PeopleTools 8.4:
PeopleSoft Global Technology

PeopleSoft®

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SKU Tr84GLB-B 0302

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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Printed in the United States.

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PeopleSoft Global Technology Preface

The *PeopleSoft Global Technology PeopleBook* provides information on the role of PeopleTools in the globalization of PeopleSoft applications.

PeopleSoft applications are functionally equipped for implementation in global enterprises. However, country-specific application business logic is not enough to make an application global-ready. The technology behind the applications, PeopleTools, needs to provide the core global abilities that are common to all our application products. Abilities such as support for multiple languages in a single database, formatting data displayed to users using standards that they expect based on their language and country, and dealing with the complexities of a system spanning multiple time zones PeopleTools is designed so that a single implementation can serve users in different regions: users who share the same data while operating in different languages and applying different date/time and numeric formatting conventions.

This book covers the PeopleTools features that are critical to a global implementation and is divided into three parts:

- **PART 1: Configuring Your System for a Global Implementation.** In this part we'll discuss some of the technological considerations you should take into account if you are implementing in multiple countries (even if you only use English language data).
- **PART 2: Working with PeopleSoft Applications in Multiple Languages.** These are things you'll do if you're using the non-English translations delivered by PeopleSoft, and/or processing application data in multiple languages.
- **PART 3: Translating PeopleSoft Applications.** These are things you do if you need to translate objects into languages not supplied by PeopleSoft, products not translated by PeopleSoft, or translating your customizations.

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 order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM and additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection website: http://www.peoplesoft.com/corp/en/login.asp

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

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

Hard-copy Documentation

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. PeopleSoft Internet site: http://www.peoplesoft.com/.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**
Email	Send email to CPI at **callcenter@conpub.com**.

PeopleBooks Standard Field Definitions

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

Field	*Definition*
As of Date	The last date for which a report or process includes data.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Freeflow text up to 30 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row. For more information about effective dates, see *Understanding Effective Dates* in Using PeopleSoft Applications.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Language or **Language Code**	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.
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.

Field	*Definition*
	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.

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

Comments and Suggestions

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

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

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

DOC@PEOPLESOFT.COM

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

PART 1: Configuring Your System for a Global Implementation

CHAPTER 1

Controlling International Preferences

This chapter provides an overview of international, locale and browser language preferences and discusses how to:

- Set up and change language preferences in PeopleSoft Internet Architecture
- Understand and apply browser language preferences
- Set up and change Windows Designer Tools language preferences.
- Understand, set up and apply locale-based formatting

Understanding International Preferences

The international preference settings control the language in which users view and use the PeopleSoft system, as well as locale formatting conventions for dates, times, and numbers.

How you define preferences depends on whether you access PeopleSoft using the PeopleSoft Internet Architecture or using the Windows-based Designer tools. The current language code and locale are read from different places. This is due to the architecture differences between these two environments.

This section provides an overview of language codes.

See Also

Understanding Locale Based Formatting

Understanding Language Codes

Every PeopleSoft session is associated with a language that is determined when you sign on to the system. PeopleSoft language codes contain three characters that represent the name of the language (and some cases, the region in which the language is spoken, although most PeopleSoft language codes don't include a country or region component).

This "user" or "session" language is used by PeopleTools when determining the language of the user interface such as field and menu labels, and also for the language of the data that is maintained or viewed during the session. For example, if a user's language code for a particular session is Spanish, PeopleTools will attempt to display the menus and field labels in Spanish for each page viewed in that session, and if the table from which the data is being

fetched has a related language record associated with it, PeopleTools will also attempt to fetch the Spanish translations of the data from this table.

Setting up and changing Language Preferences in the PeopleSoft Internet Architecture

In the PeopleSoft Internet Architecture, the *signon language* is the language selected by the user on the signon page before they enter their username and password. The signon language controls the language in which the user views language-sensitive data and objects in the application for the duration of that session.

If the signon language is the database's base language, then all language-sensitive data, messages, and objects appear in the base language. If the signon language is a non-base language, then any language-sensitive data, messages, and objects *that have been translated* appear in the preferred language; those that have not been translated appear in the base language.

This section discusses how to:

- Choose a signon language.
- Change the signon language while signed on.
- Change the signon language programmatically.
- Determine the signon language when the signon screen is bypassed.
- Control the user profile language preference.

See Also

"Using Related Language Tables"

Choosing a Signon Language

Users choose a signon language at the time they sign on to the system. Users can change their signon language during the PeopleSoft session; however, this is typically done only for development or testing purposes. You can also program your applications to change their signon languages so that your application has its own language selection options.

When the signon page initially appears, the page elements on that page appear in the language designated in the user's browser language settings. To use this browser-default language during the session, simply enter a username and password and click the Sign In button.

Signon page

Alternatively, to choose a different signon language, click one of the available language links, enter a password, and click the Sign In button.Clicking the link updates the signon screen to reflect the new language choice, and signing on using the updated screen confirms the new signon language. Only languages that have been installed and enabled by the system administrator can be used to signon to your database. If you select a language that has not been enabled in the database to which you are logging in, you will receive an error message during signon:

The language you have selected is not enabled for use with this database. Please select another language or contact your System Administrator

To enable and disable languages for signon to your database, use the Maintain Languages page. This page can be found under PeopleTools, Utilities, Maintain Languages. If you will not be using all languages delivered by PeopleSoft, of if you need to add a new language to the system, you can modify the signon page to add or remove any of the language links. Remember, the base language of your system should always be available to your users.

See Also

"Creating New Languages"

Changing the Signon Language While Signed On

In some rare cases, such as during development, testing or debugging, you may want to change the language of your session without logging out of PeopleSoft. The International

Preferences page enables you to change your signon language during a session. Any change to the current signon language made via this page is valid only for the remaining duration of the current session. Once you sign out of PeopleSoft, the language of your next session will again be determined by the language selected on the signon page.

To change your session language without signing out:

1. Open the International Preferences page.

   Choose PeopleTools, Utilities, International, Preferences. The International Preferences page appears.

2. Select a language in the Language Preference field.

   The language you select overrides the language that was used to sign on to the database. This change lasts until you exits the PeopleSoft session or change the language preference again.

3. Save the page.

   Changes take effect immediately.

Changing the Signon Language Programmatically

PeopleCode language functions enable you to change user language preferences programmatically for the remainder of their PeopleSoft Internet Architecture session. This feature may be useful if you are building a front-end to your PeopleSoft system that does not involve the signon screen, and want to allow the user to change their language preference "on-the-fly". For example, an Internet Store application may allow anonymous signon by customers of the store to browse a catalog, and therefore would not display the signon screen. The PeopleCode SetLanguage built-in function could be linked to a PeopleCode program behind a button on a page to allow the user to change the language of the interface after they have already been signed in as a guest user.

The SetLanguage built-in function temporarily overrides the user's default language preference and the %Language system variable, which evaluates to the language code for the current preferred language.

Calling the SetLanguage function is the same as changing the Language Preference field on the International Preferences page.

The %Language system variable makes it simple for application developers to determine the current preferred language and build language-specific functionality in PeopleCode. The %Language_Base system variable can be used in PeopleCode to determine the base language of the current database.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, "PeopleCode Built-in Functions and Language Constructs S-Z," SetLanguage

*PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, "*System Variables," %Language

*PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, "*System Variables," %Language_Base

Determining the Signon Language When the Signon Screen Is Bypassed

PeopleSoft offers the following ways to sign on to a PeopleSoft session without ever seeing the signon screen:

- Direct access: you can configure the web server to enable users to access PeopleSoft without having to sign on. In these cases, users access the system using a predetermined user ID.

  The language preference for users who access the system this way is determined by the user profile language preference for that user ID. User Profile language preferences are described later in this chapter.

When bypassing the signon screen, to override the user profile language preference, you can explicitly set the language code within a direct query string using the parameter &languageCd=<target language>.

- Single-signon: PeopleSoft users who take advantage of PeopleSoft single-signon capabilities need to select a language preference only once during the single signon.

  All subsequent PeopleSoft sessions that are controlled by the single signon use the same language preference.

See Also

*PeopleTools 8.4 PeopleBook: PeopleSoft Security, "*Setting up Digital Certificates and Single Signon"

Controlling the User Profile Language Preference

In addition to the session language preference that is selected at signon-time and valid for the current session only, the PeopleSoft Internet Architecture also maintains a language preference on each user's User Profile. This language preference is used when the system needs to determine the user's preferred language when that user is not logged onto PeopleSoft. For example, when the process scheduler runs a SQR report or if the workflow system sends an email to the user. In these cases, the user may not be logged into PeopleSoft, or another user may have initiated the transaction, so there is no session language that can be used. For example, a manager may be sent an email by the workflow system requesting approval for a purchase requisition. Since this email event is triggered not by the person to whom the message is addressed, but by the requester, it does not make sense to send the message in the language preference of the sender; since the recipient may not understand that language. Instead PeopleTools reads the User Profile language preference of the email's intended recipient and sends the email in that user's preferred language.

To set the user profile language preference for a user:

1. Access the user's security profile.

   Select PeopleTools, User Profiles, User Profiles. Use the standard search method to choose the desired user ID.

   The User Profile language code is on the General page.

   If you are changing your own language preference, you can use the simplified My Profile page. Select PeopleTools, Maintain Security, Use, My Profile. You do not have the opportunity to specify a user ID; only your own profile is available.

2. Choose a default Language Preference.

   If you're using the User Profile - General page, choose a language in the Language Code field.

   The Enable multilingual support option on the User Profile - General page determines whether the user can edit language-sensitive data in multiple languages without overriding the user language preference.

   If you're using the My Profile page, choose a language in the following field: My preferred language for reports and email is.

3. Save the page.

See Also

"Working With Language-Sensitive Application Data," Editing Data in Multiple Languages

Understanding the Browser Language Preference

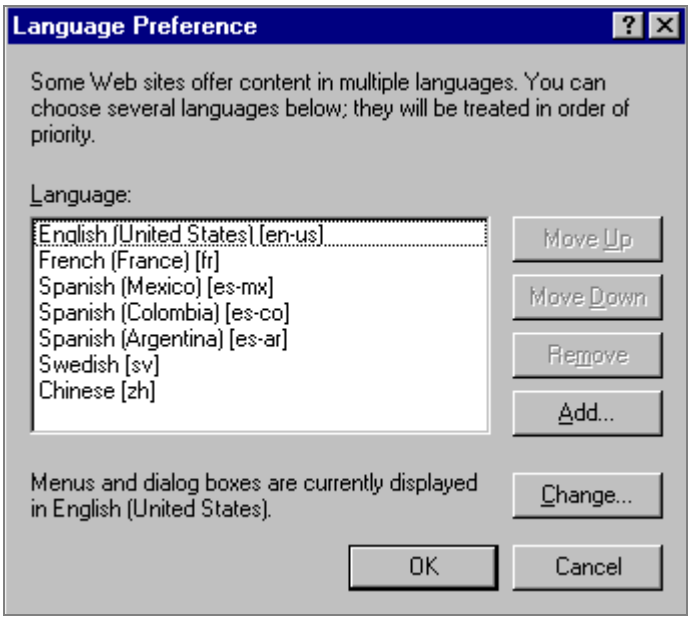
Web browsers allow users to specify a list of preferred languages for Web content.

PeopleTools uses this preferred language list in determining the default language of the signon page, amongst other things. When the user loads the signon page into the browser, PeopleTools works down the list of languages in the browser's preferred language list until it finds an entry that maps to a PeopleSoft language code in the pstools.properties file on the web server.

If none of the user's preferred languages are available (as specified in pstools.properties), the default signon screen is displayed in U.S. English (en-US).

Setting the Browser Language Preference

Under Microsoft Internet Explorer, the preferred language list can be found in the Language Preferences dialog accessed via the Tools, Internet Options menu item, and by clicking on the Languages button on the General tab of the Internet Options dialog.



Microsoft Internet Explorer's Language Preference dialog box

This list is iterated by the web server until the server finds a language in which it offers web content. Because the list is processed top-down, the user's most preferred language should appear at the top of the list, with their next preferred language second and so on.

It must be noted that the representation of language codes in the browser's preferred language list uses two to five character POSIX standard locale codes comprised of a language and country portion. In the example above, es represents Spanish and ar represents Argentina. A two-letter code represents only a language without reference to a specific country or territory.

Netscape and other browsers have a similar dialog that allows you to create your ordered list of language preferences.

Using Browser Language Settings to Determine Signon Language

In order for PeopleTools to display the signon page in the user's preferred language as determined from their browser settings, the two-to-five character language codes used by the browser must be mapped to PeopleSoft three-letter language codes. PeopleSoft reads the pstools.properties file located on the web server to perform this mapping.

As delivered, PeopleSoft includes the following PeopleSoft language code to POSIX locale mappings:

PeopleSoft Language Code	*Description*	*Corresponding POSIX Locales*
CFR	Canadian French	fr_CA
DAN	Danish	da_DK
DUT	Dutch	nl_NL, nl_BE
ENG	English	en_US,en_GB

PeopleSoft Language Code	*Description*	*Corresponding POSIX Locales*
ESP	Spanish	es_ES,es_AR,es_CO,es_MX
FRA	French	fr_FR,fr_BE,fr_CH
GER	German	de_DE,de_AT,de_AU,de_CH
GRK	Greek	el_EL
ITA	Italian	it_IT,it_CH
JPN	Japanese	ja_JP
KOR	Korean	ko_KR
POR	Portuguese	pt_BR
SVE	Swedish	sv_FI
THA	Thai	th_TH
ZHS	Simplified Chinese	zh_SG,zh_CN
ZHT	Traditional Chinese	zh_HK,zh_TW

The two-part POSIX locale provides flexibility when languages vary from country to country. For example, the POSIX code for French is fr. French is spoken in several countries, each with its own two-character country code, including France (FR), Belgium (BE), Canada (CA), and Switzerland (CH). The full locale code consists of a lowercase language code, an underbar, and an uppercase country code. So the code for Canadian French is fr_CA.

In many cases, the country distinction between languages is not relevant, or PeopleSoft does not deliver a country-specific translation. In this case, many individual POSIX locale codes may be mapped to a single PeopleSoft Language code. For example, PeopleSoft delivers a Canadian French translation with the PeopleSoft language code of "CFR". Therefore, the POSIX locale of fr_CA is mapped to the PeopleSoft language code of CFR. However, PeopleSoft does not provide a Belgian French or Swiss French translation, so the fr_BE and fr_CH POSIX locales are both mapped to the FRA PeopleSoft language code.

Setting Up and Changing Windows Designer Tools Language Preferences

In the Windows Designer Tools, the language setting within PeopleSoft Configuration Manager controls the language in which the user views almost all language-sensitive data and objects in the application.

Just like in the PeopleSoft Internet Architecture, if the language selected in the PeopleSoft Configuration Manager is the base language, then all language-sensitive data, messages, and objects appear in the base language. If the language in PeopleSoft Configuration Manager is a non-base language, then any language-sensitive data, messages, and objects *that have been translated* appear to the user in the preferred language; those that have not been translated appear in the base language.

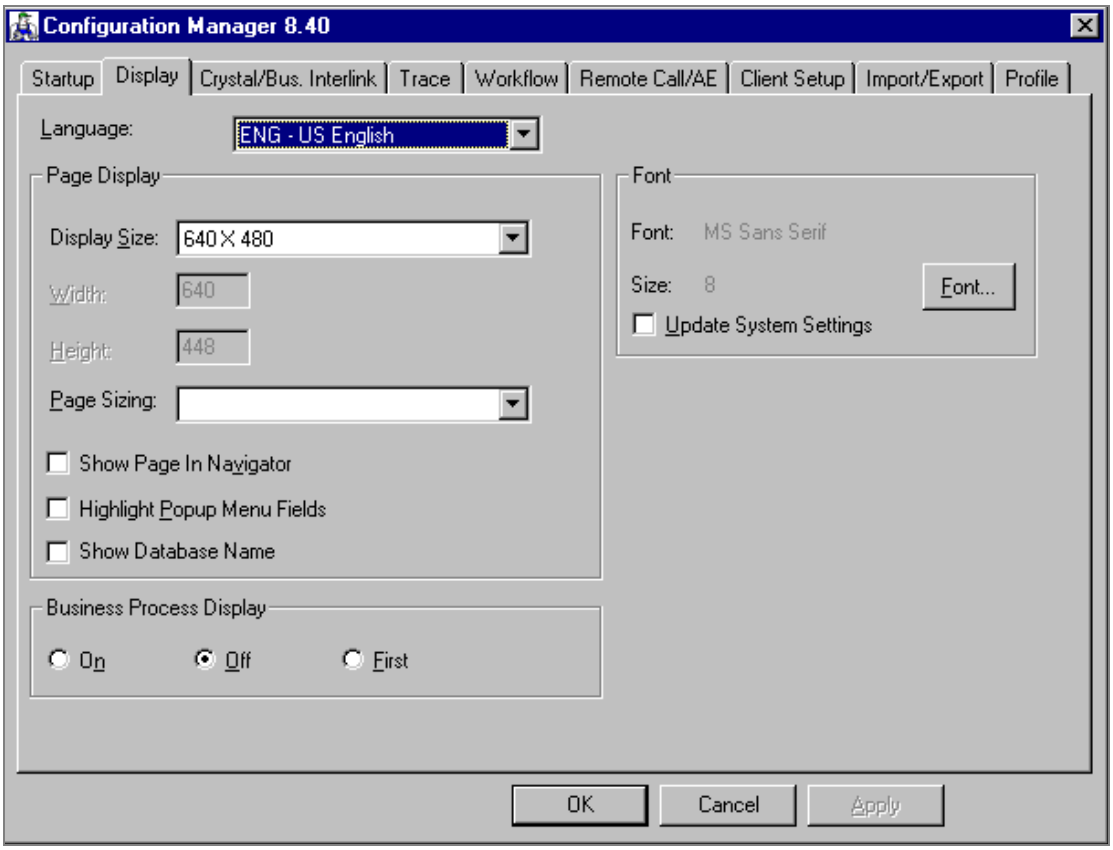
See Also

"Using Related Language Tables"

PeopleTools 8.4 PeopleBook: PeopleSoft Data Management, "Understanding Configuration Manager"

Controlling the PeopleSoft Configuration Manager Language Setting

The PeopleSoft Configuration Manager language setting is maintained on each Windows client workstation and determines the language in which the user views and maintain almost all language-sensitive data and objects in the Windows Designer tools.



Configuration Manager - Display tab

To set the PeopleSoft Configuration Manager language:

1. Start PeopleSoft Configuration Manager.
2. Select the Display tab.
3. Select a language in the Language field.
4. Click OK.

Controlling Windows Regional Settings

The Windows Regional Settings Properties dialog box (accessed through your Windows control panel) enables users to choose the format for display of numbers, dates, times, and currencies *while operating in the Application Designer and other Windows components of PeopleTools*. Windows Regional Settings do not take effect in the PeopleSoft Internet Architecture. Bear in mind that these are Windows settings, not PeopleTools settings. The Windows settings affect the entire Windows system and remain in effect until you change them in the Windows control panel.

Currency formatting is controlled by PeopleTools and is independent of Windows Regional Settings Properties dialog box.

See Also

"Controlling Currency Display Format."

Understanding PeopleSoft Internet Architecture Locale Based Formatting

The locale-based personalization architecture in the PeopleSoft Internet Architecture provides a flexible framework for formatting locale-sensitive data. There are three main levels of locale-based personalization. This section provides an overview of locale based formatting drivers and discusses:

- User-specific
- Locale-specific
- System-wide defaults

See Also

"Controlling Currency Display Format."

PeopleTools 8.4 PeopleBook: PeopleSoft Internet Architecture Administration, "Administering Web Servers," Modifying PeopleSoft Web Server Configuration Files.

PeopleTools 8.4 PeopleBook: PeopleSoft Security, "Managing PeopleSoft Personalizations"

Understanding Locale Based Formatting Drivers

There are three levels of personalization settings that drive the formatting of locale-based data in the PeopleSoft Internet Architecture; User-specific, Locale-specific and System-wide. This is to ensure that each user can have complete flexibility to specify their personal preference for formatting locale-based data such as numbers, dates and times, while maintaining an intelligent set of default formats for inexpert users and users who don't have specific preferences.

When determining how to format these types of data, the PeopleTools checks for formatting preferences at each of these levels in the order of user-specific, locale-specific and finally system-wide, and at whichever level the preferences are first found, it is those that are used for the session.

For example, a first-time user may login to the PeopleSoft Internet Architecture as a French user. As a first-time user of the system, PeopleTools will not have any personalization information specific to that user, and so will not know of any specific preferences that person has for formatting their locale-sensitive data. Next, PeopleTools will check the Personalizations tables to see if a locale-specific formatting setting exists for the French language (given that the user is signing in as a French language user). In this case, the locale-specific settings for French users are found, and the system formats all numbers, dates and times for that session using the settings defined by the system administrator for French users.

However, it is possible that the user, even though they are logged in using the French language, may prefer another type of formatting for their numbers. Let's suppose that instead of the Locale-specific formatting for numbers that was specified by the system administrator (in which the comma is used as a decimal point, and the space is used as a thousands separator), the user prefers to use a period as a decimal separator. To register this user-specific preference, the user simply opens the My Personalizations page, and overrides the "Digit Group Separator" Personalization Option with a period. This way, whenever that user access the PeopleSoft Internet Architecture, their decimal separator will be a period, regardless of their language choice. All other preferences are read from the locale-specific personalizations based on their current language choice.

Should a user sign in to the PeopleSoft Internet Architecture using a language for which locale-specific personalizations have not been setup by the system administrator, PeopleTools defaults the formatting of locale-sensitive data for that session to the system-wide defaults. These defaults are also maintained by the system administrator in the personalization system and are used as a last resort if no other formatting information is found.

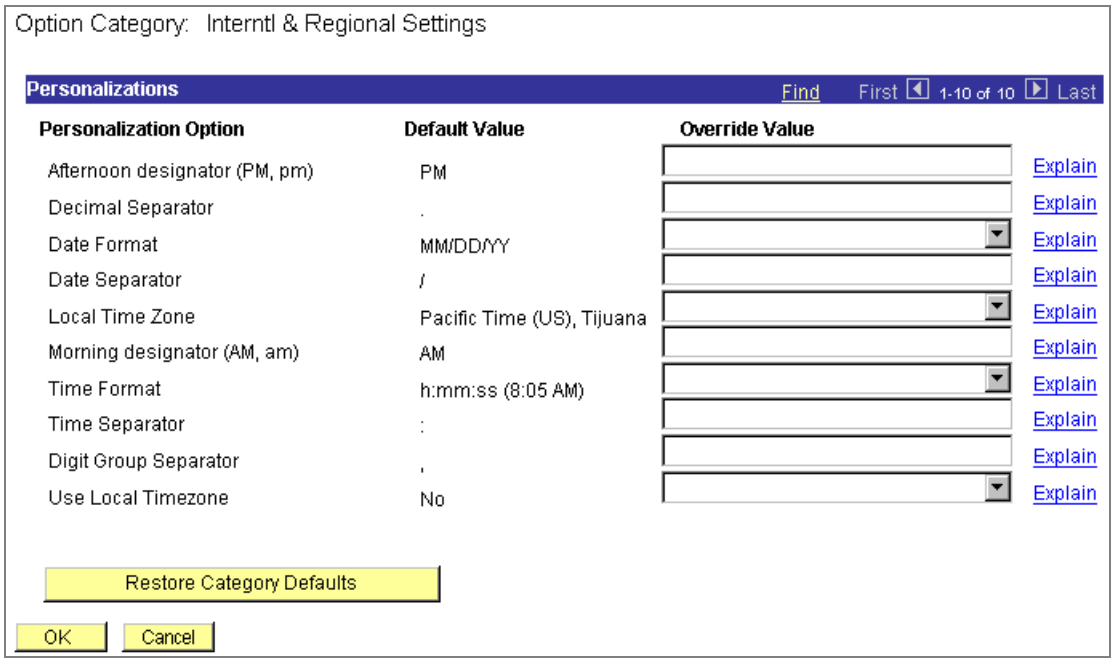
Using the personalizations system in PeopleTools, the system administrator can restrict which personalization options are driven by a locale, or which may be overridden by a user. In certain organizations where a corporate-wide policy exists for formatting numbers, dates or times, the system administrator may wish to disable the locale-sensitivity or user overrides for some or all of the locale-sensitive data formats. In this case, the system-wide defaults would take effect for each Personalization Option disabled by the system administrator via the PeopleTools, Personalizations page.

Defining User-Specific Formatting

If the System Administrator has allowed users to override the locale-sensitive formatting options (using the Maintain Personalizations pages), you can use the My Personalizations page to specify exactly how PeopleTools should format each field that contains numbers, dates and times. Each individual formatting element can be overridden on a user-by-user basis.

Setting and Applying user-specific formatting

Page Name	*Navigation*	*Usage*
My Personalizations	**My Personalizations**, click *Interntl & Regional Settings* **Personalize Options** button.	End users access this page to view and modify personalizations



International and Regional Settings, accessed from My Personalizations page

Click the Personalize Option button for the International and Regional Settings category on the My Personalization page. You can see the current system-default value for each formatting element, and any user-specific overrides you may have already specified. The Default Value column here shows you what the system-wide default is for each element; it does not indicate what the locale-specific default is for the language code you are currently using. For details of each Personalization option see *PeopleTools 8.4 PeopleBook: PeopleSoft Security*, "Managing PeopleSoft Personalizations" Understanding Locale Options.

Should you wish to override any or all of these values, simply enter the appropriate value in the Override Value column of the page. For example, if you prefer to use a dash (-) instead of a slash (/) to separate the components of dates, simply enter a dash character in the Override Value column for the Date Separator Personalization Option. Values maintained here are specific to your User ID.

If you leave any of these Override Values blank, they will be evaluated next time you sign on based on your language code, and if locale-specific preferences aren't found for your language, they will be defaulted to the system-wide values as shown in the Default Value column on this page.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Security, "Managing PeopleSoft Personalizations", Working with the My Personalizations Interface

Setting Up and Applying Locale-Specific Formatting

Locale-based personalizations enable PeopleTools to intelligently determine appropriate data formatting based on the language of the user logging into PeopleTools should they not have specified individual user-based overrides for each formatting option. Locale-based personalizations are treated differently than the other personalizations in that they have three levels of defaulting; user overrides, locale-specific and system-wide defaults..

You use the following pages to manage these personalization options:

- Locale Definition.
- Locale Defaults.

Page Name	*Navigation*	*Usage*
Locale Definition	PeopleTools, Personalizations, Locales	Control the locales for which you can specify defaults.
Locale Defaults	PeopleTools, Personalizations, Locale Defaults	Specify Personalization Option defaults for locales appearing on the Locale Definition page.

Locale Definition Page

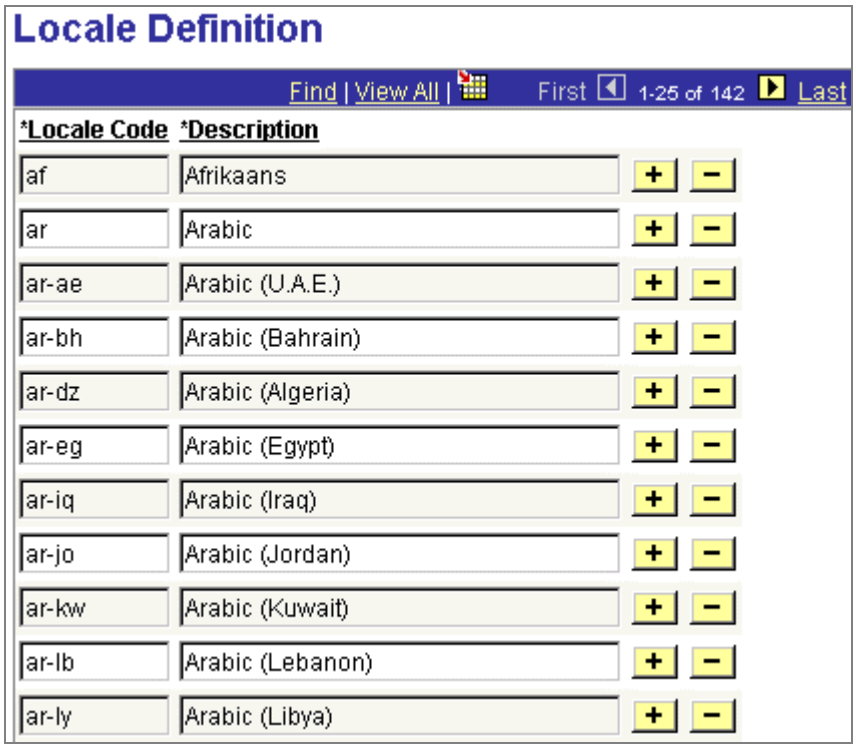
The Locale Definition page controls the locales that can have defaults specified on the Locale Defaults page. These locales are markedly different from PeopleSoft language codes (discussed earlier in this chapter) in that they typically contain both language *and* country information. When formatting data fields, both these elements are typically needed, given that many languages are spoken in different countries with each country often following different formatting conventions. Having only information on the user's language is not sufficient to determine even a default level of locale-sensitive data formatting.

For example, English is spoken in several countries that radically disagree on date formatting. In the United States, dates are typically formatted as month, day, year whereas in the United Kingdom and elsewhere they are typically formatted as day, month, year. Therefore if PeopleTools only has a signon language of English and no country information, it could not determine which of the two possible date formats to use.

To determine the specific locale for a PeopleSoft Internet Architecture session, the session language code cannot be used due to its lack of country information. Instead, the browser's language preference list is read, and the top (the most preferred) locale in that list is used to look up locale-specific formats in the Personalizations Locale Definitions page. Therefore,

you should ensure that each browser locale used by your system's users appears in the Locale Definition page if you wish to provide intelligent locale-default formatting.

See Setting the Browser Language Preference.



Locale Definition Page

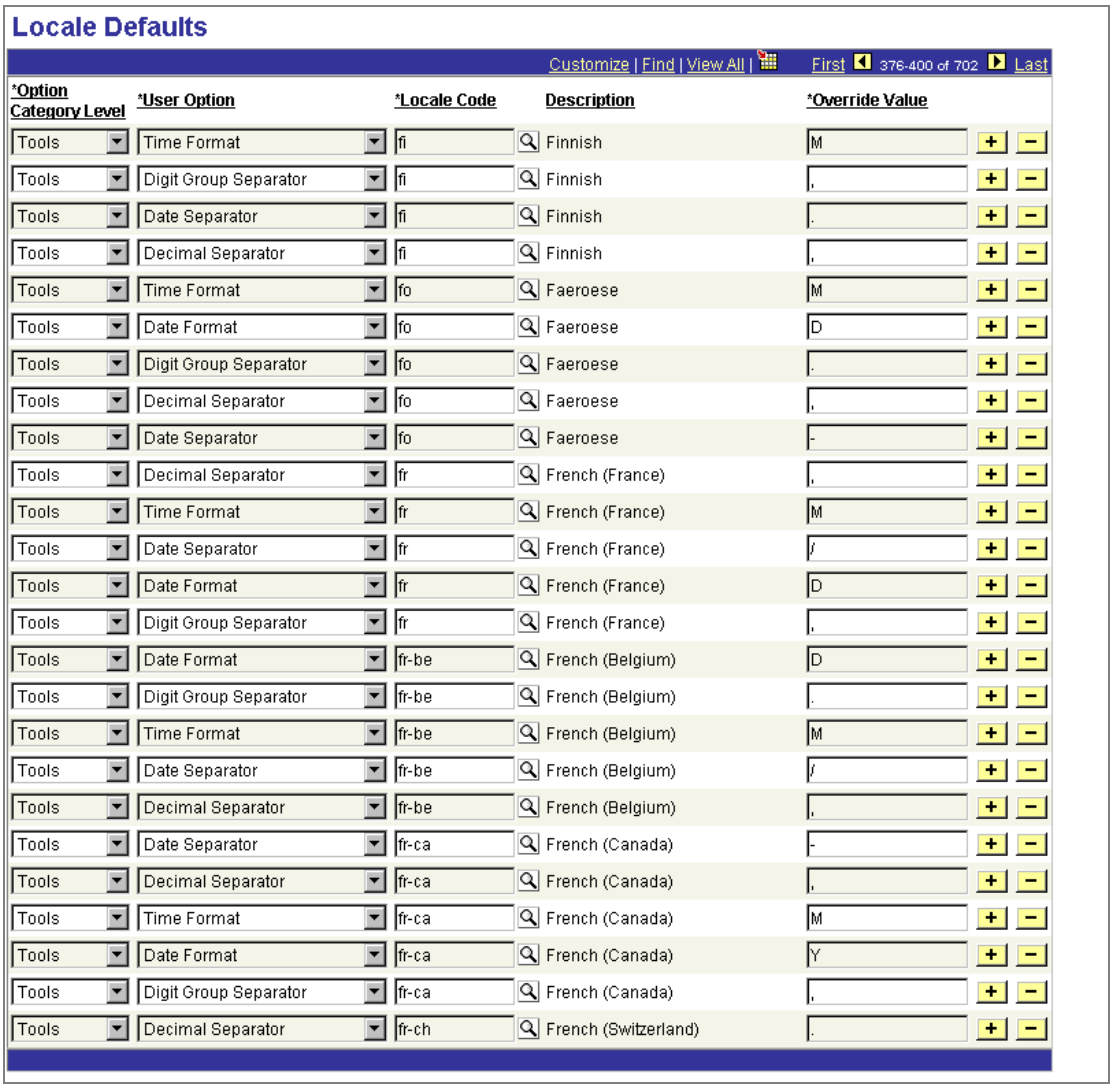
Locale Code Shows the locale code that represents a particular language preference. This must match exactly the locale code in the browser's Language Preference dialog.

Description Displays a description of the code for identification purposes.

Locale Defaults Page

The Locale Defaults page enables you to assign defaults to various personalization options per locale code. If a user has not overridden each Personalization Option at a user level, PeopleTools looks up the locale-specific value in this table based on the top-ranked locale in their browser's Language Preference list. Should neither a user-specific or locale-specific value be found, the system-wide default as defined against that Personalization Option is used for the session.Only values for the locales that appear on the Locale Definition page can have defaults assigned on this page.

To view all the defaults for a particular locale, you will find it easier to sort the data on this page by the Locale Code instead of the default sort by User Option. Click on the "Locale Code" column heading to perform this sort.



Locale Defaults

Customize | Find | View All | First 376-400 of 702 Last

*Option Category Level	*User Option	*Locale Code	Description	*Override Value
Tools	Time Format	fi	Finnish	M
Tools	Digit Group Separator	fi	Finnish	,
Tools	Date Separator	fi	Finnish	.
Tools	Decimal Separator	fi	Finnish	,
Tools	Time Format	fo	Faeroese	M
Tools	Date Format	fo	Faeroese	D
Tools	Digit Group Separator	fo	Faeroese	.
Tools	Decimal Separator	fo	Faeroese	,
Tools	Date Separator	fo	Faeroese	-
Tools	Decimal Separator	fr	French (France)	,
Tools	Time Format	fr	French (France)	M
Tools	Date Separator	fr	French (France)	/
Tools	Date Format	fr	French (France)	D
Tools	Digit Group Separator	fr	French (France)	,
Tools	Date Format	fr-be	French (Belgium)	D
Tools	Digit Group Separator	fr-be	French (Belgium)	.
Tools	Time Format	fr-be	French (Belgium)	M
Tools	Date Separator	fr-be	French (Belgium)	/
Tools	Decimal Separator	fr-be	French (Belgium)	,
Tools	Date Separator	fr-ca	French (Canada)	-
Tools	Decimal Separator	fr-ca	French (Canada)	,
Tools	Time Format	fr-ca	French (Canada)	M
Tools	Date Format	fr-ca	French (Canada)	Y
Tools	Digit Group Separator	fr-ca	French (Canada)	,
Tools	Decimal Separator	fr-ch	French (Switzerland)	.

Locale Defaults Page

Applying System-Wide Default Formatting

System-wide formatting is the last resort in the locale-sensitive formatting hierarchy. Only if a particular Personalization Option can't be found that is specific to the user or their browser's locale is the system-wide default applied for the session. System-wide defaults are defined by the system administrator using the Define Personalizations component accessed by PeopleTools, Personalization, Personalization Options, and clicking the Format tab.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Internet Architecture Administration, "Administering Web Servers," Modifying PeopleSoft Web Server Configuration Files

PeopleTools 8.4 PeopleBook: PeopleSoft Security, "Managing PeopleSoft Personalizations"

CHAPTER 2

Understanding Time Zones

This chapter provides an overview of time zones and discusses how to:

- Set the base time zone.
- Control the time zone display.
- Maintain time zones.

Time Zones Overview

PeopleSoft applications store times based on a system-wide base time zone, but also support the display of times relative to a user's local time zone or relative to the time zone in which a transaction is entered.

For example, if the base time zone is Universal Coordinated Time (also known as Greenwich Mean Time), a time entered as 10 a.m. U.S. Eastern Standard (EST) time is stored as 6 p.m. because of the time difference between the two locations. Although the time is stored as 6 a.m., it can still appear to the user as 10 a.m. EST. In fact, it can appear as the appropriate time for any time zone that you choose. You can also set up the system to enable users to choose the time zone for specific time or datetime displays.

To support display in alternate time zones, PeopleSoft maintains a global list of time zones, including information about daylight savings time observances. When a time zone begins or ends in daylight savings time, both the description of the zone and the times that are associated with that zone are adjusted to reflect the change. This approach ensures chronological consistency throughout an organization's geographically dispersed locations, while allowing for flexibility in how users see times.

Note. All time zone functionality applies to displayed values only. Internally all values are stored and manipulated in the base time zone. This means that all time values in PeopleCode are in database time, even when the time appears to the user in another time zone. This allows for easy comparison and manipulation of times so that the PeopleCode developer does not have to worry about time zone differences. Additionally, all batch processes, such as SQR and COBOL, operate in the base time zone of the system.

Types of Time Zones

PeopleTools defines three types of time zones that are important to the operation of the system:

Base Time Zone

This time zone is the primary system-wide time zone in which PeopleTools processes dates internally and which is used for display when no other time zone is specified. The base time zone must match the time zone in which the database server is operating, specifically the time zone to which the MetaSQL %currentdatetime token returns. For example, in an Oracle database, the base time zone is the time zone in which the SYSDATE system variable is returned. You must enter this time zone on the PeopleTools Options page in order for your system to function correctly.

The base time zone is also used for the following:

- All effective-date processing. Rows become effective when midnight passes on the effective date according to the base time zone of the system.
- Internal processing in PeopleCode and all batch processes.
- Display on pages and in reports, if no other time zone information is specified or available

User Time Zone

This is the time zone in which each system user is currently operating. It is read from the operating system of the user's web browser PeopleSoft Internet Architecture. Although users cannot change their user time zones while logged into PeopleTools, they can do so in their local operating system. Therefore, no validation or business rules are processed based on the user time zone in PeopleSoft. The user time zone is used only for display and data entry purposes.

Specified Time Zone

This is a time zone that a user or the system enters on a page as a fixed time zone for a specific row of data. This time zone is useful for applications where users must see the same time and time zone as those who enter transactions, such as in call processing systems. To implement a specified time zone field, your record must contain a time zone control field.

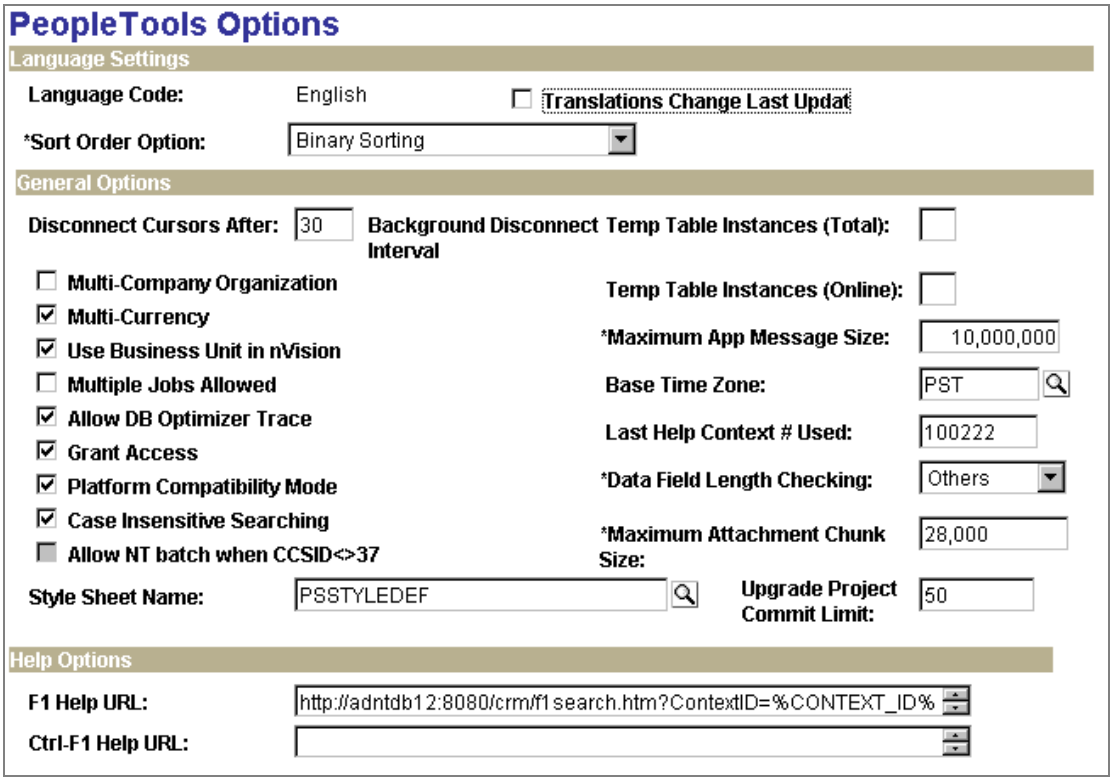
See Also

Controlling Time Zone Display

Setting the Base Time Zone

The base time zone for PeopleTools is the same as the time zone used by the database. In order for PeopleSoft to properly manage time data, the system must know which time zone that is. Enter base time zone information on the PeopleTools Options page.

The base time zone for PeopleTools (as defined on the PeopleTools Options page) must match the time zone used by your database. Any discrepancy between the two will lead to inaccurate time processing.



PeopleTools Options page

To set the base time zone:

1. Select PeopleTools, Utilities, Administration, PeopleTools Options.

   The PeopleTools Options page appears.

2. In the **Base Time Zone** field, select a valid value.

   Values are maintained in the Time Zone component.

3. Click the **Save** button.

Note. After selecting a base time zone during installation, avoid changing it. There is no automated processing to translate existing time information in the database to a new base time zone, and if you change the time zone defined on the PeopleTools Options page, no adjustment is made to the existing time data in your database.

Controlling Time Zone Display

Although times are always stored in the base time zone, you can choose whether a page displays a time in base time or some other time zone.

Time zone display and processing functions operate only on time or datetime fields, not on date fields. This is because all time zone processing requires the knowledge of the time component of the field, which is not provided in date fields. Even if some databases store PeopleSoft date fields internally, as datetime fields, PeopleSoft does not use the time component of these fields.

Control the display using a combination of settings:

Record field properties	Choose whether the time display is based on the base time zone or on another time zone. If you base the display on another time zone, you can specify a time zone control field: the field that is used to determine the time zone.
Page field properties	Choose whether to automatically include the time zone abbreviation in a field that displays time or datetime values.

These two settings work together to control the time display on pages in the PeopleSoft Internet Architecture.

- If the record field properties option specifies that time appears in the *base time zone,* setting the page field properties to show the time zone helps users interpret the time shown on the page.
- If the record field properties option specifies that the time zone of a particular time or datetime field is determined by the time zone control field, then put that control field directly on the page to allow the user to manually select the time zone for a field.
- If you put the time zone control field on the page where users are permitted to enter a time zone, disable the page field properties option that includes the time zone abbreviation in the time field. It's redundant to show the time zone in both places.
- If you don't permit users to enter a time zone manually (for example, if you use the %clienttimezone or %basetimezone system variable to set the time zone), then display the time zone either by including the control field on the page or by setting the page field properties appropriately—not both.

In the Windows client, users can display time values in their local time zones or the system's base time zone, regardless of how the record field properties and page field properties are set. By default, all Windows client time and datetime fields appear in the base time zone, but each

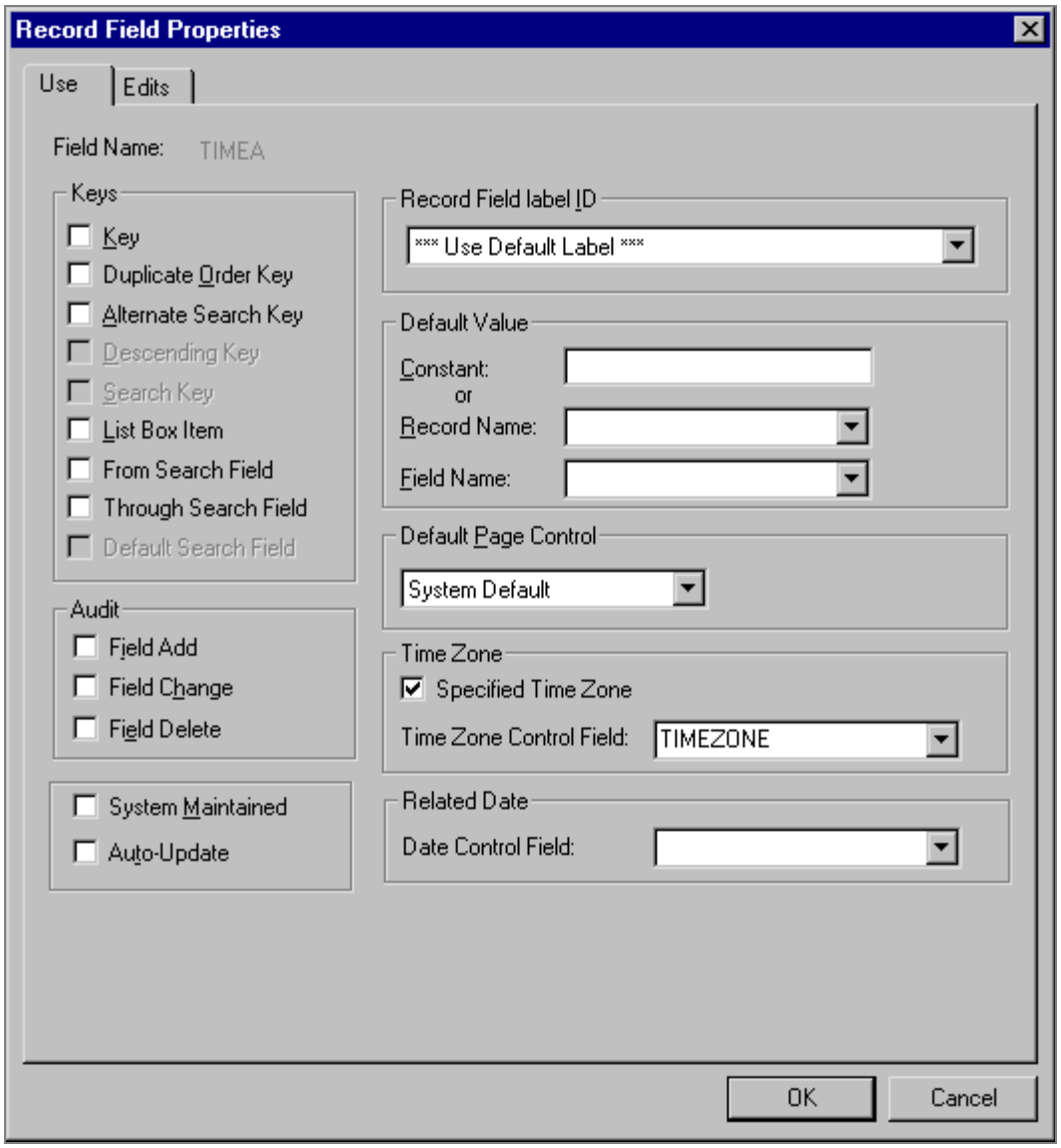
user can override this option by selecting View, Time Display, Local Time or View, Time Display, Database Time.

