

**Time Reporter**
Any employee or contractor for who time is reported or generated in PeopleSoft Time and Labor.

**Time Reporter Information**
Values associated with the Time Reporter that are displayed when entering or viewing reported time and facilitate the processes of Time Reporting and Time Management (see Time Reporting)

**Time Reporting**
Any information required by a business unit that can be attributed to an individual employee (worker/contractor) and can be expressed in hours.
**Time Reporting Code**
A hybrid of two PeopleSoft objects: the Payroll Earnings Type and the Human Resources Absence Type. The Time Reporting Code represents the level at which a business actually needs to track employee time to support all of its administrative and compensation needs.

**Time Reporting Code Type**
Categorization of a time reporting code. Valid categories include: units, amounts, hours or a combination of hours and amounts (see Time Reporting).

**Time Reporting Group**
See Group [Time and Labor].

**Time Segment**
For Service, Cash Balance Accounts, and Employee Accounts, employees can accrue benefits differently at different times. The period of time during which employees use a particular rule is that rule’s time segment.

**TimeSpans**
Relative periods, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a "rolling" time frame, rather than a specific date, is required. TimeSpans can also be used with Flexible Formulas in PeopleSoft Projects.

**Tolerance**
In PeopleSoft Projects, a value that is defined at either the project or activity level as either a percentage of a project’s funding or an actual amount.

In commitment control, the percentage over budget that you allow, excluding revenues applied to increase budget limits, before the system creates an exception.

**Total Authorized But Unissued**
The combined total number of shares from Shares Available to Issue plus Total Options Outstanding.

**Total Compensation**
In PeopleSoft Workforce Analytics, this is generally the officially recognized compensation provided an employee in the course of their employment with an organization; includes both direct compensation and benefits compensation.

**Total Compensation Management**
The ability to track and report on all types of cash programs, non-cash programs, benefits and deferred compensation for all current workers, ex-workers and individuals associated with ex-workers who receive compensation due to the employment of the ex-worker.
**Total Non-Compensation**
In PeopleSoft Workforce Analytics, generally, this is the often unrecognized compensation an employee receives in the course of their employment with an organization; it includes Learning and Development compensation such as training, and Workplace Environment Compensation such as telecommuting privileges or other prerequisites.

**Total Options Outstanding**
The number of company shares currently held by shareholders as tracked by the transfer agent. Derived by using the number of Prior Outstanding plus Grants, less Exercises and less Cancellations.

**Total Rewards**
In PeopleSoft Workforce Analytics, this is the total rewards provided to an employee by their employment with an organization; it includes their officially recognized total compensation, and less often recognized total non-compensation.

**Tour of Duty**
The scheduled days and hours per day of attendance at a duty station for an employee.

**Tracking Signals**
PeopleSoft Demand Planning, a forecasting tool that detects bias in the forecast and provides an early warning of an unstable forecast. There are six tracking signals associated with each **Forecast Item** that correspond to the six most recent historical periods.

**Trade Payment**
An authorization for a customer deduction in a Promotion application.

**Training Report 2483**
The Training Report 2483 is a French regulatory report used to declare vocational training your company has provided to your employees. It is also known as the Declaration 2483 Report. The purpose of the report is to receive tax deductions from the government based upon the amount of money your company has spent on training.

**Transaction**
A named command with optional named and typed inputs and outputs. The associated external system or the Business Interlink Plug-in understands this command. The types of inputs and outputs are based on a set of generic types.

**Transaction**
A named command with optional named and typed inputs and outputs. The associated external system or the Business Interlink Plug-in understands this command. The types of inputs and outputs are based on a set of generic types.
See also **Inventory Transaction** or, for PeopleSoft Projects, **Resource Transaction**.

**Transaction catalog**

Lists transactions used to interface to the external system.

**Transaction Code**

In PeopleSoft Projects, an additional field on each resource transaction that is used in conjunction with accounting entry templates. Transaction codes enable you to deal with exceptions to your accounting entry templates without having to create additional transaction types. You can set up separate accounting entry templates for resource transactions containing the transaction codes you create. The accounting entry templates for those resource transactions lines can then use the same transaction types, but specify different accounts.

In PeopleSoft Asset Management, transaction codes identify special asset transactions and are used in conjunction with transaction type to create accounting entries.

**Transaction Code**

Identifies what action has taken place against the position.

**Transaction Costing**

*See* Multidimensional Costing

**Transaction Currency**

In the financial services industry, the original currency in which a company conducts its business activities. When a company has multinational operations, it may use different transaction currencies. These are translated to the base currency for consolidation and reporting of financial results.