This section discusses how to:

- Set time zone options in record field properties.
- Set time zone options in page field properties.
- Use PeopleCode functions.

Setting Time Zone Options in Record Field Properties

When a record includes a time or datetime field, choose whether PeopleSoft displays the time in the system's base time zone or in another time zone such as a time zone that corresponds to the user's location. Set this option for all time and datetime fields.



Record Field Properties dialog box: Use tab

To set the time zone that controls the display time:

1. In the record, open the Record Field Properties dialog box for the time field by double-clicking the field that displays the time.

   The Use tab appears.

2. In the **Time Zone** group box, set the time zone property.

   If you leave the **Specified Time Zone** check box clear, the time appears in the database's base time zone (unless overridden by the user using the View, Time Display menu in the Windows client to display in the user's local time zone).

If you select the Specified Time Zone check box**,** the system converts the time according to the time zone that is specified in the **Time Zone Control Field** field. You must specify a time zone control field in this record.

A single time zone control field can control multiple time and datetime fields on the record. Using a single control field causes all times to appear in the same time zone. If you want multiple time or datetime fields to appear in different time zones, you need separate control fields for each of them.

You may want to set the default value of the time zone field to %clienttimezone or %basetimezone. However, the default time zone is used only when the transaction is created. Because the time zone is saved along with the transaction itself, future users who access the transaction will see the time relative to that time zone.

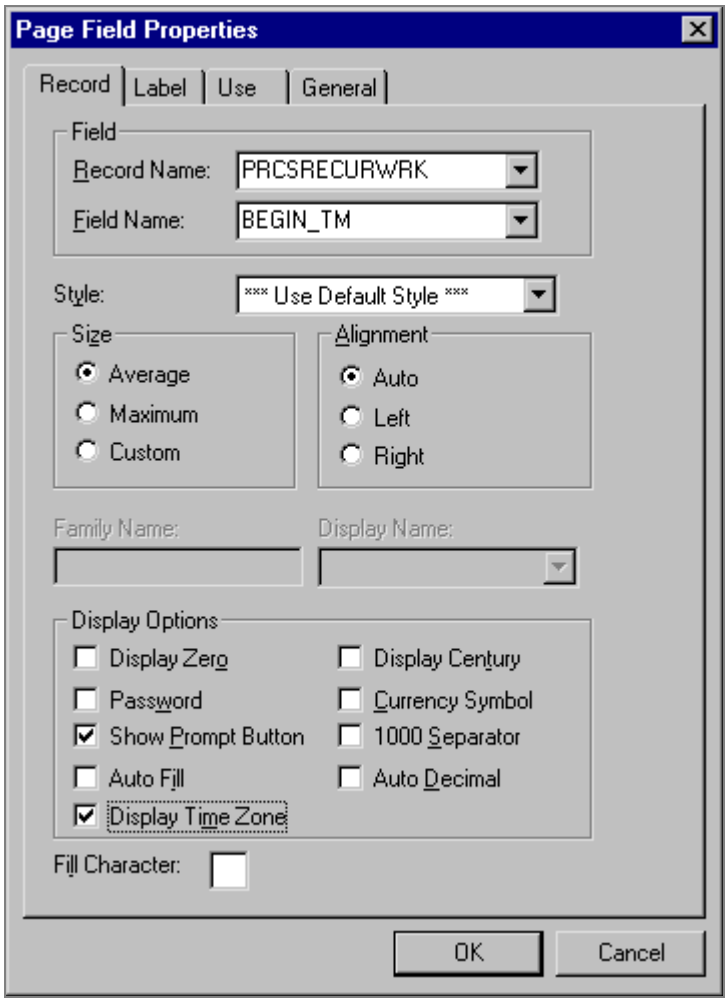
3. Click **OK.**

Setting Time Zone Options in Page Field Properties

When you place a time or datetime field on a page, you can choose whether to display the time zone in the same field where the time appears.

You would normally want to display the time zone this way when you want users to be aware of the time zone of a field without changing the time zone.

If, on the other hand, you want users to be able to set the time zone, don't display the time zone in the time field. Instead, design your page so that it includes a separate drop-down list box referencing the time zone control field. With this design, users can both see and change the time zone.



Page Field Properties dialog box: Record tab

To show the time zone in the time field:

1. On the page, open the Page Field Properties dialog box for the time field by double-clicking the page control that displays the time

   The Record tab appears.

2. Select the **Display Time Zone** check box.

   When you select this check box, the page displays the time zone in the same field as the time and resizes the edit box to allow space for up to 10 additional characters.

   This option has no affect on data entry. Users cannot override the time zone. Users who see the time in Greenwich Mean Time (GMT) must enter the time in GMT.

   If the field that is associated with this page control is not a time or datetime field, selecting the Display Time Zone check box has no effect.

3. Click OK.

Using PeopleCode Functions

There are a number of PeopleCode functions you can use to support the appropriate time zone display on pages. There are two functions that convert times to their base time zone equivalent: ConvertTimeToBase( ) and ConvertDatetimeToBase( ). Another function, IsDaylightSavings( ), establishes whether daylight savings time is in effect on a particular date.

Additionally, you can use two system variables (%clienttimezone and %basetimezone) in PeopleCode programs or as field default values. %basetimezone returns the base time zone of the database and %clienttimezone returns the current user's local time zone.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode, "PeopleCode Built-in Functions," Date and Time

Maintaining Time Zones

You maintain a list of time zones on the Time Zone Data page. PeopleSoft delivers a comprehensive list of time zones, including information about daylight savings time observances. You can update the data if necessary. For example, you can include a time zone for a locality with daylight savings observances that differ from other parts of its time zone.

This section discusses how to:

- View time zone definitions.
- View daylight savings start and end dates.

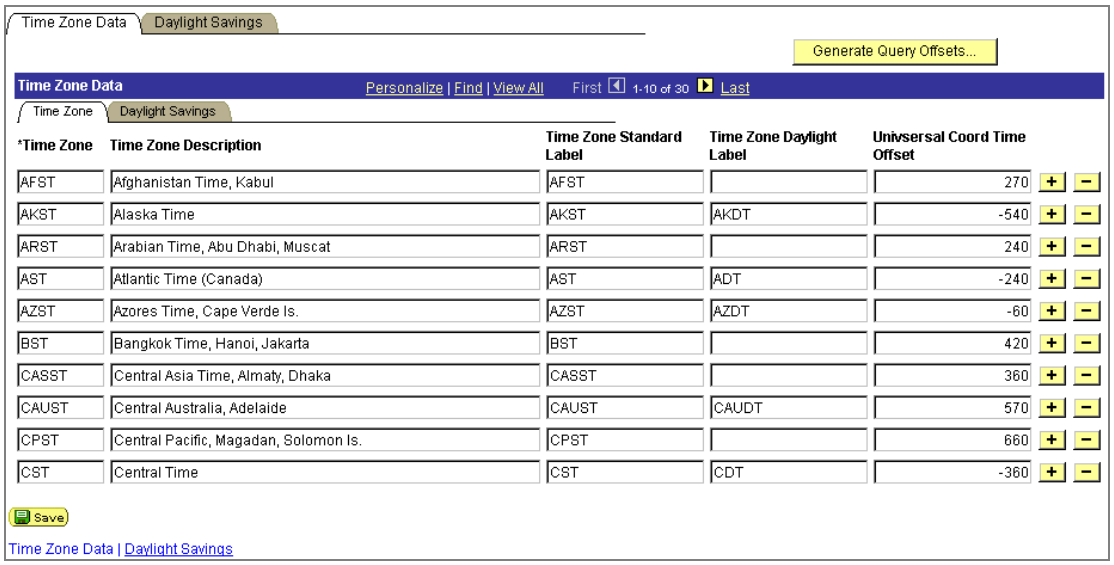
Pages Used to Maintain Time Zones

Page Name	*Navigation*	*Usage*
Time Zone Data	PeopleTools, Utilities, International, Time Zones Data	Review or update time zone data. In particular, specify the start and end days for daylight savings time by referencing a list of standard start and stop days. This list can include days in absolute format (for example, October 1) or in relative format (for example, Last Sunday in October). Entries on this list are not associated with any particular year.
Time Zone Offset Generation	Click the Generate Query Offsets button on the Time Zone Data page: Daylight Savings tab.	Generate query offsets.

Page Name	Navigation	Usage
Daylight Savings	PeopleTools, Utilities, International, Daylight Savings	Review of update time zone data.

Viewing Time Zone Definitions

Access the Time Zone Data page. Select the Time Zone tab.



Time Zone Data page: Time Zone tab

Time Zone Standard Label The label that appears for the time zone during standard time.

Time Zone Daylight Label The label that appears for the time zone during daylight savings time.

Universal Coord Time Offset (universal coordinated time offset) The number of minutes the time is offset from Universal Coordinated Time (UTC), also known as GMT.

A positive offset indicates a time zone east of UTC; a negative offset indicates a time zone west of UTC.

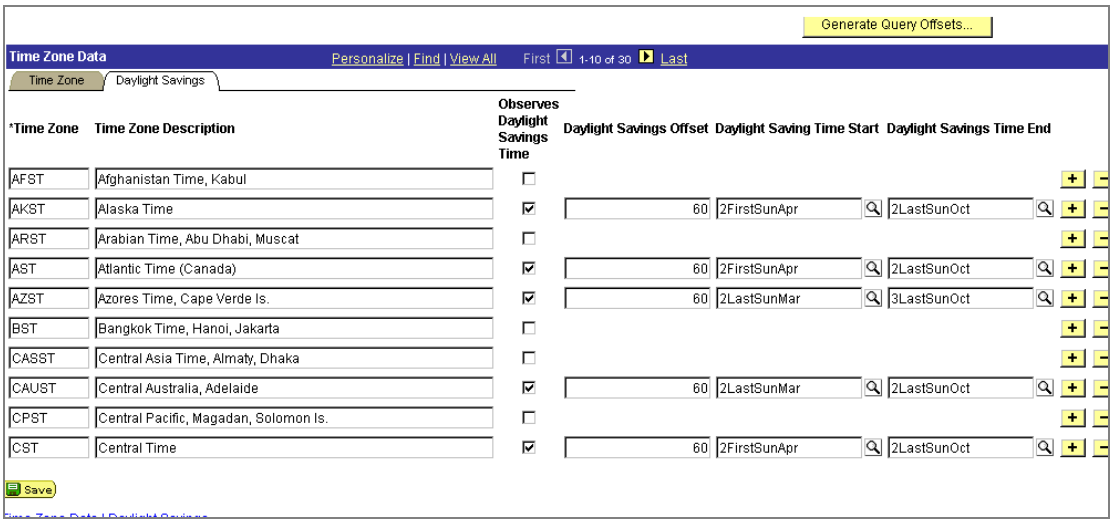
For example, the time zone for India, which is 5 ½ hours east of UTC, has an offset of +330. U.S. Pacific Standard Time (PST), which is 8 hours west of UTC, has an offset of –480.

Generate Query Offsets Takes the information from the Time Zone Data page and populates the PSTZOFFSET table with offsets for all the time zones and their daylight savings time periods for a specified period of time. This makes the time zone information available in a format that can be easily

accessed with Structured Query Language (SQL). This may be useful for the PeopleSoft Query tool.

Daylight Savings Tab

Select the Daylight Savings tab.



Time Zone Data page: Daylight Savings tab

Daylight Savings Offset The number of minutes by which the time is offset during daylight savings time.

Daylight Savings Time Start The day that daylight savings time begins. This field prompts against values from the Daylight Savings page.

Daylight Savings Time End The day that daylight savings time ends. This field prompts against values from the Daylight Savings page.

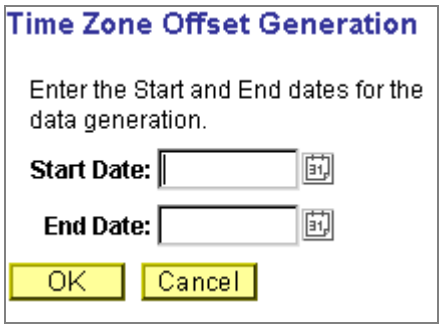
Generate Query Offsets Click this button to open the Time Zone Offset Generation page.

Takes the information from the Time Zone Data page and populates the PSTZOFFSET table with offsets for all the time zones and their daylight savings time periods for a specified period of time. This makes the time zone information available in a format that can be easily accessed with SQL. This may be useful for the PeopleSoft Query tool.

PeopleSoft does not require that you populate this table; you need to do so only if you require access to this information. If you do use the information, regenerate the offsets anytime the underlying time zone data is changed.

Generating Query Offsets

Access the Time Zone Offset Generation page.



Time Zone Offset Generation page

To generate query offsets:

1. From the Time Zone Data page: Daylight Savings tab, click the **Generate Query Offsets** button.

   The Time Zone Offset Generation page appears.

2. Enter a Start Date and an End Date.

   Select a reasonable range of dates. With the time zones delivered by PeopleSoft, more than 100 rows are generated for each year.

3. Click OK.

   The data is generated for the table. Any existing data for the same range of dates is overwritten.

For example, the following data from the PSTZOFFSET table represents one time zone, EST for a two-year period, from 01/01/1999 to 01/01/2001. It is based on a system with PST as the base time zone. When you generate query offsets, the PSZOFFSET table contains similar data for all the time zones.

TIMEZONE	STARTDATETIME	ENDDATETIME	BASEOFFSET	TIMEZONELABEL
EST	1999-01-01 00:00:00.000	1999-04-03 23:00:00.000	180	EST
EST	1999-04-03 23:00:00.000	1999-04-04 02:00:00.000	240	EDT
EST	1999-04-04 02:00:00.000	1999-10-30 23:00:00.000	180	EDT
EST	1999-10-30 23:00:00.000	1999-10-31 02:00:00.000	120	EST
EST	1999-10-31 02:00:00.000	2000-04-01 23:00:00.000	180	EST
EST	2000-04-01 23:00:00.000	2000-04-02 02:00:00.000	240	EDT
EST	2000-04-02 02:00:00.000	2000-10-28 23:00:00.000	180	EDT
EST	2000-10-28 23:00:00.000	2000-10-29 02:00:00.000	120	EST
EST	2000-10-29 02:00:00.000	2001-01-01 00:00:00.000	180	EST

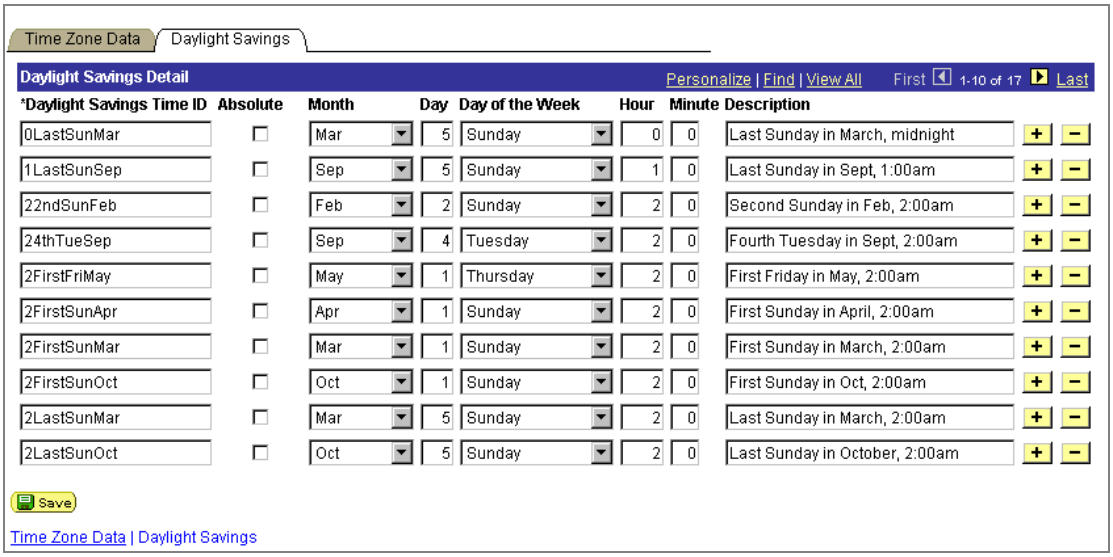
PSTZOFFSET table

The first row of data shows that from 1999-01-01 at midnight until 1999-04-03 at 11 p.m. (base time—PST, in this case), the offset between EST and the base time zone is 180 minutes, meaning that EST is 180 minutes ahead of PST. The label for EST during this period is *EST*.

The second row shows that from 1999-04-03 at 11 p.m. until 1999-04-04 at 2 a.m., there is a 3-hour time period during which EST is 240 minutes ahead of PST. This is because EST has changed to daylight savings time, but PST hasn't changed yet. The label for EST during this period is *EDT:* Eastern Daylight Time.

Viewing Daylight Savings Start and End Dates

Access the Daylight Savings page.



Daylight Savings page

Daylight Savings Time ID A unique identifier for the date.

Absolute Indicates whether the date is an absolute date. Leave this check box clear to indicate a relative date, such as ***Last Sunday in October.***

Day For absolute dates, this is the day of the month.

For relative dates, the numbers ***1, 2, 3,*** and ***4*** represent the first, second, third, and fourth occurrence of the day of the week; for example, to describe the second Sunday in February, enter ***2.***

The number ***5*** for a relative date indicates the last occurrence of the specified day of the week, even if that day of the week occurs only four times in the month.

CHAPTER 3

Controlling Currency Display Format

This chapter discusses how to:

- Maintain currency-specific settings.
- Set up a currency amount field.
- Set currency field display properties.
- Use system-wide multi-currency settings.
- Resize currency fields using the international field size report.

Maintaining Currency-Specific Settings

PeopleTools can format a currency amount that appears on a page or a report based on both your numerical format preferences and on the currency that the amount represents.

Some display settings, such as the characters that are used for the thousands and decimal separators, are based on your language preference. Others, such as the currency symbol and the decimal precision, are based on the properties of the currency in which the amount appears. Those properties include the following:

- A currency symbol, such as $ for the Australian dollar, € for the Euro, or L for the Italian lira.
- A decimal precision.

  For example, there are two decimal positions for Australian dollars ($5.00), but no decimal positions for the Italian lira (500 L).

Currency information is stored in the Currency Code table (CURRENCY_CD_TBL) record definition along with other information about all the currencies used in your implementation.

The currency symbol is controlled by the CUR_SYMBOL field.

The decimal precision for a currency is controlled by the DECIMAL_POSITIONS field.

Note. PeopleSoft provides updates to the Currency Code table containing the latest values from the ISO Standard 4217, "Codes for the representation of currencies," with each PeopleTools minor release. See your PeopleSoft Installation and Administration Guide for details on how to load these updates. Even though PeopleSoft provides these standardized values, we do not provide a full list of the symbols used by each currency, as this is not part of the ISO standard. Use the Currency Code page to check and set the appropriate currency symbol for each currency that you plan to use in your implementation.

The navigation to the page where you maintain currency code information depends on which applications you are using. Information about maintaining currency codes is in the PeopleSoft Application Fundamentals PeopleBook for your product line.

Setting Up a Currency Amount Field

To set up a currency amount field:

1. Ensure that the record definition has an appropriate currency control field.

   The currency control field must be in the same record as the currency display field and hold a valid Currency Code value. This means it must be a *Char* (character) field with a length of *3*, formatted in *Upper* (uppercase). You can use an existing field or define a new field. The field does not need to be named *CURRENCY_CD;* it can have any valid PeopleSoft field name, however if there is only one amount field on the record, we recommend that you stick with the CURRENCY_CD fieldname for consistency with other PeopleSoft applications.

   An example of a record with two currency-controlled amount fields is the CURRENCY_EXCHNG (currency exchange) record. The two amount fields on this record are: FROM_AMT (from amount) and CONVERTED_AMT (converted amount)—each of which has a currency control field: *FROM_CUR (from currency)* and *TO_CUR* (to currency), respectively.

2. Ensure that the edit properties of the currency control field are set up correctly.

3. Set the currency control field property of the currency amount record field.

   You must associate the field containing the amount with the currency control field.

   Open the Record Field Properties dialog box for the currency amount field by right-clicking the record field in the record definition and selecting Record Field Properties from the pop-up menu.

   In the **Currency Control Field** drop-down list box, select the appropriate currency control field for the currency amount field.

4. Click **OK** to accept the property settings.

5. Save the record definition.

Setting Currency Field Display Properties

When you place a currency amount field on a page, you can choose whether to display the currency symbol in the amount field along with the numerical amount and whether to display a thousands separator. Regardless of whether you choose to display the symbol in the field, it is not stored in the database. Currency field formatting is only performed if the "Multi-Currency" option is enabled on the PeopleTools Options page. See the following section for details.

To set currency field display properties:

1. Display the field's Page Field Properties dialog box.

   To open the Page Field Properties dialog box for the currency field, right-click on the page field and select Page Field Properties from the pop-up menu.

2. Set the currency display options.

   Select the **Currency Symbol** check box to display the currency symbol (as defined for the currency in the Currency Code table). Clear the check box if you don't want to display the symbol.

   Select the **1000 Separator** check box if you want the currency amount to appear using a thousands separator character. The specific character used as the thousands separator is determined by your international preference.

3. Click **OK** to accept the dialog box settings.

4. Save the page definition.

See Also

"Controlling International Preferences," Understanding Locale Based Formatting

Using System-Wide Multi-Currency Settings

The Multi-Currency check box on the PeopleTools Options page is a system-wide switch that enables:

- Automatic formatting of those currency amount fields that have associated currency control fields.
- Validation of user entry against the currency's defined decimal precision and causes the system to issue an error if the user attempts to enter a decimal precision that is greater than the precision allowed by the currency code definition.
- The display of global currency control fields.

You can design an application so that fields that are specifically related to multiple currencies can appear globally or hiden depending on the implementation. Remember that

although fields flagged as multi-currency fields are hidden from pages when the multi-currency PeopleTools Option is disabled, the field still exists in the page buffer, so if it is a required field it must have a default value.

- The hiding of all fields.

If you implement the application in an enterprise that uses only a single currency, you can hide all the fields by clearing the Multi-Currency check box. If the enterprise later begins to use multiple currencies, you can redisplay the multi-currency fields by selecting the check box. You should apply this technique only to fields that can be globally hidden without affecting the functionality of the application when working in a single currency. Use this technique for user-operated currency control fields, but not fields that actually display currency. You would also need to set the defaults of the currency display fields to the single currency used by the enterprise.

Unless you specifically want to maintain your entire system in a single currency, the Multi-Currency check box will remain selected.

This section discuss how to:

- Connect a currency control field to the system-wide multi-currency check box.
- Enable or disable system-wide currency settings.

Connecting a Currency Control Field to the Multi-Currency Check Box

To connect a currency control field to the system-wide multi-currency check box:

1. Display the field's Page Field Properties dialog box.

   To open the Page Field Properties dialog box for the currency field, right-click on the page field, and select Page Field Properties from the pop-up menu. In the Field Properties dialog box, select the Use tab.

2. Select the Multi-Currency Field check box to specify that this field can appear or hide from the PeopleTools Options page.

3. Click **OK** to accept the settings.

4. Save the page definition.

Enabling or Disabling System-Wide Currency Settings

To enable or disable system-wide currency settings:

1. Select PeopleTools, Utilities, Administration, PeopleTools Options.

   The PeopleTools Options page appears.

2. Select or clear the Multi-Currency check box.

   Selecting the check box activates automatic currency formatting; clearing the check box disables automatic currency formatting.

   If any page fields have the Multi-Currency Field option selected in the Page Field Properties dialog box, selecting the Multi-Currency check box displays those page fields; clearing the check box hides the page fields.

3. Save the PeopleTools Options page.

Resizing Currency Fields Using the International Field Size Utility

PeopleSoft applications are typically shipped with amount fields sized at fifteen integer positions and three decimal positions. However, some older applications may be shipped with smaller field sizes, and should you wish to use a greater precision, you may need to run the International Field Size utility. If the Installation Guide for your product requires it, you should use the Set International Field Sizes (TLSINST1) Structured Query Report (SQR) utility to increase the length and number of decimal position settings of field definitions. For example, you may need to do this if you process low-value currencies that require numeric fields that are longer than those provided in your standard application.

PeopleTools delivers the International Field Sizes table populated with suggested lengths for numeric fields that may require a large number of digits for certain currencies. You can edit the contents of this table to suit your own requirements, adding and deleting fields and adjusting the new field sizes and decimal positions as necessary. Keep in mind the limitations on numeric field size and precision imposed by your database platform, and the fact that some numeric fields are used in COBOL and may require COBOL working storage changes in addition to the changes performed by this utility.

To resize international currency fields:

1. Start the PeopleTools International Field Size utility.

   Select PeopleTools, Utilities, International, Process Field Size to display the International Field Size page. The International Field Size page shows the name of each field that will be adjusted, the current size of the field, and the proposed new size of the field (stored in the International Field Sizes table [PS_INTL_FLDSIZ_TBL]).

2. Edit the data in the International Field Sizes table.

   Adjust the new field sizes to meet your own requirements. You can insert or delete rows from the page.

3. Save your changes to the International Field Sizes table.

4. Run the Process Request Dialog.

   Click Run to open the Process Scheduler Request page. Set the report options, and then click OK to run the TLSINST1 SQR.

The utility updates the field definitions and creates a report showing all page fields that have been impacted by the changes in field size.

5. Check all affected pages, and rearrange page fields as necessary to rectify overlap.

   Check each page where the page field size has changed, and rearrange the fields on the page as necessary to prevent page fields from overlapping.

   The process does not update page field information such as overlapping fields that may be caused by an increase in field length, however, the system automatically adjusts the sizes of any page fields with a Size property set to *Average* or *Maximum.* If the page field size is set to custom, it will not be adjusted. If the page field is too small, the larger amount can still be entered; however, users may have to scroll to the right to see the full amount, and the truncated amount may be misleading.

6. Rebuild (SQL ALTER) any tables that have been affected by the changes in field sizes.

   Use the PeopleSoft Application Designer Build feature, with the Alter Tables option, to build (using SQL ALTER) any tables that have been affected by the changes in field size. Use the Find Object References features to determine which tables have been affected, or create a query against the PSRECDEFN, PSRECFIELD, and PS_INTL_FLDSIZ_TBL tables. For example:

```
SELECT DISTINCT A.RECNAME
FROM PSRECDEFN A, PSRECFIELD B, PS_INTL_FLDSIZ_TBL C
WHERE A.RECNAME = B.RECNAME
  AND B.FIELDNAME = C.FIELDNAME
  AND A.RECTYPE = 0
```

CHAPTER 4

Global Reporting and Analysis

This chapter discusses:

- Language-sensitive queries.
- Crystal Reports.
- PeopleSoft Cube Manager.
- The Strings table.
- SQR globalization.
- nVision
- International Versions of Microsoft Excel

Language-Sensitive Queries

PeopleSoft Query supports language-sensitive query output. If you create a query on a table that has a related language record, or if your query includes such a table, PeopleTools automatically performs the language lookup on the related language record. This means that the output of the query appears in the current, preferred language (if translations exist in the related language tables).

For example, if you built a simple query on the Country table (COUNTRY_TBL), the country descriptions in your query would appear in your preferred language, even through you queried the base language record (COUNTRY_TBL) and not the related language record (COUNTRYTBL_LANG). PeopleSoft Query performs the necessary join to the related language table to retrieve the translations; if they don't exist, it retrieves the descriptions in the database's base language.

You should keep in mind that the related language join is performed only when you run the query. Therefore, if you create a query as an English user and then execute the same query as a French user, the output appears in French, even though the query was created in English. The language preference of the user who is running the query drives the language joins.

Note. The language lookup is applied only to the data that is *output* by the query. WHERE criteria, HAVING criteria, and ORDER BY clauses are applied only to the base-language data. For example, assuming that the base language of your database is English, if you set a WHERE criterion that restricts country *descriptions* to those that begin with *Ger,* PeopleSoft Query retrieves the *Allemagne* country description when the query is run by a French language user. This is because the English description of *Allemagne* is *Germany*, which begins with *Ger.*

The automatic language join features in PeopleSoft Query are also used when you access your PeopleSoft database via the PeopleSoft Open Query ODBC interface.

Scheduled Queries

For scheduled queries, the system uses the language specified in the user's profile. It does not use the language selected during signon. The system will also use the International and Regional settings the user has specified using My Personalizations. If no personal setting have been specified, the system uses the default installation international settings.

Note. Most PeopleSoft components can default to international settings from the browser if the user has not set any user specific settings. However, this is not available for scheduled queries or any Process Scheduler processes.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Query

Crystal Reports

There are three very distinct components to dealing with Crystal Reports in multiple languages:

- Data returned by the report
- Report layout and boilerplate text
- Crystal Reports Designer/Runtime language version

See Also

*PeopleTools 8.4 PeopleBook: Crystal Reports for PeopleSoft, "*Using Crystal Reports*"*

Data returned by the report

Data returned by Crystal Reports is fetched from the database using PeopleSoft Query, so is already language-sensitive due to the automatic joining to related language tables that

PeopleSoft Query performs. No special logic is required to ensure that appropriate descriptions from related language tables are returned in Crystal Report output.

Report Layout and Boilerplate Text

The Crystal Reports .RPT file contains the layout of the report and any text that is hard-coded into the layout such as column headings, headers and footers. As Crystal Reports does not provide any ability to maintain multiple translations of this boilerplate text in a single RPT file, you must maintain separate copies of the report layout for each language.

On the file and report servers, PeopleTools maintains separate directories within the <PS_HOME>\CRW directory that correspond to the language codes that are available for your PeopleSoft implementation. Each directory contains the appropriate report in the specified language, if the report has been translated. Based on the user's preferred language, PeopleTools tries to find the directory that corresponds to the user's language preference and reads the report from there. If the system cannot find the report in the directory that corresponds to the user's language code, then it goes back to the base language directory <PS_HOME>\CRW and uses the report that it finds there. Finally, if the report is not found in the directory corresponding to the user's current language or in the base directory, the copy of the report in the <PS_HOME>\CRW\ENG directory is used.

Crystal Reports Designer/Runtime Language Version

The Crystal Reports product itself is available in several different language editions. PeopleSoft ships the appropriate edition of Crystal Reports based on the languages you have licensed from PeopleSoft. Each language version of Crystal Reports is functionally identical, the primary difference being the language of the Crystal Reports designer user interface. You don't need to match the language of the Crystal Reports design or runtime engine to the language of the report you are creating.

However, there is one important exception – the ToWords( ) function in Crystal converts numerical amounts into a textual representation of that amount, such as required on checks. For example, ToWords(10,500) returns "ten thousand, five hundred". The language of the output of the ToWords( ) function depends on the language of the Crystal Reports engine you have installed on your report server. If you are planning on running reports using ToWords( ), you must ensure that the appropriate language version of Crystal for the language of the output of ToWords( ) is installed on your report server. This may require several reports servers, as each Windows installation can only support one version of Crystal Reports at a time.

Note. Because the Crystal Reports product does not support Unicode, you are limited to a single character set in each report. For example, you can't mix French and Japanese data in the same report; instead, you must run the report once in each language on a Windows installation with a default non-Unicode (ANSI) codepage matching the character set required for the language. For example, you must run Crystal reports containing Japanese characters on a Japanese Windows machine (or a Windows 2000 machine with a default ANSI codepage of CP 932 (Japanese) , but can run Crystal reports containing Spanish characters on any Windows machine using a Western European (CP 1252) codepage, including English, German, French and Spanish versions of Windows.

PeopleSoft Process Scheduler uses the PSCRRUN.EXE process to execute Crystal reports. This section discusses the language parameter for PSCRRUN.EXE.

Language Parameter for PSCRRUN.EXE

PeopleSoft Process Scheduler uses the PSCRRUN.EXE process to execute Crystal reports. The process's language code parameter specifies the language directory that PSCRRUN.EXE uses to fully qualify the report path. Unlike Structure Query Reports (SQRs), PSCRRUN.EXE searches for a separate Crystal report file for each translation of the report. The language directory parameters are needed because each language-specific report is stored in a separate language directory. If the report is not found in the language that is specified by the parameter, PSCRRUN.EXE looks in the default, base-language directory.

Typically, the language parameter is passed to PSCRRUN.EXE from the run control that is associated with your Crystal report.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Process Scheduler

PeopleSoft Cube Manager

In PeopleSoft Cube Manager, you can build both Cognos PowerPlay cubes and Hyperion Essbase cubes that display translated data. The cubes themselves do not have to be translated; they work by accessing the translations (stored in related language tables) of language-sensitive query output and tree nodes that correspond to the cube's members.

This section discusses:

- Cognos PowerPlay local-language cubes.
- Hyperion Essbase multiple-language cubes.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Cube Manager

"Translating Application Definitions," Translating Trees

"Working With Language-Sensitive Application Data"

Cognos PowerPlay Local-Language Cubes

Cognos PowerPlay cubes are not language-sensitive. You must build a separate cube in each language that your implementation supports; users must then access the language version of the cube that matches their language preferences.

When you build a PowerPlay cube instance, you can override the default language in which the cube is built. If you do not override the language, PeopleSoft Cube Manager builds the PowerPlay cube using the database's base language.

Each PowerPlay cube instance is built using a single language. This language can be the database's base language or any non-base language that your implementation supports. If the cube is built in the base language, then all language-sensitive elements appear in the base language. If the cube is built in a non-base language, then the cube's language-sensitive elements appear in that language using translations of language-sensitive query output and tree nodes. If the language-sensitive fields for the query output and tree nodes have not been translated into the cube's language, the cube displays the base-language descriptions.

To override the language of a Cognos PowerPlay cube:

1. Select PeopleTools, Cube Manager, Build, Cube Instances.

   Use the standard search method to access the Cube Inst Def (cube instance definition) page.

2. Confirm that the **Analysis Platform** field is set to *Cognos PowerPlay*.

3. Click the **Platform Options** link.

   The PowerPlay Options page appears.

4. Select the desired language in the **Language Override** field.

5. Click the **OK** button to close the page.

6. Save the component.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Cube Manager, "Designing Cubes".

Hyperion Essbase Multiple-Language Cubes

When building a Hyperion Essbase cube instance, you specify the languages that the cube supports. These can be the database base languages and any other languages supported by the implementation. When users access the cube in Essbase Administrator (or in the Essbase Excel Client), they can choose to view aliases for the cube members (stored on Essbase alias

tables) in any of the supported languages. The translations of the aliases are derived from language-sensitive query output and tree nodes, so the translated aliases appear only if the tree nodes have been translated and the query data is language-sensitive and has been translated. Specific elements that have not been translated appear in the database's base language.

See the Essbase documentation for information about using Essbase alias tables.

Specify the languages that supported by an Essbase cube when you define the Essbase cube instance. If no languages are specified, no local-language Essbase alias tables are built, and the cube member descriptions appear in the database's base language.

To specify the languages of an Essbase cube instance:

1. Select PeopleTools, Cube Manager, Build, Cube Instance.

   Use the standard search method to access the Cube Inst Def (cube instance definition) page.

2. Confirm that the **Analysis Platform** field value is *Hyperion Essbase***.**

3. Click the Platform Options link.

   The Essbase Advanced Options page appears.

4. From the **Language Code** drop-down list, select the cube's supported languages.

   To set the value of a prompt field, click in the field and then choose from the list of supported languages. To insert a new language, click the Add button. To remove a language from the list of languages that are supported by the cube, click the Delete button.

5. Click **OK** to close the page.

6. Save the component.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Cube Manager, "Designing Cubes".

The Strings Table

The PeopleTools Strings table (STRINGS_TBL) stores textual strings used for language-sensitive labels and other text in PS/nVision and SQRs to avoid hard-coding labels into the report files themselves. The use of strings rather than hard-coded text in reports enables translators to translate the report layout in the database without editing the report's code itself. This enables you to run a single copy of a report in multiple languages, while avoiding the duplication of code and report logic.

Each row in the Strings table keys each string to a STRING_ID, which is associated with one of two different string types:

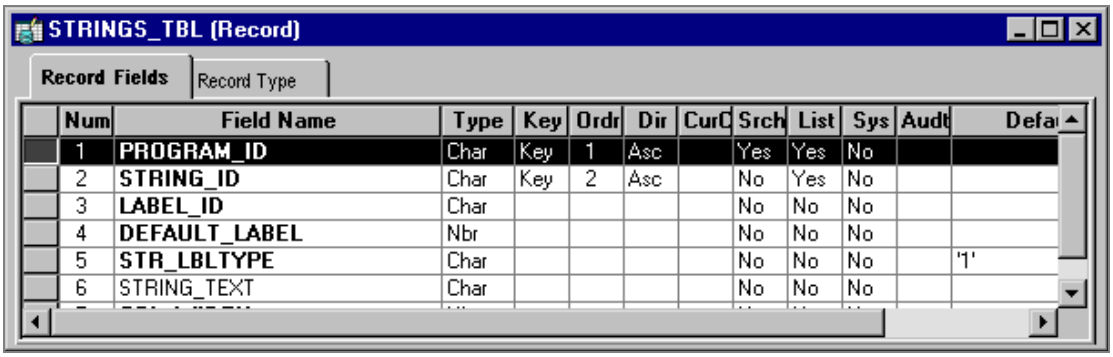
- The short (RFT Short) or long (RFT Long) field description of the field.

The STRING_ID must equal the field name.

- A free-form text string.

In either case, when a report requests a string in a particular language, the system returns the translated string if a translation is available. If no translation exists, the base language string is returned.

The Strings table is also keyed by a PROGRAM_ID field, which enables you to classify strings into groups that are used in similar reports. PROGRAM_ID can refer to a specific SQR or PS/nVision report name, or it can be a mnemonic for a group of common strings that are shared between reports.



Num	Field Name	Type	Key	Ordr	Dir	CurC	Srch	List	Sys	Audt	Defa
1	PROGRAM_ID	Char	Key	1	Asc		Yes	Yes	No		
2	STRING_ID	Char	Key	2	Asc		No	Yes	No		
3	LABEL_ID	Char					No	No	No		
4	DEFAULT_LABEL	Nbr					No	No	No		
5	STR_LBLTYPE	Char					No	No	No		'1'
6	STRING_TEXT	Char					No	No	No		

STRINGS_TBL record definition

This section discusses how the system uses the string variables in the Strings table to evaluate PS/nVision string variables.

See Also

SQR Globalization

Evaluation of PS/nVision String Variables

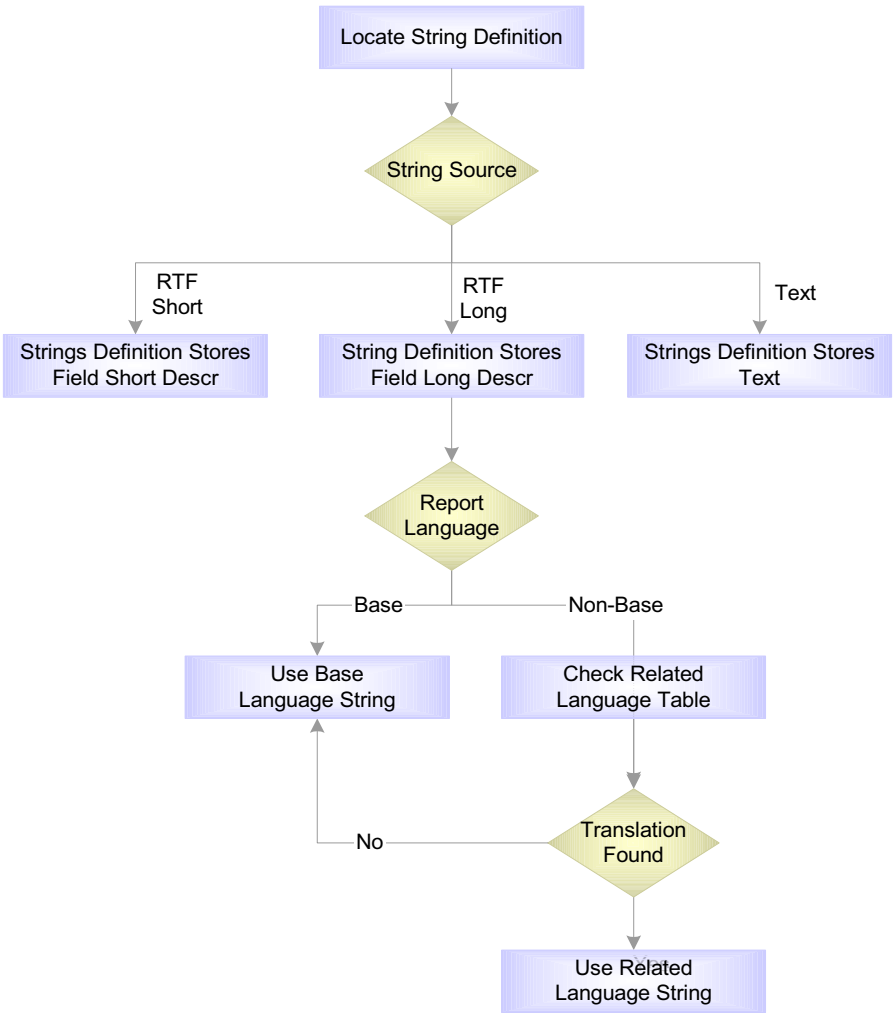
The system uses the string definitions in the Strings table to evaluate PS/nVision variables based on three factors:

- A program ID, which identifies a set of strings used in similar reports.
- A string ID, which uniquely identifies the string definition within a program ID group.
- The language of the report request. If no language is specified, the system assumes the preferred language of the current user.

The syntax of a PS/nVision string variable includes the string ID and the program ID:

```
%.StringID,ProgramID%
```

The following flowchart shows how the system evaluates language-sensitive string variables:



Evaluation of SQR and PS/nVision string variables

The evaluation follows this sequence:

1. The system locates a string definition in the Strings table using values for the program ID and string ID.

   The text string stored in the Strings table (or its related language table) can be a short or long field description (validated against the PSDBFIELD or PSDBFIELDLANG table) or a free-form text string that is not associated with a field.

2. The system determines the language of the report request. If the value is unspecified, the system uses the user's current language preference setting.

3. If the language is the system's base language, the system retrieves the string values from the base-language Strings table (STRINGS_TBL).

4. If the system is a non-base language, the system looks for a string with the correct language code in the related-language table (STRINGS_LNG_TBL).

5. If no translation exists in the related-language table, the system uses the string in the base-language table (this is the default).

See Also

"Translating Database Definitions," Translating Strings.

SQR Globalization

SQR provides a range of features to allow not only for multi-language reports, but also to handle international date/time formatting, paper sizes, numeric formatting and much more. This section discusses some of the internationalization features of SQR:

- SQR Printing for A4 paper.
- Currency precision.
- Date and time formatting.
- SQR report translation.
- Required settings for SQR and Unicode.
- Additional options for SQR and Unicode.

See Also

PeopleTools 8.4 PeopleBook: SQR for PeopleSoft Language Reference, "SQR Command Reference"

SQR Printing for A4 Paper

PeopleTools supports printing both A4 and US Letter sized paper. Changing the PAPER_SIZE setting in SETENV.SQC changes the paper size from Letter to A4 for all reports that share the same file/report/batch server directory.

Currency Precision

NUMBER.SQC enables you to make use of currency precision, both in terms of character string values—in other words, with an edit mask—and numeric values, rounded to a specified precision. Use these functions to achieve your currency precision requirements:

```
Format_Currency_Amt
Format_Currency_Amt_Numeric
```

Documentation of these functions can be found in the comments block at the top of the NUMBER.SQC SQR include file.

Date and Time Formatting

The DATETIME.SQC program provides several procedures to aid in formatting of date and time values for display in report output. While DATETIME.SQC provides generic procedures for formatting dates and times, the actual format used for date and time values can vary in each report. By default, when printing dates and times, reports use the system-wide default date and time formats that are specified in SETENV.SQC.

During your PeopleSoft installation, you should edit SETENV.SQC to specify the system-wide default format you prefer for date and time values. Edit the following lines in your SETENV.SQC to tell the SQR which format you prefer, if it is not otherwise specified in the SQR report source.

```
#define Year4       '1'             !0 = 2 digit year
#define Prompt-Date mm/dd/yyyy
#define Prompt-Mask 'MDY'
#define DateType    '0'             !iDate 0 = mdy, 1 = dmy 2 = ymd
#define TimeDisplay '1'             !iTime 0 = 12hr, 1 = 24hr
```

Based on these settings or any overrides, procedures in DATETIME.SQC provide support for various date formats. The following table identifies these formats and provides examples of the date December 14, 2000, in each.

SQR Date Format	*Description*	*Example*
{DEFDMY}	DD/MM/YYYY	14/12/2000
{DEFMDY}	MM/DD/YYYY	12/14/2000
{DEFKAN}	Japanese Kanji-format dates (using the Japanese Imperial calendar)	平成12年12月14日
{DEFROM}	Japanese Romaji-format dates (using the Japanese Imperial calendar)	H.12.12.14

For details on how to include date/time formatting in your own SQR reports, refer to the documentation inside the comment block of the DATETIME.SQC SQR include file on your file server. If you plan to use Japanese date formatting in your SQR report, remember to include *#define JapaneseDates* at the top of your SQR report.

SQR Report Translation

PeopleTools enables you to print or format SQR output for multiple languages using string definitions that are stored in the Strings table. The procedures defined in SQRTRANS.SQC enable your SQR program to access these strings dynamically.

To enable the use of the Strings table in your SQR, you must include the PeopleTools SQC file SQRTRANS.SQC, which includes the routines that are necessary to initialize and load translated strings from the Strings table.

SQRTRANS.SQC has four main functions that can be called from your report:

- Init_Report_Translation
- Get_Field_Information
- Append_Report_Translation
- Add_Report_Translation

Init_Report_Translation

Call the Init_Report_Translation procedure from your SQR before using any of the string table information. Typically, you should call Init_Report_Translation in the Init-Report section of your SQR. Init_Report_Translation takes two parameters:

Parameter Name	*Description*
$Report_ID	$Report_ID is normally the name of your SQR. This parameter is used as the program ID when looking up strings in the Strings table.
$Report_Language	$Report_Language indicates the preferred language for the strings that are being retrieved. Init_Report_Translation attempts to load all strings in the language specified; however, if a translation for any string does not exist, it loads the base language description for that string.

If you want to change languages during the processing of an SQR report (for example, if you want each page of the report to be in a different language), you can call Init_Report_Translation multiple times within a single SQR, each time passing a new $Report_Language value.

Get_Field_Information

Call the Get_Field_Information procedure for each string that you want to retrieve from the Strings table. It retrieves the label or string table entry for the field specified and places it in a report variable. You can then print the contents of this variable on your report as a label, column heading, or free text. Get_Field_Information takes four parameters:

Parameter Name	*Description*
$Report_ID	$Report_ID is normally the name of your SQR. This parameter is used as the program ID when looking up strings in the Strings table. You must have already called Init_Report_Translation specifying this $Report_ID before passing it to Get_Field_Information.
$Field_ID	This is the string ID of the string whose text you want to retrieve. It must exist as an entry in the Strings table under the $Report_ID that you specified.
$Field_Text	$Field_Text is the output variable. Get_Field_Information populates this variable with the text that corresponds to the $Report_ID and $Field_ID that are specified in the preferred language or in the database's base language (if a translation doesn't exist in the preferred language).

Parameter Name	Description
$Field_Width	$Field_Width is an output variable that Get_Field_Information populates with the width of the text string that is returned.

Append_Report_Translation

If your SQR program uses strings from more than one Strings table program ID, call Append_Report_Translation to add the strings from another program ID to the initialization array created by Init_Report_Translation. This function is particularly useful if you have a set of strings that are used across many of your SQR programs. You can group these strings under a generic program ID and use them in multiple SQRs.

Append_Report_Translation takes a single argument: $Report_ID. It assumes the same language that was specified in Init_Report_Translation. It must be called after Init_Report_Translation.

Add_Report_Translation

The Add_Report_Translation procedure calls Init_Report_Translation or Append_Report_Translation, depending on whether the Strings table has been initialized. It takes the same arguments as Init_Report_Translation. If Init_Report_Translation has not yet been called during the processing of this SQR, this function calls it, passing both parameters. If Init_Report_Translation has already been called, Add_Report_Translation calls Append_Report_Translation, passing only the $Report_ID parameter.

This function is useful in your own SQC files if you cannot be certain that the calling SQR program has already initialized the Strings table. The function ensures that the table is initialized or appended to correctly.

Sample Strings Table Enabled SQR

The following sample code demonstrates how to use the Strings table to retrieve string values in SQR, using the procedures described in the preceding sections.

```
!************************************************
!  SAMP001:  Report on database's base language *
!************************************************
#include 'setenv.sqc'    !Set environment
begin-report
  do Init-Report
  do Process-Main
  do Reset
end-report
begin-heading 6
do Get_Field_Information ('SAMP001',    'REPORT_TITLE', $REPORTTITLE,   #DWRT)
do Get_Field_Information ('SAMP001',    'EXPLAIN_TEXT', $EXPTEXT,       #DWET)
PRINT $REPORTTITLE       (1)    CENTER
PRINT $EXPTEXT           (+2,1)
end-heading
```

```
begin-procedure Init-Report
 move 'SAMP001' to $ReportID
 move 'ENG' to $Language_cd
 do Init_Report_Translation ($ReportID, $Language_cd)
 do Append_Report_Translation ('GEN')
end-procedure
begin-procedure Process-Main
do Get_Field_Information ('GEN',        'BASELANGUAGE', $BASELANGUAGE,  #DWBL)
do Get_Field_Information ('GEN',        'ENDOFREPORT',  $ENDOFREPORT,   #DWER)
begin-SELECT
LANGUAGE_CD &Base_Language
   let $langlabel = $BASELANGUAGE || ':'
   print $langlabel  (+1,1)
   let #fieldpos = #DWBL + 3
   print &Base_Language (0,#fieldpos)
FROM PSOPTIONS
end-SELECT
print $ENDOFREPORT      (+4,1)
end-procedure
#Include 'reset.sqc'     !Reset printer procedure
#Include 'sqrtrans.sqc'  !SQR Strings Table procedures
```

See Also

Using the Strings Table

Required Settings for SQR and Unicode

SQR uses Unicode for internal storage of character data regardless of whether or not you are running against a Unicode encoded PeopleSoft database. This enables a single instance of SQR to process data in virtually any language in a single report.

Although SQR runs using Unicode internally, it automatically converts data read from and to files to the appropriate non-Unicode encoding based on the operating system environment in which it is running. Alternatively, you can configure SQR to input and output Unicode data if your system is capable of handling it. For report output, file output, and file input, SQR running on Windows or Unix determines the appropriate encoding based on the locale setting of your operating system. For example, SQR running on Japanese Windows will generate report output containing Japanese characters correctly without any configuration, as the report output encoding is automatically set to Microsoft Windows Japanese character set, Shift-JIS.

Note. SQR's file input and output encodings can also be configured independently from the operating system's defaults. For example, you can generate Chinese report output on English Windows. To configure SQR's encoding settings independently from the operating system's language settings, you have to edit PSSQR.INI file in the <PS_HOME>\SQR directory.

See Additional Options for SQR and Unicode.

When running SQR on OS390, you need to edit the PSSQR.INI file if your system is running with a default encoding other than EBCDIC (CCSID37). See the section "PSSQR.INI configuration on OS/390" for more information.

SQR DB2 Platform-Specific Encoding Settings

- PSSQR.INI configuration on OS/390

If you are running SQR on an IBM OS/390 system and need to generate report or file in encoding other than EBCDIC (CCSID37), set the ENCODING-FILE-OUTPUT, ENCODING-FILE-INPUT, ENCODING-REPORT-OUTPUT parameter in [Environment: Common] section appropriately. The valid values for these parameters are any valid PeopleSoft encoding supported for your language on OS/390. For example, on a Japanese OS/390 system you would set the following values:

```
ENCODING-FILE-OUTPUT=CCSID930
ENCODING-FILE-INPUT=CCSID930
ENCODING-REPORT-OUTPUT=CCSID930
```

As delivered by PeopleSoft, all SQR source delivered for the OS/390 platform is encoded in EBCDIC (CCSID37). If you plan to maintain your SQR source in other EBCDIC encoding you also need to set the ENCODING-SQR-SOURCE parameter correctly, For example, on a Danish/Norwegian OS/390 system, you would set the following value in PSSQR.INI:

```
ENCODING-SQR-SOURCE=CCSID277
```

Also see the below section on PSSQR.INI configuration for SQR DB2 to set database encoding correctly.

- PSSQR.INI configuration for SQR DB2

If you access a DB2 for OS/390, DB2 for NT or DB2 for UNIX database with a adatabase encoding other than LATIN1 on Windows and Unix and EBCDIC (CCSID37) on OS/390 using the DB2 edition of SQR (as opposed to the ODBC edition), you need to set the ENCODING-DATABASE-API parameter in [Environment: DB2] section correctly, The values set for this parameter should match with the encoding the DB2 client program converts to on your platform. This encoding is typically specified in the environment variable DB2CODEPAGE. For example, when accessing Japanese data on DB2 for OS/390 using SQR DB2 on Windows, this parameter should be to be set to SJIS, and if you are using SQR on OS/390, this needs to be set to CCSID930 or CCSID939, whichever is appropriate.

If you are accessing a DB2 database using SQR ODBC, do not set this parameter in PSSQR.INI file. SQR ODBC can automatically determine the correct encoding to access the database.

Additional Options for SQR and Unicode

This section discusses:

- Advanced PSSQR.INI encoding settings
- String length.
- Open command.

Additional PSSQR.INI Settings

The following settings under the [Environment:Common] section in PSSQR.INI are the default as shipped by PeopleSoft. SQR can automatically determine encoding used for report and file input/output by checking operating system's language settings. However, if you would like make SQR work independently from operating system, remove the comment out from the ENCODING entry and set one of the PeopleSoft supported encodings.

```
;ENCODING=LATIN1
;ENCODING=SJIS
```

ENCODING parameter sets the default encoding for all types of operations, including report output, file input/output, SQR source, and console output. You can, however, control encodings for each operation independently by adding the following parameters in [Environment: Common] section of PSSQR.INI file.

```
ENCODING-SQR-SOURCE
ENCODING-FILE-OUTPUT
ENCODING-FILE-INPUT
ENCODING-REPORT-OUTPUT
ENCODING-CONSOLE
```

If an individual encoding parameter is explicitly included, this specific setting overrides the default encoding specified by the ENCODING parameter.

- ENCODING-SQR-SOURCE parameter specifies the encoding in which the SQR source (*.SQR, *.SQC) files are encoded.
- The ENCODING-FILE-OUTPUT and ENCODING-FILE-INPUT parameters control the character set that is used to read and write files using the SQR OPEN command. If no character set is specified explicitly in the OPEN command, the character set specified in these parameters is used to read or write the file. If SQR detects a BOM at the top of file, it always reads as a Unicode file, regardless of this setting.
- The ENCODING-REPORT-OUTPUT parameter determines the encoding for the report output file (.LIS, .PDF, .HTM, and so on). The parameter should be set to a character set that contains all the characters you expect to print using the SQR. If you are using a Unicode database, and your printer or report browser supports Unicode, you can set the character set to either UTF8 or UCS2. However, you must ensure that your output devices support this encoding.

- The ENCODING-CONSOLE parameter determines the character set that is used to write progress and other messages to the console during a SQR run. In Windows, the encoding used by DOS consoles, such as the one that is used by the SQR, is known as an *OEM* encoding; this is often different from the character set that is used by Windows itself. See http://www.microsoft.com/globaldev for a list of Microsoft Windows OEM codepages. For UNIX systems, this setting should match the character set that is supported by your terminal device.

String Length

When you work with strings in the SQR, you must consider three different ways of measuring string length:

- The number of characters in the string.
- The number of print columns occupied by these characters.

  For example, characters from the Latin alphabet normally require one print column; characters in Japanese often require two.

- The number of bytes used to store the character.

  The SQR uses the Unicode UCS-2 method of encoding characters, which means that every character occupies two bytes; however, your database may use a different encoding that requires a different number of bytes for each character.

The SQR provides the following functions to help you manage string length according to each of these criteria.

Note. Although the SQR uses Unicode internally, it can still read/write with non-Unicode (ANSI) databases and files. Refer to the OPEN command in the SQR documentation for details.

- Length() and Substr().

  Length() and Substr() deal with the number of characters in a string. As the PeopleSoft field lengths (as defined in PeopleSoft Application Designer) are character-based, the Length( ) and Substr( ) functions are useful for calculating the length of the string as it is stored in the database.

  For example, the following code determines whether string &abc will fit into a database field that is 10 characters long. If the string won't fit into the field, the code truncates the string to use only the first 10 characters.

```
If length(&abc) > 10 then
&abc = substr(&abc,1,10)
End-if
```

- Lengthp() and Substrp().

Lengthp() and Substrp() deal with the number of print columns required to print the character using a monospace (nonproportional) font.

For example, the following code determines whether string &abc will fit into a print area that is 10 columns wide. If the string won't fit into the print area, the code truncates the string to use only the first 10 columns worth of characters.

```
If lengthp(&abc) > 10 then
&abc = substrp(&abc,1,10)
End-if
```

- Lengtht() and Substrt().

Lengtht() and Substrt() deal with the number of bytes that the string occupies in a specified character set. Typically, you would use lengtht( ) and substrt( ) if you are writing to a file in a specific character set, and you need to check or limit the byte length of the string in the output file, as would be required by most interface files.

For example, the following code determines whether string &abc will require more than 10 bytes in an output file. If the string is more than 10 bytes, the code truncates the string to use only the first 10 bytes worth of characters. The SQR system variable $sqr-encoding-file-output is used to reference the SQR.INI ENCODING-FILE-OUTPUT variable, which determines the default character set of any file that is written to by the SQR OPEN command. You can substitute any valid PeopleSoft encoding for the $sqr-encoding-file-output variable.

```
If lengtht(&abc, $sqr-encoding-file-output) >10 then
&abc = substrt(&abc, $sqr-encoding-file-output,1,10)
End-if
```

OPEN Command

The SQR OPEN command, used to read and write files from within SQRs, enables the report designer to specify the character set of the file being opened. You can specify a character set explicitly in the OPEN command. If you do not specify a character set, the SQR uses the character set specified in the SQR.INI parameter ENCODING-FILE-OUTPUT or ENCODING-FILE-INPUT, depending on whether you are opening the file for reading or writing.

In order to integrate with a third-party system, specify the character set for SQRs to match the target data, For example, a mainframe-based payroll system may expect an EBDCIC format file. Specifying the character set directly in the OPEN command enables the SQR program to be independent of the SQR.INI settings and enables the SQR to create the file directly in the character set expected by the target system (without the need to convert the output in a separate step).

See the SQR Reference Guide for details about the syntax of the SQR OPEN command.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Cube Manager, Introduction to Cube Manager

PeopleTools 8.4 PeopleBook: SQR for PeopleSoft Language Reference, "SQR Command Reference", OPEN

"Character Sets and Language Input/Output"

PS/nVision Reports

In PS/nVision, you can specify the language of the user who is designing or requesting a report, the language of the user who makes a report request, and the language of the ultimate audience of a report (the person or group of people for whom the report was generated). The primary goal of these features is to allow a single layout to produce several instances of a report in a requested alternate language or group of languages. To that end, the features are designed to present reports to end users in their preferred languages. Thus, there is a distinction between the *designer's* language and the *user's* language.

Most of the strings in nVision output are fetched from the Strings table and they are delivered with the report instance. However, many labels used in macros and dialog boxes have to be translated directly in the file, as they cannot be fetched at runtime. When an nVision report happens to contain labels in macros or dialog boxes, the layout needs to be translated in Excel, and a separate copy of the layout maintained for each language. In this case, each language has its own version of the file, and the same rules for locating the appropriate language of the nVision layout spreadsheet files are used as for Crystal Reports described above. Each nVision layout and drilldown directory can contain a subdirectory for each language. nVision searches the appropriate directory for the user's current language, and performs the appropriate fallback if a translation is not found.

Language-sensitive features of PS/nVision can be broken into two distinct parts:

- Design-time features: features related to designing PS/nVision layouts.
- Runtime features: features activated when a user makes a PS/nVision report request.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft nVision

PS/nVision Design-Time Globalization Features

The following design-time features of PS/nVision adapt to the current user's language and enable you to build a layout that can produce reports in multiple languages

Column Headings	When the user selects a column from a list, the list appears in the user's language (unless database field names are requested). Wherever the heading is stored in the layout, it's stored in the base language.
Tree Names	When prompting for tree names or presenting a tree description—for example, when adding tree criteria for a field—the tree description appears in the user's language.

Depending on the structure of your tree, this may require adding related language records to one or more prompting views.

String Variables

Layouts typically contain a considerable amount of constant text, such as the column headings “Last Year to Date” and “Current Budget.” PS/nVision provides the option to build multilingual layouts where these text strings are replaced by specially formatted strings whose user-language equivalent can be retrieved from the PeopleTools Strings table. This enables a single PS/nVision layout definition to be used in multiple languages without duplicating the layout itself. These string names resemble user-defined PS/nVision variables.

PS/nVision translates only the strings that occupy a layout cell and are in the following format:

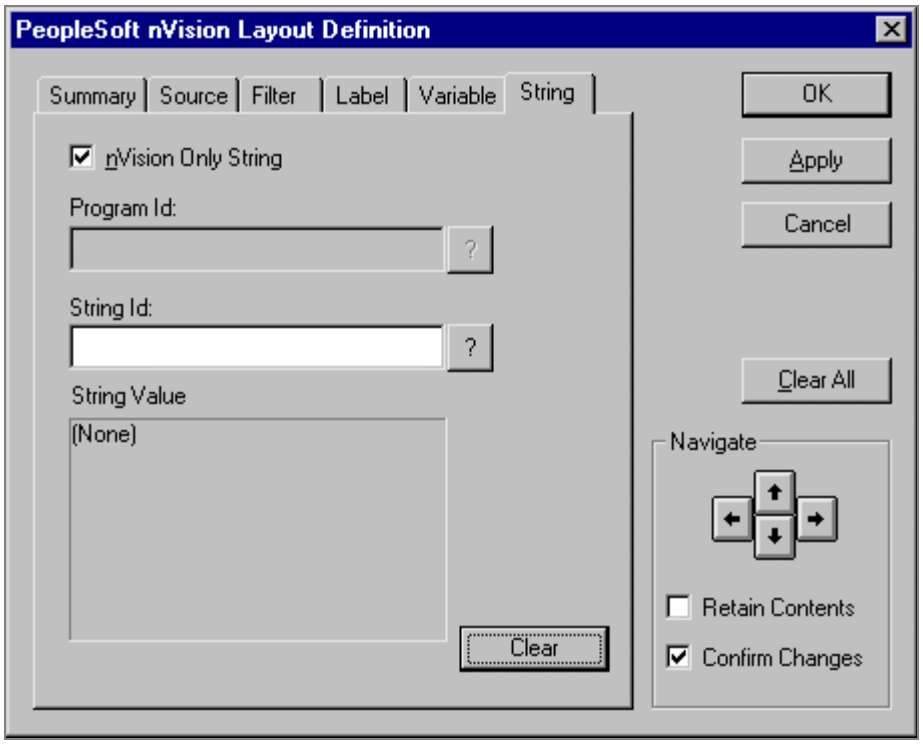
```
%.name,program%
```

where *name* is the string name and *program* is the optional group that is used to collect a common set of strings used on similar reports. You can look up the *name* in the Strings table using the Strings Table utility.

Note. This is similar to the approach used by PeopleSoft application SQRs. Names are case sensitive.

Setting Up String Criteria

Use the PeopleSoft nVision Layout Definition dialog box: String tab to set up string criteria for the current cell selection.



PeopleSoft nVision Layout Definition dialog box: String tab

To set up string criteria for the current cell selection:

1. Open the PeopleSoft nVision Layout Definition dialog box.
2. Select the String tab.

   The String tab in the PeopleSoft nVision Layout Definition dialog box appears.

   Use this tab to insert a string from the Strings table into a cell in your layout.
3. Clear the **nVision Only String** check box, if appropriate.

   By default, this tab displays only the strings that were created for use with PS/nVision—those with a program ID of NVISION. If you want to select from all available strings, clear the nVision Only String check box.
4. If the nVision Only String check box is cleared, select a **Program ID.**
5. In the **String ID** field, select the ID of the string you want to insert.

   Select any of the strings assigned to the program ID that you specified.

   Note. If the nVision Only String check box is selected, the program ID is *NVISION.*
6. Click **Apply** to save your changes and define string criteria for a different cell, or click **OK** to save your changes and close the dialog box.

If you clicked Apply, and you want to reuse all or part of the criteria you just applied, select the **Retain Contents** check box. This preserves all the dialog box information when you navigate to a new cell selection. Then repeat steps 3 through 5 to define additional string criteria.

See Also

Using the Strings Table

PS/nVision Runtime Language Features

The following features are activated when a user makes a PS/nVision report request:

Path Search

As PS/nVision looks for a file (such as an Excel spreadsheet, layout, or template), it steps through the directories listed in the appropriate paths. The paths are defined in different ways for the Windows client and the web. In the Windows client, the paths are defined in PeopleSoft Configuration Manager. In the web, the paths are defined in the [nVision] section of the PeopleSoft Process Scheduler configuration file (psprcs.cfg).

Before looking in each directory, PS/nVision looks in a subdirectory named by the user's language code; if the file is not there, or if the appropriate directory does not exist, PS/nVision looks in the directory named in the path. If the file is not there, PS/nVision moves to the next directory in the path and repeats the process.

For example, when searching for NVSUSER files for a user with France as the preferred language and the defined path for macros is %PS_HOME%\EXCEL, PS/nVision searches for %PS_HOME%\EXCEL\FRA directory first. If the files are not found, PS/nVision uses the files in the %PS_HOME%\EXCEL.

This feature supports users who need or prefer different layouts and for users of different languages. For example, it may be necessary to create an earnings report differently in Germany and France because differences in accounting rules or management requirements dictate different criteria and formatting. So, if a French user runs a PS/nVision report, PeopleTools first looks in the FRA directory under PS/nVision directory that is defined for an installation. If the required report layout isn't found in the FRA directory, PeopleTools uses the generic report layout in the base PS/nVision directory.

Request Language

The PS/nVision Report Request page includes a Language Template text box on the Advanced Options page. In the Foreign Language Translation field, enter an alternate

language code to automatically generate a translated report. If you are applying a scope to the report request, enter a string containing one or more PS/nVision variables.

If you enter one or more variables in the Foreign Language Translation field, then the value of each variable is interpreted at runtime to get the language code for each report instance. This enables retrieval of the language code from a tree node or value table that is associated with the values in the scope.

The syntax of this variable is as follows:

```
%DES.[scopefield].{detailfield|.nodefield|detailfield
.nodefield}%
```

Note that the field names required vary, depending on the type of scope you're using, but the periods between the values must always exist—except in the case of a trailing period. The *scopefield* parameter is optional. If you don't specify one, PS/nVision uses the first scope field you defined. If you want to use a field other than the first one defined in the scope, then you must specify which one.

You can provide a *detailfield* or a *nodefield* or both. PS/nVision uses the appropriate field type, based on your scope. Consequently, specifying one of each type enables you to change your scope definition without necessarily changing this variable. The detail and node table fields you specify should store PeopleSoft language codes and can be found on the same node or detail value table associated with the scopefield. Typically, the field name used is LANGUAGE_CD.

For example, a common implementation of this variable is as follows (note the inclusion of the extra period):

```
%DES..LANGUAGE_CD.LANGUAGE_CD%
```

If your scope consists of multiple scope fields (PRODUCT and BUSINESS_UNIT), your variable might look like this:

```
%DES.BUSINESS_UNIT.LANGUAGE_CD.LANGUAGE_CD%
```

If you don't include a *scopefield* or *detailfield* value, it's important that you still include the extra periods that follow those values. For example:

```
%DES...nodefield%

%DES.scopefield..nodefield%
```

However, if you don't include a *nodefield,* there's no need to include the trailing period after the *detailfield.* For

example:

```
%DES..detailfield%
```

Using a *scopefield* to drive the language of the PS/nVision report enables you to run a single report in multiple languages. Each time the contents of the *scopefield* changes, PS/nVision resets the language of the report and reloads the strings and other language-sensitive objects in the new language. This enables you to create a PS/nVision report in multiple languages so that the report can be separated and delivered to multiple recipients, each of whom may have a different language preference.

Labels When retrieving node or detail row and column labels, PS/nVision uses the appropriate alternate language record, if one has been defined through PeopleSoft Application Designer, to get labels in the user's language.

PS/nVision Variables When retrieving a descriptive value for a PS/nVision variable (such as Business Unit Description), PS/nVision determines whether the table being queried has a related language record and if the field being retrieved is on that record. If so, and if the user does not use the base language, PS/nVision retrieves the value from the related language record or, if the row doesn't exist on the related language record, from the base record.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft nVision, "Creating a Report Request"

PeopleTools 8.4 PeopleBook: PeopleSoft nVision, "Defining Report Scopes"

International Versions of Microsoft Excel

Microsoft Excel is available in numerous languages. PeopleTools is designed to work with all international editions of Excel as long as the base version of Excel is supported by that version of PeopleTools. For example, if your current PeopleTools version supports Excel 2000, then all language editions of Excel 2000 (such as Japanese Excel 2000) are supported by PeopleSoft.

See Also

PeopleTools 8.4 PeopleBook: *PeopleSoft Hardware and Software Requirements*

PART 2: Working With PeopleSoft Applications in Multiple Languages

CHAPTER 5

Modifying Terminology

This chapter provides an overview of terminology management and search statuses and discusses how to:

- Grant search privileges.
- Search.
- View and replace search results.
- View and undo replace results.
- Selecting search objects.
- Make upgrade considerations.

Understanding Terminology Management

PeopleTools includes a terminology management tool that enables you to streamline certain user interface language changes through the use of text search and replace processing. This is particularly relevant to the task of adapting a language that is based on another language. For example, if your Mexican users require that their Spanish user interface reflect terms specific to Mexico, you can use the Terminology Management Tool to adapt the PeopleSoft-delivered Spanish translations to substitute Mexican Spanish terms where appropriate.

You can also use this tool to change PeopleSoft-provided user interface terminology to better suit your organization's internal terminology or corporate vocabulary, even if English is your only user interface language.

The Terminology Management Tool only adapts an existing installed language – it cannot create a new language based on the changes you define. If you want to preserve the existing translation and use your modifications to create a new PeopleSoft language, you must first define the new language and copy the existing translations to your new language.

Searching and replacing terms is a multi-step process, with several opportunities to back out the changes. The process breaks down into three phases, each of which is discussed in this section:

1. Searching
2. Replacing

3. Undoing

Each phase consists of three separate steps: setting up the process, running the process, and reviewing the results. However, you don't have to use all three processes all the time. You can use the search process without ever invoking replace or undo.

See also

"Creating New Languages"

Searching

Step	*Description*
Setting up the search	On the Define Search Criteria page, specify which languages to search, which database objects to search, and what term to search for. If you want to replace the term with a new term, also specify the replacement text.
Processing the search	Using PeopleSoft Process Scheduler, run the Search process.
Reviewing the results	Review the results in one of two places, depending on whether replace processing is enabled. Replace processing can be disabled for specific searches or for specific users. For example, if you are considering replacing terminology and want to determine the potential exposure of such a change, disable the Defining a Search with Replacement option. This ensures that there is no risk of accidental text replacement. If replace processing is enabled, review the results in the Search Results/Replace pages. If you don't want to replace the text, you can mark the process as complete. If replace processing is disabled, review the results on the Search Only Results page.

Replacing

Step	*Description*
Setting up the replace	If your original search criteria specified replacement text, you'll see both the original text and the replacement text on the Search Results/Replace page. At this point, nothing has actually been replaced. Accept, reject, or modify the replacement text for each search result.
Processing the replace	Using PeopleSoft Process Scheduler, run the Replace process.

Step	Description
Reviewing the replace	Go to the Replace Results/Undo page to see the list of results, along with any replacement text. This page displays all results from the original search and indicates whether you replaced text. At this point, the replacement has happened, but you can still back out the changes by continuing to the undo step. If you don't want to undo any of the replacements, mark the process as complete.

Undoing

Step	Description
Setting up the undo	As you review your replace results on the Replace Results/Undo page, specify whether to undo any of the replacements.
Processing the undo	Using PeopleSoft Process Scheduler, run the undo process.
Reviewing the undo	Go to the Inquiry page that displays all search results to see the final results of all your searching, replacing, and undoing. This page displays all results from the original search, regardless of whether you replaced the term or used undo for any replacement. The search and replace is final and the record of what you did is permanent. If you ever need to back out the changes, you can use this information to research what replacements took place.

Understanding Search Statuses

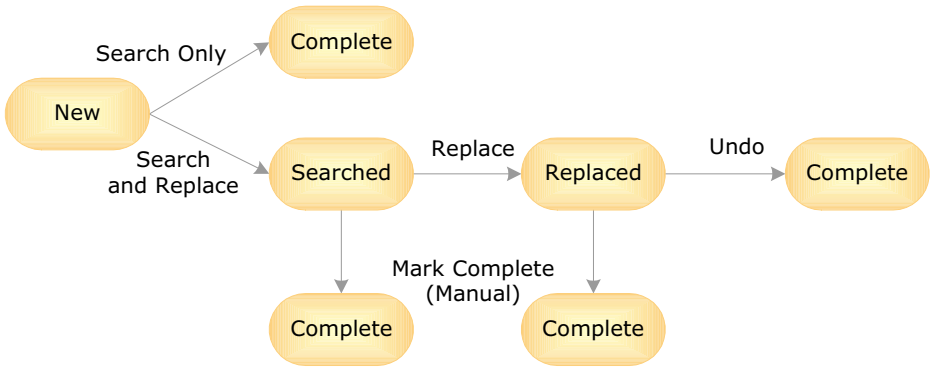
As you proceed through the search and replace process, you'll notice that all of the pages display a Status field. This status is updated automatically to reflect where you are in the process.

The default status for all new searches is *New.*

If you configure the search type to disable replacing (that is, if you choose the search-only option when you set up your search criteria), then no further action is possible after the search. Therefore, after the search, the status is updated to *Complete.* Otherwise, the status is updated to *Searched.*

Running the replace process updates the status to *Replaced;* running the undo process updates the status to *Complete.*

If you don't want to run the full search, replace, and undo process, manually mark the status *Complete* after searching or replacing. Once the status is *Complete,* you cannot change your mind. If you decide to make further terminology changes, you must recreate the search criteria using the Copy Search Criteria feature on the Search Criteria Inquiry page.



Search statuses

Granting Search Privileges

Use the User Search Options page to grant search and view access to your users

To set user search options:

1. Select PeopleTools, Translations, Modify Terminology, User Search Options.
2. Search for an existing user ID or add a new one.

   Adding a user ID does not mean that you are creating new users; it means that you are adding a user to the list of those who have permission to use the search and replace functionality.

   Add a user ID to grant access to someone who does not already have access. Search for an existing user ID to modify permissions for someone who already has access.

   Use the standard search or add method to enter the user ID and access the User Defaults page.
3. Set the user's search permissions.

   Select **Search Only** to grant the user permission to search, but not to replace or undo. When a user with this level of access defines search criteria, the Search Only (No Replace) option is selected automatically.

   Select **Search, Replace and Undo** to grant the user full access to all aspects of the PeopleSoft terminology management functionality.
4. Choose which searches the user can access.

   Select **View Other User's Activity** to grant the user permission to see searches created by all users.

   Leave this check box clear to deny access to all searches other than the user's own searches.

Only users with access to search, replace, and undo can be granted access to other users' activity.

5. Save the page.

Searching

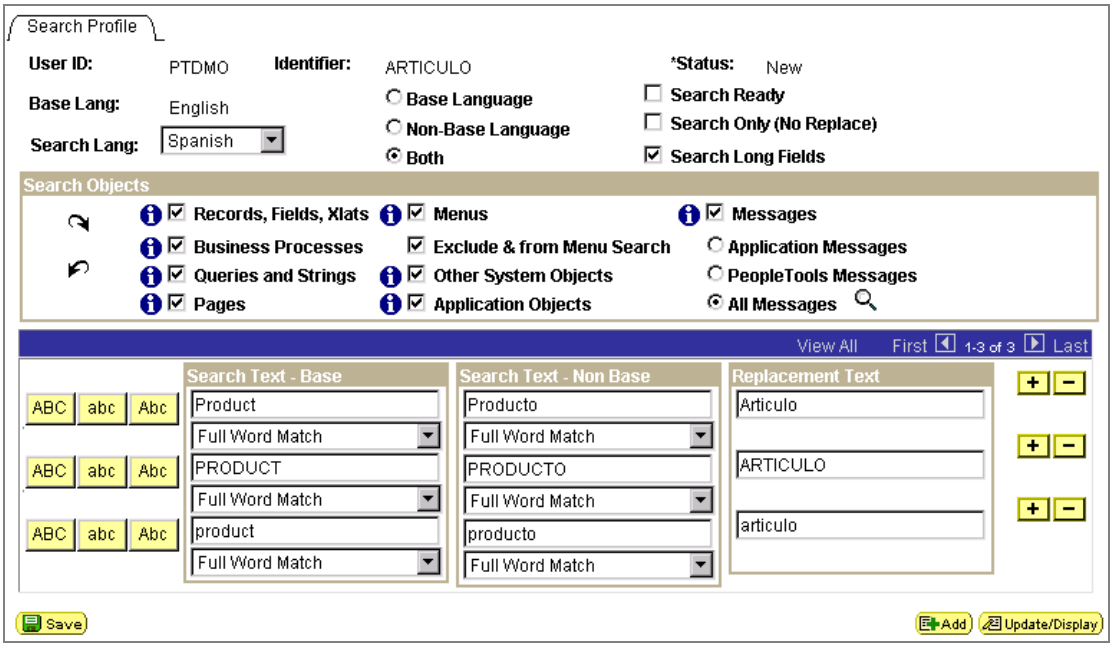
This section discusses how to:

- Define search criteria.
- Clone existing search criteria.
- Run the search rrocess.

Defining Search Criteria

The first step in a search and replace process is to define your search criteria. To define yoru search, select PeopleTools, Translations, Modify Terminoloty, Define Search Criteria.

Note. In addition to using the standard add method to create a new search, you can copy an existing search and then modify the definition as necessary.



Define Search Criteria - Search Profile page

Note. The Search Profile page displays only searches where the status is ***New***. This means that you can edit the search criteria only while the status is ***New;*** you cannot edit the search criteria after running the search.

This section discusses how to:

- Enable search processing.
- Choose which languages to search.
- Disable the replace process.
- Define your search scope.
- Define your search text.

Enabling Search Processing

To enable search processing:

1. Select the **Search Ready** check box.

   Selecting this check box enables search processing to pick up this search. You can leave this check box clear until you're ready to run your search.

Choosing Which Languages to Search

To choose which languages to search:

1. Select a search language in the **Search Lang** (search language) field .

   The **Base Lang** (base language) display-only field displays the base language of the database.

   The search language determines which language tables are searched. If you select the base language as your search language, you can search and replace data on the base language tables only. If you select a non-base language as your search language, your basis for searching can be dependent on either the base language, the search language, or both. However, you can still replace data only in the search language tables.

2. If the search language is different from the base language, select the basis for your search.

   Select one of the following options:

   Base Language — You can specify search text only for the base language tables. The system searches the base language tables, but the search returns results only when there's a match in the base language tables *and* a corresponding translation in the search language. That is, the search process ignores occurrences of the word in the base language tables if

	there is no corresponding translation on the related language table.
Non-Base Language	You can specify search text only for the related language tables. The system searches the related language tables for the text that you've specified and return the results.
Both	You can specify search text for both the base language tables and the related language tables. In this case, the results returned are only those instances where the search criteria for both the base language and related language have been met.

Disabling the Replace Process

To disable the replace process:

1. Select the **Search Only (No Replace)** check box.

   Selecting this check box ensures that the criteria is used only for searching, not for searching and replacing. By selecting this option, you prevent the system from doing anything further after you run the search.

   This check box also determines whether the status is set to *Complete* or *Searched* after you search. If you select the Search Only (No Replace) check box, then no further action is possible after the search and the status is updated to *Complete.* Otherwise, the status is updated to *Searched.*

Defining Your Search Scope

To define your search scope:

1. Specify whether to search long text fields.

   Select the **Search Long Fields** check box to include the long description field in your searches. This setting applies to any type of object that you're searching.

2. Specify which groups of database objects to search.

   Searchable text exists in many parts of the database: fields, queries, menus, and even your application data. Before you search, you must choose which types of database objects you want to search.

   Use the **Search Objects** group box to specify which types of objects are searched. Each check box in this group box represents a group of searchable objects. Select the groups that you want to search.

Note. With certain PeopleSoft Application Designer objects, the translatable text shows up only in PeopleSoft Application Designer dialog boxes and on property sheets. For example, you see page descriptions in the PeopleSoft Application Designer Open dialog box, but end users don't see the descriptions when they look at the actual page. The important exception to this situation are fields, translate values, page text, and menus. The descriptions for these four types of objects are visible to end users.

Select one or more of these groups:

Records, Fields, Xlats	Includes record descriptions, field labels, and translate (xlat) values.
Business Processes	Includes the descriptions for activities and business process maps and the labels of the icons on those maps.
Queries and Strings	Includes the descriptions for queries and strings.
Pages	Includes descriptions of pages and page text that does not come from a field definition or translate value.
Menus	ncludes all levels of navigation, including the component name. Some menu descriptions include an extra ampersand to designate a hot key. For example, a menu that looks like *Administer Workforce* is actually stored in the system as *Administer &Workforce.* Most likely you would prefer to disregard the ampersand when you search; to do this, select **Exclude & from Menu Search.**
Other System Objects	Includes all other PeopleTools objects, such as application messages, business components, and process definitions.
Other Application Objects	Includes translatable application data—application tables with related language tables. There doesn't have to be a translation in your search language; the existence of the related language table is enough to qualify a table for inclusion. PeopleSoft provides a PeopleSoft Data Mover script, TSRECPOP.dms, which creates this list of translatable application tables. If you've customized the system with new translatable tables, you must run this script to recreate the table.
Messages	Includes both the messages and the longer explanatory text that is associated with each message. When searching messages, you can select the range of message to search. In PeopleSoft, message sets 1–999 are reserved for PeopleTools messages. Messages sets 1000–19999 are used by the applications. Selecting either the **Application Messages** or **PeopleTools Messages** check

boxes narrow your search to the selected numeric range. You can also select **All Messages.**

Alternatively, you can narrow your search to a specific range of messages. To do this, select the All Messages check box, and then click the prompt button to the right to open the page where you can enter the desired message set range.

Defining Your Search Text

To define your search text:

1. Enter the search and text for the base language or the search language or both.

   There are three columns for search text. Different choices are available, depending on which languages you've selected to search and whether you've allowed replacing.

Search Text - Base	This option is available if you're searching the base language or both the base and non-base languages.
Search Text - Non Base	This option is available if you're searching the non-base language or both the base language and the non-base language.
Replacement Text	This option is available unless you selected the **Search Only (No Replace)** check box.

   For each language that you're searching, enter the text for which you want to search. The system searches only the appropriate language tables.

   Note. You can enter multiple rows in each column. This is useful if you want to search for several different terms, or if you want to search for several forms of the same word. For example, if you want to search for *mouse* and *mice* in the same search, create two search rows and use one for each word.

2. Make sure that your search text is in the proper case.

   Searching is case sensitive. When you want to search for all occurrences of a word, regardless of case, create multiple search rows and enter the word multiple times—once for each variation.

   Use the three *abc* buttons to automatically put the text in the specified case. **ABC** capitalizes the text, **abc** lowercases the text, and **Abc** puts the text in title case (the first letter of each word is capitalized).

   These buttons modify all text in the associated row. So if you are not using the same case in all three columns, take care not to inadvertently reset the case in one column when intentionally resetting the case in another.

3. Choose the matching method for the search.

   Directly underneath each search text field, select one of the following matching methods to use when searching for that text:

Exact Text Match	Returns any instance where the text constitutes the entire contents of the field. For example, if you perform an exact text search on *Department,* your results won't include fields that contain *Department Code.*
Full Word Match	Returns all occurrences of the text string where the string is not embedded in another word. In this case, searching for *Department* returns occurrences of *Department Code,* but won't not return occurrences of *Departments* or *Departmentalize.*
Like Text Match	Returns all occurrences of the text string

See Also

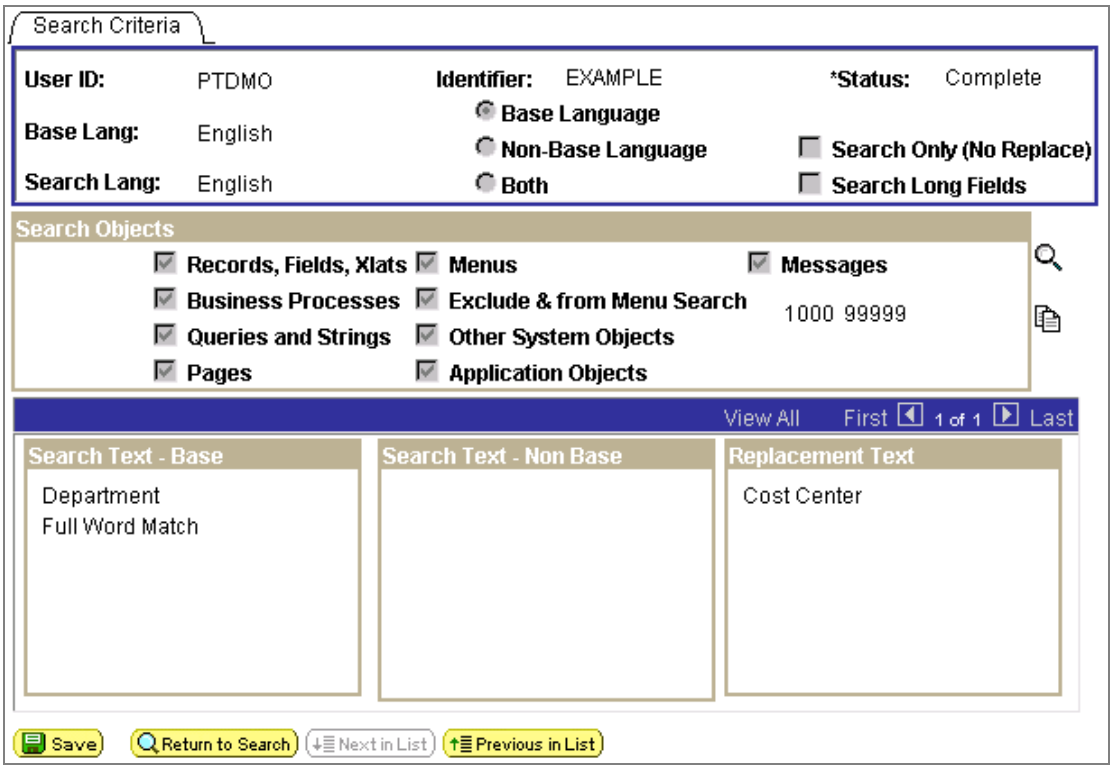
Understanding Search Statuses

Reviewing Search Criteria

Modifying Searchable Objects

Cloning Existing Search Criteria

If you want to set up multiple similar searches, expedite data entry by cloning an existing search. This enables you to start with most of your criteria already in place.



Search Criteria page

To clone a search definition:

1. Select PeopleTools, Translations, Modify Terminology, Search Criteria.

   You are prompted to identify a search.

2. Enter the identifiers for the search definition.

   Use the standard search method to access the Search Criteria page.

3. Click the **Copy Search Criteria** button.

   You are prompted for a unique search identifier.

4. Enter a **Text Search Identifier** that will be the unique name for the new search.

5. Click **OK.**

   The Search Profile page appears, and the cloned definition is saved. You can now modify the search criteria as necessary.

Sample Search Criteria

Following are examples of possible searches:

- Searching base language text.

If you enter text in the **Search Text - Base** and **Replacement Text** sections, the search and replace is only on the base tables. This is a search and replace because the **Search Only (No Replace)** check box is clear. Because the search and base languages match, you can enter data in the Search Text - Base and Replacement Text sections of the page.

Notice that all of the check boxes are selected in the **Search Objects** area. That means that the system searches all of the available search objects for the word *Department.* When the search results are returned, you can replace each instance of the word *Department* with the term *Cost Center.* The text replacment occurs in the base language tables.

- Searching for base language text with existing translations.

For example, enter the word *Product* in the **Search Text – Base** section only. In this case the system searches for the word *Product* in the base language tables and shows all occurrences where *Product* has been translated into Spanish. You might do this as a preliminary effort, to see the different ways in which the word *Product* has been translated.

- Searching non-base language text.

For example, if you enter the word *Producto* (and select the full word match) in the **Seach Text - Non Base** section, the system searches for all instances of the word *Producto* in the Spanish language tables. Again, you might do this type of search in order to see the number of occurrences in the database. The result shows all occurrences where English text has a translation with the word *Producto*.

- Replacing non-base language text.

For example if you enter the words *Producto, PRODUCTO,* and *producto* in the Search Text - Non Base section (and select the full word match for each instance), and enter the words *Articulo, ARTICULO,* and *articulo* in the **Replacement Text** section, the system searches for all instances of the word *Producto* and gives you the option to change each instance to the word *Articulo.*

Using the different cases enables you to catch all occurrences.

- Searching base language and non-base language text.

Select the **Both** option so that the only occurrences that are returned are those where the search criteria matches on both the base table and the non-base table. Let's say, for example, that you have translated the word *Product* in two different ways in your database: *Producto* and *Articulo.* You then realize that, for consistency, you want *Product* to always be translated to *Articulo.* This search ignores where *Product* has already been translated to *Articulo* and searches only for the instances where *Product* has been translated to *Producto.* This search also enables you to change each instance of *Producto* to *Articulo.*

Running the Search Process

Once you define and save your search criteria (and select the **Search Ready** check box), you are ready to run a search.

To run a search:

1. Select PeopleTools, Translations, Modify Terminology, Search.
2. Search for an existing run control ID or add a new one.

   Use the standard search or add method to enter your run control ID and access the Search page.
3. Verify that the appropriate search definitions will be processed.

   By default, the search includes all previously unprocessed search definitions (that is, definitions with the status ***New***) where the Search Ready check box is selected. If a search appears here that you do not want to run, go back to the Search Profile page and clear the Search Ready check box. If a search is missing, go back to the Search Profile page and select the Search Ready check box.

   Click the **View Search Criteria** button to display a read-only version of the search criteria. This is useful when you want to confirm that you're satisfied with the search criteria. Remember that running the search won't affect your data, but it can still be inconvenient to run the wrong search, as you can't go back and modify the search criteria.
4. Click the **Run** button.

   The Process Scheduler Request page appears.
5. Complete the Process Scheduler Request page.

   See *PeopleTools 8.4 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling a Process Request."
6. Click **OK.**

   The search runs. Once the search is complete, you can navigate to the Search Results/Replace page to see the results.

Viewing and Replacing Search Results

After a search is completed, select PeopleTools, Translations, Modify Terminology, Search Results/Replace to review the search results.

This section discusses how to:

- Replace non-message text.
- Replace message text.

- Run the replace process.

Replacing Non-Message Text

The Replace Data page displays the database object search results, but not the Message Catalog search results. Use this page to review search results, verify replacement text, and indicate when to run the replace process.

This section discusses how to:

- Review search results.
- Verify replacement text.
- Enable or disable replace processing.

Reviewing Search Results

To review search results:

1. Examine the search results in both the base language and the non-base language.

   The search results appear in a grid, where you can see details about each occurrence of the search text.

   Base Text — Displays the occurrences of the text that you searched for in the base language tables.

   Non-Base Text — Displays the occurrences of the text you searched for in the non-base language tables. This is the text that is replaced if you decide to run the replace process. If you searched the base language only, there is no non-base text, and the base text is replaced.

   Replacement Text, Too Long, and **Replace** — These columns are used to finalize your replacement text.

   See Viewing and Replacing Search Results.

2. Look to see which pages display the search text.

   Pages — This column indicates the number of pages on which this instance of the search text appears. This number appears only for objects that are placed on pages: fields, translate values, and (hard-coded) page text.

   View Text Search Details — Click this button to display details about that occurrence of the search text.

   View the record and field where this instance was found, as well as the keys for each occurrence of the text in the

record. Also view the text from the base language table, the corresponding translation from the related language table, and the suggested replacement text.

View Text Found — Click this button to display information about which search words were found. Remember that a single set of search criteria can include searches for many terms. For example, if you searched for both *Codigo* and *Departamento,* the Text Found page shows which word or words were found in this record.

3. (Optional) Review the information about the record and field where the text was found.

Field Name — System name of the field where the text resides.

Length — This column displays the length of this field. This information is useful when you plan to replace text because it tells you the maximum length of any replacement text.

Record — Name of the record where this occurrence was found.

RLang Rec (related language record) — Name of the corresponding related language table.

4. (Optional) Inspect the original search criteria.

View Search Criteria — Click this button to display a read-only version of the search criteria. This can help you understand your search results.

Verifying Replacement Text

To verify replacement text:

1. Inspect the suggested replacement text.

Replacement Text — Shows the suggested replacement text, based on your original search criteria. At this point no replacement has occurred. Remember that the replacement text replaces the non-base text unless you searched only the base language, in which case it replaces the base text.

2. If necessary, modify the replacement text.

Modify the replacement text if you're not happy with the suggested text or if the suggested text is too long for the field.

Too Long — The system selects this check box when the suggested replacement text is too long for the field. This can occur when the replacement text is longer than the search text.

When this happens, you must edit the replacement text (perhaps using an abbreviation) so that it fits in the field. It may help to look at the Length column to see the maximum allowable length.

Once the replacement text is an acceptable length, the system clears the Too Long check box.

You don't need to modify the text if you decide that you don't want the replacement to happen at all; the next step describes a different mechanism for disabling replacement for specific rows.