**Transaction Date**

The date a transaction actually occurred as opposed to the date the transaction is recognized—the accounting date (although the two dates can be the same).

**Transaction Dated**

Data aggregated over a date range.

**Transaction group**

The package can contain one or more transaction groups. Each transaction group is a set of transactions of the same type, with the same trading partners involved.

**Transaction Loader**

The SQR in PeopleSoft Asset Management that transfers load lines from the Loader tables into the PeopleSoft Asset Management Tables as assets and open transactions.
**Transaction Tables**
In the PeopleSoft Enterprise Warehouse, these are tables that contain dynamic information and are keyed by business units.

**Transaction Type**
The building blocks of accounting entry templates in PeopleSoft Asset Management and Projects. For each transaction type you create you define specific transaction lines. The transaction lines are then transferred into accounting entry templates. In the accounting entry templates each transaction line is assigned a specific general ledger account.

**Transactional System**
A business application for performing the business transactions that keep your company running. Transactional applications, and the databases that support them, are optimized for quick transaction processing. Because they are constantly changing and are not optimized for data retrieval, transactional system databases are not usually the best source of data for analysis.

**Transfer Agent**
An individual or firm who that keeps a record of your shareholders and the number of shares they own. Transfer Agents also issue new share certificates and cancel old certificates. Unlike Brokers, Transfer Agents are not responsible for selling stocks. Instead they are primarily concerned with maintaining records on all stocks which your company has issued.

**Transfer Forecast**
In PeopleSoft Inventory Planning, a Generation process option that transfers the forecast from the target view in Demand Planning forecasts. The process only transfers items from Demand Planning that have been set to update the **Inventory Policy**.

**Transfer Punch**
The start of a work period that specifically denotes a change in task and usually compensation-related characteristics.

**Transfer Type**
An interunit transfer setting PeopleSoft Production Planning and Enterprise Planning use to determine where it will obtain item data for transfer tasks. If the type is a supply or demand transfer task, the Planning engine only processes the transfer item for a single location, reducing the time for plan processing. If the transfer type value is both, the Planning engine processes the transfer item using data from both the To and From units.

**Transfer Worksheet**
A work space for transferring an open item from one customer to another.
**Transferable Stock Options**
Options that may be transferred by the optionee, generally only to a family member or to a trust, limited partnership or other entity for the benefit of family members, or to a charity.

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

**Transport Rate**
The Transport is a statutory deduction in France. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. This deduction is used by the region to subsidize transportation, and maintain and build roads.

**Transportation Lead Times**
The transportation lead time is the in-transit interval from the date and time a shipment leaves your warehouse (**Inventory Business Unit**) to the date and time it arrives at your customer's receiving dock. The transportation lead time is used in calculating the scheduled shipment and scheduled arrival dates on the order when you enter either a requested arrival date or a requested shipment date.

**Travel And Relocation Date**
Length of time an employee must remain in the Government after the Government has paid to relocate him/her from one official duty station to another or for initial appointment.

**TRC Program**
A program that runs the level at which an organization actually needs to track employee time to support all of its administrative and compensation needs. TRCs are assigned to TRC Programs, which are ultimately assigned to workgroups. Multiple Workgroups can share these TRC Programs.

**Treasury Interface files**
These are DOS-based files generated by PeopleSoft in accordance with FMS file layouts for transmission of payment data to one of the FMS' Regional Financial Centers.

**Treasury Position Code**
In the financial services industry, this is a lookup code used for off-balance sheet treasury position accounts, such as foreign exchange, derivatives, precious metals, or any other account position that is the result of trading room and treasury operations.
**Treasury Stock**
 Shares of a company’s stock that have been repurchased or otherwise reacquired by the company and are "held in treasury." Whether the treasury shares count as "issued" or as "outstanding" shares of the company is a matter of state corporate law. Generally, a company may not vote its own shares held in treasury.

**Treasury Stock Method**
 The method of calculating primary and fully diluted earnings per share when common stock equivalents such as unexercised stock options exist. Required under generally accepted accounting principles.

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

**Tree Compare Utility**
 A PeopleSoft Enterprise Warehouse utility that enables you to compare effective dates for trees. The results page shows nodes that have been added, deleted, or moved from one parent to another. You may also view the detail objects that have changed.

**Tree control**
 Tree Control is a hierarchical search tool that you can imbed in a panel. Tree Controls give the user a view of hierarchical data structures and enable them to drill down through the hierarchy to a particular row of data.