Note. When the replacement text is too long, the search text won't be replaced during the replace process.

3. Selectively enable and disable replacement processing.

Replace Use this check box to replace some occurrences of the search text without replacing all of them.

Select the check box for the occurrences that you want to replace; clear the check box for the occurrences that you want left as they are. When you run the replace process, only the selected rows are updated.

After you run a search, the Replace check box is automatically selected for all occurrences other than those where the suggested replacement text is too long for the field.

To clear the Replace check box in all rows, click the arrow that curves to the left.

To select the Replace check box in all rows (other than those where the replacement text is too long for the field), click the arrow that curves to the right.

Enabling or Disabling Replace Processing

To enable or disable replace processing:

1. To enable replace processing, select the **Replace Ready** check box.

   The replace process picks up only searches where this check box is selected.

2. To permanently disable replace processing for this specific search, click the **Complete** button.

   This button changes the status of the results to Complete. Once this happens, no further processing is possible. If you've edited messages on the Replace Messages page, those changes become permanent. .

3. Save the page.

See Also

Replacing Message Text

Replacing Message Text

The Replace Messages page provides a focused view of all the Message Catalog entries that satisfy the search criteria. Use this page to review the messages and make replacement changes manually. This can be done at any time in the search, replace, and undo process.

Note. You must manually update message text. If you continue to the undo step, you must also manually back out your changes. The automatic replace and undo process for other database objects does not apply to message text.

To review search results and update message text:

1. Click the Review Messages button to load the results into the page.

   Once the results are loaded, you can see each message that contained the search text from your search.

2. (Optional) Inspect the original search criteria.

   Click the View Search Criteria button to display a read-only version of the search criteria.

3. Review the messages.

   You can see only one message at a time on this page; to review the messages, page through them and look at each one individually.

4. Edit the messages as necessary.

   As you review the messages, determine whether it is appropriate to replace the text or reword the message. When you decide to make changes, you can edit the text directly on this page. Saving the page updates the Message Catalog.

   Note. You must update message text manually; the automatic replace process for other database objects does not apply to message text.

5. Save the page.

Running the Replace Process

After you've finalized your replacement text and settings in the Search Results/Replace page, you must run a replace process to actually make the replacements. Running the replace process updates the search status from *Searched* to *Replaced.*

After you run the replace process, you have one last chance to back out any changes made by the process.

See Replacing Message Text.

Warning! Once you change the search status and update the search status, you can no longer view this search in the Search Result/Update pages. Be sure that you are finished with *both* pages (that is, you've finished manually editing your messages) before you change the status.

To run the replace process:

1. Select PeopleTools, Translations, Modify Terminology, Replace.
2. Search for an existing run control ID or add a new one.

   Use the standard search or add method to enter your run control ID and access the Replace page.
3. Verify that the appropriate search definitions will be processed.

   By default, the replace includes all search definitions that have the status *Searched* and have the Replace Ready check box selected. If a search appears here that you do not want to run, go back to the Search Results/Replace page and clear the Replace Ready check box. If a search is missing, go back to the Search Results/Replace page and select the Replace Ready check box.

   Click the **View Search Criteria** button to display a read-only version of the search criteria. This is useful when you want to confirm which set of criteria you're processing.
4. Click the **Run** button.

   The Process Scheduler Request page appears.
5. Complete the Process Scheduler Request page.

   See *PeopleTools 8.4 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling a Process Request."
6. Click **OK.**

   The replace process runs. Once the replace is complete, you can navigate to the Replace Results/Undo page to view the results.

Viewing and Undoing Replace Results

This section discusses how to:

- Undo data replacements.
- Undo text replacements.

- Run the undo process.

Undoing Data Replacements

After you run the replace process, select PeopleTools, Translations, Modify Terminology, Replace Results/Undo Replace to review your results and decide whether to undo any of the replacements.

This section discusses how to:

- Replace replacement text.
- Enable or disable undo processing.

Reviewing Replacement Text

To review replacement text:

1. Review the results of the replace process.

   The Replace Results/Undo page shows the same information as the Replace Data page.

   The **Base Text** and, if applicable, the **Non-Base Text** show the original text.

   You can see how many pages display the text, and you can click the **View Text Search Details** button to see details about these pages.

   The **Replacement Text** field shows what was—or would have been—substituted for the original search text.

   The **Replaced** check box indicates whether the original search text was replaced. At this point, the original text has been replaced, but the change has not been finalized.

   The **Field Name, Length, Record,** and **RLang Rec** columns provide details about where the text is stored in the database.

2. Selectively enable and disable undo processing.

   You can undo some of the replacements without undoing all of them. Control which occurrences are replaced using the **Undo** check boxes.

   Select Undo for those rows where you want to back out your changes. Leave the Undo check box clear for the rows where you're satisfied with the replacement. When you run the undo process, only the selected rows are affected.

3. Save the page.

Enabling or Disabling Undo Processing

To enable or disable undo processing:

1. To enable replace processing, select the **Undo Ready** check box.

   The undo process picks up only the rows where this check box is selected.

2. To permanently disable undo processing for this search, click the **Complete** button.

   This button changes the status of the results to ***Complete.*** Once this happens, no further processing is possible. Any replacements that have been made, including changes to messages, are now finalized.

   See Replacing Message Text.

3. Save the page.

Undoing Text Replacements

The Undo Messages page displays the search results in the Message Catalog. If you edited the messages during the replace step, the text reflects those changes.

The Undo Messages page is identical to the Replace Messages page, and you can review and update messages using the same procedures.

Note. Just as you have to replace message text manually, so must you back out any changes manually. The automatic replace and undo process for other database objects does not apply to message text.

See Also

Replacing Message Text

Running the Undo Process

To run the undo process:

1. Select PeopleTools, Translations, Modify Terminology, Undo.

2. Search for an existing run control ID or add a new one.

   Use the standard search or add method to enter your run control ID and access the Undo page.

3. Verify that the appropriate search definitions will be processed.

By default, the undo includes all search definitions that have the status ***Replaced*** and the Undo Ready check box selected. If a search appears here that you do not want to run, go back to the Replace Results/Undo page and clear the Undo Ready check box. If a search is missing, go back to the Replace Results/Undo page and select the Undo Ready check box.

Click the **View Search Criteria** button to display a read-only version of the search criteria. This is useful when you want to confirm which set of criteria you're processing.

4. Click the **Run** button.

   The Process Scheduler Request page appears.

5. Complete the Process Scheduler Request page.

   See *PeopleTools 8.4 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling a Process Request."

6. Click **OK.**

   The undo process runs. Once the undo is complete, navigate to the All Search Results page to view the results.

Reviewing Search Information

Three read-only pages provide you with information about searches.

This section discusses how to:

- Review search criteria.
- View results for search-only searches.
- View search results for all searches.

Reviewing Search Criteria

To see the search criteria for any search that's been defined, select PeopleTools, Translations, Modify Terminology, Search Criteria.

This page is a display-only version of the Search Profile page.

To transfer to the page that is appropriate to the current status of the search, click the View Details button. For example, if the status is ***Searched,*** then in order to continue the search-replace-undo process, you must go to the Search Results/Replace pages. The following table explains which component you'll see, based on the status of the search:

Status	***Component***
New	Define Search Criteria (PeopleTools, Translate, Use, Define Search Criteria)

Status	*Component*
Searched	Search Results/Replace (PeopleTools, Translate, Use, Search Results/Replace)
Replaced	Replace Results/Undo (PeopleTools, Translate, Use, Replace Results/Undo)
Complete	All Search Results (PeopleTools, Translate, Inquire, All Search Results)
Complete	Search Results Only (PeopleTools, Translate, Inquire, Search Results Only)

Click the Copy Search Criteria button to clone this search definition.

See Also

Cloning Existing Search Criteria

Viewing Results for Search Only Searches

When a search is defined as Search Only (No Replace), the status is set to ***Complete,*** which prevents you from viewing the search results on the Search Results/Replace pages. Instead, you must access the result using one of the Inquiry pages.

To see the search results for a completed Search Only (No Replace) search, select PeopleTools, Translations, Modify Terminology, Search Only Results.

This page is a display-only version of the Search Results/Replace page.

See Also

Viewing and Replacing Search Results

Viewing Search Results for All Searches

To see the search results for any search, select PeopleTools, Translations, Modify Terminology, All Search Results.

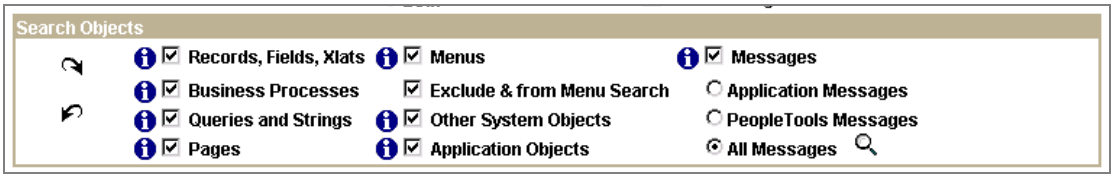
This page is a display-only version of the Replace Results/Undo page.

See Also

Viewing and Undoing Replace Results

Selecting Search Objects

When you define your search, you select which types of objects to include in your search. You do this by selecting from predefined groups of object types.



Groups of object types

PeopleSoft has already defined each group by associating particular tables in each group. You can see which tables are included in each group by clicking the **View Objects** button.

You can use the Define Text Search Records page to view additional information about these records. Specifically, you can identify the key fields and the searchable fields.

You can use the same page to change the association between searchable fields and the groups of object types. However, this is not advisable. The only time you should modify the object groups is when you want to add newly created tables to the Application Objects group; PeopleSoft provides a PeopleSoft Data Mover script to do this for you.

This section discusses how to:

- View searchable objects.
- Modify searchable objects.

Viewing Searchable Objects

Use the Define Text Search Records page to view additional information about the searchable records.

To view the searchable fields in any searchable record:

1. Select PeopleTools, Translations, Modify Terminology, Define Text Search Records.

   You are prompted to identify the record you want to view.

   You can search for records either by record (table) name or by object type. The object types are the same as the groups you use when defining a search.

2. Search for the record you want to view.

   Use the standard search or add method to enter the user ID and access the Text Search Records page.

3. Examine the information about this record.

The **Record** and **Related Language Record Name** fields identify the record you're viewing.

The **Combined Language Table** check box is selected when the base record and the related language record are the same; you cannot change this setting.

The **Object Type** field identifies which searchable group of objects includes this record.

Warning! Although you can modify the **Object Type** field on this page, it is not advisable. As delivered, records are already logically organized into appropriately named groups; changing the association causes the group names to no longer reflect the records in the group.

The **Keys** and the **Searchable Text Fields** fields display additional information about the record. All translatable fields (that is, the non-key fields in the related language record) are searchable.

Modifying Searchable Objects

If you create additional related language tables for delivered tables or develop a new translatable structure, you can make those tables searchable by adding them to the Application Objects group. To do this, run the PeopleSoft Data Mover script TSRECPOP.dms. This script refreshes the Application Objects group so that it includes all application tables that have related language tables.

Making Upgrade Considerations

Be aware that terminology updates are registered as changes to the affected database objects. This means that when you upgrade to a new PeopleSoft release, your object definitions are out of sync with those in the new PeopleSoft database.

This means that your upgrade reports, which identify changed objects, will include all the objects that have new or changed terms. Depending on the extent of your terminology changes, this can significantly impact the amount of time you spend analyzing the differences.

If you have implemented the PeopleSoft system with no customizations, you can deal with this issue by accepting the new PeopleSoft-delivered objects and then reapplying your terminology changes.

If you've customized your system and modified the delivered terminology, you may want to minimize the upgrade compare differences by doing one of the following:

- Reversing your terminology changes before the upgrade and then redoing the terminology changes after the upgrade.
- Applying your terminology changes to the PeopleSoft-delivered software before running the upgrade and compare reports.

Both of these methods cause the upgrade reports to disregard any terminology-only changes, which simplifies your analysis of these reports.

Note. Upgrading becomes more complicated and involves extra steps when you've made terminology changes. Be sure to consider this cost when you decide whether terminology changes are necessary.

CHAPTER 6

Character Sets and Language Input/Output

This chapter describes how to select and configure the appropriate character set for PeopleSoft client workstations, application servers, and database servers. It outlines the decisions that need to be made when installing and configuring a multilingual PeopleSoft system.

This chapter provides an overview of character sets and describes how to:

- Validate field length.
- Handle international characters in PeopleTools.
- Detect and convert characters.

Understanding Character Sets

A *character set* (also known as a *codepage*) is an ordered set of characters in which each character is mapped to a numeric index, called a *codepoint*. This codepoint is used to store character data in a computer system. Many hundreds of character sets exist. Some are international standards, sanctioned by the International Organization for Standardization (ISO), some are country-specific standards, and others are not standardized at all but are specific to a particular computer system vendor. Given the number of separate computers that are involved in a typical PeopleSoft installation, it is likely that your system uses several different character sets.

This section discusses:

- Common character sets.
- Unicode standard.
- Non-unicode character sets.
- Character sets in the PeopleSoft Internet Architecture.
- Database character sets.
- Client workstation character sets and language management.

Common Character Sets

Although, although there is general agreement on the content and arrangement of most character sets, especially those standardized by the ISO, many different names are used by vendors and software packages for similar or identical character sets. ASCII is the most common character set used worldwide, and it encodes the basic characters and symbols that are needed to write the English language. However ASCII is limited to 127 characters and cannot represent many characters needed by Western European languages such as French and German, let alone ideographic languages such as Japanese and Chinese where each character represents a word or concept. Many character sets, however, use ASCII as their base and include all ASCII characters in addition to their other characters.

The following table illustrates just a few common character sets that you are likely to encounter and some of the names that are used by different vendors to refer to them:

Character Set	***Description and Comments***	***Type***	***PeopleSoft and SQR Name***	***Oracle DBMS Name***	***Microsoft Windows Name***
ISO 8859-1	Western European "Latin-1." ASCII-based. Contains all characters required to represent Western European languages. Does not include the euro symbol.	ISO	LATIN1 or ISO_8859-1	WE8ISO8859P1	CP28591
Microsoft Codepage 1252	Microsoft Codepage 1252 - Western European. Very similar to ISO 8859-1, except for the inclusion of line drawing and other characters in place of some symbols. Includes the euro symbol, but using a different codepoint than ISO 8859-15.	Vendor (Microsoft)	CP1252	WE8MSWIN1252	CP1252
ISO 8859-2	Central/Eastern European "Latin-2". ASCII-based. Contains characters that are required for Central European languages, including Czech, Hungarian, and Polish. Does not include the euro symbol.	ISO	LATIN2 or ISO_8859-2	EE8ISO8859P2	CP28592

Character Set	*Description and Comments*	*Type*	*PeopleSoft and SQR Name*	*Oracle DBMS Name*	*Microsoft Windows Name*
ISO 8859-15	Western European extended "Latin-9." ASCII-based and similar to ISO 8859-1, but contains the euro symbol and several characters that are required for Icelandic.	ISO	LATIN9 or ISO_8859-15	WE8ISO8859P15	CP28605
Shift-JIS	Japanese PC-based, double-byte character set. ASCII-based.	Vendor	SJIS	JA16SJIS	CP932
IBM CCSID 37	IBM Coded Character Set ID 37. Western European Multilingual EBCDIC-based character set.	Vendor (IBM)	EBCDIC	WE8EBCDIC37	CP1140

Some of these character sets, such as ISO 8859-1 and IBM CCSID 37 are single-byte character sets (SBCS), meaning that they require only 1 byte to represent each character. For example, in ISO 8859-1, the hexadecimal number 61 represents the lowercase Latin letter *a.* However, for ideographic languages such as Japanese, more characters exist in the language than the 256 values that can be represented by a single byte. Therefore, 2 bytes need to be used for each character. These character sets, such as Shift-JIS, are known as double-byte character sets (DBCS).

The Unicode Standard

The most important consideration when dealing with character sets across your system is ensuring that all characters that you plan on representing with in your PeopleSoft system exist in the character set used by each component of the system.

For example, if you are planning on maintaining Japanese characters in your employee names, you must ensure the following:

- That the character set used by your database system includes Japanese characters.
- That each external system feeding in to or out of PeopleSoft expects data in a character set that includes Japanese characters.
- That your workstations and printers are installed with fonts that include those characters.

For example, the Japanese Shift-JIS character set contains Japanese and many ASCII characters; it is sufficient for encoding both English data and the primary characters required in Japanese. However, it does not include the accented Latin characters that are needed for

French and German, so it is not a suitable character set for implementations that encompass Western European countries.

Given the sample list of common character sets in the previous table and the number of languages required by a typical global PeopleSoft implementation, selecting a character set can be daunting, especially when you are planning to support a large list of languages.

To simplify this type of situation, an industry consortium of vendors devised a universal character set: The Unicode Standard ("Unicode"). This internationally recognized character set encodes every character required to write virtually every written language. The repertoire of characters is jointly maintained by The Unicode Consortium and ISO and is synchronized with ISO Standard 10646: Universal Multiple-Octet Coded Character Set (UCS).

PeopleSoft uses Unicode throughout PeopleTools to simplify character handling. PeopleSoft allows the use of Unicode within PeopleSoft databases to enable you to maintain a single database with characters from virtually any language.

Unicode Encodings

Unicode provides space for more than one million characters. Of course, only a small percentage of this encoding space is actually used today. The latest version (3.1) of Unicode encodes 94140 characters.

To manage such a large repertoire of characters, the Unicode Standard defines 16 *planes.* Each plane consists of 65,533 character positions. Plane zero, known as the Basic Multilingual Plane (BMP) contains approximately 49000 characters and is generally sufficient for everyday business use. The other planes are intended to encode extended or rarely used ideographic characters (such as Japanese, Chinese and Korean ideographs), archaeic scripts and other rarely used characters such as braille and advanced mathematical symbols.

Note. PeopleTools 8.4 only supports the use of characters from the Basic Multilingual Plane (BMP), otherwise known as Plane 0. Support for characters on other planes is planned for a later release of PeopleTools.

Based on the concept of 16 planes, each Unicode character has a unique four-byte code. As you can imagine, using four bytes of storage per character seems very wasteful, especially considering that most applications today use a small collection of characters and that the vast majority of characters in business applications will be from the BMP. Therefore, several different encoding forms for Unicode characters have been standardized and adopted by vendors who are implementing the standard.

See The Unicode Standard Version 3.0, The Unicode Consortium, Reading, MA, USA, Addison-Wesley Developers Press, 2000. ISBN 0-201-61633-5. The standard is also available online at http://www.unicode.org/unicode/uni2book/u2.html

Four encodings of the Unicode standard are widely used. All of them are fully compatible with each other and share the same repertoire of characters. They differ, however, in how each character is represented at the byte level. These encodings are as follows:

- UTF-32

- UCS-2
- UTF-16
- UTF-8

Given that PeopleSoft currently supports only the BMP, only UCS-2 and UTF-8 encodings are used by PeopleSoft; however, following is a brief overview of each:

Encoding	*Description*
UTF-32 (Universal Transformation Form - 32-bit)	UTF-32 is the full 32-bit (4-byte) encoding of Unicode. Each Unicode character is represented by a 4-byte number. For example, the character LATIN SMALL LETTER A (a) is represented in hexadecimal as 0x00000061. UTF-32 was formerly called UCS-4. PeopleSoft systems do not use UTF-32.
UCS-2 (Universal Character Set - 2-byte)	UCS-2 uses two bytes (16 bits) to represent each Unicode character. As such, it can reference only 65,535 codepoints and is limited to characters on the Basic Multilingual Plane (BMP). PeopleSoft uses UCS-2 in memory on the Windows development tools, the application server, and in Unicode Microsoft SQL Server and IBM DB2/UDB databases.
UTF-16 (Universal Transformation Form - 16-bit)	UTF-16 is an extension of UCS-2 that allows the application to reference characters on planes other than the BMP by combining two UCS-2 code units to designate a single non-BMP character. UCS-2 is upward compatible with UTF-16 in that each UCS-2 character is also a valid character in UTF-16. However, UTF-16 allows characters outside the BMP to be referenced. These additional characters are known as surrogate characters because they require two UTF-16 code units to be represented: a low surrogate and a high surrogate. When no surrogate characters are present, UTF-16 is identical to UCS-2. PeopleSoft plans to use UTF-16 in future versions of PeopleTools, but does not use UTF-16 in PeopleTools 8.4.
UTF-8 (Universal Transformation Form - 8-bit)	UTF-8 is a transformation of Unicode that encodes each character as one to four bytes, depending on which character is being encoded. All ASCII characters are encoded in UTF-8 as 1 byte, and this byte is identical to the encoding in ASCII. UTF-8 data is therefore backward compatible with ASCII data. All characters in the BMP are encoded as one, two, or three UTF-8 bytes. Characters in other planes are encoded as four bytes in UTF-8. UTF-8 has three main advantages: it is fully ASCII compatible, ASCII data can be considered as UTF-8 data, and it does not require that all characters use two or more bytes of storage. PeopleTools uses UTF-8 for serving HTML pages in PeopleSoft Internet Architecture (PIA). PeopleSoft also uses UTF-8 in Oracle Unicode databases.

The following table summarizes these four Unicode encodings and their uses in PeopleSoft:

Unicode Encoding	*Minimum Bytes/ Character*	*Maximum Bytes/ Character*	*PeopleSoft Usage*	*Example Encodings*
UTF-32	4	4	None	LATIN SMALL LETTER A (a) 0x00000061 LATIN SMALL LETTER N WITH TILDE (ñ) 0x000000f1 HIRAGANA LETTER KA (か) 0x0000304b
UTF-16	2	4	None; planned for future	LATIN SMALL LETTER A (a) 0x0061 LATIN SMALL LETTER N WITH TILDE (ñ) 0x00f1 HIRAGANA LETTER KA (か) 0x304b
UTF-8	1	4	PIA HTML pages; inbound and outbound XML; Oracle Unicode databases.	LATIN SMALL LETTER A (a) 0x61 LATIN SMALL LETTER N WITH TILDE (ñ) 0xc3b1 HIRAGANA LETTER KA (か) 0xe3818b
UCS-2	2	2	In-memory Windows client; application server; SQL Server and DB2/UDB Unicode databases	LATIN SMALL LETTER A (a) 0x0061 LATIN SMALL LETTER N WITH TILDE (ñ) 0x00f1 HIRAGANA LETTER KA (か) 0x304b

Non-Unicode Character Sets

Although much of the PeopleSoft system runs using Unicode, there are several components that you can choose to configure with a non-Unicode character set. When making these choices, you should understand the types of character sets other than Unicode that exist.

Note. For the sake of terminology, some systems, such as Microsoft Windows refer to two types of character sets: Unicode and ANSI. ANSI, in this context, refers to the American National Standards Institute, which maintains equivalent standards for many national and international standard character sets. In the context of this book, ANSI character sets refer to non-Unicode character sets, which can be any international, national, or vendor standard character set, such as those discussed at the beginning of this chapter.

This section discusses:

- Single-byte character sets.
- Double-byte character sets.

Single-Byte Character Sets

Most character sets use one byte to represent each character and are therefore known as single-byte character sets(SBCS). These character sets are relatively simple and can represent up to 255 unique characters. Examples of single-byte character sets are ISO 8859-1 ("Latin1"), ISO 8859-2 ("Latin2"), Microsoft CP1252 (similar to Latin1, but vendor specific), and IBM CCSID 37.

Double-Byte Character Sets

Double-byte character sets (DBCS) use one or two bytes to represent each character and are typically used for writing ideographic scripts such as Japanese, Chinese, and Korean. Most double-byte character sets allow a mix of 1-byte and 2-byte characters, so you cannot assume an even-string byte length.

PeopleSoft supports the use of two distinct types of DBCS: shifting and non-shifting. The difference between these types of DBCS is in the way that the system determines whether a particular byte represents one character or is part of a two-byte character.

- Non-Shifting Double-Byte Character Sets

Non-shifting double-byte character sets use ranges of code points, specified by the character set definition, to determine whether a particular byte represents one character or is part of a two-byte character.

In non-shifting DBCS, the two bytes used to form a character are called *lead bytes* and *trail bytes*. The lead byte is the first in a two-byte character, and the trail byte is the last in the two-byte sequence. Non-shifting DBCS differentiate single-byte characters from double-byte characters by the numerical value of the lead byte. For example, in the Japanese Shift-JIS encoding, if a byte is in the range 0x81-0x9F or 0xE0-0xFC, then it is a lead byte and must be paired with the following byte to form a complete character.

The most popular client-side Japanese codepage, Shift-JIS, uses this lead byte/trail byte encoding scheme, as do most Microsoft Windows and UNIX ASCII-based, double-byte character sets representing Chinese, Japanese, and Korean characters. Contrary to its name, Shift-JIS is a non-shifting double-byte character set.

- Shifting Double-Byte Character Sets

There is another double-byte encoding scheme in use that doesn't make use of the lead byte/trail byte concept. This system is known as a *shifting* character set. The IBM DB2/390 EBCDIC-based Japanese, Chinese, and Korean character sets use this shifting encoding scheme.

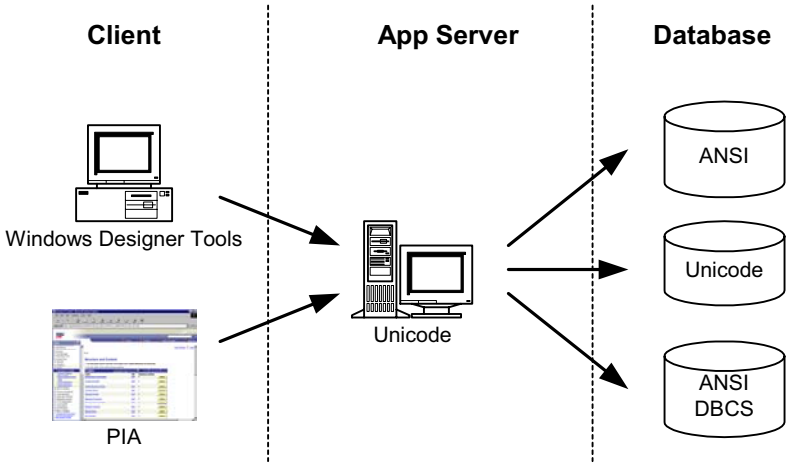
Instead of reserving a range of bytes as lead bytes, shifting double-byte character sets always keep track of whether they are in double-byte or single-byte mode. In double-byte mode, every 2 bytes form a character. In single-byte more, every byte is a character in itself. To track what mode the character set is in, the system uses *shifting* characters. By default, the

character set is expecting single-byte data. As soon as a double-byte character needs to be represented, a shift-in byte is added to the string. From this point on, all characters are expected to be two bytes per character. This continues until a shift-out byte is detected, which indicates that the character set should go back to single-byte per character mode.

This scheme, while more complex than the lead byte/trail byte scheme, provides greater performance, because the system always knows how many bytes should be in any particular character. Unfortunately, it also increases the length of the string. For example, a character string that comprises of a mixture of single-byte and double-byte characters will require more space to store in a shifting character set because you need to include the shift-in and shift-out bytes, as well as the data itself.

Character Sets in the PeopleSoft Internet Architecture

PeopleSoft installations include multiple components, each of which must handle differing character sets.



PeopleSoft Unicode Architecture

PeopleSoft clients and application servers use Unicode exclusively and do not rely on other character sets for the representation and processing of data. However, depending on your environment, not all components of your system may support Unicode encoded data, so you may not be able to run all parts of your system in Unicode. Therefore, PeopleTools enables you to configure several components of the system to use other character sets. The following PeopleTools system components or functions enable you to specify a non-Unicode character set:

- PeopleSoft database.

  Not all database platforms support Unicode data storage. Even when Unicode storage is available, not all PeopleSoft implementations require the flexibility in language choices that are available with Unicode, so you may choose to use a non-Unicode encoding for your database.

- COBOL.

The character set used for PeopleSoft COBOL processing must match the character set of your database. If you created a Unicode database for PeopleSoft, you must run your COBOL in Unicode also.

- File input/output.

  All file operations in PeopleTools, including file layout objects, trace and log files, and file operations from Structured Query Reports (SQRs) can be performed in Unicode or any supported non-Unicode character set. This is useful in situations where you must interface with an external system that does not support Unicode.

- Third-party products that are non-Unicode compliant.

  Some third-party products that are supported by PeopleTools do not yet support the Unicode Standard. In this case, PeopleTools converts application data to a specific non-Unicode character set before communicating with these tools. Some of the products that do not yet support Unicode data are Crystal Reports, Hyperion Essbase, and Cognos PowerPlay.

When Unicode is not used for any of these types of operations or data storage, PeopleSoft transparently handles the conversion from Unicode to a non-Unicode character set. Which non-Unicode character set is used depends on several settings, which are discussed in detail later in this chapter.

The following table lists the character sets that are supported by PeopleSoft and the names by which they can be referred to in PeopleSoft applications. You can use these character set names in the following places:

- In PeopleCode programs, for manipulating file layout objects.
- In SQR code, for controlling the character set of input, output, and report files.
- In PSSQR.INI to determine the default character set for files manipulated by SQR.
- In the UNIX application server configuration, to determine the default non-Unicode character set for log files, trace files, and UNIX operating system interfaces.
- When creating your database. A limited number of the character sets in this table are supported as database character sets.

  See the *PeopleSoft Hardware and Software Requirements* guide for details about the character sets that are supported for your database platform.

Character Set Name	Description and Comments	Character Set Type
ANSI	Current ANSI-based code page Not really a character set, but causes the system to use the default non-Unicode character set of the host operating system. Under Windows NT, the ANSI codepage is dependent on the language version of your Windows operating system. For example, Japanese Windows NT uses CP932 as its ANSI codepage. English Windows NT uses CP1252 as its ANSI codepage. Windows 2000 and XP allow the system administrator to select the ANSI codepage independently of the language release of Windows.	SBCS
ASCII	US 7-bit ASCII	SBCS
Big5	Big5 (Traditional Chinese)	Non-Shifting DBCS
CCSID1027	IBM EBCDIC 1027 (Japanese-Latin)	SBCS
CCSID1047	IBM EBCDIC 1047 (Latin1)	SBCS
CCSID290	IBM EBCDIC 290 (Katakana)	SBCS
CCSID300	IBM EBCDIC 300 (Kanji)	Non-Shifting DBCS
CCSID930	IBM EBCDIC 930 (Kana-Kanji)	Shifting DBCS
CCSID935	IBM EBCDIC 935 (Simplified Chinese)	Shifting DBCS
CCSID937	IBM EBCDIC 937 (Traditional Chinese)	Shifting DBCS
CCSID939	IBM EBCDIC 939 (Latin-Kanji)	Shifting DBCS
CCSID942	IBM EBCDIC 942 (Japanese PC)	Non-Shifting DBCS
CP1026	Windows 1026 (EBCDIC)	SBCS
CP1250	Windows 1250 (Eastern Europe)	SBCS
CP1251	Windows 1251 (Cyrillic)	SBCS
CP1252	Windows 1252 (Latin1)	SBCS
CP1253	Windows 1253 (Greek)	SBCS
CP1254	Windows 1254 (Turkish)	SBCS
CP1255	Windows 1255 (Hebrew)	SBCS
CP1256	Windows 1256 (Arabic)	SBCS
CP1257	Windows 1257 (Baltic)	SBCS
CP1258	Windows 1258 (Vietnamese)	SBCS
CP1361	Windows 1361 (Korean Johab)	SBCS

Character Set Name	*Description and Comments*	*Character Set Type*
CP437	MS-DOS 437 (US)	SBCS
CP500	Windows 500 (EBCDIC 500V1)	SBCS
CP708	Windows 708 (Arabic - ASMO708)	SBCS
CP720	Windows 720 (Arabic - ASMO)	SBCS
CP737	Windows 737 (Greek - 437G)	SBCS
CP775	Windows 775 (Baltic)	SBCS
CP850	MS-DOS 850 (Latin1)	SBCS
CP852	MS-DOS 852 (Latin2)	SBCS
CP855	MS-DOS 855 (IBM Cyrillic)	SBCS
CP857	MS-DOS 857 (IBM Turkish)	SBCS
CP860	MS-DOS 860 (IBM Portuguese)	SBCS
CP861	MS-DOS 861 (Icelandic)	SBCS
CP862	MS-DOS 862 (Hebrew)	SBCS
CP863	MS-DOS 863 (Canadian French)	SBCS
CP864	MS-DOS 864 (Arabic)	SBCS
CP865	MS-DOS 864 (Nordic)	SBCS
CP866	MS-DOS 866 (Russian)	SBCS
CP869	MS-DOS 869 (Modern Greek)	SBCS
CP870	Windows 870	SBCS
CP874	Windows 864 (Thai)	SBCS
CP875	Windows 875 (EBCDIC)	SBCS
CP932	Windows 932 (Japanese)	Non-Shifting DBCS
CP936	Windows 936 (Simplified Chinese)	Non-Shifting DBCS
CP949	Windows 949 (Korean)	Non-Shifting DBCS
CP950	Windows 950 (Traditional Chinese)	Non-Shifting DBCS
EBCDIC	IBM EBCDIC CCSID37 (USA)	SBCS
EUC-JP	Extended UNIX Code (Japanese)	Non-Shifting DBCS
EUC-KR	Extended UNIX Code (Korean)	Non-Shifting DBCS
EUC-TW	Extended UNIX Code (Taiwan)	Non-Shifting DBCS
EUC-TW-1986	Extended UNIX Code (TW-1986)	Non-Shifting DBCS
GB12345	GB 2312 (Simplified Chinese)	Non-Shifting DBCS

Character Set Name	*Description and Comments*	*Character Set Type*
GB2312	GB 2312 (Simplified Chinese)	Non-Shifting DBCS
ISO-2022-JP	ISO-2022-JP Japanese	Shifting DBCS
ISO-2022-KR	ISO-2022-JP Korean	Shifting DBCS
ISO_8859-1	ISO 8859-1 (Latin1)	SBCS
ISO_8859-10	ISO 8859-10 (Latin6)	SBCS
ISO_8859-11	ISO 8859-11 (Thai)	SBCS
ISO_8859-14	ISO 8859-14 (Latin8)	SBCS
ISO_8859-15	ISO 8859-15 (Latin9 / Latin0)	SBCS
ISO_8859-2	ISO 8859-2 (Latin2)	SBCS
ISO_8859-3	ISO 8859-3 (Latin3)	SBCS
ISO_8859-4	ISO 8859-4 (Latin4)	SBCS
ISO_8859-5	ISO 8859-5 (Cyrillic)	SBCS
ISO_8859-6	ISO 8859-6 (Arabic)	SBCS
ISO_8859-7	ISO 8859-7 (Greek)	SBCS
ISO_8859-8	ISO 8859-8 (Hebrew)	SBCS
ISO_8859-9	ISO 8859-9 (Latin5)	SBCS
JIS_X0201	Japanese Half-width Katakana	Non-Shifting DBCS
JIS_X_0208	Japanese Kanji	Non-Shifting DBCS
Java	Java (Unicode encoding)	Unicode
Johab	Johab (Korean)	Non-Shifting DBCS
Shift_JIS	Shift-JIS (Japanese)	Non-Shifting DBCS
UCS2	Unicode UCS-2	Unicode
UTF7	Unicode UTF-7 An outdated Unicode 7-bit clean transformation sometimes used for email that must pass through gateways that do not support 8-bit characters.	Unicode
UTF8	Unicode UTF-8	Unicode

Note. Although the PeopleSoft use of Unicode incorporates all languages, PeopleSoft does not currently support Arabic or Hebrew; those languages require bi-directional rendering because they are written with a right-to-left general orientation.

See Also

For more information and code charts for Microsoft codepages, visit http://www.microsoft.com/globaldev/reference/cphome.asp

For more information and code charts for the ISO 8859 series of character sets, visit http://czyborra.com/charsets/iso8859.html

For more information and code charts for Unicode, visit http://www.unicode.org

Database Character Sets

The primary character set decision that you must make when installing PeopleSoft is the character set used for the database system. Ideally, all databases are encoded in Unicode; however, as can be seen from the Unicode encoding chart earlier in this chapter, in some cases Unicode requires several bytes to represent each character when only one byte may be required in a non-Unicode character set. Therefore, PeopleSoft still allows you to use a non-Unicode character set for your database character set, provided you don't require the mix of languages enabled by a Unicode database.

Using a Unicode encoded database, you can maintain a single database with data in any combination of languages you choose. A single PeopleSoft application server can serve multiple users connecting to the mixed-language database, regardless of the language or character set of those users' client machines. The only restriction on a user's ability to access mixed-language data is the capability of the user's client workstation to interpret, display, and accept keyboard entry of the characters from the various languages.

Most language- or region-specific, non-Unicode character sets provide sufficient characters for only a few languages. If you create a non-Unicode database, you must ensure that all the characters for all the languages that you plan on using can be represented in the character set you choose. See your operating system and database guides for the contents of each character set and to determine whether the languages you require are represented.

Depending on the data you store and how your database stores Unicode characters, a Unicode database can be significantly larger than a non-Unicode database. Keep in mind, however, that only the storage of character data is impacted; the space required for non-character data, such as numbers and dates (which are stored by your database system as numbers), is not affected.

Depending on your database platform, you can use one of the four character set types when creating your database (SBCS, non-shifting DBCS, shifting DBCS, and Unicode). However, the number of characters you can store in each column is affected greatly by the type of character set you choose for your database encoding.

See Also

PeopleSoft Hardware and Software Requirements Guide

PeopleSoft Installation and Administration PeopleBook for your database platform.

Application Server Character Sets

All data stored in memory and processed by the PeopleTools Application Server is held in Unicode. However. the application server allows the creation of files on the server through the use of PeopleCode file layout objects and for log and trace files. Although the PeopleSoft application server uses Unicode internally for all data processing, it can create these files in Unicode or in a non-Unicode character set.

Each PeopleSoft application server is configured with a default non-Unicode character set. If a file operation must create a non-Unicode file, this is the character set used, unless another character set is explicitly specified in the file operation. For example, if you create a file layout object to write a non-Unicode file, but you don't specify which character set the file should be created in, the default non-Unicode character set of the application server is used.

On Windows NT application servers, the operating system's default ANSI character set is used for the PeopleSoft application server's default non-Unicode character set. In Windows NT 4.0, this default ANSI character set is hard-wired into the operating system, based on the language of the Windows version being used- you cannot change it. For example, in English Windows NT 4.0, the default non-Unicode character set is Microsoft CP1252. In Japanese Windows NT 4.0, the default non-Unicode character set is Microsoft CP932. You can determine the default ANSI character set of your Windows machine by issuing the "chcp" command at a command prompt.

Windows 2000 and XP allows you to change the default character set of the system, although as installed, the default character set matches the default locale of the Windows 2000 or XP installation. To change the system default locale (and therefore the character set), on Windows 2000 servers, use the Control Panel's Regional Options applet and click the Set Default button under *Language settings for the system*.

When running on UNIX, the PeopleSoft application server enables you to specify the default non-Unicode character set in the application server's configuration file, which is selected using the PSADMIN tool. Any valid PeopleSoft character set (as listed in the table earlier in this chapter) with a character set type of SBCS or Non-Shifting DBCS is a valid default non-Unicode character set for PeopleSoft application servers that run on UNIX.

See Also

Character Sets in the PeopleSoft Internet Architecture

Client Workstation Character Sets and Language Management

The client components of PeopleTools must be considered when you are planning your language strategy. The requirements for language support on your client workstations are markedly different, depending on whether you are using PeopleSoft Internet Architecture or the PeopleTools Windows development tools.

This section discusses:

- Character sets and fonts in PeopleSoft Internet Architecture.

- Fonts and the Windows client.
- Input methods.

Character Sets and Fonts in PeopleSoft Internet Architecture

PeopleSoft Internet Architecture serves all HTML pages using the UTF-8 encoding of Unicode. This encoding is recognized automatically by the web browser, because the encoding of the page is announced in the HTTP header when the browser communicates with the web server. Most modern browsers can support the use of UTF-8 encoded HTML pages, including all browsers supported by PeopleTools.

However, other components are needed by your browser in order to correctly display and enter the vast array of characters that are available in Unicode. Specifically, you need appropriate fonts to display the various scripts in which you expect data to be maintained, and you may need alternative keyboard layouts or, in the case of ideographic scripts such as Chinese, Japanese, and Korean, you will need input method editors (IMEs) to convert sequences of keystrokes into ideographs.. The requirement for alternate keyboard and IMEs is the same for both PeopleSoft Internet Architecture and the Windows client, and this is discussed in a separate section, below.

Not all fonts contain a full repertoire of Unicode characters, because many fonts are tailored to address a specific list of languages and contain only the glyphs that are required by those languages. If you try to view Unicode data with a font that does not contain the appropriate characters for the displayed language, you will most likely see square boxes in place of the appropriate characters. Your data has not been corrupted; there is just no glyph available in the current font for the character that the system is trying to display. For this reason, you may need to license or configure several fonts for a global PeopleSoft system.

PeopleSoft Internet Architecture includes a set of style sheets, defined with PeopleSoft Application Designer, that determine the font used to display HTML pages. In some cases, your application data may contain characters that are not present in this font and that require a different font. For example, none of the default fonts in the English version of Microsoft Windows NT 4.0 include sufficient Japanese characters to display most Japanese translated data.

You may need to obtain and configure fonts that contain the characters for the languages that you are planning to use, if your workstations are not already configured with these fonts. Obtain fonts from the following sources:

- Many Windows and other operating system applications are packaged with Unicode fonts containing glyphs covering a large range of languages. Microsoft Office 2000 is packaged with several fonts containing a large portion of the characters in the Unicode standard, including the Microsoft Sans Serif font. These fonts can be used in PeopleSoft Internet Architecture by specifying them in the PeopleSoft Application Designer style sheet definitions or by following the browser-specific instructions below.
- Several public domain fonts exist that contain a large character repertoire for use in web browsers.

  See http://www.hclrss.demon.co.uk/unicode/fonts.html for an index of such fonts.

- Several font foundries license fonts for individual or corporate use. Some of these foundries include Agfa Monotype, Bitstream, and Tiro Typeworks.

Depending on your browser, you can also download fonts from your browser's manufacturer.

Microsoft Internet Explorer 5.0 or later allows you to download fonts for most popular languages from the Microsoft web site. Trigger these downloads by visiting the Internet Explorer web site at http://www.microsoft.com/ie and downloading the Internet Explorer Language pack in the language of your choice. Alternatively, select View, Encoding to select the encoding for a language for which you want to download fonts. This causes Internet Explorer 5.0 (or later) to automatically download the font pack from the Microsoft Web site. After this download is completed, select View, Encoding again in order to reset your encoding to UTF-8 so that PeopleSoft Internet Architecture pages appear correctly.

Microsoft Internet Explorer automatically selects the appropriate font for displaying data in the language that is presented in the HTML page. The appropriate font is the one that most closely matches the font specified by PeopleSoft in the page's style sheet definition.

Netscape Navigator 6.0 also performs this automatic font matching, based on the language of the page, but does not provide international fonts.

Netscape Navigator 4.0 versions do not perform automatic font matching, and you must configure the browser manually if the font specified on the style sheet does not exist on particular workstations. Select Edit, Preferences and then selecting Fonts from the tree on the left side of the dialog box that appears. All PeopleSoft Internet Architecture pages are served using the UTF-8 Unicode encoding, so you must change the font setting for the Unicode character set in the Netscape Font dialog box.

Note. PeopleSoft does not support the display or maintenance of Japanese, Chinese and Korean data using Netscape 4 due to significant limitations in that browser's handling of UTF-8 encoded data. In order to view or maintain Japanese, Chinese and Korean data using the PIA, you must use Microsoft Internet Explorer 5.0 or later or Netscape Navigator 6 or later. Please refer to the PeopleSoft Platforms Database on Customer Connection for more information.

Fonts and the Windows Designer Tools

The Windows client allows you to specify the font used for all graphical components in PeopleSoft Application Designer, the Windows client panel processor, and all other PeopleTools Windows modules. There are three separate areas that allow you to specify a font:

- Configuration manager font setting (Display tab)

  This setting affects the font used by all the designer components of PeopleTools, including all the text contained in the Windows resource files

  See "Translating PeopleTools".

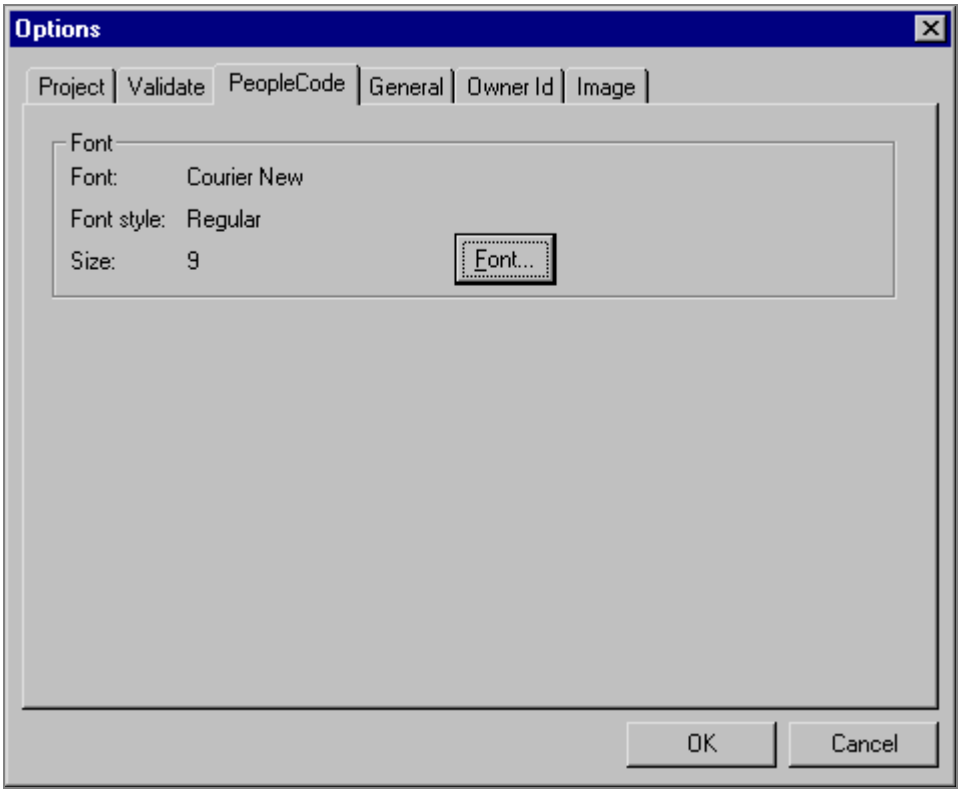
  Changing this font setting may be necessary if your workstation's default locale does not contain the characters that are used for the language you are attempting to display or

maintain. For example, if you are attempting to view Japanese characters on an English Windows workstation, you can change the PeopleSoft Configuration Manager font setting to select a font that contains the characters for the language that you are trying to display.

Several fonts shipped with Microsoft Windows 2000 and Microsoft Office 2000, including Arial Unicode MS and Microsoft Sans Serif, contain a large number of glyphs covering most of the languages supported by the Unicode Standard. Windows 2000 and Windows XP can also be configured with fonts for most worldwide languages by selecting the required languages under the Regional Settings Control Panel applet.