**Tree Denormalizer**
 The Tree Denormalizer Application Engine process converts trees into multi-column data format so they can be used by third-party OLAP or ROLAP tools.

**Trigger**
 See Event Trigger.

**Trustee Extract**
 A PeopleSoft Pension Administration data extract containing data that a third party needs in order to produce pension checks.

**Turnover Costing**
 In PeopleSoft Workforce Analytics, this is a calculation of the cost to the organization of employee turnover, in dollars.
**Turnover Rate**
In PeopleSoft Workforce Analytics, the rate that employee’s are leaving the company.

**TUXEDO**
BEA’s middleware product used to manage transaction queues, server process initiation, system administration, time-outs, data encryption, compression, logging and other application server processing.

**Two-Tier**
A two-tier architecture refers to the traditional client/server model in which a client workstation connects to and sends SQL directly to the database server.

**Type of Appointment**
Indicates the specific type of appointment, e.g., part-time permanent, full time temporary, etc.

**Underlying Security**
The security underlying a stock option that an optionee has the right to buy, or the security underlying a convertible security.

**Underpayment Adjustment Limit**
The maximum amount or percent above which underpayment adjustments are not allowed for a given business unit.

**Underwater Option**
When the current market price is below the option exercise price. When an option is underwater, it would cost more than the underlying stock is worth to exercise the option. Such options are also described as being "out-of-the-money."

**Underwriter**
An investment banking firm that actually buys the shares from the company in a public offering and then resells them (at a slightly higher price) to its customers.

**Unexpected Losses**
In the financial services industry, these occur when the economic capital is exhausted and the insolvency rate is exceeded. Unexpected losses are determined by a targeted insolvency rate (confidence level); for example, a 99.7% confidence level indicates that there is a 0.03% estimated probability that the unexpected losses will exceed economic capital (or shareholder equity).
Union Code
Part of a group of defaults assigned to job codes. Union code may be used by human resources to group similar jobs or bargaining units together, dependent on individual company parameters.

Unit Code
In the financial services industry, Unit Code is used as an alternate means of measuring the relative size of companies participating in external surveys. A typical measure would be the number of employees in a company. The concept of unit is generic enough that the units can be other measures besides number of employees. For example, in the hospital industry the unit could be the number of hospital beds. Or in the hotel industry the unit could be the number of rooms.

Unit of Measure (UOM)
A type of unit used for quantifying in PeopleSoft systems. Depending on the application, units of measure might describe dimensions, weights, volumes, or amounts of locations, containers, or business activities. Examples include inches, pounds, workhours, and standard cost dollars.

Unit of work
Each transaction group includes one or more individual units of work. A unit of work is a single transaction that you want to commit or rollback as a whole.

Unitize Assets
The process of unitizing a single load line, usually originating from a different application, into multiple assets in PeopleSoft Asset Management.

Univariate Forecasting Technique
In Enterprise Planning and Simulation, the Univariate Forecasting Technique is a forecasting method that uses only the recorded history for the value to forecast its future.

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

Unscheduled Punch
A punch that is made by a time reporter who was not scheduled (see Time Reporting)

Unvested Shares
Unvested stock options are options that have not vested and, therefore, are not exercisable.
URI
A URI does not include the query string (the text following a ? on the URL). You can think of it as a subset of the URL that points to the resource, but does not include any parameters being passed to that resource. From the above example, the URI portion of the URL is as follows:

http://serverx/InternetClient/InternetClientServlet

URL
In this document, the term URL refers to the entire query string. The following is an example of a URL:

http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k

URSSAF Code
The URSSAF is the body responsible for ensuring payment of Social Security contributions by all French employers.

Useful Life
The amount of time an asset may be depreciated.

User Data
PeopleSoft Demand Planning, data held in user-defined fields. These fields provide for storage of additional data that is not supplied by the standard set of fields in the system. The fields can also become part of the key for the Forecast Item at each level within the Forecast View.

User-Defined History
A summary of customer receivables activity that is defined by the user.

User-Field Code
PeopleSoft Demand Planning, a definition of a set of user-defined fields that contain data specific to the installation.

Valuation
The way a company represents the value of a non-monetary award such as stock.

Value allocation
A process in PeopleSoft Workforce Planning, by which you assign an overall monetary value to a competency strategy for your organization, and assign a weight or importance to the roles,
competencies and accomplishments in the strategy. The system then allocates a breakdown of the value to roles, competencies, and accomplishments in the strategy based on their relative weighting or importance.

**Value Object**
In the PeopleSoft Enterprise Warehouse, Value Objects are a metadata layer that provides descriptive information about fields and values. Value Objects are used as constants in Data Manager target object definition.

**Variable**
Temporary storage for use or defined information used in the creation and application of rules (see Time Administration)

**Variable [Global Payroll]**
An element type that defines and stores values such as a character, date, or number. You can use variables to create generic formulas for situations where you use the same values over and over again in a calculation.

**Variable Compensation**
In PeopleSoft Workforce Analytics, direct compensation that is not fixed, that is paid out in variable amounts, such as bonuses and commissions.

**Variable Plan.**
A plan in which either the number of shares and/or the price at which they will be issued is not known on the grant date.

**VAT Account Type**
A code that identifies the different types of accounting entries that must be created for VAT transactions. These codes are also used to categorize transactions in the VAT transaction table. The account type is used in conjunction with the VAT code and VAT transaction type to determine the VAT ChartFields used for a given VAT accounting entry.

**VAT Apportionment**
For mixed activity, VAT apportionment is the mechanism that allows you to specify the ratio of taxable activity to exempt activity for individual ChartFields.

**VAT Calculation Method**
Options are Net or Gross. When calculating VAT at net, the early payment discount is applied to the goods amount before calculating the VAT. The amount of VAT calculated using this method is the amount that is to be paid, regardless of whether the early payment discount is actually taken at time of payment. When calculating VAT at gross, the VAT is initially calculated based on the gross transaction amount. The early payment discount is not taken
into account at this point. However, in some countries an adjustment is made to the VAT amount at the time of payment, if the early payment discount is taken.

**VAT Calculation Type**
Options include Exclusive or Inclusive. If exclusive, the VAT amount is stated separately from the goods amount. If inclusive, the VAT is not stated separately but is included with the goods amount.

**VAT Code**
The tax code used to define a percentage the system uses to determine the VAT amount. The VAT code is similar to the sales and use tax code, with a few exceptions. The tax authority tied to the VAT code generally consists of a single authority, and the ChartFields for a VAT code don’t reside with the tax authority but are determined by the combination of the VAT code, VAT account type, and VAT transaction type.

**VAT Declaration Point**
When VAT transaction information is declarable for reporting purposes. Options include Invoice or Payment. If you choose invoice, the system will recognize VAT at invoice time; if you choose payment, the system will recognize VAT at the time of payment.

**VAT Entity**
The level or entity within an organization at which VAT reporting is performed. VAT entities can be registered for VAT in multiple countries, but only one country can be designated as the VAT entity’s home country. VAT and Intrastat reporting information and VAT default information are defined for each country in which the VAT entity is registered. You may also specify any VAT exceptions—either exoneration or suspension from paying VAT—for any country in which the entity is registered.

**VAT Exempt Supply or Purchase**
A transaction where the product or item is non-taxable or exempt from VAT. No VAT code is associated with the transaction. Although no tax is applied to the transaction, the transaction is still logged in the VAT transaction table.

**VAT Exonerated**
A transaction where the purchaser has been determined as not subject to VAT. For these cases, there may be an exoneration certificate number tied to the purchasing entity (either the customer or the VAT entity) as proof of exoneration. A zero-rated VAT code should be associated with transactions where exoneration applies. The transaction is still logged in the VAT transaction table, but no tax is applied.

**VAT Rebate Percent**
Within Canada, for Public Service Bodies, the percentage of VAT that is not normally recoverable but which may be refunded in the form of a tax rebate.
**VAT Recoverability Percent**
The percent of VAT that’s recoverable.

**VAT Registration Countries**
Country codes associated with a VAT registration number for a particular customer or VAT entity.

**VAT Transaction Table**
Stores detailed transaction information for VAT reporting. It is the primary source of information for all VAT reports. Each application is responsible for writing to this table and also to a cross-reference table used to link entries in the VAT transaction table with entries within each application.

**VAT Transaction Type**
Used to categorize VAT transactions according to particular VAT accounting and reporting requirements. The VAT code and the VAT transaction type are used in conjunction with the VAT account type to obtain the ChartFields for accounting entries.

**VAT Treatment**
A description of how the transaction must be treated for VAT purposes. This is used to determine how VAT defaults are applied, what accounting entries are required, and how and if the transaction is reported on the VAT return.