- PeopleCode font

The PeopleCode editor in PeopleSoft Application Designer also enables you to select a font for character display in the editor's window itself. This is useful if the PeopleCode programs you are working on contain Unicode characters. To set the font in PeopleSoft Application Designer, select Tools, Options, and then select the PeopleCode tab.



Font Options dialog box

Input Methods

If users will enter foreign language data using either PeopleSoft Internet Architecture or the Windows client, you must ensure that an appropriate keyboard layout or input method editor is installed on the workstation.

Most alphabetic languages can be typed using a relatively simple keyboard layout. Several specialized keyboard layouts exist for most languages; configure these keyboard layouts

through your operating system. For example, a Spanish keyboard layout contains keys for the n-tilde character (ñ) and several other accented characters.

There are several ways of entering these characters using a non-localized keyboard. Your operating system manual can help you use specialized keyboard layouts, such as the *English - International* layout, which allows the entry of accented characters using two keystrokes. Microsoft's website contains information about keyboards that are supported by Windows and instructions for installing and configuring Windows keyboard layouts.

See http://www.microsoft.com/globaldev/keyboards/keyboards.asp.

Ideographic languages, such as Chinese, Japanese, and Korean, require the use of a front-end processor to intercept multiple keyboard strokes and transform them into an ideographic character. These are known as *input method editors* (IMEs), and they must be installed on each workstation where you plan to enter the ideographic languages.

Most localized versions of operating systems for these languages come preconfigured with IMEs that are appropriate for the language supported by the operating system. But on systems where the default locale is not Chinese, Japanese, or Korean, you may need to configure or license an IME from a third-party vendor. PeopleSoft Internet Architecture supports any IME that is supported by your browser. The Windows designer tools support all standard Microsoft IMEs.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Application Designer, "Creating Style Sheet Definitions"

Validating Field Length

This section discusses:

- PeopleSoft Application Designer field length semantics.
- Field length checking for non-unicode databases.

Application Designer Field Length Semantics

Your database character set choice determines the way that PeopleTools interprets the column length defined in PeopleSoft Application Designer.

If you create a Unicode database, the field length, as shown in Application Designer, indicates the maximum number of Unicode Basic Multilingual Plane (BMP) characters that are permitted in the field, regardless of the Unicode encoding used by your database. Some database platforms, such as Oracle, use byte lengths to measure column sizes when operating in a Unicode database, while others use character lengths. The following table shows the data types and length semantics for each of the valid PeopleSoft database/character set combinations. When the database uses byte-sized column lengths, PeopleSoft sizes your database columns based on the worst-case ratio between bytes and characters in the Unicode

encoding used by your database. For example, the UTF-8 character set is used by Oracle; therefore, the worst-case character-to-byte ratio, when running against an Oracle Unicode database, is 1:3, so column sizes will be tripled when creating a Unicode database on Oracle. For example, a field defined in the Application Designer as a CHAR(10) will be created on an Oracle Unicode database with a type of VARCHAR2(30). This tripling of column maximum size does not have any effect on the actual size of your database, as a variable length character fields no not reserve space in the database.

Other database platforms use character-based column lengths, whose sizes represent the maximum number of Unicode of characters instead of bytes that may be stored. Examples of this implementation is Microsoft SQL Serfver's NCHAR datatype and IBM DB2/UDB for Unix/NT's GRAPHIC datatype.

If you create a non-Unicode database, the field length in PeopleSoft Application Designer represents the number of bytes permitted in the field, based on the character set you used to create your database. Therefore, a PeopleSoft Unicode database will allow you significantly more space for character data within the database when dealing with ideographic languages such as Japanese that require more than one byte storage per character.

The following table shows some of the possible database encodings for database platforms that are supported in Unicode and/or DBCS by PeopleSoft, and their effects on database column sizes.

Database Platform	***Database Character Set***	***Database Representation of a Character Field With Length 10 in PeopleSoft Application Designer***	***Number of Characters (Worst Case) Allowed in a Character Field With Length 10 in PeopleSoft Application Designer***
Oracle	Unicode (UTF-8)	VARCHAR2(30)	10
	Any SBCS	VARCHAR2(10)	10
	Shift-JIS (JA16SJIS)	VARCHAR2(10)	5
Microsoft SQL Server	Unicode (UCS-2)	NCHAR(10)	10
	Any SBCS	CHAR(10)	10
	Shift-JIS (CP932)	CHAR(10)	5
Sybase	Any SBCS	CHAR(10)	10
	Non-Shifting DBCS	CHAR(10)	5
IBM DB2 for OS/390	Any SBCS	CHAR(10)	10
	Shifting DBCS (CCSID 930/939)	CHAR(10)	4 (4 x 2 byte characters, plus shift-in & shift-out bytes)
All Others	Any SBCS	CHAR(10)	10

Field Length Checking for Non-Unicode Databases

The maximum number of characters permitted in a PeopleSoft field varies, depending on the character set of your database (see previous table). Because all components of PeopleTools use Unicode for internal storage, by default field length checking occurs in terms of Unicode character counts. This calculation is appropriate for Unicode databases and for any single-byte character set (SBCS) databases.

However, if you are using a non-Unicode DBCS, special length checking has to occur each time you move off a field to ensure that the string you entered will fit in the database column when the string is converted to the database's character set.

For graphically sizing page fields, PeopleTools uses the Unicode length of the field as defined in PeopleSoft Application Designer. For example, if a field is defined in PeopleSoft Application Designer as a 10-character field, page fields in both PeopleSoft Internet Architecture and the PeopleTools Windows clients allow 10 characters to be displayed unless manually resized by the developer.

However, if your database is encoded in a non-Unicode DBCS character set such as Japanese Shift-JIS or IBM CCSID 930/939, special length validation will need to take place because your database column size is created relative to a byte count, not a character count as is used by the simple field length validation.

For example, if a user enters 10 Japanese characters into a field that is defined as CHAR(10) in PeopleSoft Application Designer, this string needs 20 bytes of storage in a non-shifting DBCS character set and 22 bytes of storage in a shifting character set. This 10-character input would fail insertion in both of these databases.

To address this issue, the page processor checks the Data Field Length Checking option on the PeopleTools Options page and performs character-set specific length validation against the contents of each field when the field is validated. Typically length validation occurs when the field's FieldChange PeopleCode event fires, so the actual time of validation may differ, depending on whether your page uses deferred mode processing.

Enabling or Disabling Data Field Length Checking

To enable or disable data field length checking:

1. Select PeopleTools, Utilities, Use, PeopleTools Options.

   The PeopleTools Options page appears.

2. Select a value for the **Data Field Length Checking** field: *DB2 MBCS, MBCS*, or *Others*.

   Choose a value based on the character set you are using for your database.

   - Choose *Others* if you are using a Unicode encoded database or a non-Unicode SBCS database.

   This prevents special field length checking, which isn't required by these types of databases.

- Choose *DB2 MBCS* if you are running a Japanese database on the DB2/MVS platform.

This enables field length checking based on a shifting DBCS character set.

- Choose *MBCS* if you are running a non-Unicode Japanese database on any other platform.

This enables field length checking based on a non-shifting DBCS character set.

Note. The non-Unicode DBCS settings are specifically oriented to Japanese language installations, as Japanese is the only language supported by PeopleSoft in a non-Unicode DBCS encoding. All other languages requiring double-byte character sets are supported by PeopleSoft only when using Unicode encoded databases.

Once this option is set, the PeopleTools page processor and other components automatically validate the length of the data that is entered into page fields and Windows client dialog boxes based on the character set used by your database.

If more characters are entered into a field than are allowed by the database, an error message indicates how many characters must be trimmed from the value entered and the reason for the requirement. The error message also contains some helpful hints specifically for Japanese users in determining how many characters may fit in a field.

3. Save the page.

Handling International Characters in PeopleTools

PeopleTools contains several features that allow the manipulation of character data based on the language, script, or type of character being processed. Some field formats, such as the Name format, are dependent on the language of the data being maintained. Several PeopleCode functions are provided to allow manipulation of language-dependent characters.

This section discusses standard name formats for Chinese, Japanese, and Korean characters.

Standard Name Formats for Chinese, Japanese, and Korean Characters

The PeopleSoft standard name format is as follows: [lastname] [suffix],[prefix] [firstname] [middle name/initial]

However, if the name contains any of the following types of characters (typically used in Chinese, Japanese, and Korean names), you must separate the first and last names by a space, instead of a comma:

- Chinese, Japanese and Korean Unified Ideographs (Chinese “Hanzi”, Japanese “Kanji”, Korean “Hanja”)
- Japanese half-width or full-width Katakana

- Japanese Hiragana
- Korean Hangul

Example of the PeopleSoft standard name format when any one of the previous types of characters appear: [lastname] [suffix] [prefix] [firstname] [middle name/initial]

This format allows for Chinese, Japanese, and Korean names, which are traditionally separated by spaces and which would appear incorrectly if separated by a comma.

Detecting and Converting Characters

PeopleTools also provides PeopleCode string functions that recognize and convert between different characters within the Japanese character set. This lets you detect, convert, and enforce the types of characters that you can enter any PeopleSoft field. PeopleSoft used these functions in the development of Alternate Character Architecture in some PeopleSoft applications. Alternate Character Architecture is used in several PeopleSoft applications to provide a feature that enables the entry of, and enforces the characters contained in, Japanese phonetic spellings (Furigana) using the Hiragana or Katakana scripts.

This section discusses:

- Common Char_Code values.
- CharType.
- ContainsCharType.
- ContainsOnlyCharType.
- ConvertChar.

See Also

*PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, "*PeopleCode Built-in Functions" CharType, ContainsCharType, ContainsOnlyCharType, ConvertChar

Common Char_Code Values

The character sets are represented by a set of *char_code* values shared by these functions:

Character Code	***Character Set***
0	Alphanumeric (7-bit ASCII codes: A-Z, a-z, 1-9, punctuation)
1	Extended Latin-1 characters (ISO8859-1 accents for Spanish, French, and so forth)
2	Hankaku Katakana (half-width Japanese Katakana)
3	Zenkaku Katakana (full-width Japanese Katakana)

Character Code	Character Set
4	Hiragana (Japanese)
5	Unified Han Ideographs (Japanese Kanji, Chinese Hanzi, Korean Hanja)
6	Double-byte alphanumeric (Japanese)
7,8,9	Reserved for future use
10	Japanese punctuation

CharType

The syntax of CharType is as follows: CharType(source_str, char_code)

- source_str is the first character to be test.
- char_code is a number representing the character type to be test for.

CharType returns one of the following number values:

Return Value	Description
1	Character is of type char_code.
0	Character is not of type char_code.
-1	UNKNOWN: unable to determine whether character is of set char_code. This return code was given by previous versions of PeopleTools when the character set could not be detected, but this should not occur with PeopleTools 8.

Example

This example tests to see if a character is Kanji:

```
&ISKANJI = CharType(&STRTOTEST, 5);
If (&ISKANJI = 1) Then
 WinMessage("Character type is Kanji");
Else
 If (&ISKANJI = 0) Then
 WinMessage("Character type is not Kanji");
 Else
 WinMessage("Character type is UNKNOWN");
 End-If
End-If
```

See Also

Common Char_Code Values

*PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, "*PeopleCode Built-in Functions" CharType

ContainsCharType

ContainsCharType determines whether any of the characters in a source string are of a specific character type. The char_code is a number value representing a character set. Its syntax is as follows: ContainsCharType(source_str, char_code)

- *source_st* is the string to be examined.
- *char_code* is a number value representing the character set to be tested for.

CharType returns one of the following number values:

Return Value	*Description*
1	String contains at least one character of set char_code.
0	String contains no characters of set char_code.
-1	UNKNOWN: unable to determine whether one or more characters in the string is of set char_code. This return code was given by previous versions of PeopleTools when the character set could not be detected, but this should not occur with PeopleTools 8.

Example

This example tests to see if the string contains any Kanji:

```
&ANYKANJI = ContainsCharType(&STRTOTEST, 5);
If (&ANYKANJI = 1) Then
 WinMessage("There are Kanji characters");
Else
 If (&ANYKANJI = 0) Then
 WinMessage("There are no Kanji characters");
 Else
 WinMessage("UNKNOWN");
 End-If
End-If
```

See Also

*PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, "*PeopleCode Built-in Functions" ContainsCharType

ContainsOnlyCharType

ContainsOnlyCharType determines whether every character in a source string belongs to one or more of the character sets in a list of character codes. Its syntax is as follows: ContainsOnlyCharType(*source_str*, *char_code_list*)

- source_str is the string to search.
- *char_code_list* is a list of character set codes in the form *char_code_1* [, *char_code_2*].

ContainsOnlyCharType returns one of the following number values:

Return Value	*Description*
1	String contains only characters that belong to the sets listed in char_code_list.
0	String contains one or more characters that do not belong to sets listed in char_code_list.
-1	UNKNOWN: unable to determine whether one or more characters in the string is of set char_code. This return code was given by previous versions of PeopleTools when the character set could not be detected, but this should not occur with PeopleTools 8.

Note. If any character is determined to be unknown, the return value is *UNKNOWN*.

Example

This example tests to see if the string is only Hiragana or punctuation:

```
&ONLYHIRAGANA = ContainsOnlyCharType(&STRTOTEST, 4, 10);
If (&ONLYHIRAGANA = 1) Then
 WinMessage("There are only Hiragana and Punctuation characters");
Else
 If (&ONLYHIRAGANA = 0) Then
 WinMessage("Mixed characters");
 Else
 WinMessage("UNKNOWN");
 End-If
End-If
```

See Also

*PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, "*PeopleCode Built-in Functions" ContainsOnlyCharType

ConvertChar

ConvertChar converts every character in a source string to a target character code type, if possible, and places the converted string in an output string. Its syntax is as follows:

```
ConvertChar(source_str, source_char_code, &output_str, target_char_code)
```

ConvertChar supports the following conversions:

- Conversion among the Japanese Hankaku Katakana, Zenkaku Katakana, and Hiragana characters.
- Conversion of Japanese Hankaku (half-width) Katakana, Zenkaku (full-width) Katakana, and Hiragana characters to ASCII alphabetic characters.
- Conversion of Japanese full-width alphanumeric characters to their alphanumeric equivalents.
- Conversion of Japanese full-width punctuation characters to their regular equivalents.

Other *source_str* and *target_char_code* combinations are either passed through without conversion or not supported. Character types 0 and 1 (alphanumeric and extended Latin-1) are always passed through to output_str without conversion.

UNKNOWN characters are echoed as-is to the output string. If *source_str* can be partially converted, ConvertChar will partially convert the string, echo the remaining characters to the output string as-is, and return a value of -2 (Completed with Issues).

This section discusses:

- Returns
- Parameters
- Supported Conversions

Returns

ConvertChar returns a number with one of the following values:

Value	*Description*
1	String successfully converted.
0	String not converted.
-1	UNKNOWN condition: this return code was given by previous versions of PeopleTools when the character set could not be detected, but this should not occur with PeopleTools 8.
-2	Completed with issues. Conversion was executed, but one or more characters were encountered that were either not recognized or whose conversion is not supported.

Note. If any character cannot be translated, it is echoed as-is to *output_str*. *Output_str* could therefore be a mixture of converted and non-converted characters.

Parameters

source_str String to be converted.

source_str_category Language category of input string.

Character Code	Description
0	Alphanumeric (7-bit ASCII codes: A-Z, a-z, 1-9, punctuation)
1	Extended Latin-1 characters (ISO8859-1 accents, Spanish, French, and so forth)
2	Japanese (any)

Output_str A string variable to receive the converted string.

Target_char_code A number representing the conversion target character type.

Character Code	Description
0	Alphanumeric (7-bit ASCII codes: A-Z, a-z, 1-9, punctuation)
2	Hankaku Katakana (half-width Japanese Katakana)
3	Zenkaku Katakana (full-width Japanese Katakana)
4	Hiragana (Japanese)
6	Double-byte alphanumeric (Japanese)

The following target values are not supported; if the source string is of the same type as any of these values, then the string is passed through without conversion.

Character Code	Description
1	Extended Latin-1 characters (ISO8859-1 accents, Spanish, French, and so forth)
5	Kanji (Japanese)
10	Japanese punctuation

Supported Conversions

The following table shows which conversions are supported, which are passed through without conversion, and which are not supported:

Source	*Target*	*Conversion*
0 (Alphanumeric ASCII)	0-6 (All supported character types)	Pass through without conversion
1 (Extended Latin-1 characters)	0-6 (All supported character sets)	Pass through without conversion
2 (Hankaku Katakana)	0 (Alphanumeric)	Conversion supported
	1 (Extended Latin)	Not supported
	2 (Hankaku Katakana)	Pass through without conversion
	3 (Zenkaku Katakana)	Conversion supported
	4 (Hiragana)	Conversion supported
	5 (Kanji)	Not supported
	6 (Full-width alphanumeric)	Not supported
3 (Zenkaku Katakana)	0 (Alphanumeric)	Conversion supported
	1 (Extended Latin)	Not supported
	2 (Hankaku Katakana)	Conversion supported
	3 (Zenkaku Katakana)	Pass through without conversion
	4 (Hiragana)	Conversion supported
	5 (Kanji)	Not supported
	6 (Full-width alphanumeric)	Not supported
4 (Hiragana)	0 (Alphanumeric)	Conversion supported
	1 (Extended Latin)	Not supported
	2 (Hankaku Katakana)	Conversion supported
	3 (Zenkaku Katakana)	Conversion supported
	4 (Hiragana)	Pass through without conversion
	5 (Kanji)	Not supported
	6 (Full-width alphanumeric)	Not supported
5 (Kanji)	0-4, 6	Not supported
	5 (Kanji)	Pass through without conversion
6 (Double-byte alphanumeric)	0 (Alphanumeric)	Conversion supported
	1-5	Not supported

Source	Target	Conversion
	6 (Full-width alphanumeric)	Pass through without conversion
10 (Japanese punctuation)	0 (Alphanumeric)	Conversion supported
	1 (Extended Latin)	Not supported
	3-6, 10	Pass through without conversion

Example

This example attempts to convert a string to Hiragana:

```
&RETVALUE = ConvertChar(&INSTR, 2, &OUTSTR, 4);
If (&RETVALUE = 1) Then
 WinMessage("Conversion to Hiragana successful");
Else
 If (&RETVALUE = 0) Then
 WinMessage("Conversion to Hiragana failed");
 Else
 If (&RETVALUE = - 1) Then
 WinMessage("Input string is UNKNOWN character type.");
 Else
 WinMessage("Some characters could not be converted.");
 End-If
 End-If
End-If
```

See Also

*PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, "*PeopleCode Built-in Functions" ConvertChar

CHAPTER 7

Using Related Language Tables

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

- Install PeopleSoft-provided translations.
- Swap the base language.
- Create related language tables.
- Create related language views.

Understanding Related Language Tables

PeopleTools can store multiple translations of application data and PeopleTools objects in a single database . Each PeopleSoft database has a single "base language". The base language of a new PeopleSoft database upon installation is always English, but can be changed by an administrator. The base language should be the language most commonly used by application users, and is the language in which data is stored in the core PeopleSoft tables known as "base language tables".

All PeopleTools objects (such as pages, fields and queries) can be maintained in multiple languages. Descriptions of application data elements (such as departments, locations and jobcodes) can also be maintained in multiple languages. The key to maintaining this data in multiple languages is through the use of special tables known as "related language tables".

A related language table stores descriptions (and other language-sensitive elements) in all languages *other* than the base language of the database. In this way, while any table in the database can store data in the base language of that database, only tables that have related language tables can maintain the same data in multiple languages simultaneously. For example, it is unlikely that you will want to maintain the descriptions of your General Ledger journal lines in multiple languages – the sheer volume of the journal lines in most systems would preclude any effort to maintain translations of their descriptions. The cost of hiring a translator to translate each journal line would be prohibitive, and in most cases only the person entering the journal line (and possibly their supervisor) would be likely to want to view it again. However for frequently used values such as a chart of accounts, many users across your entire organizations would often need to refer to this data, and so you would most likely want to maintain the descriptions of each chartfield entry in each language spoken by your users.

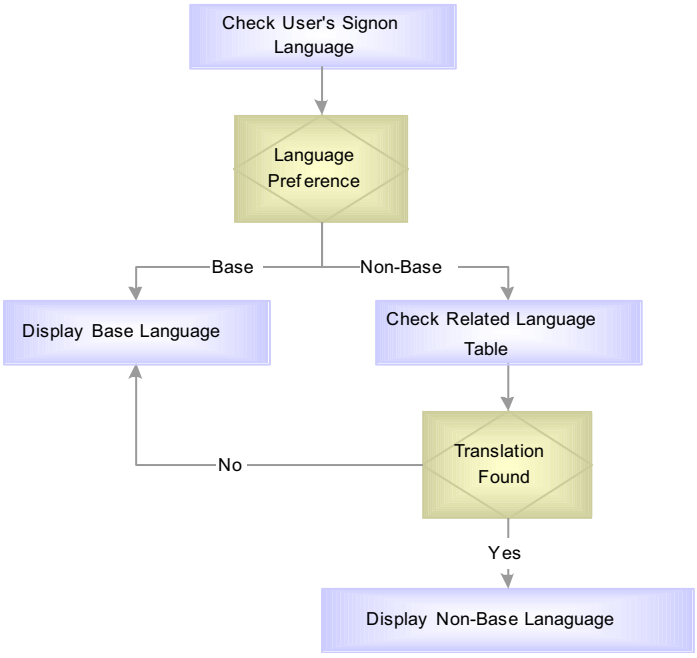
In this case, you would not need a related language table for your Journal Lines table (as you would be maintaining Journal Line descriptions in a single language only, and this would be in the base table), but you would need a related language table for each of your chartfield tables.

When the system displays a language-sensitive field value, it retrieves the text from either the base table or the related language table, depending on the following:

- The current language preference.
- Whether any translated rows for the field are found in the related language table.

The language preference refers to either the PeopleSoft Internet Architecture signon language or in the case of the Application Designer, the language preference as determined by the PeopleSoft Configuration Manager'slanguage setting.

If the current language preference is the system's base language, the text is retrieved from the base table. If the language preference is a non-base language, then the system looks for a translation of the text in the related language table. If it finds a translation, it displays the translated text; if no translation exists, the system uses the text in the base table. This enables developers to selectively translate portions of the system, while keeping the system fully functional at all times, even if not all rows have been translated. The following flowchart shows this flow of execution:



System display of base and non-base language text

Synchronization of related language tables with their base tables are automatically maintained by PeopleTools. When you translate a language-sensitive field, the system adds a new row to the related language table. When you delete a row from a base table, any child rows in the related language table are deleted. The primary responsibility of the application developer in the language architecture is to define and maintain the related language tables.

Note. PeopleTools automatically handles the storage and display of data in related language tables and their synchronization with corresponding entries in the base language tables based on each user's language preference. However, PeopleTools cannot automatically translate data! PeopleSoft provides translations of PIA components and user interfaces for most application products into several languages. Also, translations of several key application data tables such as country and currency codes are also provided by PeopleSoft. However, you will need to plan a way to translate application data entered by your users that needs to be maintained in multiple languages. Some users who are familiar with several languages may wish to translate the data elements they enter themselves using the Multilingual Support feature. In other cases, you may wish to bring in translators periodically to translate key elements into each language used in your organization. PeopleTools provides an architecture to store these translations, but does not perform "machine translation" or provide other automated linguistic translation technologies.

In releases of PeopleTools prior to PeopleTools 8.4, some PeopleTools tables were language-sensitive but did not conform to the standard related language table architecture described in this chapter. These tables stored all languages, both base and non-base in their base language table. These tables have been re-designed in PeopleTools 8.4 to follow the standard architecture of related language tables.

The tables that were re-designed include:

XLATTABLE

PSPNLFIELD (and child tables)

PSPNLDEFN

MESSAGE_CATALOG

MESSAGE_SET_TBL

See Also

"Controlling International Preferences"

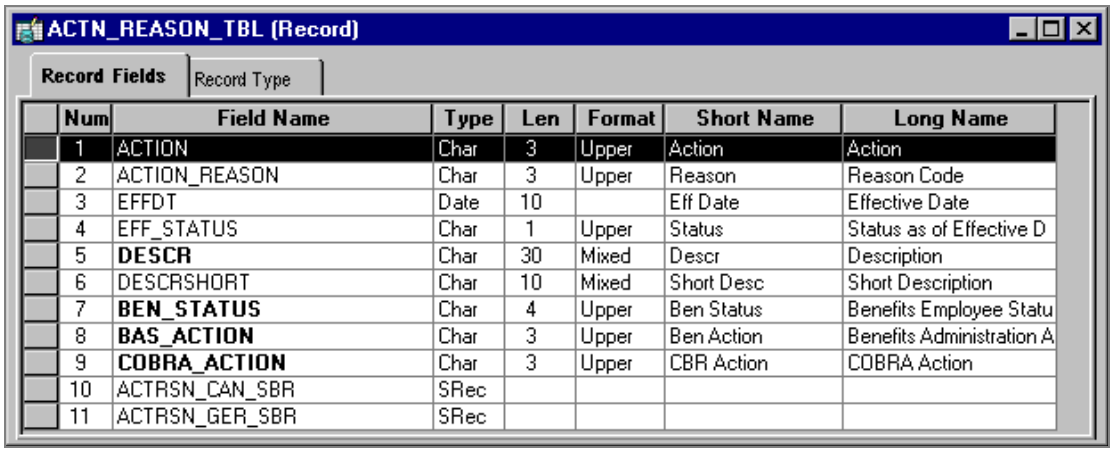
"Working With Language-Sensitive Application Data", Editing Data in Multiple Languages

Related Language Table Structure

Related language tables store multiple translations of language-sensitive fields from an associated base table. For example, description (DESCR) and short description (DESCRSHORT) fields are commonly language sensitive.

Each table in your database that is not a related language table is by definition, a base language table. The Action Reason table, ACTN_REASON_TBL, is one example of a base table. Note that it has DESCR and DESCRSHORT fields which would typically be language-sensitive. All other fields in the table are translate value or prompt table editable codes and are therefore not language sensitive. In the following example, the developer has decided that it is likely that each user would need to see the description of the Action Reason in their own

language, and so a related language table is needed to store translations of DESCR and DESCRSHORT.



ACTN_REASON_TBL (Record)

Record Fields | Record Type

Num	Field Name	Type	Len	Format	Short Name	Long Name
1	ACTION	Char	3	Upper	Action	Action
2	ACTION_REASON	Char	3	Upper	Reason	Reason Code
3	EFFDT	Date	10		Eff Date	Effective Date
4	EFF_STATUS	Char	1	Upper	Status	Status as of Effective D
5	**DESCR**	Char	30	Mixed	Descr	Description
6	DESCRSHORT	Char	10	Mixed	Short Desc	Short Description
7	**BEN_STATUS**	Char	4	Upper	Ben Status	Benefits Employee Statu
8	**BAS_ACTION**	Char	3	Upper	Ben Action	Benefits Administration A
9	**COBRA_ACTION**	Char	3	Upper	CBR Action	COBRA Action
10	ACTRSN_CAN_SBR	SRec				
11	ACTRSN_GER_SBR	SRec				

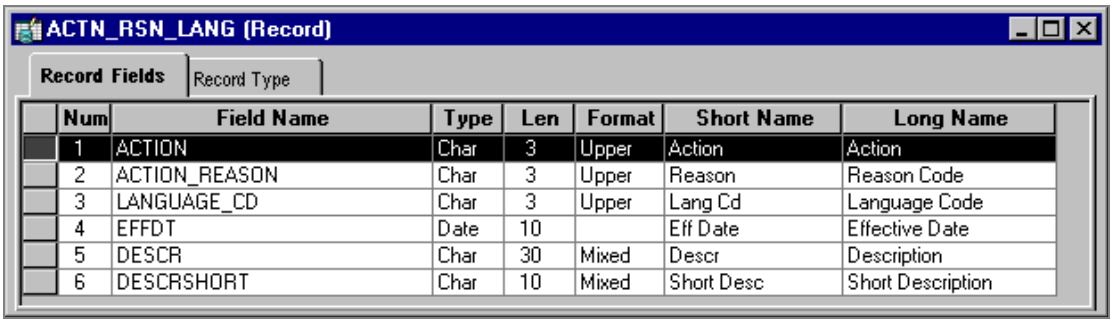
ACTN_REASON_TBL

The developer has therefore created a new record definition, ACTN_RSN_LANG to act as the related language table for ACTN_REASON_TBL. Related Language records are defined in the Application Designer just like any other record definitions. However, as they often contain many of the same fields as their base language table, it is often quicker to create the related language table by "cloning" the base table, achieved by opening the base language table, using the File, Save As menu option and entering the name for the new record. Once cloned, any fields not required on the related language record can be deleted from the new record.

A related language table must:

- Share all key record fields with its base table.
- Have an additional key record field, which must be LANGUAGE_CD.
- Have language-sensitive fields matching those in the base table (these are typically DESCR and DESCRSHORT or LONGNAME and SHORTNAME).
- Not contain any fields that are not present on the base table, except the LANGUAGE_CD key field.
- Not contain any non-key, non-language-sensitive fields from the base table.

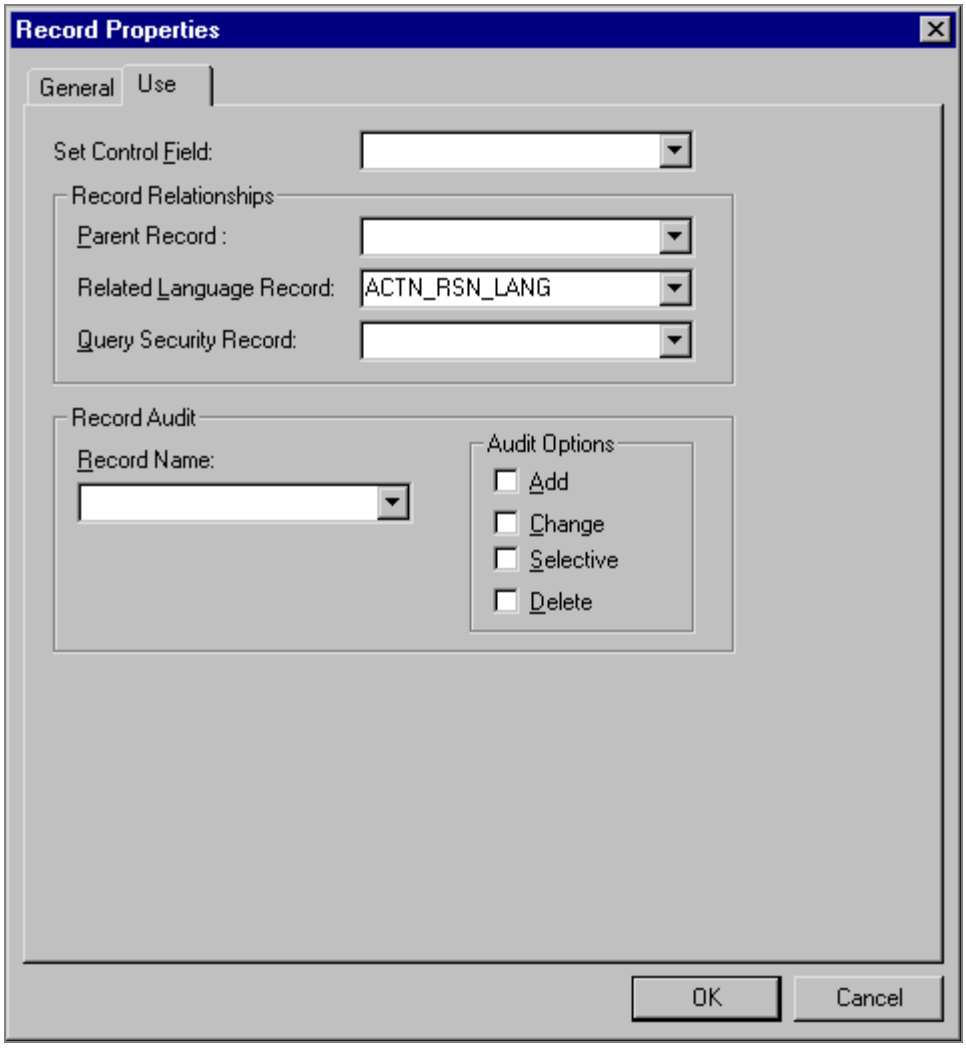
The related language table, ACTN_RSN_LANG, meets all of these requirements:



Num	Field Name	Type	Len	Format	Short Name	Long Name
1	ACTION	Char	3	Upper	Action	Action
2	ACTION_REASON	Char	3	Upper	Reason	Reason Code
3	LANGUAGE_CD	Char	3	Upper	Lang Cd	Language Code
4	EFFDT	Date	10		Eff Date	Effective Date
5	DESCR	Char	30	Mixed	Descr	Description
6	DESCRSHORT	Char	10	Mixed	Short Desc	Short Description

ACTN_RSN_LANG

The base table must be explicitly associated with its related language table. This association is made on the Use tab of the *base table's* Record Properties dialog box:



Record Properties dialog box: Use tab

How Related Language Tables Store Translations

Base tables store language-sensitive descriptions in the database's base language. Related language tables store translations of these descriptions in non-base languages. For each row in the base table, there can be zero rows or one row in the related language table for each non-base language.

For example, the following table shows a row of data from the ACTN_RSN_TBL table.

Action	*Action_Reason*	*Effdt*	*Descr*	*DescrLong*
PAY	PRO	01/01/98	Promotion	Promotion

The following table shows child rows of data from the ACTN_RSN_LANG table. For each LANGUAGE_CD, there is a row with appropriate translations of the language-sensitive fields in the parent row.

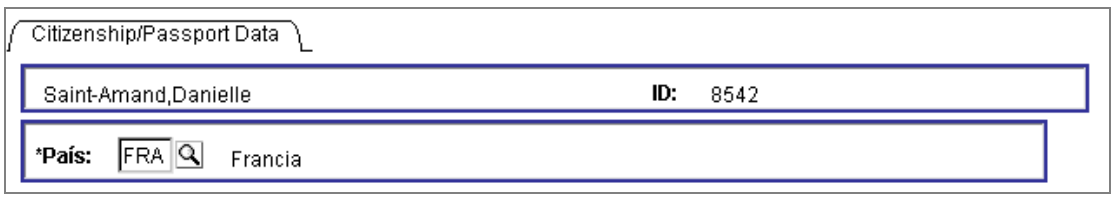
Action	*Action_Reason*	*Effdt*	*Language_Cd*	*Descr*	*DescrLong*
PAY	PRO	01/01/98	ESP	Promoción	Promoción
PAY	PRO	01/01/98	FRA	Promotion	Promotion
PAY	PRO	01/01/98	GER	Beförderung	Beförderung

How Related Language Tables Are Used

Related language tables are the primary means of storing language translations in the PeopleSoft system. They store translations of descriptive text for both data (such as a standard list of expense categories) and system objects (such as descriptions of fields and records).

Related language tables that store descriptive text for data are generally associated with edit tables that store lists of values that are used for validation and prompting. When a page field prompts against a table that has an associated related language table, then, if the user's language preference is a non-base language, the description fields that have been translated into the current language appear in place of the base language descriptive text.

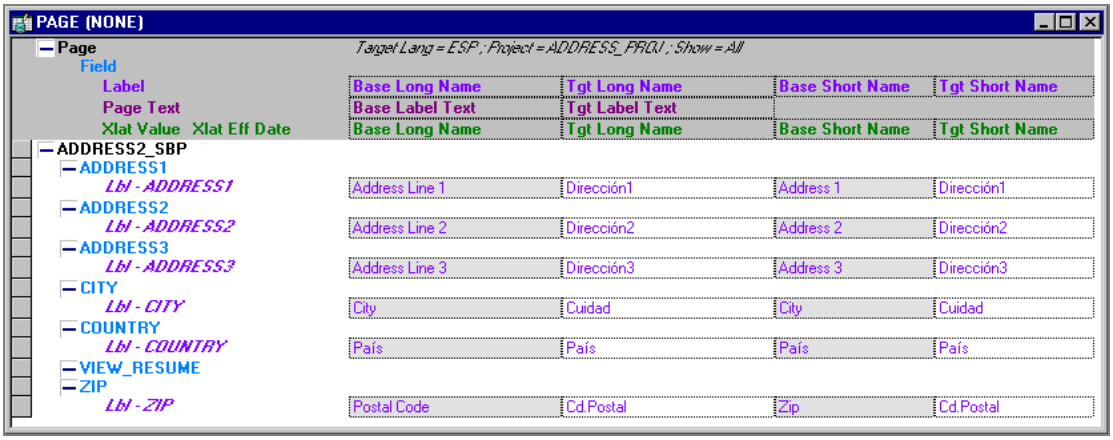
For example, the following page appears when the user's language preference is Spanish (ESP). The Country field (País) prompts against the Country table (COUNTRY_TBL). The translated description (Francia) comes from the Country table's related language table (COUNTRYTBL_LANG).



Page with translated descriptive text

Many PeopleTools object definitions, including fields, records, and components also have associated related language tables. This makes maintenance of multiple language PeopleTools objects and therefore the system user interface relatively straightforward: the system uses a single mechanism for maintaining translated data and for maintaining the system objects themselves. Field translation is particularly powerful because translated field descriptions appear on search pages and on pages where the descriptive text for the field is used as the field label.

For example, all the fields on the ADDRESS2_SBP subpage are translated into Spanish:



Translation of fields in ADDRESS2_SBP

Because the fields are translated, the translated versions of field labels appear when a user whose language preference is Spanish accesses a page that shows the long name or short name of any of these fields. No additional development work on the part of the developer is required.

Of course, whenever the base labels change, you must also update the translations of the object names.

See Also

"Working With Language-Sensitive Application Data"

"Translating Application Definitions"

"Global Reporting and Analysis," Language-Sensitive Queries

Installing PeopleSoft-Provided Translations

In many cases, PeopleSoft provides translations of the user interface and key application data for many of our application products. Except for PeopleTools, these translations are shipped on a separate CD-ROM for each product line known as the "Global Multi-Language CD-ROM". If you did not receive this CD-ROM in your kit, you may not have licensed the appropriate translations from PeopleSoft. Contact Customer Care to obtain the CD.

Translations for PeopleTools itself are shipped on the PeopleTools CD – no Global Multi-Languge CD-ROM is required for PeopleTools.

Typically you would install these translations when you first install your database. However, if you did not install the PeopleSoft-provided translations during your initial install, this section describes the steps to follow to add translations that you have licensed from PeopleSoft to an already-existing database.

Note. We recommend installing the PeopleSoft Global Multi-Language CD-ROM at the same time that you install the English release.

To add translations licensed from PeopleSoft, you must determine how you will perform your upgrade. Choose the most appropriate option:

- Add the translations provided on the PeopleSoft Global Multi-Language CD-ROM to your existing PeopleSoft database.

  This option is available only if you have not made any customizations to existing PeopleTools-based objects in your existing database.

  PeopleTools-based objects include any objects that you maintain using PeopleSoft Application Designer or PeopleSoft Tree Manager, such as pages, fields, and menus. If you have added only new PeopleTools objects to your database, without modifying existing definitions, then you can use this option.

  Adding or customizing system data, such as account codes, departments, and locations, is not considered a PeopleTools object change. If you have performed only these types of transactions against your existing database, and you have not modified any objects using PeopleSoft Application Designer or PeopleSoft Tree Manager, then you can use this option.

- Upgrade your customizations to a multilingual database.

  If you have customized the PeopleTools objects in your database, you cannot simply add the translations contained on the PeopleSoft Global Multi-Language CD-ROM to your existing database. Instead, you must create a new database containing all of your licensed translations and use the upgrade process to copy customizations from your existing database to your newly installed database.

Adding Translations to an Existing Database

This topic explains how to load translations by adding them to an existing database. This method of loading translations may not be available to you, depending on the customizations you have performed on your existing database. Be sure to read the overview for this section before loading translations.

To add translations to an existing database:

1. Load your PeopleSoft Global Multi-Language CD-ROM.

See *PeopleSoft Installation and Administration Guide*, "Setting Up the File Server."

2. Rerun the steps for setting up the batch environment.

   If you are running a Windows NT or Windows 2000 process scheduler (*PSNT*), then you must rerun the steps for "Setting Up the Batch Environment" documented in your *PeopleSoft Installation and Administration Guide.*

   Because the PeopleSoftGlobal Multi-Language CD-ROM contains translations for your Crystal Reports and PS/nVision layouts, you must transfer those translations to your Windows NT or Windows 2000 process scheduler.

   If you run only non-Windows NT or Windows 2000 process schedulers, you do not need to complete this step. This step also does not need to be performed for UNIX batch servers because the only objects that don't contain translations in the database are Crystal and PS/nVision reports, both of which are supported on only Windows NT and Windows 2000 batch servers.

3. Generate database setup from PeopleSoft Data Mover.

   Run PeopleSoft Data Mover in bootstrap mode by logging in with your database's access ID. From PeopleSoft Data Mover, select File, Database Setup, and follow the wizard step by step to generate the database setup script. Be sure to select "Add New Language" in the "Database Type" selection box in the second step of the Wizard.The generated database setup script appears in the PeopleSoft Data Mover input view. Be sure to enter the same database parameters that you entered the first time you ran the database setup program to install your English database; do not select any language that already exists in your database.

   If you choose a new base language, then the generated script will include the command to swap the base language.

4. Run the PeopleSoft Data Mover script.

   Because you have already created your database and set up the appropriate database-specific objects, you must perform only the "Run Data Mover Import Scripts" task.

5. Run the VERSION Application Engine program to update your PeopleTools version numbers.

   Run the PeopleTools VERSION Application Engine program against your database. This synchronizes the PeopleTools version numbers, taking the new translations into account.

6. Rerun your database audits.

   Your database should now be complete. To ensure that it is complete, rerun the database audits.

   See *PeopleSoft Installation and Administration Guide,* "Creating a Database," Check Database

Upgrading Your Customizations into a Multilingual Database

This section explains how to load translations by upgrading your customizations into a multilingual database. Be sure to read the overview for this section before loading translations.

To upgrade your customizations into a multilingual database:

1. Follow steps one and two in the previous section entitled Adding Translations to an Existing Database.

2. Create and load your new PeopleSoft Global Multi-Language database, which contains all of the languages you've licensed.

   See *PeopleSoft Installation and Administration Guide,* "Creating a Database."

   Keep in mind that you must load the English objects provided by PeopleSoft even if you don't plan to run your system in English. Follow all of the applicable steps in "Creating a Database." Do not follow the Swap Base Language step. You should not swap the base language of your new database until you have copied your customizations into it.

3. Copy your customizations into your new PeopleSoft Global Multi-Language database.

   Using the Upgrade Copy utility in PeopleSoft Application Designer, copy the objects you have modified from your existing database into your new PeopleSoft Global Multi-Language database.

   If you have maintained all of your customizations in PeopleSoft Application Designer projects, you can easily use these projects to copy only the objects you have modified over to your new PeopleSoft Global Multi-Language database.

   If you have not maintained your customizations in a project, you may want to use the PeopleSoft Application Designer Upgrade Compare process to compare your customized database against a newly installed, English-only database in order to identify your changes. Remember that for this compare process, your source database is your existing database, and your target database is a newly installed, English-only database.

   Once you have identified the objects you have changed, using the Compare process, use Upgrade Copy to copy the objects into your new Multi-Language database. Remember that during the Upgrade Copy process, your source database is your existing English-only database and your target database is the new Multi-Language database.

4. Run the VERSION Application Engine program to update your PeopleTools version numbers.

   Run the PeopleTools VERSION Application Engine program against your database. This will synchronize the PeopleTools version numbers, taking the new translations into account.

5. Swap your base language.

If you have not already swapped your base language and you decide to run your database in a non-English base language, swap the base language of your database.

Your database should now be complete. To ensure that it is complete, rerun the database audits, as documented under the heading "Check Database" in chapter 5, Creating a Database, of the *PeopleSoft Installation and Administration Guide.*

See Also

PeopleTools 8.4 PeopleBook:PeopleSoft Application Designer, "Upgrading with PeopleSoft Application Designer"

Swapping the Base Language

Swapping the Base Language

As delivered, the PeopleSoft database have a base language of English; the system has English data in its base language tables and non-English data (if you have licensed and installed PeopleSoft-provided translations) in the related language tables. To choose a language other than English as your base language, you must move all English data to the related language tables (with an appropriate language code) and move all of the data in your new base language to the base tables. This process is called *swapping the base language* of your database. If you later decide to change base languages again, you must go through the same process.

PeopleSoft Data Mover provides the following command to automate this process:

```
SWAP_BASE_LANGUAGE <target language>;
```

To swap the base language of your database, you must identify the language to swap in as the new base language. PeopleSoft Data Mover finds all the affected tables and loads the appropriate language data into them.

This process handles all related language tables in the system: PeopleTools tables and application tables. Changes are committed after each table is swapped; a log file records the process of the swap and can help you troubleshoot any errors during the process.

You can check the existing base language code by looking in the PeopleTools, Utilities, Use, Options page. You can't change the Base Language Code setting in this page; it is for display purposes only. To change your base language, use the SWAP_BASE_LANGUAGE PeopleSoft Data Mover command.

This section lists prerequisites and discusses how to:

- Run the auditing report.
- Check space and resources.
- Swap the base language.

Prerequisites

Before swapping the base language of your database, you must have:

- A clean audit report (to ensure that there are no data integrity problems).
- Sufficient space and resources to run the swapping process.

Running the Auditing Report

The SQR process SWPAUDIT.SQR ensures that there are no data integrity problems that will cause errors during the swap process.

See *PeopleTools Installation Guide*, "Creating a Database" for information on how to run SQRs manually in your environment. This SQR does not have a run control, and therefore cannot be run with PeopleSoft Process Scheduler.

SWPAUDIT.SQR may report one or more of the following errors. Refer to the instructions below to correct these errors before continuing with your swap process, and rerun the audit until it reports no errors.

Warning! Errors reported during the audit process indicate that the swap base language process will fail unless the errors are corrected.

(SWAP-1) Related Language Records That Are Not Valid Records

The records listed are defined as related language records for one or more base records, but they do not exist in your database.

To fix this problem, do one of the following:

- Create the related language record, as appropriate, based on the keys and translatable fields of the base record.
- Open the base language record in PeopleSoft Application Designer, and remove its association with the related language record in the Object Properties dialog box.

(SWAP-2) The Field LANGUAGE_CD Is Not a Key in the Following Related Language Record(s)

A record is defined as a related language record, but it does not have LANGUAGE_CD as a component of its key. LANGUAGE_CD must be a key field on every related language record.

To fix this problem, make LANGUAGE_CD into a key field on the related language record.

(SWAP-3) The Following Related Language View(s) Have the Wrong Key Structure Defined

The keys of a view used as a related language record by one or more records do not conform to the requirements for PeopleSoft related language records. The related language record must share all of the same keys as its base language record, plus an additional key (LANGUAGE_CD).

To fix this problem, correct the key structure to ensure that it conforms to this requirement and then recreate the view in the database.

(SWAP-4) The Following Related Language Table(s) Have the Wrong Key Structure Defined

The keys of a table used as a related language record by one or more records do not conform to the requirements for PeopleSoft related language records. The related language record must share all of the same keys as its base language record, plus an additional key (LANGUAGE_CD).

To fix this problem, correct the key structure to ensure that it conforms to this requirement, and then alter the table in the database to match the new key structure.

(SWAP-5) The Following Related Language Table(s) Have the Wrong Structure Defined

The fields of a table used as a related language record by one or more records do not conform to the requirements for PeopleSoft related language records. The related language record must share all of the same fields as its base language record, plus an additional key (LANGUAGE_CD).