**VAT Use ID**
A code used to identify the type of activity in which a purchased good or service will be used, and therefore to determine a recoverability percent and a rebate percent (when applicable) that will be applied to a transaction line. Activities are categorized as taxable, exempt, or mixed. Where activity is mixed, you may associate either the ratio of taxable activity to exempt activity directly with the Use ID, or you may indicate that this ratio is determined at the ChartField level.

**VdkVgwKey**
A key within a Verity BIF file for every document to be indexed. VdkVgwKey values must be unique across all collections that will be searched in any one application.

**Vendor Draft**
A draft issued by a vendor. PeopleSoft Receivables generates vendor drafts, provides a flexible worksheet environment for approval management, and enables discounted or standard submission for bank processing. PeopleSoft Payables receives vendor drafts and associates the appropriate vouchers.

**Verity**
The third-party search engine integrated with the PeopleSoft Portal.
**Verity Fields**

Verity fields are stored in the collection for retrieval and searching, and can be returned on a results list. Fields are defined in the BIF file and stored in the collection for retrieval and searching, and can be returned on a results list. Fields, like date and numeric fields can be used with the comparison operators (<,<=,>,>=).

**Verity Thesaurus**

The custom thesaurus consists of lists of synonyms defined in a synonym control file and can be used for synonym searching. After defining synonym lists in the control file, you use the mksyd utility to create a custom thesaurus (a control file which has the .syd extension) that the search engine uses.

**Verity Topics**

Verity applications can provide end users with predefined search criteria called *topics*. A topic is a named object that represents a concept, or subject area and can be used for synonym searching. It consists of words and phrases grouped together using the Verity query language in a tree-like structure. When provided, topics can be shared by all users.

**Verity Zones**

Zones are specific regions of a document to which searches can be limited. When the zone filter is used, the Verity engine builds zone information into the collection's full-word index. The index, enhanced with zone information, permits quick and efficient searches over zones. Searching a zone is faster than field searching. Zones are defined in the DAT file. The contents of a zone cannot be returned in the results list of an application.

**Version**

There can be up to five budget versions for each Budget Center level in a Budgeting Model. Budget versions are used to perform what-if analysis and comparisons of budget amounts before the user selects one version to submit as the Budget Center’s budget plan. PeopleSoft Budgeting-specific.

**Vest Deferral Grace Period**

The specified period of time within which an optionee must return from leave to avoid having the vesting differed. Only applicable if the Stock Action is LOA. Suspend Vesting must be selected for this rule to be applicable.

**Vest Deferral Grace Period Service Rule**

If the company provides a vest deferral grace period, they may stipulate that only certain individuals are eligible for the grace period based on service with the company. Only applicable if the Stock Action is LOA. Suspend Vesting must be selected for this rule to be applicable.
**Vest Immediately**
A stock option plan may provide that upon specific types of terminations, or upon a case by case scenario, all unvested shares held by an individual can be made immediately vested as of a specific date. Some companies’ plans provide that under certain circumstances, such as retirement, the vesting of option shares accelerates upon termination of employment. When this occurs, you must modify the vesting schedule before you terminate the individual.

**Vested Shares**
Option shares that are free of any ownership restriction. Generally, vested exercised shares are fully owned by the optionee, free from restrictions and freely tradable.

**Vested Termination**
The termination of an employee who has a vested benefit. The benefit is deferred until the participant reaches retirement age. The employee is considered “Terminated Vested,” “Term Vested,” or simply “TV.”

**Vesting**
The method by which a granted option becomes free of all restrictions and the Optionee has full rights to the shares.

**Vesting Schedule (Template)**
A convenient way to set up the framework for a vesting schedule that can be uniformly applied to individual options. When you grant stock options, you define a vesting schedule to determine the default-vesting schedule for the option.

**Vesting Service**
The service used to determine an employee’s vesting percentage. Rules for accruing vesting service may be different from rules for accruing other plan service credits.

**VETS–100 Federal Contractor Report**
This report is required of employers in the United States. It lists federal job classifications, and the number of employees and new hires in the last 12 months who are special disabled military veterans or Vietnam era military veterans. It also provides totals for each job classification of both veterans and non-veterans who hold these jobs.

**View**
PeopleSoft Demand Planning, a multilevel forecast structure. Each view is associated with a unique view ID and includes information that defines the view and structure type. The three types of views are working, disbursement, and dynamic.