To fix this problem, correct the field structure to ensure that it conforms to this requirement, and then alter the table in the database to match the new field structure.

(SWAP-6) The Following Related Language Table(s) Have the Orphan Row Defined

For each row on the related language record there must be a single row on the base table with matching keys. An orphan row is a row of data on the related language record that does not have a corresponding parent row on the base table. Orphan rows must be deleted.

Select against the related language table using the key fields listed in the report to find

To fix this problem, using your platforms query tools select against the related language table, using the fields listed in the report, where the values do not match a row on the base table. For every row on the report there is an orphan row on the table. Do a select first to ensure you are getting the same row count as the report then delete the selected rows. Here is sample SQL for an Microsoft SQL database.

```
SELECT * FROM PSCONTDEFNLANG A WHERE NOT EXISTS
(SELECT 'X' FROM PSCONTDEFN B WHERE A.ALTCONTNUM = B.ALTCONTNUM
AND A.CONTNAME = B.CONTNAME AND A.CONTTYPE = B.CONTTYPE)

DELETE FROM PSCONTDEFNLANG  WHERE NOT EXISTS
(SELECT 'X' FROM PSCONTDEFN B WHERE PSCONTDEFNLANG.ALTCONTNUM = B.ALTCONTNUM
AND PSCONTDEFNLANG.CONTNAME = B.CONTNAME AND PSCONTDEFNLANG.CONTTYPE =
B.CONTTYPE)
```

```
SELECT * FROM <Related Language Record> A WHERE NOT EXISTS
(SELECT 'X' FROM <Base Record> B WHERE A.<Field Name> = B.<Field Name> ...for
each field name listed)
```

(SWAP-7) The Following Base Records Do Not Have an Unique Index

A base record that has a corresponding related language record must have an unique index, that is a key field.

To fix this problem, open the base recorded listed in the report using Application Designer, select a field you want to make a key field. Right mouse click on the field and select **Record Field Properties**. In the dialog that pops up select the **Key** checkbox and save the record. Then click on the **Build** bar item, select **Current Definition**, click Key, select **Execute SQL Now**, click on the **Build** button.

Checking Space and Resources

Before running the SWAP_BASE_LANGUAGE command, be sure that your database has sufficient space and resources to perform the swap process. Although the swap base language process commits after each table is successfully swapped, you need sufficient log space (or rollback space, in the case of Oracle databases) to hold the contents of the largest table to be swapped.

On a newly installed PeopleSoft database, the PSPNLFIELD table is typically the largest table to be swapped, and this can be used as a benchmark for sizing your log space. Plan on at least 50 to 75Mb log or rollback segment space before running the swap process.

Swapping the Base Language

Once you are ready to swap the base language, start PeopleSoft Data Mover in non-bootstrap mode by logging in using a regular PeopleSoft user ID (not the access ID). Once PeopleSoft Data Mover begins, type and run SWAP_BASE_LANGUAGE command:

```
SWAP_BASE_LANGUAGE <target language>;
```

PeopleSoft Data Mover provides feedback during the swap process, including the name of the record currently being swapped and the number of records that remain to be swapped.

Even when SWPAUDIT completes with no errors, the swap base language process may fail. Typically, environmental issues, such as lack of database space, log space, or rollback segment space, cause any errors during this stage of the process. If a failure occurs, note the database-specific error message issued, and take the appropriate action according to your database platform documentation.

PeopleSoft Data Mover stops when errors are encountered, once you have corrected the problems that caused the failure in the swap base language process, you can restart the process without having to restore your database or remember where the first error occurred. To restart the swap process, rerun the SWAP_BASE_LANGUAGE command. PeopleSoft Data Mover

recognizes the tables whose data has already been swapped and does not attempt to swap the data in those tables again; it will report that zero rows were swapped for those tables.

It is safe to rerun this command as many times as needed, correcting errors between runs, until the log file reports no errors.

In some situations, you may want to swap a specific record. Typically, you would swap a single record only if errors occurred during the swap base language process and you want to verify that the swap will succeed without having to re-swap all the records in the database or trace or troubleshoot the swap process.

To swap a specific table, use the following PeopleSoft Data Mover commands:

```
SET BASE_LANGUAGE <target language>;
SWAP_BASE_LANGUAGE <recname>;
```

Note. You should swap individual tables only when there has been an error with system-wide swapping.

If you want PeopleSoft Data Mover to not stop when errors are encountered; and continue the swap process you should set.

```
SET IGNORE_ERRORS;
SWAP_BASE_LANGUAGE <LANGUAGE_CD>;
```

Once the swap process is complete, if you chose to ignore errors during the swap, you should carefully review the log file produced to ensure that no errors occurred. If an error occured, once you have fixed the reason for the error, re-swap that specific table using the SWAP_BASE_LANGUAGE command in individual table mode for each table that failed.

See Also

PeopleSoft Installation and Administration Guide

PeopleTools 8.4 PeopleBook: PeopleSoft Data Management Tools, "Data Mover"

Creating Related Language Tables

PeopleSoft applications provide related language tables for most edit tables that you are likely to translate, so in most cases, you won't have to create your own related language tables. However, if during a customization you create a new table that requires translation, you must create your own related language table.

The following procedure assumes that you know how to design and build records in PeopleSoft Application Designer.

To create a related language table:

1. Check the structure of the base table record, noting its key fields, and make sure that it has fields that can be language-sensitive (such as DESCR and DESCRSHORT).

   If the base table has no fields that are language sensitive, then it does not need a related language record.

2. Design the related language record.

   The related language record must:

   - Have all the same key fields as the base table.
   - Have an additional key field, which must be LANGUAGE_CD.
   - Have the language-sensitive fields from the base table.
   - Not contain any fields that are not present on the base table except the LANGUAGE_CD key field.
   - Not contain any non-key, non-language-sensitive fields from the base table.

   By convention, the related language record name should reflect its relationship to the base table and end with *LANG*. For example, if the base table is MY_NEW_TBL, the related language table might be named MY_NEW_LANG.

3. Build the related language table.

   An easy way to build the related language table is to copy the base record definition using the File, Save As menu command. Once you save the record with a new name, you can remove the fields that are not required on the related language table and add the LANGUAGE_CD key. By using this approach, you avoid having to remember the key structure and column names of the base table.

   Note. When using Save As to create the related language record, you do not need to also save the PeopleCode that is associated with the base record. PeopleCode programs on related language records are not executed; therefore, they are redundant and may be misleading. For this reason, we recommend that you not maintain PeopleCode programs on related language records.

4. Associate the related language table with the base table record.

   Open the Record Properties dialog box for the base table. On the Use tab, select the related language record in the **Related Language Record** field.

   Click **OK** to close the Record Properties dialog box.

5. Save the record.

See Also

PeopleTools 8.4 PeopleBook:PeopleSoft Application Designer, "Creating Record Definitions"

PeopleTools 8.4 PeopleBook:PeopleSoft Application Designer, "Building SQL Tables and Views"

Creating Related Language Views

Just as records with language-sensitive fields require related language records, views with language-sensitive fields require related language views. This is necessary because the view is created at the database-level (outside of PeopleTools) and cannot recognize when one or more of the tables it selects from has a related language table. If you create a view over a table that has a related language record and don't create the corresponding related language view, any data selected from your view will appear only in the base language of the database.

Related language views work the same way as related language records:

- You can create a related language view for any view that selects language-sensitive fields from a table with a related language record. Anytime you create a view over a table that has a related language record, you typically also need a related language view.
- The related language view consists of all the key fields from the base view, a language code, and the language-sensitive fields.
- You associate the base view and the related language view in the Record Properties dialog box of the base view.
- When a user logs on in a non-base language, PeopleSoft retrieves the data with the appropriate language code from the related language view.
- It's best to use the same naming convention for related language views as you do for related language records: append a *LANG* suffix to the view name.

Related language views have one additional issue: the select statement from the original view must be modified to select any language-sensitive fields from the appropriate related language tables.

The select statements behind the views vary in complexity, depending on how many tables are involved and how many of those tables have related language records.

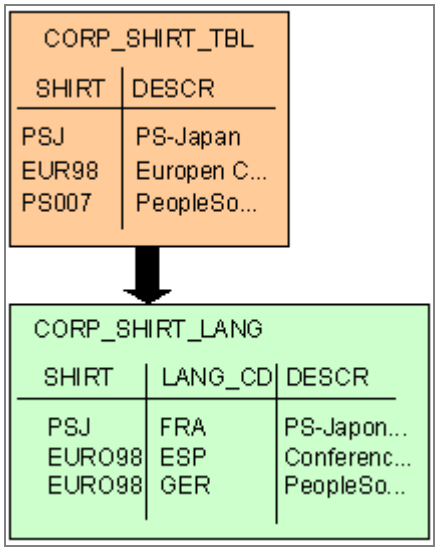
This section discusses how to construct the select statements for the following language-sensitive views:

- One base table, one related language table.
- Two base tables, one related language table.
- Two base tables, two related language tables.

One Base Table, One Related Language Table

When you have a view that selects data from a single table, the select statement for the language-sensitive view is straightforward: select the data from the related language table, making sure to also select the LANGUAGE_CD.

For example, consider a view on the CORP_SHIRT_TBL, a table keyed by SHIRT and with one language-sensitive field (DESCR):



One base table, one related language table

Let's assume you must create a view that selects only the rows where the SHIRT key field begins with the letter *P*.

Following is the select statement for the base view:

```
SELECT SHIRT, DESCR FROM PS_CORP_SHIRT_TBL WHERE SHIRT LIKE 'P%'
```

Following is the select statement for the language-sensitive view:

```
SELECT SHIRT, DESCR, LANGUAGE_CD FROM PS_CORP_SHIRT_LANG WHERE SHIRT LIKE 'P%'
```

Because this view is simple and selects only columns that exist both in the base table and in the related language table, the related language view is straightforward. It differs from the base view in only two ways:

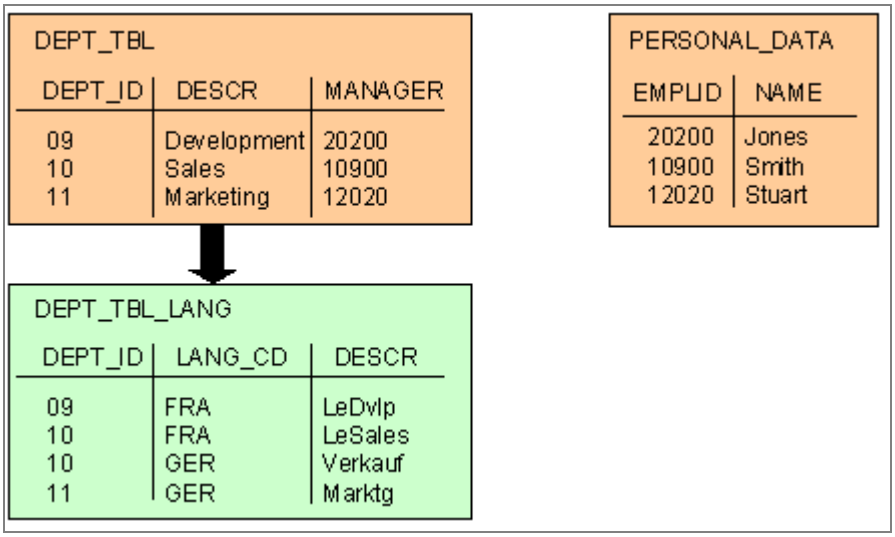
- The name of the table from which it selects.
- The addition of the LANGUAGE_CODE column.

If the base view also selected non-key, non-language-sensitive columns from the base table, there would be no need to select those columns in the related language view because non-language-sensitive fields don't need to be included in related language records.

Two Base Tables, One Related Language Table

When you join two tables, one of which has a related language record, the select statement becomes only slightly more complex.

For example, consider a view that joins DEPT_TBL, which has a related language record, with PERSONAL_DATA, which does not:



Two base tables, one related language table

Following is the select statement for the base view that selects the department ID and description and the name of the manager for each department:

```
SELECT A.DEPT_ID, A.DESCR, B.NAME
FROM PS_DEPT_TBL A,
       PS_PERSONAL_DATA B
WHERE A.MANAGER = B.EMPLID
```

Following is the select statement for the language-sensitive view:

```
SELECT A.DEPT_ID, A.DESCR, C.NAME, A.LANGUAGE_CD
FROM PS_DEPT_TBL_LANG A,
     PS_DEPT_TBL B,
     PS_PERSONAL_DATA C
WHERE A.DEPT_ID = B.DEPT_ID
AND B.MANAGER = C.EMPLID
```

In this case, the related language view can't get all the information from the related language table. This is because the MANAGER field (which is used to get the manager's name from PS_PERSONAL_DATA) is not language-sensitive and is therefore not part of the related language table.

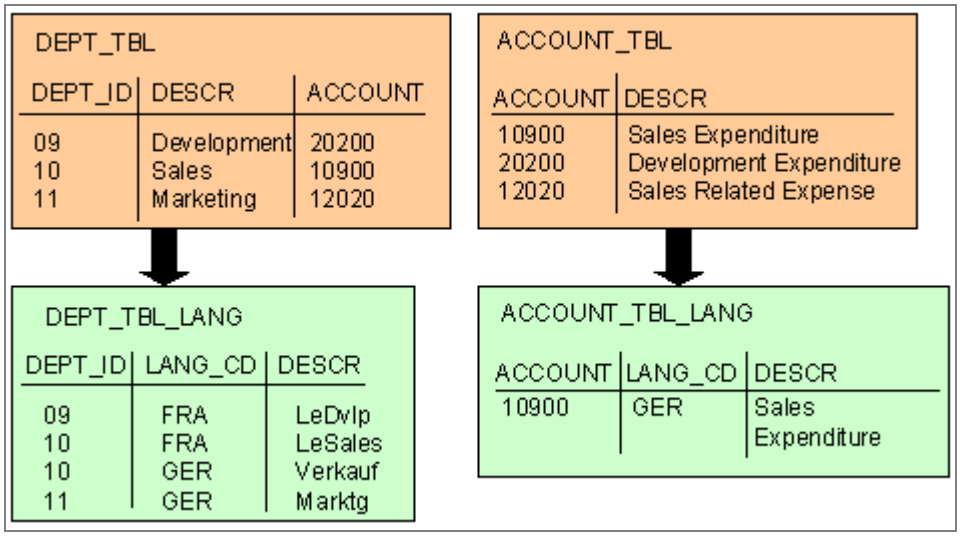
In order to retrieve the MANAGER field, PS_DEPT_TBL_LANG needs to be joined to PS_DEPT_TBL.

Because the PERSONAL_DATA record does not have a related language table, no special logic is required for fetching the manager's name because it is the same in all languages.

Two Base Tables, Two Related Language Tables

When you join two tables that both have related language records, your select statement becomes complex.

For example, consider a view that joins DEPT_TBL with ACCOUNT_TBL:



Two base tables, two related language tables

In this example, the base view joins DEPT_TBL with ACCOUNT_TBL in order to retrieve the description of the account. Following is the select statement for the base view:

```
SELECT A.DEPT_ID, A.DESCR, B.ACCOUNT, B.DESCR
FROM PS_DEPT_TBL A,
     PS_ACCOUNT_TBL B
WHERE A.ACCOUNT = B.ACCOUNT
```

Creating the related language view is difficult because both tables referenced in the base view have related language records. Because the related language architecture does not require that all rows have translations, creating the related language view is not as simple as joining DEPT_TBL_LANG with ACCOUNT_TBL_LANG.

Your related language view needs to take into account the following scenarios:

- A translated department may reference a translated account.
- A translated department may reference an untranslated account.
- An untranslated department may reference a translated account.

In this scenario, there is no row in DEPT_TBL_LANG, but there is a row in ACCOUNT_TBL_LANG. If you join DEPT_TBL_LANG with ACCOUNT_TBL_LANG in the view, no translation is retrieved by the related language view because the department doesn't have a translation—even though the account did.

- An untranslated department may reference an untranslated account.

The related language view doesn't need to address this situation because no translation exists in this case. It's correct for the related language view to return no rows.

To address these scenarios, the Structured Query Language (SQL statement for the related language view must include logic for the first three scenarios—those where translations exist. Following is the select statement for the language-sensitive view:

```
SELECT A.DEPT_ID, A.DESCR, C.ACCOUNT, C.DESCR, A.LANGUAGE_CD
FROM PS_DEPT_TBL_LANG A,
     PS_DEPT_TBL B,
     PS_ACCOUNT_TBL_LANG C
WHERE A.DEPT_ID = B.DEPT_ID
     AND B.ACCOUNT = C.ACCOUNT
     AND A.LANGUAGE_CD = C.LANGUAGE_CD
UNION
SELECT E.DEPT_ID, E.DESCR, G.ACCOUNT, G.DESCR, E.LANGUAGE_CD
FROM PS_DEPT_TBL_LANG E,
     PS_DEPT_TBL F,
     PS_ACCOUNT_TBL G
WHERE E.DEPT_ID = F.DEPT_ID
     AND F.ACCOUNT = G.ACCOUNT
     AND NOT EXISTS (SELECT 'X'
                     FROM PS_ACCOUNT_TBL_LANG H
                     WHERE H.ACCOUNT = G.ACCOUNT
                     AND H.LANGUAGE_CD = E.LANGUAGE_CD)
UNION
SELECT I.DEPT_ID, I,DESCR, J.ACCOUNT, J.DESCR, J.LANGUAGE_CD
FROM PS_DEPT_TBL I,
     PS_ACCOUNT_TBL_LANG J
WHERE I.ACCOUNT = J.ACCOUNT
     AND NOT EXISTS (SELECT 'X'
                     FROM PS_DEPT_TBL_LANG K
                     WHERE K.DEPT_ID = I.DEPT_ID
                     AND K.LANGUAGE_CD = J.LANGUAGE_CD)
```

This view is really three separate SQL statements whose output is concatenated using the SQL UNION operator. Each select statement in the view addresses one of the first three scenarios previously described. Let's examine this view, statement by statement.

Statement One

```
SELECT A.DEPT_ID, A.DESCR, C.ACCOUNT, C.DESCR, A.LANGUAGE_CD
```

```
FROM PS_DEPT_TBL_LANG A,
     PS_DEPT_TBL B,
     PS_ACCOUNT_TBL_LANG C
WHERE A.DEPT_ID = B.DEPT_ID
     AND B.ACCOUNT = C.ACCOUNT
   AND A.LANGUAGE_CD = C.LANGUAGE_CD
```

This select statement addresses scenario one: it retrieves the rows where translations for both the department and the account exist.

Statement Two

```
SELECT E.DEPT_ID, E.DESCR, G.ACCOUNT, G.DESCR, E.LANGUAGE_CD
FROM PS_DEPT_TBL_LANG E,
     PS_DEPT_TBL F,
     PS_ACCOUNT_TBL G
WHERE E.DEPT_ID = F.DEPT_ID
     AND F.ACCOUNT = G.ACCOUNT
     AND NOT EXISTS (SELECT 'X'
                     FROM PS_ACCOUNT_TBL_LANG H
                     WHERE H.ACCOUNT = G.ACCOUNT
                     AND H.LANGUAGE_CD = E.LANGUAGE_CD)
```

This select statement addresses scenario two; it addresses instances where the department translation exists, but the account translation does not exist.

The subselect statement is required in order to prevent this statement from retrieving records that have already been selected by the statements that address scenario one, where a translated account may exist.

Statement Three

```
SELECT I.DEPT_ID, I,DESCR, J.ACCOUNT, J.DESCR, J.LANGUAGE_CD
FROM PS_DEPT_TBL I,
     PS_ACCOUNT_TBL_LANG J
WHERE I.ACCOUNT = J.ACCOUNT
     AND NOT EXISTS (SELECT 'X'
                     FROM PS_DEPT_TBL_LANG K
                     WHERE K.DEPT_ID = I.DEPT_ID
                     AND K.LANGUAGE_CD = J.LANGUAGE_CD)
```

This select statement addresses scenario three, where translations exist for the account but not the department. Again, the subselect statement is needed to avoid returning rows that have already been selected by the other select statements in the SQL statement where a translated department exists.

CHAPTER 8

Working With Language-Sensitive Application Data

This chapter discusses how to:

- Maintain related language tables and base tables.
- Edit data in multiple languages.

See Also

"Translating Application Definitions"

"Global Reporting and Analysis"

"Understanding Related Language Tables"

PeopleTools 8.4 PeopleBook: PeopleSoft Portal PeopleBook, "Administering a PeopleSoft Portal"

Maintaining Related Language Tables and Base Tables

When a user changes data on a language-sensitive page, the system responds by changing the contents of the base table or the related language table, or both depending on the language of the user, and which field was modified. The following table explains at the database table level the actions that are performed when you work with language-sensitive tables.

Action	*Signon Language*	*Result*
Translate a language-sensitive field (the base language field has never been translated).	Non-base	Adds a new row to the related language table that is keyed to the current signon language.
Edit a language-sensitive field.	Base	Changes a field in the base table without affecting the related language table.
Edit a language-sensitive field.	Non-base	Changes a field in a row of the related language table that is keyed to the current signon language. Doesn't affect the base table.
Edit a non-language-sensitive field.	Base	Changes a field in the base table without affecting the related language table.

Action	*Signon Language*	*Result*
Edit a non-language-sensitive field.	Non-base	Changes a field in the base table without affecting the related language table. As the related language table contains only language-sensitive fields, no changes to this table are necessary.
Add a row (new key).	Base	Adds a new row to the base table without changing the related language table.
Add a row (new key).	Non-base	Adds a new row to the base table and a new row, keyed to the current signon language, to the related language table. This could introduce non-base language descriptions into the base language table.
Insert a row (effective-dated).	Base	Adds a new effective-dated row to both the base table; add a new effective-dated rows to the related language table for each language for which translations exist for the object. Any updates to language-sensitive fields are applied only to the base table.
Insert a row (effective-dated).	Non-base	Adds a new effective-dated row to both the base table and the related language table for all languages for which translations exist for the object. Any updates to language-sensitive fields are applied to the current language in the related language table and to the base table.
Delete a row.	Base or non-base	Deletes the base table row and all dependent rows in the related language table.

Editing Data in Multiple Languages

There are two methods of maintaining translations of application data.

- By logging into the system in a language other than the database's base language and updating a field that is language-sensitive.
- By using the Multi Language Entry feature.

This section provides an overview of Multi Language Entry and discusses how to:

- Enable Multi Language Entry.
- Maintain data in multiple languages using Multi Language Entry.

Understanding Multi Language Entry

Multi Language Entry provides significant benefits over simply changing the session language and overwriting existing base language descriptions with their translations. It allows you to:

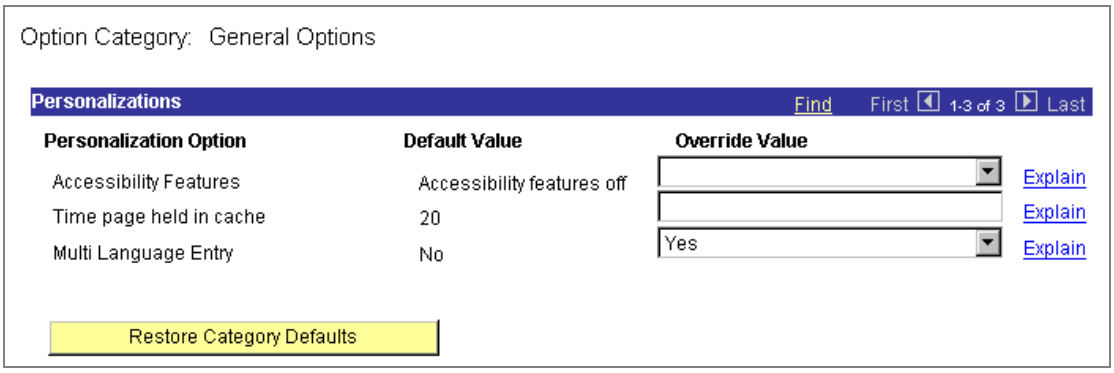
- Enter or edit data in multiple languages during the same session without changing the signon language.
- View all translations of a row of data in a single session, which may be important for multilingual implementations that need to describe data in a different language.
- Easily recognize which fields on a page are language-sensitive and which are language-neutral.

Multi Language Entry makes it more intuitive for a multilingual user (such as a Canadian operator who is proficient in both French and English) to maintain data in several languages before saving a page.

Multi Language Entry is active if *both* of the following are true:

- The multi language entry option is enabled for the user operator.
- The current page contains a record that has a related language record.

Enabling Multi Language Entry



Multi Language Entry enabled

To enable multi language entry:

1. Select **My Personalizations** on the navigation menu from your homepage.

   The My Personalization page appears.

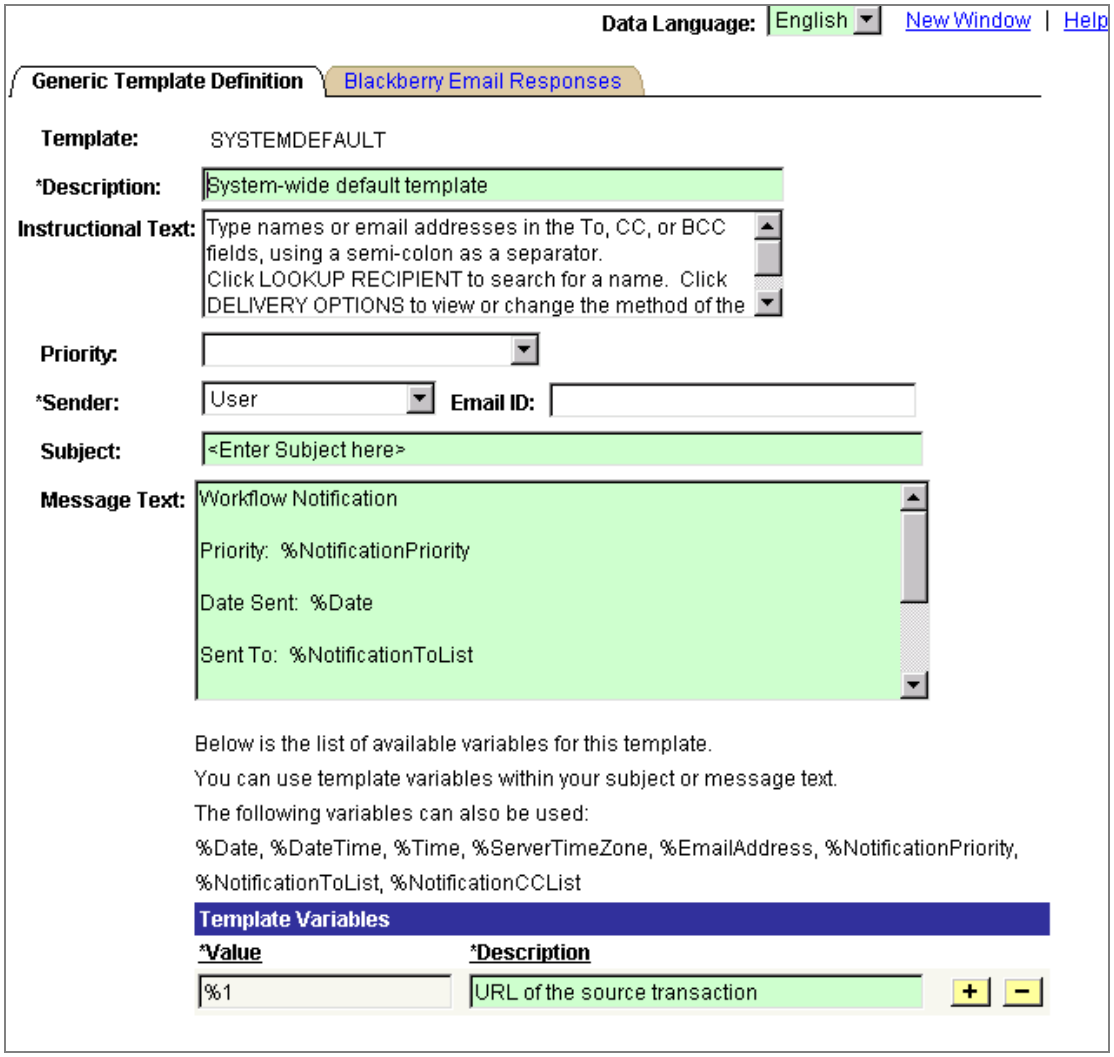
2. Click the **Personalize Options** button on the **General Options** line.

   The Option Category General Options page appears.

3. Change the value in the **Multi Language Entry** Override Value field to *Yes*.

4. Click **OK.**

Entering Data in Multiple Languages



Multi Language Entry enabled

Once Multi Language Entry has been enabled in your My Personalizations, you will notice two important changes to the display of a page.

1. A *Data Language* drop down menu appears at the top of each page. The Data Language drop down menu indicates in which language the language-sensitive fields on the current page are being maintained. You can switch the display of the page between different data languages and maintain translations in each, by changing the selected language in the drop down menu.

2. Any fields that are language-sensitive (that is, they are translatable as they exist both on the base language and related language records and are not keys) appear with a pale green shaded background. This makes it very easy to determine if the changes you make to the data will take effect in the current language only, or take effect across all languages in the database.

For example, on the above page, the Subject field is language-sensitive; a different translation of the subject can be entered for each language enabled in the database; but the Email ID field is not, so any changes to the Email ID will be visible to all system users.

To translate this data into another language, simply pick a new language from the Data Language drop down menu. If translations exist for the current row of data in the new language, those translations will appear. If not, the base language values will still be displayed, and you can translate these into to the new language selected.

Note. Changing the Data Language of a page using Multi Language Entry only changes the language of application data; it does not change the language of the user interface of the page such as field labels and help text. The language of the user interface is controlled only by your signon language preference.

As changing the data language does not change the labels and other user interface elements of a page, it is also useful to determine terminology in different languages. For example, if Department descriptions in your Department Table have been translated into several different languages, you can view the description of a department in each language simply by navigating to the Department Table page and changing the data language. As this only changes the language of the application data and not the user interface, you can "look up" terminology in other languages without needing to be able to navigate or use a page that has been translated into that language.

To enter data in multiple languages:

1. Enable the Multi Language Entry function.

   See Enabling Multi Language Entry.

2. Navigate to the page on which the data is to be maintained.

   Any language-sensitive fields on the page are highlighted in green to make it easy to identify fields that permit data maintenance in multiple languages.

3. From the Languages menu, choose a target language.

   The language that appears on the page remains the same; only the language-sensitive data is reloaded in the selected language.

4. Enter or edit data in any language-sensitive fields in the target language.

5. When finish editing the multilingual fields, save the page.

   The system updates the base and related-language tables for the page.

CHAPTER 9

COBOL Globalization

This chapter discusses:

- Unicode Encodings in PeopleSoft COBOL.
- COBOL and Unicode.
- COBOL conversion utility.
- Manual fine-tuning of COBOL programs.

See Also

"Understanding Character Sets"

Unicode Encodings in PeopleSoft COBOL

The character set used for PeopleSoft COBOL processing must match the character set for your database. If you created a Unicode database for PeopleSoft, you must also run your COBOL in Unicode.

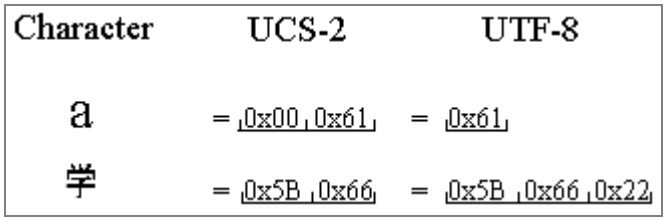
The Unicode Standard provides several methods of encoding Unicode characters into a byte stream. Each of these encodings have specific properties that make them suitable for use in different environments. The two main encodings important to understanding how PeopleSoft COBOL operates when running in Unicode are UCS-2 and UTF-8. PeopleSoft uses both these Unicode encodings:

- UCS-2 is the Unicode encoding that PeopleTools uses internally for data held in memory on the Application Server. UCS-2 encodes all characters in to a fixed storage space of two bytes.
- UTF-8 is the encoding that PeopleSoft uses in COBOL. UTF-8 is a variable format of one to four bytes per character (currently PeopleSoft supports only one to three byte characters – four byte UTF-8 characters are required only to represent characters outside Unicode's Basic Multilingual Plane). In UTF-8, the actual number of bytes used to store a character can be determined by the first three bits of the first (or only) byte of a character:

Bit Pattern of first byte	*Character Length*
0xxxxxxx	One byte

Bit Pattern of first byte	*Character Length*
110xxxxx	Two bytes
111xxxxx	Three bytes

For example, the following graphic shows the different UCS-2 and UTF-8 encodings for two sample characters:



UCS-2 and UTF-8 encodings

PeopleSoft transparently handles the conversion between UCS-2 and UTF-8 when data is passed into the COBOL program from the database. If you are reading or writing files directly from your COBOL program, the input and/or output files will be UTF-8 encoded when running PeopleSoft COBOL programs in Unicode.

Note. In this document, the word *character* refers to a single character in any language, regardless of how many bytes are required to store the character.

See Also

"Unicode Encodings"

COBOL and Unicode

This section discusses:

- Expanded storage space requirements.
- Special logic for parsing Unicode strings.
- Sorting in COBOL.
- Unicode-specific error messages.

Expanded Storage Space Requirements

Moving to a COBOL Unicode environment means that character data can potentially require three times the storage space required in a single-character environment, given the variable length of a character encoded in UTF-8 from one to three bytes. To allow for this, all internal data definitions for character-type data in COBOL programs must be expanded to allow for

three times as many bytes. This expansion is critical as in a Unicode PeopleSoft database, column sizes are calculated based on a character length, not a byte length. So, a CHAR(10) column on a Unicode database allows the storage of 10 characters, regardless of how many bytes each character takes to store. Given the three-bytes-per-character maximum requirement of UTF-8 (four byte UTF-8 characters are not yet supported by PeopleSoft), the maximum byte size of this CHAR(10) column is 30 bytes. Therefore, a COBOL type of PIC X(30) may be required to store the contents of a CHAR(10) field on a Unicode database.

PeopleSoft provides a COBOL conversion utility to automatically expand the character-data fields in the working storage to accommodate the number of bytes in the UTF-8 encoding scheme.

See Also

The COBOL Conversion Utility

Special Logic for Parsing Unicode Strings

In an non-Unicode COBOL installation, parsing through a string is easy because you can assume that all characters coming in are one byte in length. But in UTF-8, a character can vary between one byte and three bytes in length. Therefore, you must incorporate special logic to handle string parsing when you are dealing with characters in UTF-8 format.

See Also

Identifying Unicode and ANSI Data

Single Character Arrays

Sorting in COBOL

Any in-memory sorting performed using COBOL language functions is performed as a binary sort in the current character encoding used for COBOL processing and may not necessarily match the sort order returned by the database in response to an ORDER BY clause. If you require the database to return data sorted using a binary sort of its encoding rather than the default linguistically correct sort, you must use the %BINARYSORT Meta-SQL function around each column in the WHERE or ORDER BY clause where binary ordering is important.

However, for OS/390 implementations, you must remember that this binary sorting is equivalent only when the COBOL program is run on a OS/390 server. For example, the binary sort produced in COBOL differs from the binary sort produced by the database, as the database is encoded in EBCDIC and the client is in an ASCII-based encoding. Therefore, use the %BINARYSORT Meta-SQL function only in COBOL programs that are not run via RemoteCall (as the OS/390 platform is not supported as a RemoteCall server).

When running against non-OS/390 systems, the %BINARYSORT function can be used in both RemoteCall and non-RemoteCall programs.

For example:

```
SELECT RECNAME FROM PSRECDEFN  WHERE %BINARYSORT(RECNAME) < %BINARYSORT('xxx')
```

```
SELECT RECNAME FROM PSRECDEFN  ORDER BY %BINARYSORT(RECNAME)
```

Note. Using the %BINARYSORT token in your WHERE and ORDER BY clauses often negates the use of any indexes, as most databases can't use indexes for functional comparisons (for example, where %BINARYSORT(column) > 'X'). Use this syntax only when sorting equivalence of Structure Query Language (SQL) statement results and when COBOL memory order is absolutely required.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference Guide, "Meta-SQL Reference"

PeopleTools 8.4 PeopleBook: PeopleSoft Data Management, "PeopleTools Options"

Unicode-Specific Error Messages

The following error messages can occur when you are running a COBOL program against a Unicode database:

- Fetch failed: unsuccessful UCS-2 to UTF-8 conversion on column <column number>.
- Bind of parameter failed: unsuccessful UTF-8 to UCS-2 conversion on column <column number>.
- Attempting to use an ANSI API to access a Unicode database.
- Attempting to use an ANSI COBOL with a Unicode database.
- Attempting to use a Unicode API to access an ANSI database.
- Fetch failed: the converted Unicode length of <length> exceeds the allocated buffer length <length> for column <column number>.

These messages appear in the COBOL output log file.

The COBOL Conversion Utility

As delivered by PeopleSoft, all COBOL programs are configured to run only on non-Unicode databases. In order to run the PeopleSoft-delivered COBOL on a Unicode database, it first must be converted using the PeopleTools COBOL Conversion Utility. This utility is typically called automatically by the PeopleSoft installation process, however in certain circumstances, such as when you make customizations to your COBOL code or apply a PeopleSoft-provided patch to a COBOL program, you may need to run the COBOL Unicode conversion utility manually.

Moving to a COBOL Unicode environment means that character data can potentially require three times the storage space required in a single-character environment. To allow for this, all

internal data definitions for character-type data in COBOL programs must be expanded to allow for three times as many bytes.

PeopleSoft recommends customizing and applying patches to only one set of COBOL source code – non-Unicode source. It is much easier to write COBOL programs without having to remember to triple the size of your working storage as you go. Once your customization or patch is complete and you are ready to compile the program, first run it through the COBOL Conversion Utility, then compile. This approach has several benefits over customizing the converted code:

- You maintain a single source tree for all your COBOL – the non-Unicode source. This way you don't run the risk of accidentally making customizations to both the non-Unicode COBOL programs *and* the Unicode converted COBOL programs and potentially losing the modifications to the converted programs next time you run the converter.

- Although PeopleSoft tests all delivered COBOL programs and patches on both Unicode and non-Unicode environments, only non-Unicode versions of the source are delivered. Therefore, any time you apply a PeopleSoft COBOL patch to a Unicode system, the patched source code must be run through the COBOL converter. If you had already modified the post-converted source, the re-conversion would obliterate your modifications.

Should the COBOL Conversion Utility make modifications to your code that are undesirable, instead of modifying the post-converted code, PeopleSoft provides a series of directives to the Utility that can tell it how specific lines of code should (or should not be) converted. This allows you to limit your changes only to the non-converted code, and make the conversion completely automated.

In a non-Unicode (also known as ANSI) implementation, one character typically occupies one byte of storage. So for a 10-character field, you can define a PICTURE clause of PIC X(10). In a Unicode implementation, however, you must allow for the maximum number of storage bytes required for any character field. Therefore, in the Unicode environment, you must define this same 10-character field with a PICTURE clause of PIC X(30).

To accommodate the number of bytes in the UTF-8 encoding scheme, PeopleSoft provides a COBOL conversion utility to expand the character fields in the working storage.

This section discusses the various elements involved when converting COBOL from ANSI to Unicode, including how to:

- Run the conversion utility.

- Identify converted COBOL programs.

- Understand what is expanded.

- Use utility directives.

- Understand error logs.

Running the Conversion Utility

Use the following command syntax to run the COBOL conversion utility:

```
<PS_HOME>\bin\client\winx86\pscblucvrt.exe  -s:<Source Directory>
-t:<Destination Directory>  [-r:<TEMP Directory>]
```

Command	*Description*
-s:<Source Directory>	Specify the source directory where the ANSI version of COBOL resides. For the directory, you must specify where the COBOL subdirectories reside (\BASE, \WIN32, \UNIX, and so on). Example: -s:d:\PT8\SRC\CBL
-t:<Destination Directory>	Specify where you want to place the expanded version of COBOL. The utility puts the modified source file in the same COBOL subdirectory it was found in. Example: -t:d:\PT8\SRC\CBLUNICODE
-r or -rd:<Temp directory>	(Optional) If you want the utility to generate the exception log files , specify the directory where you want the utility to place these output files. -r generates only the summary log file; -rd generates all the log files.

The utility produces a new source file for each .CBL file that is found. These new files are placed in the PS_HOME\src\ directory.

As delivered by PeopleSoft, the batch utilities that compile your COBOL programs include logic to convert all programs and copybooks prior to compiling. This logic is triggered only when the Unicode version of PeopleTools is installed.

Compiling COBOL in Windows NT or Windows 2000

The <PS_HOME>\setup\cbl2uni.bat command converts all the COBOL programs and copybooks found in the <PS_HOME>\src\cbl directory. After the conversion, you'll find your COBOL files in the following directories:

- <PS_HOME>\src\cbl unicode contains the expanded COBOL source codes

Compiling COBOL in UNIX

The <PS_HOME>/install/pscbl.mak command triggers the conversion before any COBOL programs are compiled. This utility stores all converted programs in the <PS_HOME>/src/cblunicode directory.

Identifying Converted COBOL Programs

When the COBOL conversion utility runs, it places a comment at the beginning of each COBOL program that it converts:

```
******* Converted for Unicode: <date converted>
******************** DO NOT MODIFY THIS FILE *******************
**** ALL SOURCE CODE CHANGES MUST BE DONE TO THE ANSI VERSION ****
******************** FOUND IN %PS_HOME%/SRC/CBL *****************
```

This comment line identifies converted programs in two ways:

- A person looking at the program can tell whether it has been converted.
- If you attempt to convert the COBOL source file again, this comment line prevents the conversion utility program from expanding the working storage of this COBOL source file again.

Understanding What Is Expanded

In order for the utility to recognize when it is appropriate to expand data, strict adherence to the PeopleSoft COBOL coding standards is required. The utility looks for certain code-style patterns to make these decisions.

The conversion utility expands all PIC X[(N)] data fields to triple their original size, with the following exceptions:

- SQL buffer setup data that refers to numeric or date data types SELECT-SETUP or BIND-SETUP is not expanded.
- Character fields that are redefined to a numeric field and group-level fields that contain such character fields are not expanded. In instances where the redefined field is also redefined as a character field, the original character field and the redefinition that is a character field are expanded.
- Fields and group-level fields that appear to be dates are not expanded, unless the EXPAND directive is specified for this field or group-level field.
- For arrays that comprise a single character, the PIC clause is expanded for character data, but the OCCURS clause is not expanded. However, if the data name ends with *-POS*, *-CHAR,* or *-BYTE,* the OCCURS clause is expanded instead of the element size.

The utility also converts copybooks on the fly: the first time that a copybook is referenced inside a code module, it is expanded immediately.

The utility processes an entire set of COBOL modules in a single run. It maintains a record of what it has converted to avoid converting copybooks twice.

Note. The COBOL conversion utility ensures that edited lines do not go past the 72nd column. If the conversion would normally cause a line to exceed that limitation, the utility removes some of the blank spaces between the field name and the PIC X string so that the line fits in the allowed area.

This section discusses the following exceptions:

- Exception 1: certain SQL buffer setup data.
- Exception 2: certain redefined character fields.
- Exception 3: certain fields that appear to be dates.
- Exception 4: arrays comprising a single character.

Exception 1: Certain SQL Buffer Setup Data

SQL buffer setup data that refers to numeric or date data types SELECT-SETUP or BIND-SETUP is not expanded.

For the interface to PTPSQLRT, a COBOL program passes a SELECT list (SELECT-DATA) and a descriptor area (SELECT-SETUP). The program also passes similar data and setup areas for bind variables. The descriptors that are passed are always character-type data with embedded values that signal the actual data type and length of the data fields. Because these descriptors represent the lengths of the associated data fields in the corresponding SELECT-DATA/BIND-DATA structures, the utility adjusts only the length of the descriptors that are representing character-type data.

Example 1: In the following code, the select list contains two character fields (EMPLID and NAME), a small integer (EMPL_RCD), and a date (EFFDT):

```
SELECT-SETUP.
02  FILLER   PIC X(60)   VALUE ALL 'C'.
02  FILLER   PIC X(2)   VALUE ALL 'S'.
02  FILLER   PIC X(10)   VALUE ALL 'D'.
02  FILLER   PIC X(90)   VALUE ALL 'C'.
SELECT-DATA.
02  EMPLID   PIC X(60).
02  EMPL_RCD   PIC 99   COMP.
02  EFFDT   PIC X(10).
02  NAME      PIC X(90).
```

In the Unicode world, the only fields that should be expanded are the two character fields (EMPLID and NAME). Numeric data is never impacted by Unicode, and (according to the PeopleTools definition), dates are not impacted either: they are treated as numeric strings and cannot have special characters.

Thus, the utility converts this code as follows:

```
SELECT-SETUP.
02  FILLER  PIC X(60)     VALUE ALL 'C'.
```

```
02  FILLER  PIC X(2)      VALUE ALL 'S'.
02  FILLER  PIC X(10)     VALUE ALL 'D'.
02  FILLER  PIC X(90)     VALUE ALL 'C'.

SELECT-DATA.
02  EMPLID  PIC X(60).
02  EMPL_RCD       PIC 99 COMP.
02  EFFDT   PIC X(10).
02  NAME           PIC X(90).
```

Example 2: The following code represents ANSI COBOL (COBOL that has not yet been expanded):

```
01  I-ERRL.
          05  SQL-STMT            PIC X(18)   VALUE
                                              'INPXPROC_I_ERRL'.
          05  BIND-SETUP.
              10  FILLER          PIC X(10)   VALUE ALL 'C'.
              10  FILLER          PIC X(6)    VALUE '0PPPPP'.
              10  FILLER          PIC X(4)    VALUE ALL 'I'.
              10  FILLER          PIC X       VALUE 'H'.
              10  FILLER          PIC X(18)   VALUE ALL 'C'.
              10  FILLER          PIC X(4)    VALUE ALL 'I'.
              10  FILLER          PIC X(4)    VALUE ALL 'N'.
              10  FILLER          PIC X(30)   VALUE ALL 'H'.
              10  FILLER          PIC X(30)   VALUE ALL 'C'.
              10  FILLER          PIC X(30)   VALUE ALL 'H'.
              10  FILLER          PIC X(10)   VALUE ALL 'C'.
              10  FILLER          PIC X(6)    VALUE '0PPPPP'.
              10  FILLER          PIC X(8)    VALUE '0PPPPPPP'.
              10  FILLER          PIC X       VALUE 'Z'.
          05  BIND-DATA.
              10  TSE-JOBID       PIC X(10)   VALUE SPACES.
              10  TSE-PROC-INSTANCE PIC 9(10) VALUE ZERO  COMP-3.
              10  TSE-SET-NBR     PIC 9(6)    VALUE ZERO  COMP.
              10  TSE-EDIT-TYPE   PIC X       VALUE SPACE.
              10  TSE-FIELDNAME   PIC X(18)   VALUE SPACES.
              10  MESSAGE-SET-NBR PIC 9(5)    VALUE ZERO  COMP.
              10  MESSAGE-NBR     PIC 9(5)    VALUE ZERO  COMP.
              10  MESSAGE-PARM    PIC X(30)   VALUE SPACES.
              10  MESSAGE-PARM2   PIC X(30)   VALUE SPACES.
              10  MESSAGE-PARM3   PIC X(30)   VALUE SPACES.
              10  BUSINESS-UNIT   PIC X(10)   VALUE SPACES.
              10  TRANSACTION-NBR PIC 9(10)   VALUE ZERO  COMP-3.
              10  SEQ-NBR         PIC 9(15)   VALUE ZERO  COMP-3.
              10  FILLER          PIC X       VALUE 'Z'.
```

The utility converts this code as follows:

```
01  I-ERRL.
           05  SQL-STMT            PIC X(54)   VALUE
                                                'INPXPROC_I_ERRL'.
           05  BIND-SETUP.
               10  FILLER          PIC X(30)   VALUE ALL 'C'.
               10  FILLER          PIC X(6)    VALUE '0PPPPP'.
               10  FILLER          PIC X(4)    VALUE ALL 'I'.
               10  FILLER          PIC X(3)   VALUE  ALL 'H'.
               10  FILLER          PIC X(54)   VALUE ALL 'C'.
               10  FILLER          PIC X(4)    VALUE ALL 'I'.
               10  FILLER          PIC X(4)    VALUE ALL 'N'.
               10  FILLER          PIC X(90)   VALUE ALL 'H'.
               10  FILLER          PIC X(90)   VALUE ALL 'C'.
               10  FILLER          PIC X(90)   VALUE ALL 'H'.
               10  FILLER          PIC X(30)   VALUE ALL 'C'.
               10  FILLER          PIC X(6)    VALUE '0PPPPP'.
               10  FILLER          PIC X(8)    VALUE '0PPPPPPP'.
               10  FILLER          PIC X       VALUE 'Z'.
           05  BIND-DATA.
               10  TSE-JOBID       PIC X(30)   VALUE SPACES.
               10  TSE-PROC-INSTANCE PIC 9(10) VALUE ZERO  COMP-3.
               10  TSE-SET-NBR     PIC 9(6)    VALUE ZERO  COMP.
               10  TSE-EDIT-TYPE   PIC X(3)    VALUE SPACES.
               10  TSE-FIELDNAME   PIC X(54)   VALUE SPACES.
               10  MESSAGE-SET-NBR PIC 9(5)    VALUE ZERO  COMP.
               10  MESSAGE-NBR     PIC 9(5)    VALUE ZERO  COMP.
               10  MESSAGE-PARM    PIC X(90)   VALUE SPACES.
               10  MESSAGE-PARM2   PIC X(90)   VALUE SPACES.
               10  MESSAGE-PARM3   PIC X(90)   VALUE SPACES.
               10  BUSINESS-UNIT   PIC X(30)   VALUE SPACES.
               10  TRANSACTION-NBR PIC 9(10)   VALUE ZERO  COMP-3.
               10  SEQ-NBR         PIC 9(15)   VALUE ZERO  COMP-3.
               10  FILLER          PIC X       VALUE 'Z'.
```

Exception 2: Certain Redefined Character Fields

Character fields that are redefined to a numeric field (and group-level fields that contain such character fields) are not expanded. In instances where the redefined field is also redefined as a character field, the original character field and the redefinition that is a character field *are* expanded.

Example 1: In this example, the DB-PIC-PRECIS-CHAR is not expanded:

```
07  DB-PIC-PRECIS-CHAR  PIC X(2).
07  DB-PIC-PRECIS-NUM   REDEFINES
```

```
    DB-PIC-PRECIS-CHAR PIC 9(2).
```

Example 2: In this example, the I-REMIT-ADDR-SEQ is not expanded:

```
02  I-REMIT-ADDR-SEQ        PIC 9(04).
02  I-REMIT-ADDR-SEQ-C REDEFINES
    I-REMIT-ADDR-SEQ        PIC X(04).
```

Example 3: In this example, the original definition is a character-type field. Although some of the redefined fields are numeric fields, all the character fields, including the original definition, are expanded.

```
02  MSGDATA1                PIC X(30)   VALUE SPACES.
02  FILLER       REDEFINES MSGDATA1.
    03  MSGDATA1-INT        PIC Z(9)9-.
    03  INT-FILL1           PIC X(19).
02  FILLER       REDEFINES MSGDATA1.
    03  MSGDATA1-DOL        PIC Z(9)9.99-.
    03  DOL-FILL1           PIC X(16).
02  FILLER       REDEFINES MSGDATA1.
    03  MSGDATA1-DEC        PIC Z(9)9.9(5)-.
    03  DEC-FILL1           PIC X(13).
```

Exception 3: Certain Fields That Appear to Be Dates

Fields and group-level fields that appear to be dates are not expanded, unless the EXPAND directive is specified for this field or group-level field.

The following table describes the criteria used to determine fields or group-level fields as dates:

DATE Data Type	*Field or Group-Level Field Name*	*Field Length or Total Length of a Group-Level Field**
Date	Contains "-DT' or "DATE"	10
Time	Contains "-TM' or "TIME"	15
Date-Time	Contains "-DTTM", "DATE" or "TIME"	26

* When calculating the total length, the utility takes into consideration that a group-level field may contain REDEFINE fields. The length of the REDEFINE field is not included when determining the total length of the group field.

Example 1: The field in this example is not expanded:

```
10  START-DATE          PIC X(10)   VALUE SPACES.
```

Example 2: The fields in this example are not expanded:

```
02  W-EMP-BIRTHDATE.
```

```
03 YEAR             PIC 9(4).
03 FILLER           PIC X(1).
03 MONTH            PIC 99.
03 FILLER           PIC X(1).
03 DAYS             PIC 99.
```

Example 3: The field in this example are not expanded:

```
03  PAY-DATE-TIME.
04  PAY-DTTM-DATE   PIC X(10).
04  PAY-DTTM-DELIM1 PIC X         VALUE '-'.
04  PAY-DTTM-TIME   PIC X(15).
```

Example 4: The field in this example are not expanded:

```
05  BEGIN-DTTM-TIME.
07  SYS-HOUR        PIC 99      VALUE ZERO.
07  FILLER          PIC X       VALUE SPACE.
07  SYS-MINUTE      PIC 99      VALUE ZERO.
07  FILLER          PIC X       VALUE SPACE.
07  SYS-SECOND      PIC 99      VALUE ZERO.
07  FILLER          PIC X       VALUE SPACE.
07  SYS-MICRO-SECOND  PIC 9(6)  VALUE ZERO.
```

Example 5: In this example, the group field contains REDEFINE fields. The conversion utility expands the fields because the group field meets the criteria for expansion: it has a total length of 10 and the field name includes the *-DT* string.

```
02  END-DT.
03  END-DT-YY           PIC X(4).
03  END-DT-YY-NUM       REDEFINES END-DT-YY
PIC 9999.
03  FILLER              PIC X.
03  END-DT-MM           PIC XX.
03  END-DT-MM-NUM       REDEFINES END-DT-MM
PIC 99.
03  FILLER              PIC X.
03  END-DT-DD           PIC XX.
03  END-DT-DD-NUM       REDEFINES END-DT-DD
PIC 99.
```

Exception 4: Arrays Comprising a Single Character

For arrays that comprise a single character, the PIC clause is expanded for character data, but the OCCURS clause is not expanded. However, if the data name ends with *-POS*, *-CHAR,* or *-BYTE,* the OCCURS clause is expanded, instead of the element size.

Example 1: In this example, the field is expanded:

```
01  CHAR-ARRAY       PIC X         OCCURS 80 TIMES.
```

```
       Is expanded to:
01  CHAR-ARRAY       PIC X(3)      OCCURS 80 TIMES.
```

Example 2: In this example, the data name ends with *-POS;* therefore, the OCCURS clause is expanded, instead of the element size:

```
01  CHAR-POS  PIC X         OCCURS 80 TIMES.
      Is expanded to:
01  CHAR-POS  PIC X         OCCURS 240 TIMES.
```

Using Utility Directives

The COBOL conversion utility accepts various directives in the first six columns of COBOL code. You can use these directives to override the utility's normal mode of processing for a single source code line or for a block of lines:

Directive	*Description*	*Purpose*
NOCBGN	No conversion: begin	Starting with this line, do not perform expansions.
NOCEND	No conversion: end	End the NOCBGN directive after this line (the directive line is not expanded).
NOCLN	No conversion: line	Do not perform expansions in this single line.
COCCUR	Convert occurrence	Expand the OCCURS clause instead of the PIC clause in this line.
EXPEOF	Expand end of field	Expand a group item by increasing the length of the last field in the group.
EXPAND	Instruct utility to expand field	Force expansion of fields that would normally not be expanded because they appear to be date, time, or datetime fields.

The following examples use existing PeopleSoft COBOL programs to illustrate possible uses for the utility directives.

NOCBGN, NOCEND, and NOCLN Directives

One of the PeopleSoft Human Resources COBOL programs has a unique way of setting the PAY-PERIODS group field. The program defines an 88 level definition based on the concatenated value of the five one-column, character-type fields. If the conversion utility were to convert the program without the special directives, none of the cases defined in the 88-level field would ever be true:

```
NOCBGN          03  PAY-PERIODS.
                    88  PAY-PERIODS-ALL              VALUE 'YYYYY'.
                    88  PAY-PERIODS-ALL-BIWEEKLY     VALUE 'YYYNN'.
                    88  PAY-PERIODS-ALL-SEMIMONTHLY  VALUE 'YYNNN'.
                    88  PAY-PERIODS-NONE             VALUE 'NNNNN'.
```

```
                    04  PAY-PERIOD1     PIC X.
                    04  PAY-PERIOD2     PIC X.
                    04  PAY-PERIOD3     PIC X.
                    04  PAY-PERIOD4     PIC X.
                    04  PAY-PERIOD5     PIC X.

                03  FILLER REDEFINES PAY-PERIODS.
                    04  PAY-PERIOD      PIC X       OCCURS 5.
                        88  PAY-PERIOD-YES          VALUE 'Y'.
NOCEND                  88  PAY-PERIOD-NO           VALUE 'N'.

       01  S-DEDPDS.
           02  SQL-STMT                PIC X(18)   VALUE
                                                   'PSPDCFSA_S_DEDPDS'.

           02  BIND-SETUP.
               03  FILLER              PIC X(10)   VALUE ALL 'C'.
               03  FILLER              PIC X(10)   VALUE ALL 'H'.
               03  FILLER              PIC X(10)   VALUE ALL 'D'.
               03  FILLER              PIC X(10)   VALUE ALL 'A'.
NOCBGN         03  FILLER              PIC X       VALUE ALL 'C'.
               03  FILLER              PIC X       VALUE ALL 'H'.
               03  FILLER              PIC X       VALUE ALL 'C'.
               03  FILLER              PIC X       VALUE ALL 'H'.
NOCEND         03  FILLER              PIC X       VALUE ALL 'C'.
               03  FILLER              PIC X       VALUE 'Z'.

           02  BIND-DATA.
               03  COMPANY             PIC X(10).
               03  PAYGROUP            PIC X(10).
               03  PAY-END-DT          PIC X(10).
               03  YEAR-END-DT         PIC X(10).
NOCLN          03  PAY-PERIODS         PIC X(5).
               03  FILLER              PIC X       VALUE 'Z'.
```

COCCUR Directive

The conversion utility wouldn't normally expand the size of the array in this line from one of the PeopleTools COBOL programs. Using the COCCUR directive ensures that the OCCURS clause is expanded:

```
            02  PARM.
COCCUR   05  PARM-CH             OCCURS 30 TIMES

                        PIC X.
```

EXPEOF Directive

In the example below, the FIELDNAME group-level field is broken down to check the first four characters of the string. In this instance, it makes more sense to adjust the length of the

FILLER field. By using the EXPEOF directive, you direct the utility to expand the FILLER field to a length of 50:

```
EXPEOF      02  FIELDNAME.
                03  FIELDNAME4          PIC X(4)    VALUE SPACE.
                    88  FIELDNAME-TSE               VALUE 'TSE_'.
                03  FILLER              PIC X(14)   VALUE SPACE.
```

Understanding Error Logs

The COBOL conversion utility produces a set of error and warning logs with messages that identify non-standard code styles and inconsistencies. The utility also logs expansion actions that may require manual review.

The utility produces the following logs:

Exception Log	This log contains warnings that occurred because of ambiguous working storage definitions. You may need to modify code or add utility directives to resolve the issues logged.
Exception BIND/SELECT Log	This log contains warnings and errors that occurred because of ambiguous BIND and SETUP definitions.
Exception Date Log	This log lists all group-level date fields detected by the utility.
Summary	This log provides general statistics regarding the number of programs processed.

When you specify the -4 flag, you see only the summary log. Set the -rd flag on the conversion utility command line if you want the utility to produce all the detail logs: exception, BIND/SELECT, and exception date.

The following tables summarize all the messages that can appear in the three exception log files. Errors indicate problems that are encountered by the conversion utility.

Messages From the Exception Log

Message	*Type*	*Note*
Non-matching conversion block found in line <line number>.	Error	Detected the NOCBGN directive, but couldn't find the corresponding NOCEND.
Error in determining numeric length in line <line number>.	Error	Program couldn't decipher the numeric PICTURE clause.
The size of the one character array will be expanded in line <line number>.	Warning	Detected a one-character array where field contains the string -BYTE, -POS, or -CHAR.

Message	Type	Note
A one-character array is found in <line number>. The conversion routine will expand this to PIC X(3).	Warning	
Unable to find the copy library <copy library name>.	Error	Program references a copy library, but the file couldn't be located.

Messages From the Exception BIND/SELECT Log

Message	Type	Note
Didn't find the corresponding DATA section for <DATA field name> in line <line number>.	Error	Detects either a BIND-DATA or a SELECT-DATA, but cannot find the SETUP group field.
No delimiter found on <group field name> section in line <line number>.	Warning	Didn't find a FILLER field with a value *Z* in a DATA or SETUP group field.
Unable to convert the <group field name> section due to problems reading the Copylib.	Error	DATA or SETUP refers to a copy library that cannot be located.
The <group field name> found in line "<line number>" has a mismatch count.	Warning/Error	The number of columns in DATA doesn't match the count for the corresponding SETUP.
Incompatible date type match for field in line <line number>.	Error	The data type definition in SETUP doesn't correspond to the data type in DATA.

Messages From the Exception Date Log

Message	Type	Note
Date/time/datetime detected and will not be expanded in line.	Warning	
Verify if a date/time/datetime field in line number: <line number>.	Warning	Found a character-type field or group field with a total length of 10, 15, or 26 that could be a date, time, or datetime.

Manual Fine-Tuning of COBOL Programs

Although the COBOL conversion makes most of the changes that are needed to run COBOL in a Unicode environment, some manual fine-tuning may still be necessary.

This section discusses how to:

- Identify Unicode and ANSI data.
- Specify column lengths in dynamic SQL.

- Define single character arrays.

Identifying Unicode and ANSI Data

Your COBOL program may need to determine whether it's dealing with ANSI or Unicode data. For example, if your program parses a string character, it must apply different logic depending on whether the string is an ANSI string or a Unicode string. The program can get this information from the ENCODING-MODE-SW in the PTCSQLRT copy library:

```
03  ENCODING-MODE-SW    PIC X(3)    VALUE SPACE.
                   88  ANSI-MODE                  VALUE 'A'.
                   88  UNICODE-MODE               VALUE 'U'.
```

The ENCODING-MODE-SW value is set by the COBOL application programming interface (API), which determines which type of data it's dealing with by checking the value of the UNICODE_ENABLED field in the PSSTATUS table. When the value of the UNICODE_ENABLED flag is set to *1* (TRUE), this signals the COBOL API that it is accessing a Unicode database.

The PeopleSoft COBOL trace file provides information about which encoding scheme COBOL API used:

```
PeopleSoft Batch Timings Report: cobsql_0416165133.trc

Encoding Scheme Used: Unicode

                          PeopleSoft Batch Statistics
                            (All timings in seconds)

                  R e t r i e v e    C o m p i l e    E x e c u t e      F e t c h
Statement          Count     Time   Count     Time   Count     Time   Count     Time

APIBNN                 0     0.00       0     0.00  266043     4.71       0     0.00
APISSB                 0     0.00       0     0.00    1315     0.00       0     0.00
COMMIT                 0     0.00       0     0.00      10     0.22       0     0.00
CONNECT                0     0.00       0     0.00      75     0.92       0     0.00
DISCONNECT             0     0.00       0     0.00      75     1.91       0     0.00
```

Sample trace file

Note that the COBOL API also performs the necessary translations between the UTF-8 encodings that are required by COBOL and the UCS-2 encodings that are used elsewhere in the PeopleSoft system.

Specifying Column Lengths in Dynamic SQL

Perhaps the biggest effort in getting COBOL fully functional in a Unicode environment is setting up the bind parameters and select buffers of any dynamic SQL statements.

Programs that use dynamic SQL must specify the column lengths for bind or select fields prior to calling the PTPDYSQL program. Within a COBOL program, there are two ways bind parameters and select buffers of dynamic SQL statements can be assigned:

- Using a predefined working storage area in conjunction with the dynamic SQL statement.

  This method is similar to the method used for stored SQL statements.

  In this case, PTPDYSQL adjusts the length of character-data fields that are passed to PTPSQLRT. This is necessary because the COBOL Unicode conversion utility expands only the working storage fields; it does not modify the length of fields that are hard-coded in the PROGRAM-DIVISION section of your COBOL programs.

  Because PTPDYSQL sends the correct length to PTPSQLRT, no changes to the COBOL program are necessary.

- Use a buffer array.

  At runtime, this array is partitioned based on the properties of all the fields that are referenced by the dynamic SQL statement. The properties of those fields are retrieved from the PSDBFIELD table; they include both the field's data type and the field's length.

  In this case, you must modify the COBOL program to adjust the length specified for a character field. Adjust the length by a factor of three.

To adjust the length of the character field appropriately, the program must recognize the encoding scheme that is used by the COBOL API. The program can take advantage of the ENCODING-MODE-SW field in PTCSQLRT to determine when the length of the field needs to be adjusted.

The following code section illustrates the use of a buffer array to calculate the length of a character field in the Unicode environment:

```
02  SELECT-DATA.
              03  FIELDNAME           PIC X(54)   VALUE SPACE.
              03  FIELDNUM            PIC 9(3)    VALUE ZERO  COMP.
              03  DEFFIELDNAME        PIC X(90)   VALUE SPACES.
              03  FIELDLEN            PIC 9(3)    VALUE ZERO  COMP.
              03  FIELDTYPE           PIC 9(2)    VALUE ZERO  COMP.
                  88  RDM-CHAR                    VALUE ZERO.
                  88  RDM-LONG-CHAR               VALUE 1.
                  88  RDM-NUMBER                  VALUE 2.
                  88  RDM-SIGNED-NUMBER           VALUE 3.
                  88  RDM-DATE                    VALUE 4.
                  88  RDM-TIME                    VALUE 5.
                  88  RDM-DATETIME                VALUE 6.
              03  DECIMALPOS          PIC 9(2)    VALUE ZERO  COMP.
              03  FILLER              PIC X       VALUE 'Z'.
                  88  RDM-NUMBER                  VALUE 2.
                  88  RDM-SIGNED-NUMBER           VALUE 3.
                  88  RDM-DATE                    VALUE 4.
                  88  RDM-TIME                    VALUE 5.
                  88  RDM-DATETIME                VALUE 6.
```

```
               03  DECIMALPOS          PIC 9(2)    VALUE ZERO  COMP.
               03  FILLER              PIC X       VALUE 'Z'.
       . . .
. . .
       . . .
. . .
MOVE CORR SELECT-DATA OF S-RECFLD
                       TO FLD-ARRAY OF RECFLD (FLD-IDX)
            *  CONVERT FIELD TYPE FROM PSDBFIELD TYPE TO SQLRT CODE.
MOVE FIELDLEN OF S-RECFLD TO SETUP-LENGTH OF RECFLD (FLD-IDX)
IF RDM-CHAR OF S-RECFLD
          SET SETUP-TYPE-CHAR OF RECFLD (FLD-IDX) TO TRUE
          IF UNICODE-MODE OF SQLRT
              COMPUTE SETUP-LENGTH OF RECFLD (FLD-IDX) =
                     SETUP-LENGTH OF RECFLD (FLD-IDX) * 3
          END-IF
              END-IF
```

See Also

Identifying Unicode and ANSI Data

Defining Single Character Arrays

Some COBOL programs define single-character arrays to parse or examine a string of characters, one character at a time. In a Unicode environment, be sure that you're examining the string one *character* at a time, not one *byte* at a time.

Following is an example of a code fragment in which the program is examining a string one character at a time:

```
01  CHAR-ARRAY.
    02  CHAR-POS          PIC X  OCCURS 256 TIMES
                                 INDEXED BY CHAR-IDX.
        88  FIELD-DELIM                      VALUE '*'.
. . .
. . .
SET CHAR-IDX  TO  1
SEARCH CHAR-ARRAY
    WHEN FIELD-DELIM(CHAR-IDX)
        SET W-OFFSET  TO  CHAR-IDX
        DISPLAY 'FIELD DELIMITER FOUND AT POSITION ' W-OFFSET
END-SEARCH
```

The intent of the code above is to examine each character of the array, looking for the first delimiter character. When that character is found, the code displays the position of the delimiter.

In an ANSI environment that uses only the Latin1 character set, this works because there is one byte (one array element) per character. In a Unicode environment (or in an ANSI environment that allows double-byte character sets), this fails because what could potentially be examined is the second or third byte of a two- or three-byte character. It is possible for the second or third byte to match the bit pattern of the delimiter character, thus falsely passing the test and ending the search loop.

To correct this situation, you must know the length (in bytes) of each character that is being processed. A new COBOL function, PTPSTRFN, is available that returns the length of a character so that the code can take this into account when performing a character search. The PTPSTRFN subroutine works for both Unicode character sets and ASNI double-byte characters sets.

The PTPSTRFN subroutine offers two ways of retrieving the character length of a character database type field:

- Requesting the length of a single character.
- Requesting a map of an entire character string.

  Choose this second option if your application program needs to get the length information of all characters within a string.

Requesting the Length of a Single Character

Input parameters:

Parameter	*Value*	*Notes*
ACTION-TYPE	ACTION-CHARLEN	
CHAR-CD	The character whose length you want to verify.	This variable is included in the PTCSTRFN.CBL copy library.

Values returned:

Parameter	*Value*	*Notes*
CHAR-LENGTH	The subroutine returns one of the following values, representing the length of the character referenced by CHAR-CD: • ONE-BYTE • TWO-BYTES • THREE-BYTES	This variable is included in the PTCSTRFN.CBL copy library.
STRFN-RC	Returns one of the following values: • STRFN-RC-OK • STRFN-INVALID-ACTION	This variable is included in the PTCSTRFN.CBL copy library.

Example:

At the beginning of this section, there was a code fragment in which the program was examining a string, one character at a time, looking for the first delimiter character:

```
01  CHAR-ARRAY.
    02  CHAR-POS          PIC X  OCCURS 256 TIMES
                                  INDEXED BY CHAR-IDX.
        88  FIELD-DELIM                       VALUE '*'.
. . .
. . .
SET CHAR-IDX  TO  1
SEARCH CHAR-ARRAY
    WHEN FIELD-DELIM(CHAR-IDX)
        SET W-OFFSET  TO  CHAR-IDX
        DISPLAY 'FIELD DELIMITER FOUND AT POSITION ' W-OFFSET
END-SEARCH
```

After the code is modified for Unicode, it looks like this:

```
01  CHAR-ARRAY.
    02  CHAR-POS          PIC X  OCCURS 256 TIMES
                                  INDEXED BY CHAR-IDX.
        88  FIELD-DELIM                       VALUE '*'.

01  STR-FUNC                  COPY 'PTCSTRFN'.
. . .
. . .
SET CHAR-IDX  TO  1
SEARCH CHAR-ARRAY
    WHEN FIELD-DELIM(CHAR-IDX)
        SET W-OFFSET  TO  CHAR-IDX
        DISPLAY 'FIELD DELIMITER FOUND AT POSITION ' W-OFFSET
    WHEN OTHER
       MOVE CHAR-POS(CHAR-IDX)   TO CHAR-CD OF STR-FUNC

       CALL 'PTPSTRFN'  USING   ACTION-CHARLEN
                                STR-FUNC

       IF TWO-BYTES OF STR-FUNC
          SET CHAR-IDX UP BY 1
       ELSE IF THREE-BYTES OF STR-FUNC
          SET CHAR-IDX UP BY 2
       END-IF
END-SEARCH
```

The above modification ensures that the code continues to function properly in a Unicode environment. However, we can be sure that modification works only when the character the program is searching for is one byte in length.

Consider the following code fragment, where the character that the program is searching for may be longer than one byte:

```
01  W-DELIMITER           PIC X(3)      VALUE '<some extended character>'.
01  CHAR-ARRAY.
    02  CHAR-POS          PIC X  OCCURS 256 TIMES
                              INDEXED BY CHAR-IDX
                                         CHAR-IDX2
           CHAR-IDX3.
        88  FIELD-DELIM                 VALUE '*'.
. . .
. . .
SET CHAR-IDX  TO  1
SEARCH CHAR-ARRAY
        WHEN CHAR-POS(CHAR-IDX)  =  W-DELIMITER
    SET W-OFFSET  TO  CHAR-IDX
    DISPLAY 'FIELD DELIMITER FOUND AT POSITION ' W-OFFSET
END-SEARCH
```

For this code to work in a Unicode environment, a Unicode-specific search algorithm must be used. Ensure that the program always compares the correct bytes from the array (up to three bytes, based on the current character length) to the fixed three-byte field containing the search value.

The proper search method looks like this:

```
01  CHAR-ARRAY.
    02  CHAR-POS          PIC X  OCCURS 256 TIMES
                              INDEXED BY CHAR-IDX.
        88  FIELD-DELIM                     VALUE '*'.

01  STR-FUNC                  COPY 'PTCSTRFN'.
. . .
. . .
SET CHAR-IDX  TO  1

PERFORM UNTIL CHAR-IDX > 256

    MOVE CHAR-POS(CHAR-IDX)   TO CHAR-CD OF STR-FUNC

    CALL 'PTPSTRFN'    USING   ACTION-CHARLEN
                               STR-FUNC

    INITIALIZE W-WORK

    EVALUATE TRUE
```

```
            WHEN ONE-BYTE OF STR-FUNC
                MOVE CHAR-POS(CHAR-IDX)  TO  W-WORK
                SET CHAR-IDX UP BY 1

            WHEN TWO-BYTES OF STR-FUNC
                SET CHAR-IDX2  TO  CHAR-IDX
                SET CHAR-IDX2  UP  BY 1
                STRING  CHAR-POS(CHAR-IDX)
                        CHAR-POS(CHAR-IDX2)
                        DELIMITED BY SIZE
                        INTO W-WORK
                END-STRING

                SET CHAR-IDX UP BY 2

            WHEN THREE-BYTES OF STR-FUNC
                SET CHAR-IDX2  TO  CHAR-IDX
                SET CHAR-IDX2  UP  BY 1
                SET CHAR-IDX3  TO  CHAR-IDX
                SET CHAR-IDX3  UP  BY 2
                STRING  CHAR-POS(CHAR-IDX)
                        CHAR-POS(CHAR-IDX2)
                        CHAR-POS(CHAR-IDX3)
                        DELIMITED BY SIZE
                        INTO W-WORK
                END-STRING

                SET CHAR-IDX UP BY 3

           WHEN OTHER
               DISPLAY '**ERROR** INVALID CHARACTER LENGTH'
               <ABEND>
           END-EVALUATE

           IF W-WORK  =  W-DELIMITER
               SET W-OFFSET  TO  CHAR-IDX
               DISPLAY 'FIELD DELIMITER FOUND AT POSITION ' W-OFFSET
           END-IF

       END-PERFORM
```

As you can see from the previous example, searching a string array for a particular value that may be an extended character can be difficult; if possible, avoid such a search.

Requesting a Map of an Entire Character String

Parameter	*Value*	*Notes*
ACTION-TYPE	ACTION-STRMAP.	

Parameter	*Value*	*Notes*
STRING-LENGTH	Length of the character string <String Parameter 1>.	This variable is included in the PTCSTRFN.CBL copy library.
<String Parameter 1>	The character string.	
<String Parameter 2>	The buffer area to be updated by the subroutine.	

Values returned:

Parameter	*Value*	*Notes*
<String Parameter 2>	This buffer is updated with the appropriate values. This field contains at least one of these values: • 1: The next character position is part of a one-byte character. • 2X: The next two character positions are part of a two-byte character. 3XX: The next three character positions are part of a three-byte character.	Refer to the example following this table to see how the function works.
STRFN-RC	Returns one of the following values: • STRFN-RC-OK • STRFN-INVALID-ACTION	This variable is included in the PTCSTRFN.CBL copy library.

Example:

The PTPSTRFN COBOL subroutine provides an option to map the byte length of an entire character string. The sample COBOL code below provides an example of how this feature is used. The code reads all fields from the following Unicode table:

LANGUAGE	UNITEXT
Catalan	Quan el món vol conversar, parla Unicode
Chinese (Simplified)	当世界需要沟通时，请用Unicode！
Chinese (Traditional)	當世界需要溝通時，請用統一碼(Unicode)
Danish	Når verden vil tale, taler den Unicode
Dutch	Als de wereld wil praten, spreekt hij Unicode
English	When the world wants to talk, it speaks Unicode
Esperanto	Kiam la mondo volas paroli, ĝi parolas Unicode
Finnish	Kun maailma haluaa puhua, se puhuu Unicodea
French	Quand le monde veut communiquer, il parle en Unicode

Sample Unicode table

For each row shown in the previous table, the code performs the following functions:

- Calls the PTPSTRFN to get the string mapping of the UTF-8 character string of the text retrieved for the UNITEXT field.
- Displays the UTF-8 string equivalent of the text.
- Tallies the number of one-byte, two-byte, and three-byte characters of the text.

The COBOL code analyzes the text as follows:

```
01  W-WORK.
    02  LANGUAGE               PIC X(20).
    02  UNICODE-TEXT           PIC X(300).
    02  UNICODE-TEXT-MAP       PIC X(300).
    02  DATA-LEN               PIC 9(3)    COMP.
    02  BYTE-POS-MAX           PIC 9(4)    COMP.
    02  COUNTERS.
        05  COUNT-1BYTE-CHAR   PIC 9(02)   VALUE ZEROS.
        05  COUNT-2BYTE-CHAR   PIC 9(02)   VALUE ZEROS.
        05  COUNT-3BYTE-CHAR   PIC 9(02)   VALUE ZEROS.

01  BYTE-ARRAY.
    02  BYTE-POS               PIC X   OCCURS 300   TIMES
                                 INDEXED BY BYTE-IDX.
        88  ONE-BYTE-CHAR              VALUE '1'.
        88  TWO-BYTES-CHAR             VALUE '2'.
        88  THREE-BYTES-CHAR           VALUE '3'.
        88  BYTE-STRING-END            VALUE SPACE.

01  STR-FUNC                  COPY 'PTPSTRFN'.

. . .
. . .
 <Code to retrieve the text from the database and assign to the
appropriate fields>
. . .
. . .

* Initialize the string map before calling the function
   MOVE SPACES    TO UNICODE-TEXT-MAP

   CALL 'PTPSTRFN'    USING   ACTION-STRMAP
                              STR-FUNC
                              UNICODE-TEXT
                              UNICODE-TEXT-MAP

   IF NOT STRFN-RC-OF OF STR-FUNC
       <ABEND PROGRAM>
   END-IF
```

```
           SET BYTE-POS-MAX TO 300
           MOVE 300 TO DATA-LEN OF W-WORK

           MOVE UNICODE-TEXT-MAP  TO  BYTE-ARRAY

           PERFORM VARYING BYTE-IDX FROM 300  BY -1
               UNTIL BYTE-IDX  <=  1
               OR NOT BYTE-STRING-END(BYTE-IDX)
                SUBTRACT 1  FROM  DATA-LEN OF W-WORK
           END-PERFORM

         * Initialize counters
           MOVE ZEROS   TO COUNT-1BYTE-CHAR
           MOVE ZEROS   TO COUNT-2BYTE-CHAR
           MOVE ZEROS   TO COUNT-3BYTE-CHAR

           PERFORM UNTIL BYTE-IDX > DATA-LEN OF W-WORK

               EVALUATE TRUE

                  WHEN ONE-BYTE-CHAR
                       ADD 1 TO COUNT-1BYTE-CHAR

                  WHEN TWO-BYTES-CHAR
                       ADD 1 TO COUNT-2BYTE-CHAR

                  WHEN THREE-BYTES-CHAR
                       ADD 1 TO COUNT-3BYTE-CHAR

               END-EVALUATE

               SET BYTE-IDX UP BY 1

           END-PERFORM

           DISPLAY ' LANGUAGE = ' LANGUAGE
           DISPLAY '   UTF8 TEXT: (LENGTH = ' DATA-LEN ')'
           DISPLAY '          ' UNICODE-TEXT
           DISPLAY ' '
           DISPLAY '   UTF8 BYTE MAPPING:'
           DISPLAY '          ' UNICODE-TEXT-MAP
           DISPLAY ' '
           DISPLAY '   TALLY:'
           DISPLAY '     NUMBER OF ONE-BYTE CHAR:    '
                        COUNT-1BYTE-CHAR
           DISPLAY '     NUMBER OF TWO-BYTES CHAR:   '
                        COUNT-2BYTE-CHAR
           DISPLAY '     NUMBER OF THREE-BYTES CHAR: '
                        COUNT-3BYTE-CHAR
           DISPLAY ' '
           DISPLAY ' '
```

The output of this program appears as follows. Note that certain strings appear to be garbled. This is because there is no font to display the characters properly.

```
LANGUAGE = Catalan
   UTF8 TEXT: (LENGTH = 0041)
          Quan el mÃ³n vol conversar, parla Unicode
   UTF8 BYTE MAPPING:
          1111111112X11111111111111111111111111111111
   TALLY:
     NUMBER OF ONE-BYTE CHAR:    039
     NUMBER OF TWO-BYTES CHAR:   001
     NUMBER OF THREE-BYTES CHAR: 000

 LANGUAGE = Chinese (Simplified)
   UTF8 TEXT: (LENGTH = 0043)
          å½"ä¸-ç•Œéœ€è|□æ²Ÿé€šæ—¶ï¼Œè¯·ç"¨Unicodeï¼□
   UTF8 BYTE MAPPING:
          3XX3XX3XX3XX3XX3XX3XX3XX3XX3XX3XX11111113XX
   TALLY:
     NUMBER OF ONE-BYTE CHAR:    007
     NUMBER OF TWO-BYTES CHAR:   000
     NUMBER OF THREE-BYTES CHAR: 012

 LANGUAGE = Chinese (Traditional
   UTF8 TEXT: (LENGTH = 0055)
          ç•¶ä¸-ç•Œéœ€è|□æ°□é€šæ™,ï¼Œè«‹ç"¨çµ±ä¸€ç¢¼ï¼^Unicodeï
   UTF8 BYTE MAPPING:
          3XX3XX3XX3XX3XX3XX3XX3XX3XX3XX3XX3XX3XX3XX11111113XX
   TALLY:
     NUMBER OF ONE-BYTE CHAR:    007
     NUMBER OF TWO-BYTES CHAR:   000
     NUMBER OF THREE-BYTES CHAR: 016

 LANGUAGE = Danish
   UTF8 TEXT: (LENGTH = 0039)
          NÃ¥r verden vil tale, taler den Unicode
   UTF8 BYTE MAPPING:
          12X1111111111111111111111111111111111111
   TALLY:
     NUMBER OF ONE-BYTE CHAR:    037
     NUMBER OF TWO-BYTES CHAR:   001
     NUMBER OF THREE-BYTES CHAR: 000

 LANGUAGE = Dutch
   UTF8 TEXT: (LENGTH = 0045)
          Als de wereld wil praten, spreekt hij Unicode
   UTF8 BYTE MAPPING:
```

```
          1111111111111111111111111111111111111111111111
  TALLY:
    NUMBER OF ONE-BYTE CHAR:    045
    NUMBER OF TWO-BYTES CHAR:   000
    NUMBER OF THREE-BYTES CHAR: 000

LANGUAGE = English
  UTF8 TEXT: (LENGTH = 0047)
          When the world wants to talk, it speaks Unicode
  UTF8 BYTE MAPPING:
          11111111111111111111111111111111111111111111111
  TALLY:
    NUMBER OF ONE-BYTE CHAR:    047
    NUMBER OF TWO-BYTES CHAR:   000
    NUMBER OF THREE-BYTES CHAR: 000

LANGUAGE = Esperanto
  UTF8 TEXT: (LENGTH = 0047)
          Kiam la mondo volas paroli, Ä□i parolas Unicode
  UTF8 BYTE MAPPING:
          1111111111111111111111111112X11111111111111111
  TALLY:
    NUMBER OF ONE-BYTE CHAR:    045
    NUMBER OF TWO-BYTES CHAR:   001
    NUMBER OF THREE-BYTES CHAR: 000

LANGUAGE = Finnish
  UTF8 TEXT: (LENGTH = 0043)
          Kun maailma haluaa puhua, se puhuu Unicodea
  UTF8 BYTE MAPPING:
          11111111111111111111111111111111111111111
  TALLY:
    NUMBER OF ONE-BYTE CHAR:    043
    NUMBER OF TWO-BYTES CHAR:   000
    NUMBER OF THREE-BYTES CHAR: 000

LANGUAGE = French
  UTF8 TEXT: (LENGTH = 0052)
          Quand le monde veut communiquer, il parle en Unicode
  UTF8 BYTE MAPPING:
          1111111111111111111111111111111111111111111111111111
  TALLY:
    NUMBER OF ONE-BYTE CHAR:    052
    NUMBER OF TWO-BYTES CHAR:   000
    NUMBER OF THREE-BYTES CHAR: 000
```

PART 3: Translating PeopleSoft Applications

CHAPTER 10

Adding New Languages

This chapter provides an overview the steps required when adding a new language.

Understanding Custom Translations

PeopleSoft provides translations in several languages for all end-user objects, and these translations can be licensed from PeopleSoft. However, you can maintain data in your PeopleSoft database in as many languages as required, as long as the characters needed to represent these languages exist in the character set used to create your database. Of course, if you are running a Unicode database, you can maintain data in all languages supported by the Unicode Standard in a single PeopleSoft database.

As shipped, the PeopleTools package includes definitions for only the languages provided by PeopleSoft. If you plan on using additional languages in your system, you must first define these languages in PeopleTools.

There are several places where you must define new languages before PeopleTools can use and recognize them. Work with your system administrator to ensure that you complete all the necessary steps (shown below) before using a new language in PeopleTools.

Note. You do not need to perform these steps for any language where PeopleSoft has provided translations.

Creating New Languages

This section discusses how to:

- Add a new language code to the system.
- Determine PeopleSoft and POSIX standard codes for your language
- Determine the appropriate non-Unicode character set.
- Add the new language to the translate table (PSXLATDEFN).
- Add the new language to the PSLANGUAGES table.
- Modify the PeopleSoft Configuration Manager Windows resources.

- Modify the PeopleSoft Internet Architecture Signon page.
- Add the new language to the pstools.properties file.

Adding a New Language Code to the System

To add a new language code to the system:

1. Determine the PeopleSoft and POSIX codes for your language.
2. Determine the default non-Unicode character set for your language.
3. Add the new language to the Translate table (PSXLATDEFN).
4. Add the new language to the PSLANGUAGES table.
5. Modify the PeopleSoft Configuration Manager Windows resources to include the new language in the Configuration Manager's language selection drop-down list.
6. Modify the PeopleSoft Internet Architecture signon page to include a selection for the new language.
7. Add the new language to the PeopleSoft Internet Architecture *pstools.properties* file, providing a mapping between the browser's POSIX language code and your PeopleSoft language code.

See Also

PeopleSoft Installation and Administration Guide, "Loading Translations"

Determining PeopleSoft and POSIX Codes for Your Language

PeopleSoft does not currently use the POSIX standard language and locale identifiers in PeopleTools. Instead, PeopleTools uses a proprietary three-letter language code that is determined and maintained by PeopleSoft. When adding a new language, you must choose a three-letter language code to represent the name of your language.

Because this code is used to key several PeopleTools database objects and the PeopleTools cache file, ensure that the language code contains only three uppercase U.S. ASCII letters—no numbers, spaces or accented characters.

The existing PeopleSoft language codes that have been allocated are as follows:

Code	*Language*
ENG	English
CFR	Canadian French
DUT	Dutch

Code	Language
ESP	Spanish
FRA	French
GER	German
JPN	Japanese
POR	Portuguese
SVE	Swedish
THA	Thai
ZHT	Traditional Chinese
ZHS	Simplified Chinese

In our example, we'll choose *NRS* for Norwegian (the NRS code is derived from the Norwegian name for their language, Norsk) as our additional language.

Once you have chosen a three-letter code for your new language, you must determine which POSIX locale corresponds to that language. POSIX locales are comprised of two components: a language identifier and a territory identifier, separated by an underscore or a hyphen. Typically, the language component is in lowercase letters, and the territory identifier is in uppercase letters. For example, *en_US* is the POSIX locale for U.S. English, and *de_CH* is the POSIX locale for Swiss German.

The language component of the locale is the two-letter language code defined by the ISO 639 standard. The territory component of the locale is the two-letter country code defined by the ISO 3166 standard.

The territory portion of the POSIX locale can be omitted if you want to indicate only a language and not a country-specific derivation of that language. In our example, we plan to add the Norwegian language, so the appropriate POSIX locale is *no*. If we were adding a specific dialect of Norwegian, we would use a specific POSIX locale, such as *no_NO*. But as long as we're adding the generic Norwegian language, we can use *no* as the complete POSIX locale code.

In most situations, you can use only the language portion of the POSIX locale. However, the two-component locale is important if you are planning to add derivations of existing languages, such as Mexican Spanish (es_MX) or Australian English (en_AU). You can easily create those language derivations from a related language using the PeopleTools Terminology Management tool.

See Also

"Modifying Terminology"

Determining the Appropriate Non-Unicode Character Set

Although the majority of the PeopleSoft system runs in Unicode, some operations cannot use Unicode characters such as file system operations on Unix platforms and integration to some third-party products. For each language in your database, you must determine which non-Unicode character set should be used when Unicode operations cannot be performed. The following table lists some of the non-Unicode character sets that are supported by PeopleTools. The complete list is in the PSCHARSETS table in your PeopleTools database. For each new language you add, select the appropriate non-Unicode character set from this table.

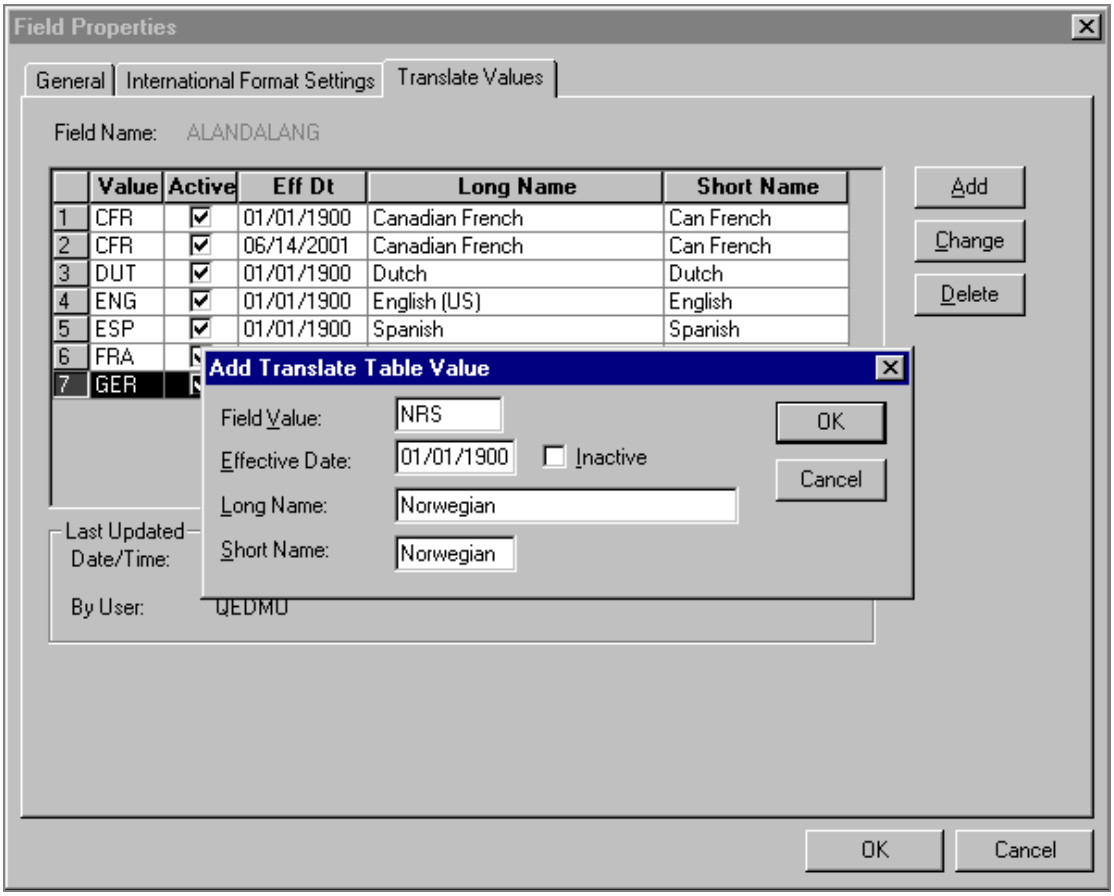
If you are not using a Unicode PeopleSoft database, the character set you select must be the character set you used to create your PeopleSoft database. For example, if you are using a OS/390 database, you must specify the EBCDIC CCSID specified in your subsystem's ZPARMS.

Remember that this table is an excerpt from the complete list of character sets that are supported by PeopleTools. For the complete list, query the PSCHARSETS table in your SQL tool or in PeopleSoft Query.

Character Set	*Description*
ISO-2022-KR	ISO-2022-JP Korean
ISO_8859-1	ISO 8859-1 (Latin1)
ISO_8859-10	ISO 8859-10 (Latin6)
ISO_8859-11	ISO 8859-11 (Thai)
ISO_8859-14	ISO 8859-14 (Latin8)
ISO_8859-15	ISO 8859-15 (Latin9 / Latin0)
ISO_8859-2	ISO 8859-2 (Latin2)
ISO_8859-3	ISO 8859-3 (Latin3)
ISO_8859-4	ISO 8859-4 (Latin4)
ISO_8859-5	ISO 8859-5 (Cyrillic)
ISO_8859-6	ISO 8859-6 (Arabic)
ISO_8859-7	ISO 8859-7 (Greek)
ISO_8859-8	ISO 8859-8 (Hebrew)
ISO_8859-9	ISO 8859-9 (Latin5)
Shift_JIS	Shift-JIS (Japanese)

Adding the New Language to the Translate Table (PSXLATDEFN)

Once you have determined the PeopleSoft three-letter language code for your new language, you must add it to the Translate table so that other PeopleTools utilities and PeopleSoft applications can recognize it.



Adding a new language code

To add the language code to the Translate table:

1. Open a field (whose field length is four characters or less) in PeopleSoft Application Designer, and select File, Definition Properties.

2. Move to the Translate Values tab, and click the Add button.

   The Add Translate Table Value dialog box appears.

3. Add the new three-letter language code and a description of your new language.

   Use an effective date of 01/01/1900 to ensure that the language is always accessible to your applications. When adding the long and short names for your new language code, enter the name of the language as it is referred to in the base language of your database.