For PeopleSoft Budgeting see Budget View.
**Virtual Tasks**
In Time and Labor, Virtual task data is associated with a taskgroup profile that defines common characteristics for a given Taskgroup and Task Profile ID. A single row of data is linked to multiple Earnings records for multiple employees. By minimizing the physical storage of daily task data we provide enhanced performance without limiting its functionality.

**Vision**
In PeopleSoft Balanced Scorecard, the overall mission of an organization. Usually the highest level on a strategy tree. Vision is optional; you aren’t required to have a vision component on each strategy tree.

See also Strategy Tree

**Volume**
Total share volume traded in a stock during market hours.

**W**

**WA (Workforce Analytics)**
See PeopleSoft Workforce Analytics

**Waiver Of An OPM Qualification Standard**
Involves setting aside requirements in a published standard to place an employee in a particular position, usually to avoid some kind of hardship to the employee, such as in cases of RIF or administrative error on part of the agency. Extra training and/or skills development may be needed to help the employee adjust to the new position. Waivers are granted by OPM or an agency, as appropriate, on a case-by-case basis, and do not directly affect other positions in the organization.

**Warehouses**
A warehouse reporting and analysis solution that supports the specific PeopleSoft business application that warehouse is using. It consists of predefined ETL maps, data warehouse tools, and Data Mart definitions. The warehouses we deliver are: PeopleSoft Financials Warehouse, PeopleSoft HRMS Warehouse, PeopleSoft CRM Warehouse, and PeopleSoft Supply Chain Warehouse.

**Warning Exception**
A transaction that exceeds the available funds but is allowed to continue to be posted against the budget. Warnings are informational only.
**Warrant**
A type of security, usually issued together with a bond or preferred stock, that entitles the holder to buy a proportionate amount of common stock at a specified price, usually higher than the market price at the time of issuance, for a period of years or to perpetuity. A warrant is usually issued as a sweetener, to enhance the marketability of the accompanying fixed income securities. Warrants are freely transferable and are traded on the major exchanges.

**WCB**
In Canadian provinces the Worker’s Compensation Board (WCB) operates as an independent board, and thus would have different requirements in each province. For example, in British Columbia the organization is called the Worker’s Compensation Board of British Columbia and in the Province of Quebec, the board is known as Commission de la Santé et de la Sécurité du Travail (CSST).

**Weight**
In PeopleSoft Planning, a user-defined value for the constraints that can be violated, determining how the schedules score will be calculated. Violations that are more critical to your schedule merit a higher weight.

**Weight and Volume Pricing**
You can price shipments by weight or volume to create price prices. Weight and Volume pricing requires using estimated shipments.

**Weighted Average Cost of Funds**
The projected principle payments for an instrument are used to derive a series of matched maturity funding rates, which in turn are used to calculate the overall base PeopleSoft Funds Transfer Pricing (FTP) rate. The Weighted Average Cost of Funds (WACF) method calculates a weighted average FTP rate where each of the funding rates is weighted by the principle payment amount and the term to maturity of the payment.

**WFA (Workforce Analytics)**
See PeopleSoft Workforce Analytics

**WGI Due Date**
Identifies the date of an employee's next within grade increase. Current policy is that the step increase is implemented on this date automatically unless prevented by the processing of an unsatisfactory performance appraisal.

**WGI Non-Creditable Days**
Total number of days that cause the WGI due date to be adjusted forward.
Whole Calendar Month
An instruction telling the system to use every day in each month for this time period. The system fills in the last day of the period according to the information you have entered.

Wildcard
You can replace the right-hand characters in a search field with a percent (%) wild card to query a range of values beginning with the remaining, left-hand characters. For example, by entering ‘2%’ in a six-character field, you will receive a range of available values, such as 200000 through 299999 or 2aaaaa through 2zzzzz.

Window Period
The ten-day period, from the third to twelfth day after public release of a company's financial statement, when insiders may exercise their stock-appreciation rights without violating Securities and Exchange Commission rules for short-term trading.

Windows Client
Traditional PeopleSoft 32-bit client. Windows clients connect to the application server domain (Tuxedo) using a port number (or connection string) specified in PeopleSoft Configuration Manager.

WIP Replenishment Method
Designates how the PeopleSoft Flow Production request is communicated. For a replenishment method of Inventory, the Workflow, Pull Ticket, and Pull List replenishment methods are available. With feeder line replenishment, you can only use Pull Tickets.

WIP Replenishment Mode
Determines how PeopleSoft Flow Production is triggered to generate a replenishment request for an item. Replenishment options include Backflush, Manual, and Kanban Card.

WIP Replenishment Source
Determines where you send your PeopleSoft Flow Production replenishment request and what source supplies your WIP location. Options include Feeder, Inventory, and Vendor.

Withdrawal
An election not to continue participation in a stock purchase plan.

Withdrawal of Contributions
In a pension plan, the act of returning pension contributions, with interest, to an employee who is terminating. An employee who withdraws contributions typically forfeits all service associated with those contributions. If the employee is later rehired, repayment of contributions and interest typically reinstates the forfeited service.
**Withholding**
A deduction taken by employers out of taxable income of an individual. Typical withholding taxes include federal income taxes, federal social security, Medicare taxes, and state and local income taxes.

**Within Grade Increase (WGI)**
A longevity-based increase in salary based on predetermined time in grade requirements and acceptable performance.

**Work Council (Comité d’Enterprise)**
In France it is mandatory for companies with more than 50 employees to elect a Work Council to represent the employees in negotiations with management.

**Work Effort**
See Activity Type.

**Worker**
In PeopleSoft Workforce Analytics, workers are defined as anyone who performs functions for the organization, and receives compensation from the organization's operating expense funds in return. Workers can be direct employees or independent contractors. This includes individuals contracting business directly from the company or through an agency.

**Work Group**
In PeopleSoft Enterprise Performance Management, the work group is a grouping of employees that share a similar activity profile.

**Work Period**
A Days On/Days Off template; the smallest unit of time that a business uses to communicate with their employees regarding when to be and/or not to be at work (that is, time working and time not working). The work period can be any number of hours. Until clock hour reporting is implemented, the application does not care about the number of hours. The initial Time and Labor product will apply the work period to a calendar day.

**Work Queue**
In PeopleSoft Demand Planning and Inventory Planning, a feature for reviewing and working with exceptions created during the processing of forecasting and inventory data.

**Work Schedule**
A template consisting of a sequence of work periods (days) on and off, and the number of scheduled hours per work period. Work Schedules and Work Periods should not be confused with calendar days.
**Worksheet**
A way of presenting data to the user through a BAM interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

**Work Templates**
Work templates describe your employee’s work patterns. Work templates could apply to individuals or entire organizations. For instance, 9 AM to 5 PM, Monday through Friday is a fairly standard working week in organizations.

**Workday**
A 24-hour period rounded by daybreaker with one or more associated shifts (see Scheduling)

**Workday Override**
A function that allows a Time Manager to override a Time Reporter’s schedule for a single workday. For example, Jane’s long-term schedule assignment is Monday – Friday, 8.00 to 17.00. Due to an increase in production demand, her manager needs to schedule her to work 7.00 to 18.00 on Thursday, 16 March 2000. Her manager needs to be able to make this change to her schedule in the PeopleSoft Time and Labor system, so when Jane checks her schedule for this week, she’ll see the revised schedule.

**Worker**
Workers can be defined as anyone who performs functions for the organization and receives compensation from the organization's operating expense funds in return. Workers can be direct employees or independent contractors (includes individuals contracting business directly from the company or through an agency).

**Workers Compensation**
The days an employee is on LWOP due to sustaining an injury or illness while on the job.

**Workflow**
The background process that creates a list of administrative actions based on your selection criteria and specifies the procedure associated with each action.

**Workflow**
The background process that creates a list of administrative actions based on your selection criteria and specifies the procedure associated with each action.

**Workforce Monthly Report (Déclaration Mensuelle Obligatoire des Mouvements de Main D’œuvre)**
In France, companies that employ 50 or more employees are required to submit the Workforce Monthly Report to the Administrative Division of the Ministry of Work and Social Relations. The report contains workforce information for a given establishment of a company, including
the total number of employees and details of employees who have joined or left the establishment during the month.

**Workgroup**
A user-defined group of employees who share identical compensation rules. A workgroup may be equivalent to all the employees in a business enterprise, all employees in a Paygroup, all employees belonging to the same Union or Union Local, or all employees who work at a specific work location.

**Worklist**
The automated "to do" list that Workflow creates. From the Worklist you can directly access the panels you need to perform the next action, and then return to the Worklist for another item.

**Worklist**
The automated “to do” list which Workflow creates. From the worklist you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

**Works Councils (Betriebsrat)**
In Germany, the works councils for your company are internal committees elected by the employees that represent the interests of salaried and hourly paid employees, other than management. Every work location in your company has it's works council (this would be the local works council) and the company as a whole has a central works council.

**Work-Study Program**
Government or non-government programs supervised work experience related to a student's course of study and are a part of, or a supplement to, education. Federal student-trainee programs are examples of such programs.

**Yearly Maximum Pensionable Earnings (YMPE)**
Amount set by the government upon which Canadian Pension Plan (CPP) contributions are made.
**Zero-Based Budgeting**
A budgeting option that builds a budget from the ground up starting with zero values. This is in contrast to an incremental budget that is based upon using prior year actual or budget values as starting point. PeopleSoft Budgeting-specific.

**Zero-Rated VAT**
A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

**Zip Code**
The term for postal codes in the United States.
Index

A
application server 1-3, 1-6
  domains 1-6
  server processes 1-10
Application Server
  administering a domain 3-1, 3-2
  basic concepts 1-6
  batch server environment 1-12
  booting a domain 3-3
  checking domain status 3-4
  components 1-11
  configuration files 2-17
  configuration templates 2-8
  configuring a domain 3-6
  deleting a domain 3-11
  editing configuration files 3-7
  executables 2-17
  handlers 1-7
  Jolt 1-5, 1-11
  listeners 1-7
  menus 2-5
  Process Scheduler 1-13
  processes 1-7
  PSADMIN 1-6, 2-1, 3-1
  quick configure 2-16
  servers and services 1-11
  shutting down a domain 3-3
  Tuxedo 1-11
  viewing log files 3-7
APPSSRV.LOG
  editing 3-9
architecture
  batch server support 1-12
  logical 1-14
  physical 1-14
Architecture 1-1
  application server components 1-11
  browsers 1-4
  database server 1-13
  web server 1-4

B
  batch server 1-3
  browser 1-2

C
Caching
  application server 4-19
Command Line
  Process Scheduler 3-19
  PSADMIN 2-8
    commands 2-9
      creating domains 2-10
      syntax 2-9
components
  server 1-4
configuration files
  web server 5-6
  web server (PeopleSoft) 5-10
Configuration Templates 2-8

D
Database Options
  PSADMIN 4-3
database server 1-3
Domain
  parameter reference 4-1
  parameters 4-1
  settings 4-10
  domains 1-6
Domains
  booting 2-21
  configuring 2-18, 3-6
  creating 2-10
  creating from command line 2-14
  loading configuration 2-20
  quick configure 2-16
  stopping 2-22

F
failover
  Jolt 5-23
Forced shutdown 3-4

H
  Handlers 1-7
installNTservicePIA.cmd 6-4
interface driver 4-31

java executables 5-2
Java heap size
  WebSphere 7-6
jolt
  failover 5-23
Jolt
  back end 9-15
  compression threshold 4-8
  front end 9-13
Internet Relay
  installing 9-9
  setting up 9-7
  starting 9-16
  stopping 9-16
UNIX 9-9
Windows NT 9-10

JOLT Listener 4-6
Jolt Relay Adapter 9-15
JOLT Relay Adapter 4-9
Jolt Station Handler 1-9
Jolt Station Listener 1-9
JRAD 4-9, 9-15
  configuring 9-15
JRLY 9-7
JSH 1-9
JSL 1-9
JVM heap size
  WebLogic 6-17

Listeners 1-7

Messaging Server 4-28
  processes 4-28

Normal shutdown 3-4
NT Services
  for PeopleSoft 3-19. See also Service Setup

PeopleBooks
  printed, ordering ii
PeopleSoft Architecture 1-1
  browser 1-2
  components 1-1
PeopleSoft Internet Architecture 1-1
PeopleSoft Portal 1-16
PeopleSoft site
  WebSphere 7-8
PIA 1-1
  batch server environment 1-12
  deployment options 1-13
  transmitting requests 5-4
  web server administration 5-1
Plugin-cfg.xml 7-12
Process Scheduler
  command line options 3-19
  configuring 3-12
  menus 2-6
  on application server 1-13
  PSADMIN menu 3-12
Process Scheduler Server
  configuring 3-15
  creating configuration 3-16
  deleting 3-17
  modifying 3-18
  starting 3-14
    command line 3-19
  stopping 3-14
    command line 3-19
proxy server
  setting up 7-15
  WebLogic 6-9
PSADMIN
  administering a domain 3-2
  application server menu 3-1
  booting a domain 2-21
  booting down a domain 3-3
  cache settings 4-19
  checking domain status 3-4
  command line options 2-8
    valid values 2-12
  configuring a domain 3-6
  configuring an application server 2-1
  creating a domain 3-10
  database options 4-3