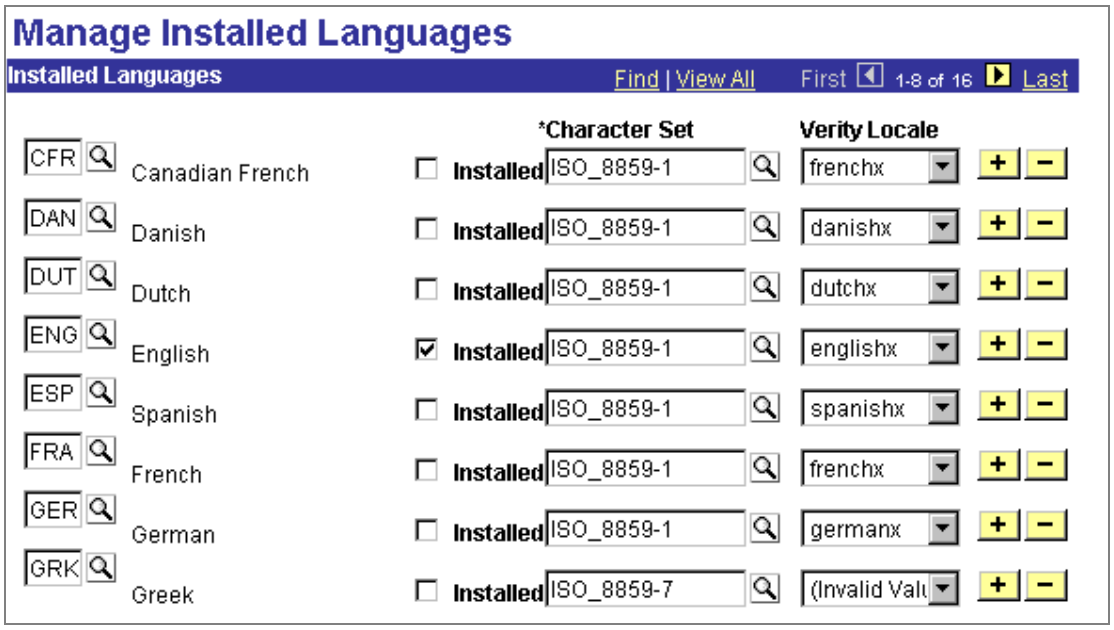
Once you have defined the translate value for your language code, you can translate it into each language.

In our example, the database's base language is English, so we'll use *Norwegian* as both the long and short name of our new language. Once we have finished defining this new language, our Norwegian translators may want to translate this new value into Norwegian as *Norsk*.

Adding the New Language to the PSLANGUAGES Table

The PSLANGUAGES table is used by many PeopleTools utilities to determine which languages defined in the database are actually in use (rather than being defined but unused). This table also provides a mapping to a default non-Unicode character set that is used to represent that language when a Unicode representation is not possible (for example, during some file system operations). You can update and add the languages used by PeopleSoft in the Manage Installed Languages page.

Select PeopleTools, Utilities, International, Languages.



Utilities - Manage Installed Languages page

Installed Languages	Enter the PeopleSoft three letter language code.
Installed checkbox	Select the checkbox to
Character Set	Enter the appropriate Character set for the language code selected.
Verity Locale	Use the dropdown list to select which Verity locale should be used when indexing data for search in this language.

Modifying the Configuration Manager Windows Resources

PeopleSoft Configuration Manager provides a list of languages that are available to users for their PeopleTools Windows client and Application Designer sessions. This list is embedded in the Windows Resource File for PeopleSoft Configuration Manager itself.

To add your new language to the list of languages in PeopleSoft Configuration Manager:

1. Create a new directory \RES\<newlang>\PSCFG for your new language.
2. Copy \RES\<lang>\PSCFG into \RES\<newlang>\PSCFG.

   PSCFG.RC stores the list of languages used in the Display tab of PeopleSoft Configuration Manager. These languages are stored as strings with the name *IDS_LANGx*, where *x* is a sequential number. You can edit PSCFG.RC using any text editor. To add your new language, find the next available IDS_LANG entry, and change the text to match your new language using the format *LanguageCode - Description.*
3. Once you have updated the next available IDS_LANG entry, update the entry IDS_NUMLANGUAGES to specify the new highest IDS_LANG entry you used.

   Make the changes to both \RES\<newlang>\PSCFG\pscfg.rc and \RES\ENG\PSCFG\pscfg.rc.
4. Translate all strings within \RES\<newlang>\PSCFG\pscfg.rc into your newly added language.
5. Once you have modified the resource files to add your new language, use the MAKEALTL.BAT batch file to compile the alternate language dynamic-link library (DLL) for PeopleSoft Configuration Manager in each language where you added the new entry.

Note. Typically, no alternate language DLLs are required for the English language, as English resources are included in each core PeopleTools DLL. However, in this case, you must modify the English language resources for PeopleSoft Configuration Manager in order to add your new language. This means that you must compile an English alternate language DLL for PeopleSoft Configuration Manager (PSCFGENG.DLL), just as you do for any other language. Use the MAKEALTL.BAT batch file to compile your English resources, specifying *ENG* as the language code argument.

If you plan on translating your Windows resources into your new language, you should also create another directory structure under %PS_HOME%\SRC\RES on your file server to contain the new translations. To do so, copy the existing %PS_HOME%\SRC\RES\ENG tree (or use another language, if you prefer not to use English as the source for your translations) to a new directory under %PS_HOME%\SRC\RES, matching the PeopleSoft three-letter code for your new language.

See Also

"Translating PeopleTools"

Modifying the PeopleSoft Internet Architecture Signon Page

The PeopleSoft Internet Architecture enables users to select their signon language by selecting the language from the Signon page. This page is maintained on your web server as a static HTML file and is not generated from a PeopleTools page definition. You must edit this HTML file to add your new language code.

Work with your web server administrator to edit the file signin.html on your PeopleTools web server. The signin.html file contains an HTML table that lists each PeopleTools language. Add a new entry to this table to reference the name of your new language *in the language of the new language*. If the language does not use Latin characters, you may want to reference an image that contains the name of the language to ensure that all users can correctly see the language name, even if their web browser settings are not configured appropriately for that language.

In the following example, we added the last three lines to our signin.html file. Note the Japanese entry demonstrating how to reference an image that contains the language name for a non-Latin language:

```
<tr>
                  <td> </td>
                  <td><a HREF="<%=servletLoc%>?cmd=login&languageCd=JPN"><img
src="<%=psHome%>/images/kanji.gif" width="37" height="15" align="bottom"
alt="Japanese" border="0"></a>     </td>
                  <td class="PSHYPERLINK"><a
HREF="<%=servletLoc%>?cmd=login&languageCd=POR">Portugu&ecirc;s</a>  
;   </td>
                  <td class="PSHYPERLINK"><a
HREF="<%=servletLoc%>?cmd=login&languageCd=DUT">Nederlands</a>  </td
>
                  <td class="PSHYPERLINK"><a
HREF="<%=servletLoc%>?cmd=login&languageCd=NRS">Norsk</a>  </td>
                </tr>
```

Adding the New Language to the pstools.properties File

You must add an entry for your language needs to the *pstools.properties* file, also located on your web server. This file provides a mapping between the POSIX locale used by the browser and the three-letter PeopleTools language code that you selected for your language. The mapping is used by the PeopleSoft Internet Architecture to provide the signon screen in the user's preferred language based on the web browser's language preference settings.

Work with your web server administrator to edit the pstools.properties file in the same directory as the signin.html file that you edited in order to modify the signon page.

The *pstools.properties* file includes a section that maps POSIX locales to the equivalent PeopleSoft three-letter language code. Each PeopleSoft language code can be mapped to any number of POSIX locales to deal with the case where multiple POSIX locales are handled by a single PeopleSoft language. For example, by default, en, en_US, and en_GB are all mapped to the PeopleSoft language code ENG because separate English translations are not provided for these locales.

In the following example, we added mappings to the new NRS Norwegian PeopleSoft language code (see line *no=NRS*):

```
#iso language and country code to psft language code cross reference
en=ENG
en_US=ENG
en_GB=ENG
es=ESP
es_ES=ESP
es_AR=ESP
es_CO=ESP
es_MX=ESP
fr=FRA
fr_FR=FRA
fr_BE=FRA
fr_CH=FRA
fr_CA=CFR
it=ITA
it_IT=ITA
it_CH=ITA
ja=JPN
ja_JP=JPN
nl=DUT
nl_BE=DUT
no=NRS
de=GER
de_DE=GER
de_AT=GER
de_AU=GER
de_CH=GER
pt=POR
pt_BR=POR
sv=SVE
sv_FI=SVE
```

See Also

"Controlling International Preferences," Understanding the Browser Language Preference

CHAPTER 11

Translating PeopleTools

This chapter lists prerequisites and discusses how to:

- Translate PeopleTools.
- Using alternate language dynamic-link libraries (DLLs).
- Locate resource directories.
- Translate resource files.
- Translate property files, txt files, and images.

Prerequisites

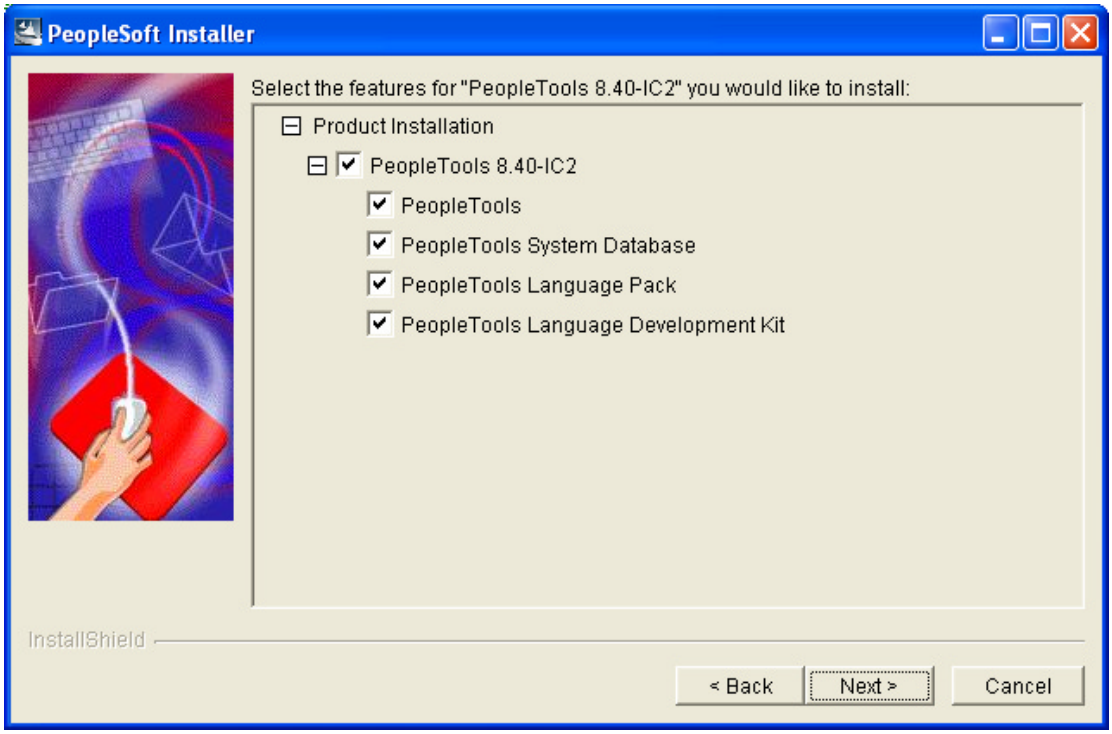
Before you begin modifying or creating new translations of PeopleTools, ensure that you have the required files and software tools.

This section discusses:

- Required files.
- Required tools.

Required Files

In order to modify translations of PeopleTools or to translate PeopleTools into a new language, you must have installed the PeopleTools Language Development Kit. The installation process for the PeopleTools CD contains an option to install the PeopleTools Language Development Kit when you install your fileserver.



PeopleSoft Installer Language Development Kit option

If you have installed this kit, you will find a directory <PS_HOME>\SRC\RES on your fileserver. You can install the PeopleTools Language Development Kit at any time – if this directory does not exist on the fileserver where you are planning to perform the translation, simply re-run the PeopleTools setup program and select only this option to install.

PeopleSoft provides source code to the English language resource files—and selected local language resources—as well as supporting header files that you need to produce your own alternate language DLLs. PeopleSoft also provides batch files to automate the resource compilation process.

In addition to the source code to the resource files that are delivered in the PeopleTools Language Development Kit, PeopleSoft also delivers pre-compiled Alternate Language DLLs for each language provided by PeopleSoft. These are installed by selecting the PeopleTools Language Pack from the PeopleTools installer. If you intend on using a translation that PeopleSoft provides but don't plan on modifying PeopleTools translations, you only need to install the Language Pack, not the Language Development Kit.

Required Tools

The tools that you need to customize Windows resources are part of Microsoft's Visual C++ compiler package. You won't have to change or compile any C++ code, but you must use the resource compiler and linker; if you are translating any resources other than strings, you must use the Microsoft Developer Studio.

See the *PeopleSoft Hardware and Software Requirements* guide for the exact version of Visual C++ required.

Translating PeopleTools

PeopleSoft provides utilities and methods for translating all definitional objects built using PeopleTools such as pages and reports. However, there are some components of PeopleTools itself that are visible to end-users and should be translated. These include messages issued by the Application Server, the Windows components of PeopleTools (such as the nVision designer and Query) and images used for standard navigation in the PeopleSoft Internet Architecture.

This chapter explains the different translatable components of PeopleTools itself, and how you can customize the translations delivered by PeopleSoft or translate PeopleTools into new languages.

More information on how to translate applications and customizations built using PeopleTools and not PeopleTools itself.

See Also

"Global Reporting and Analysis"

PeopleTools 8.4 PeopleBook: PeopleSoft Internet Architecture Administration

Using Alternate Language DLLs

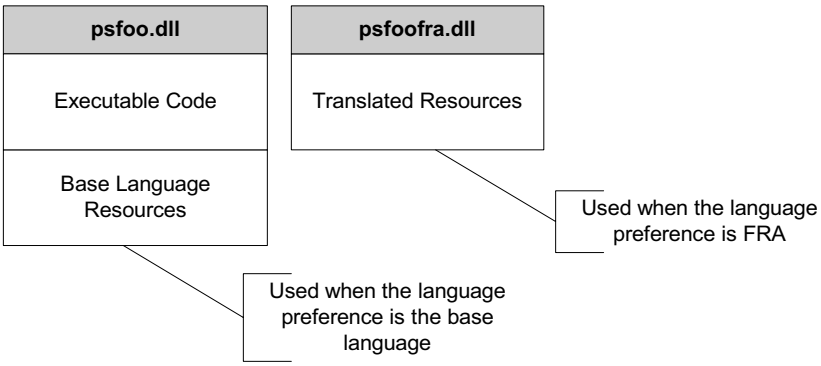
Although the vast majority of PeopleTools user interface elements viewed by the end user are stored in the database, PeopleTools' executable modules do contain some translatable elements. When running PeopleTools components (such as the Application Server, nVision and Query) on Windows, these translations are read from Alternate Language DLLs. An alternate language DLL is a file that stores translated strings for an associated PeopleTools DLL or EXE file (module). At runtime, the system uses the resources in the alternate language DLLs that correspond to the user's language preference.

PeopleSoft uses a naming convention that includes the name of the base executable (the executable with which the alternate language DLL is associated) and the language code that identifies the language of the alternate language DLL. An alternate language DLL is named as follows:

PS*ZZZXXX*.DLL

- *ZZZ* is a three-character code that identifies the PeopleTools module associated with the alternate language DLL.
- *XXX* is a three-character code that identifies the language of the alternate language DLL.

The alternate language DLL is used only to store translated resources. All code is executed from the base-language executable. The following diagram illustrates the structure of a base-language module (PSFOO.DLL) and its French alternate language DLL (PSFOOFRA.DLL).



Base language DLL and alternate language DLL

The system uses the resources that are stored in the alternate language DLL that matches the user's language preference, if the DLL exists. Otherwise, it uses the resources that are stored in the base executable file.

Locating Resource Directories

Alternate language DLLs must be present on all application servers. Windows clients in a three-tier installation also must have the alternate language DLLs present.

Windows NT application servers and Windows client machines use Windows resources from the base language and alternate language DLLs. UNIX application servers, however, store resources for all languages and modules in a single file, PSAPPSERV.RES. This file contains the same resources as the alternate language DLLs.

The following table shows the content of the directories that are used to support translated resources. These directories are distributed with PeopleTools and contain user-customizable resource files and other supporting files that are needed to compile, bind, name, and copy alternate language resource DLLs.

Directories and Files	***Purpose***
\SRC\RES	The root directory for alternate language resource DLLs. The files in this directory include some batch files that are used in constructing alternate language DLLs.
\SRC\RES\ENG	A prototypical alternate language development directory for the English language. There is one of these directories for each alternate language. Copy this directory for each new alternate language that you create.
\SRC\RES\ENG\INC	Holds header (.H) files that are common to several DLLs and various icons and bitmaps.

Directories and Files	*Purpose*
\SRC\RES\ENG\xxxxx	Within this directory, there is a directory for most PeopleTools DLL and EXE files found in \SRC\BIN. These directories contain the following file types: • *.RCX: string table resource files. • *.RC: menu and dialog box resource files. • *.CUR: cursors. • *.H: header files containing resource identifiers. • *.BMP: bitmap files used for icons and other graphical components. • *.ICO: icon files for Windows Explorer.

See Also

Using MAKEUNIX.BAT

Translating Resource Files

To translate resource files into a new language, we recommend that you start by copying the source code for the English translations provided by PeopleSoft and use this as a starting point for your new language. Alternatively, if you are only making minor modifications to an existing translation provided by PeopleSoft (such as to change terminology), you can use any of the languages provided by PeopleSoft as your starting point. This chapter assumes that you are using the English translations as your start, and that you're adding a new translation.

Note. Keep in mind that PeopleSoft provides pre-translated PeopleTools alternate language DLLs for many languages, including French, Spanish, Dutch, Portuguese, Japanese, German, Italian, Danish, Traditional Chinese, and Canadian French. You must follow these steps only if you want to translate PeopleTools into a language that is not provided by PeopleSoft or if you want to modify one of the provided translations.

This section discusses how to:

- Translate English resource files.
- Use MAKEALTL.BAT.
- Use MAKEUNIX.BAT.

Translating Resource Files

To translate resource files:

1. Determine the three-letter designation of the new language.

   In this example, we'll use the NRS designation for Norwegian. For consistency in referring to languages throughout the system, use one of the standard code values stored in the Translate table for the LANGUAGE_CD field. PeopleSoft does not use standard POSIX codes for languages, but three-letter codes instead. You can decide the appropriate three-letter code for your language, but you should ensure that it is consistently used across PeopleTools whenever you use this language.

   See "Adding New Languages."

2. Copy the contents of \SRC\RES\ENG to the target resource directory.

   For Norwegian, the target resource directory will be \SRC\RES\NRS.

3. Use Microsoft Developer Studio to convert the English resources to the alternate language.

   A text editor is adequate to change string resources contained in the *.RCX files, however when modifying *.RC files that contain Windows dialog boxes and other graphical elements, you should use the resource editor provided in Microsoft Developer Studio bundled with Microsoft Visual C++. The resource editor enables you to size and position elements in dialog boxes, edit bitmaps, cursors and other graphic components of the resource files.

4. Set up your environment variables.

   Before compiling your translated resource files, you must set the appropriate environment variables for the C++ resource compiler. Typically, Microsoft Visual C++ provides a batch file, VCVARS32.BAT, which sets the variables for you. In addition to the variables set in this batch file, set the environment variable TOOLBIN to the <PS_HOME>\BIN\CLIENT\WINX86 directory of your file server, and append the <PS_HOME>\SRC\RES\ENG\INC directory to the environment variable INCLUDE.

5. Compile alternate language DLLs using MAKEALTL.BAT.

6. (NT application servers only) Copy the resultant alternate language DLLs to the BIN\SERVER\WINX86 directory of your NT application server.

7. (UNIX application servers only) Compile UNIX application server resources and transfer to the UNIX application server.

   If you are using a UNIX application server, you must run MAKEUNIX.BAT to compile the resource files into a format that is readable by the UNIX application server.

Note. If you have changed any menu item text, you have to update the Security settings to give users access to the menu items.

See Also

Using MAKEALTL.BAT

Using MAKEALTL.BAT

The MAKEALTL.BAT file calls the Microsoft Visual C++ Resource Compiler and Linker to compile your translated resources into a Windows DLL. Before running MAKEALTL.BAT, ensure that the environment variables required by the Resource Compiler and Linker are set correctly in your current DOS window. These environment variables are as follows:

Environment Variable	*Description*	*Example*
%path%	Must include your Microsoft Visual C++ executables directory.	C:\MSDEV\BIN
%include%	Must include your Microsoft Visual C++ INC directory and the Microsoft Foundation Classes (MFC) BIN directory. It must also include a copy of the PeopleTools resource include directory.	C:\MSDEV\INC C:\MSDEV\MFC\INC C:\PT810\SRC\RES\ENG\INC
%lib%	Must include your Microsoft Visual C++ library directory.	C:\MSDEV\LIB
%toolbin%	Must point to the directory containing your PeopleTools executables.	C:\PT810\BIN\CLIENT\WINX86

Once you have verified that the variables in the table above are correct, you can run MAKEALTL.BAT.

To run MAKEALTL.BAT:

1. In a DOS window, go to the SRC\RES directory.
2. Run the MAKEALTL batch file with <language> and <PeopleTools module> parameters.

   This process compiles the resources into language-specific DLLs and copies the files to your PeopleTools executables directory.

   The syntax of the command is as follows:

```
MAKEALTL <language> <PeopleTools module>
```

- <*language*> is the three-letter code for the language that you are compiling (such as NRS).
- <*PeopleTools module*> is the name of the directory that contains the resource files that you have translated (such as PSSYS).

Pass *ALL* in place of the directory name to compile all PeopleTools modules in the language that you specified.

Using MAKEUNIX.BAT

MAKEUNIX.BAT compiles your translated resources into a single file that is readable by the PeopleSoft UNIX application servers. It reads the same translated resources as MAKEALTL.BAT, but instead of producing a separate DLL for each language/module combination, MAKEUNIX.BAT produces a single indexed resource file called PSAPPSRV.RES.

To run MAKEUNIX.BAT, you must also have the Microsoft Visual C++ development environment installed on your workstation. MAKEUNIX.BAT calls the C++ compiler to parse the resource files from all languages and to create PSAPPSRV.RES. In addition to the environment variables that are required to run MAKEALTL.BAT, MAKEUNIX.BAT requires that you set the %PSVER% environment variable. Set this variable to the base directory in which you installed PeopleTools.

If you have added any new languages as part of your PeopleTools translations, you must edit MAKEUNIX.BAT to include the new languages so that they are included in the PSAPPSRV.RES file.

To run MAKEUNIX.BAT:

1. Open a DOS command prompt window.
2. Change the directory to your \PT810\RES directory.
3. Run the MAKEUNIX batch file.

   MAKEUNIX doesn't require that you pass the module or language name arguments; it compiles the UNIX application server resources for all languages and modules in one pass.

   The output from MAKEUNIX.BAT, and PSAPPSRV.RES is placed in <PS_HOME>\APPSERV\UNIX. You must transfer PSAPPSRV.RES to the BIN directory of your UNIX application server using a network file transfer utility, such as FTP.

Translating Property Files, txt Files, and Images

Not all translatable elements used internally by PeopleTools can be contained in resource files. Some strings referenced by Java and other components of PeopleTools are stored in Java-style

property files. The PeopleSoft Internet Architecture makes use of images for many navigational and user interface elements. Some of these images contain text which must also be translated.

This section discusses:

- Translating property and text files
- Translating images.
- Translating HTML definitions.

Translating Properties Files

Java components of PeopleTools such as the servlets on the Web Server derive some strings from Java-style properties files. Java properties files are simple text files that are read at runtime by the servlet and contain strings that are displayed to the user, typically in error messages.

These files can be translated using any standard text editor, and are located on the Web Server. The following files contain translatable text:

Base Properties File	*Translated Properties File*
text.properties	text_<language_code>.properties
errors.properties	errors_<language_code>.properties

The base version of the file (without a language code) contains the English version of the strings. Copy this file to a new file containing the language code of your target language before translating the contents. For example, if you are translating the resources into Norwegian, you would create text_NRS.properties and errors_NRS.properties and update these files with Norwegian translations of the contents.

See “Adding New Languages.”

When translating into a language that cannot be represented by the Latin-1 character set (such as Japanese, Chinese and Korean), the contents of the Java properties files must be converted into escaped Unicode character references. Sun’s Java Development Kit (JDK) contains the utility native2ascii which can be used to convert Unicode character references in a Java properties file into a native character set and vice-versa. Please refer to the documentation of the native2ascii utility in the JDK for more information.

Translating Images

The PeopleTools Internet Architecture uses many images as part of its user interface component, and some of these images contain text. You will typically translate only images that contain textual elements or elements that are specific to one language or culture.

This section discusses how to:

- Translate an image.

Translating an Image

To translate an image:

1. Change the PeopleSoft Configuration Manager language preference to the target language.
2. Open PeopleSoft Application Designer.
3. Open the image.

   Choose File, Open, and select the image you want to open.
4. Export the image to a file.

   Choose File, Export Image and select a filename and image format to save the image to disk
5. Use a graphics editor to modify the saved image file and update the translation
6. Select Edit, Update Image.

   A standard Open dialog box appears.
7. Open the file with the translated image.

   The new graphic replaces the original graphic in the image.
8. Save the image.

   The translated image is saved into the related language table under the language that you selected in the Configuration Manager in the first step.

CHAPTER 12

Translating Application Definitions

This chapter provides an overview of how to translate PeopleTools application definitions into new languages, and how to translate your customizations. It discusses how to:

- Use the Translation Workbench.
- Use the translation pages.
- Translate Application definitions.

Understanding Your Translation Options

If you are running PeopleSoft applications with a multiple language user interface, you will want to translate any customizations you make to the product using PeopleTools into each of the languages that you are using. PeopleTools provides a full suite of tools to help you translate the application user interface; the same tools that PeopleSoft uses internally to provide the translations we ship on the Global MultiLanguage CDs.

The main definitions requiring translation in order to provide a fully multilingual user interface are pages and fields. However, PeopleTools allows the translation of many other definitions; everything that the end user sees via the PeopleSoft Internet Architecture can be translated into multiple languages.

You can translate PeopleTools definitions with PeopleSoft Application Designer, PeopleSoft Tree Manager, or the translations utilites. The translations utilities are a particularly powerful option for translating fields, translate values, and hard-coded text on pages (that is, text that is not derived from the field description). Given the definitional approach to PeopleTools applications however, the order in which you translate objects is critical in order to obtain the most leverage from your translation work.

Using the Translation Workbench

The Translation Workbench within PeopleSoft Application Designer provides an efficient mechanism for translating the highest volume and highest profile definitions: pages. Page definitions include field labels, page text that is not derived from field labels, and translate values (which normally appear either as radio button labels or as values in drop-down lists). The Translation Workbench facilitates translations with an easy-to-use grid where you can view the base-language text and enter a translation simultaneously, enabling translators to review their translations side-by-side instead of simply overwriting source text with a translation.

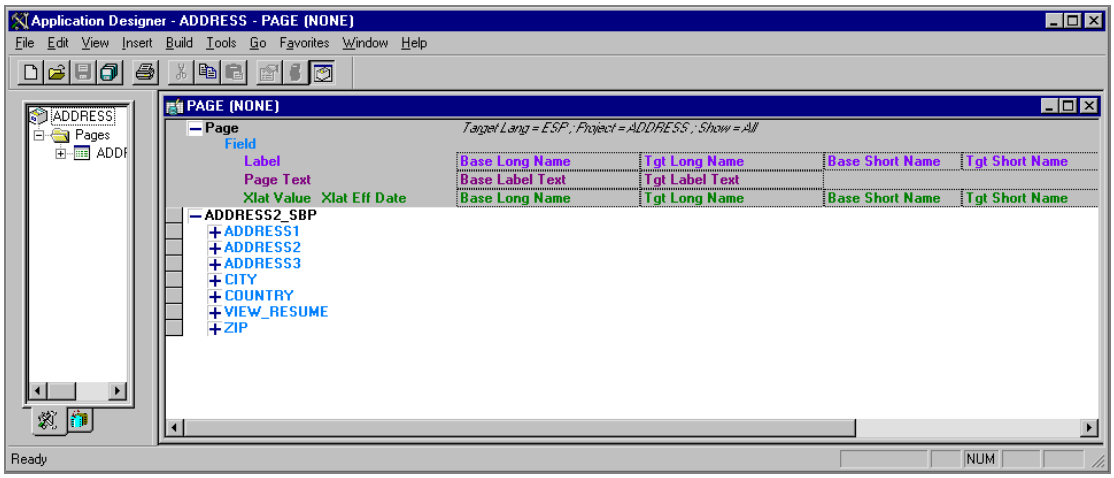
This section discusses how to:

- Open the Translation Workbench
- Using Translation Workbench display options.
- Work in the Translation Workbench.
- Translate system definitions.

Opening the Translation Workbench

The Translation Workbench shows all the translatable definitions in your current Application Designer project, along with their base-language and translated text.

The grid contents are based on the PeopleSoft Application Designer project that is open when the Translation Workbench is started. This association with PeopleSoft Application Designer projects is a handy mechanism for organizing your translation effort. However, it also means that, to use the Translation Workbench, you must have a project open, and it must contain one or more pages. If you modify the project, Translation Workbench won't pick up the new objects in the project until you save the changes and refresh..



Translating Page Definitions in the Translation Workbench

To open the Translation Workbench:

1. Set your language preference to the target language.

   Because you'll be using the Application Designer to access the Translation Workbench, set your language preference using PeopleSoft Configuration Manager.

2. Log in to the Application Designer.

3. Create or open the project containing the definitions to be translated.

It makes sense to use projects with the non-base language versions of any pages. That way you're sure to include all definitions on the pages. If you are creating a new project, you must save it before opening the Translation Workbench. It is a good idea to keep the number of pages in the project being translated to a minimum, as all the fields and other translatable definitions on each page in the project are loaded into memory when the Translation Workbench starts. A project with a lot of pages may take some time to open due to the sheer volume of fields on the page. We suggest you keep the number of pages in a project to be translated using the Translation Workbench under 20.

4. Open the Translation Workbench.

   - To translate the pages in your project, select Tools, Translate, Translate Page Definitions.

   This is the most versatile option because it shows you all translatable definitions that are associated with a page: you can use it to translate field labels, panel text (not derived from field labels), and translate values—all in one grid.

   - To translate only the fields in your project, select Tools, Translate, Translate Fields.

   This option lets you translate fields that are directly included as definitions in your project. Fields that are part of records or pages in your project are not included unless they are also explicitly included in your project as fields.

   - To translate only the tanslate values in your project, select Tools, Translate, Translate Xlats.

   You can also access all of these commands in the pop-up menu that appears when you right-click in the project workspace.

   After you select one of the translate options, the Translation Workbench appears in the object workspace.

   Depending on which translation grid you opened, different translatable definitions from the active project appear in the grid. All definitions are arranged hierarchically: pages (if included) are at the top level; fields are at the next level; and field labels, panel text, and translate (xlat) values are at the lowest level. Use standard tree controls to expand and collapse the view in order to display definitions at different levels. You can also collapse or expand all levels of the tree by right-clicking on the tree node and selecting the appropriate option from the pop-up menu.

5. (Optional) Arrange the window to maximize the Translation Workbench.

   If you want more space for the translation grid, maximize the Application Designer window and then maximize the Translation Workbench within the window. For even more space, hide the other frames in the PeopleSoft Application Designer window. To toggle the display of the project workspace, select View, Project Workspace, or press Alt+0 (zero). To toggle the display of the output window, select View, Output Window, or press Alt+1.

See Also

"Controlling International Preferences," Setting Up and Changing Windows Designer Tools Language Preferences

Expanding and Collapsing Nodes

Using Translation Workbench Display Options

This section discusses how to:

- Use the information bar.
- Expand and collapse nodes.
- Choose which rows to view.
- Resize columns and rows.

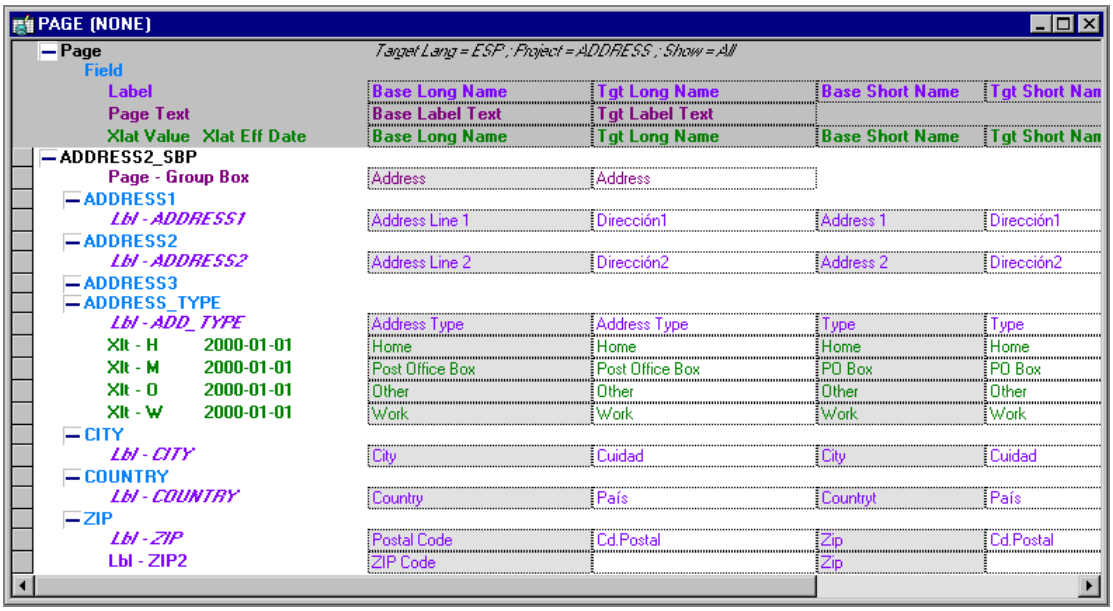
Using the Information Bar

Across the top of the translation grid, an information bar displays helpful information about the project. The target language, current project, and current viewing option (all, translated, untranslated, or modified) are set in italic.

On the left side of the bar, you can see the hierarchical organization that is used to display definitions in the grid: pages (at the highest level), fields (at the next level), and translatable definitions—field labels, page text, and translate values—at the lowest level.

Each definition is color-coded to remind you which definition type you're working with:

- Fields: blue.
- Field labels: light purple.
- Page text (not derived from a field label): dark purple.
- Translate values: green.



Color-coded definitions

In this example, notice that there is a group box with page text that is not derived from a field label. The ADDRESS_TYPE field has a set of associated translate values. All other translatable definitions are field labels.

Notice also that field labels that appear on the page are in italic. This is apparent when you look at the ZIP field, which has two labels. The other field labels appearing in the grid are associated with the field, but not used on the page being translated; they are displayed primarily so the translator can see the context in which they are translating the label and ensure consistency of terminology across labels.

Expanding and Collapsing Nodes

The left side of the translation grid is a hierarchical tree control that displays all the definitions on the page.

Click once to expand the definition by one level.

Click once to collapse definition by one level.

To expand or collapse the entire tree structure, select View, Expand All, or View, Collapse All. Right-clicking anywhere in the grid displays a pop-up menu that contains these options. Another option on the pop-up menu, Expand Current Definition, expands the selected definition by one level.

Choosing Which Rows to View

Right-click anywhere in the translation grid to see a pop-up menu that lets you choose which rows are displayed in the grid:

All	Shows all translatable definitions.
Translated	Shows only the definitions that have already been translated—that is, where the base language label and target language label do not match.
Untranslated	Shows only the definitions that have not been translated—that is, where the target language label is blank or the base language label and target language label match.
Modified	Shows the definitions that have been modified in the translation grid. The Translation Workbench defaults to this mode when it encounters a save conflict.

Keep in mind that the options you select in the pop-up menu work together. If you select Expand Current Object while Untranslated is activated, you might not see anything. This means that everything in the current definition is translated.

Resizing Columns and Rows

To change the column width, place the cursor over the column divider on the information bar. When the cursor changes, drag the column divider to the desired position. You can resize only translatable columns; you cannot resize the columns that display the hierarchical tree of page definitions. Use the same technique to change row height.

Working in the Translation Workbench

This section discusses how to:

- Enter translations.
- Navigate the translation workbench.
- Search and replace.
- Use PeopleSoft Application Designer functionality.
- Integrating with other applications.

Entering Translations

The working area of the translation workbench consists of four columns of data: Base Long Name, Tgt Long Name (target long name), Base Short Name, and Tgt Short Name (target short name).

As the column names imply, the two base language columns display the base language labels for the definitions in the grid. To translate the labels, type the translation into the Tgt Long Name and Tgt Short Name fields.

The grid incorporates standard text editing functionality. Cut, copy, and paste operations are available under the Edit menu. To force a line break within a label (so that the text wraps on the page), press CTRL+ENTER.

The first time that you translate a particular field label, the same translation is entered into any other occurrence of that field in the current grid. This ensures consistency and saves time.

The grid automatically limits the length of the text you enter based on the maximum length of the fields. When you reach the maximum length, you cannot add any more characters.

As with any PeopleSoft Application Designer definition, changes are not permanent until you save them.

Note. To save related-language data, you must have values in all fields. You cannot partially translate a single PeopleTools definition. For example, if you translate the long name but not the short name for a field, the short name defaults to the base-language short name, and this value is saved in the related language table. Similarly, if you translate some but not all translate values for a particular field, any untranslated values pick up the base language text, which is then saved to the related language table.

Navigating the Translation workbench

Click to move to a cell or node in the translation workbench, or use the standard Windows keyboard shortcuts:

- Press TAB or ENTER to move to the right; press SHIFT+TAB to move to the left.
- Use any of the arrow keys to move from cell to cell.

  For example, the UP ARROW key moves you to the cell above the current cell.
- To move from the text cells to the tree, press the LEFT ARROW key.
- To move from the hierarchical tree to the text cells, press TAB.

  You can use the RIGHT ARROW key only when there are text cells in the same row—that is, if the current node is a translatable definition.
- Use the UP ARROW and DOWN ARROW keys to move around in the hierarchical tree—for example, from a field to an adjacent field or to a page.

  To move to a lower level, first press TAB to move into the main translation workbench. Then move up or down to the desired node. Then use the LEFT ARROW key to move back into the tree.
- If there are several pages in your project, scroll directly to the node for a particular page by right-clicking that page in the project workspace and selecting Translate, Translate Page Definitions from the pop-up menu.

Searching and Replacing

To search for a specific word within a single column:

- Place the cursor anywhere in that column, and select Edit, Find and Replace In Current Column.

If you are searching a non-editable column, select Edit, Find in Current Column.

- The Find and Replace dialog boxes provide standard search and replace functionality, including the Find Next, Replace, and Replace All buttons. In either dialog box, select the Match case checkbox if you want to enable case-sensitive searching.

- The Find function provides enables you to search up or down the column.

When you reach the top or the bottom of the column, the search does not cycle back through the column. Therefore, if you want to search the entire column, ensure that you're in the top row when you press Find Next.

- The Replace function always searches down the column.

If you want to replace all occurrences in the column, ensure that you're in the top row when you press Replace.

Using Application Designer Functionality

Because the translation workbench is integrated into the PeopleSoft Application Designer, you can use all standard Application Designer features while the translation workbench is open. Some features that are particularly useful during translations are:

- Using Edit, Find Definition References to research where in the system a particular definition is used.

- Opening a translated page in order to realign translated definitions.

- Opening definitions to see the properties.

  Remember, as long as you're logged on using a non-base language, modifying labels in the definition updates the related language tables, not the base language tables.

There are several ways to open a definition:

- Use standard PeopleSoft Application Designer functionality to open the definition from the project window.

- Select the File, Open command.

- Double-click or right-click the definition within the translation workbench and select View Definition from the pop-up menu that appears.

When you've selected page text that is not associated with a field definition, the page itself opens.

If there is a version of the page for the user's language preference, that version appears; if not, the base language page appears.

Note. Security controls access to different PeopleSoft Application Designer definitions. A user who cannot open a particular type of definition from within the Translation Workbench may not have the necessary level of access.

See Also

PeopleTools 8.4 PeopleBook: Security

Integrating With Other Applications

Because the translation workbench emulates a Microsoft Excel spreadsheet, you can use the standard Windows copy and paste tools to copy translations from the Translation Workbench into Excel or another Windows application. This is useful when running spell check against your translations or when saving your translations in a spreadsheet for offline review.

To copy the entire contents of the currently open translation workbench into the clipboard, select the entire grid (select Edit, Select All or click in the top left cell of the grid's border). Then select Edit, Copy from the menu.

With the Translation Workbench, you can copy an entire translation workbench to the clipboard, but you can paste only individual field values back into the grid. You cannot paste the entire grid into the Translation Workbench after reviewing it in another application.

Using the Translation Pages

For definitions that cannot be translated via the Translation Workbench, PeopleTools contains several Translation Pages that are especially useful if the translator has limited experience using PeopleTools. A translator who has good technical skills and who is familiar with PeopleTools may prefer to translate using the design tools as described later in this chapter.

In the PeopleSoft Internet Architecture under PeopleTools, Translations, Translate System Definitions, you'll find pages to help you translate system definitions: records, menus, menu items, components, component interfaces, queries, message channels, messages, message definitions, portal definitions, process definitions, PeopleSoft Application Engine programs, Business Interlinks, review page text, and HTML definitions.

Translating Using the Translation Pages

You should translate PeopleTools definitions in the following order to ensure the least amount of duplication during your translation process:

1. Translate pages, messages, and menus—in any order (using the Translation Workbench).
2. Translate business processes, the Process Scheduler, and portals—in any order.
3. Translate trees, records, queries, strings, and PeopleSoft Application Engine—in any order.

Translating Pages

All page objects except the HTML Definitions can be translated directly in the Translation Workbench. However, you can also translate pages, translate values and fields directly in the Application Designer if you are familiar with the designer tools.

Definition	*Base Table*	*Related Language Table*	*Where to Translate*
Field Labels	PSDBFLDLABL	PSDBFLDLABLLANG	Translation Workbench
Translate Values	PSXLATITEM	PSXLATITEMLANG	Translation Workbench
Page Definitions	PSPNLDEFN	PSPNLDEFNLANG	Translation Workbench
Page Fields (Page text)	PSPNLFIELD	PSPNLFIELDLANG	Translation Workbench
Page Buttons	PSPNLBTNDATA	PSPNLBTNLANG	Translation Workbench
Page HTML	PSPNLHTMLAREA	PSPNLHTMLLANG	Application Designer

Note. Don't be confused by the name *Translate table.* It is a common table that is used throughout PeopleTools and PeopleSoft applications and is not used for translation purposes.

To translate values from the Translate table in PeopleSoft Application Designer:

1. Change the PeopleSoft Configuration Manager language preference to the target language.
2. Open the PeopleSoft Application Designer.
3. Open the field whose translate values you want to access.
4. Select File, Definition Properties.
5. Access the translate values tab in the Field Properties dialog box.
   a. Click the **Properties** icon (or right-click in the field definition and choose **Field Properties**).
   b. Click the Translate Values tab (this tab is visible only for fields with a length of four or less).

      If the descriptions have not been translated, they appear in the base language.
6. Translate the descriptions into the target language.

a. For each translate value, click the **Change** button to display the Change Translate Table dialog box.

b. Translate the **Long Name** and **Short Name** fields.

Don't change any other fields.

c. Click **OK** to accept the changes and close the dialog box.

7. Click **OK** to close the Field Properties dialog box.

8. Save the field.

Translating Messages

The following table lists where to translate message sets and message catalogs:

Object	*Base Table*	*Related Language Table*	*Where to Translate*
Message Sets	PSMSGSETDEFN	PSMSGSETLANG	Translate Messages page
Message Catalog	PSMSGCATDEFN	PSMSGCATLANG	Translate Messages page

To translate messages:

1. Select PeopleTools, Translations, Translate System Definitions, Messages to start the Translate Messages utility.

   The Messages page enables you to select a message set from the Message Catalog and then translate the message set description, messages, and detailed explanations of the messages into a specific target language.

2. In the **Target Language** field, select the language into which you want to translate the message set.

3. In the **Message Set Number** field, enter a message set.

   Click the **Search** button to prompt for a specific message set number.

4. Click the **Get Messages** button.

   A set of messages appears in the message list based on the value in the Message Set Number field.

5. Translate the message set description into the target language.

   a. Click the **Update Message Set** button to display the Add Message Set page.

   b. Enter descriptions for the message set in the target language.

   c. Click **OK** to accept the change and return to the Translate Messages page.

6. Translate the message text and explanation into the target language.

   For each message in the message list, enter translations for the messages and explanations in the **Target Message Text** and **Target Explanation** fields.

7. Save the page.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Data Management,"PeopleTools Utilities," Message Catalog

Translating Menus

The following table lists where to translate menu and component objects:

Object	*Base Table*	*Related Language Table*	*Where to Translate*
Menu Definitions	PSMENUDEFN	PSMENUDEFNLANG	Translate Menu page
Menu Items	PSMENUITEM	PSMENUITEMLANG	Translate Menu Item page
Component Descriptions	PSPNLGRPDEFN	PSPNLGDEFNLANG	Translate Components page
Components	PSPNLGROUP	PSPNLGROUPLANG	Translate Components page

This section discusses how to:

- Translate menu definitions.
- Translate menu items.
- Translate folder tabs in PeopleSoft Application Designer.
- Translate folder tab labels using Translation Utilties.

Translating Menu Definitions

Use the Translate Menus page of the Translation Utilities to translate menu definitions and menu group labels.

In a portal, the names that appear in the menu are actually content references. You must translate these using the Translate Menus Page. Use PeopleSoft Application Designer to change only pop-up menus.

To translate menus:

1. Select PeopleTools, Translations, Translate System Definitions, Menus to start the Translate Menus utility.

   The Menus page enables you to select a set of menu definitions and translate the labels for its menu and menu group into a specific target language.

2. In the Target Language field, select the language into which you want to translate the message set.

3. In the **Menu Name** field, select a set of menu definitions.

   Leave the Menu Name field blank if you want to select all the menus in the system.

   If you want to work through the menus alphabetically, enter the first characters of the menu name in the Menu Name field. If you want to translate a specific menu, enter the menu name in the field or click the Search button to prompt for a specific menu.

4. Click the **Get Menu** button to bring the menu descriptions into the menu list.

5. Translate the menu label and menu group into the target language.

   The base-language descriptions for each label appear on the left; enter the translations in the fields on the right.

   If you want to include accelerator keys for use with Windows client navigation, position the accelerator key ampersand to the left of the character that will serve as the accelerator key for the menu or menu group.

6. Save the page.

Translate Menu Items

To translate menu items:

1. Select PeopleTools, Translations, Translate System Definitions, Menu Items to start the Translate Menu Items utility.

   The Menu Items page enables you to select a set of menu definitions and then translate the labels for its menu bars and menu items into a specific target language.

2. In the Target Language field, select the language into which to translate the menu bar and menu item labels.

3. In the **Menu Name** field, select a set of menu definitions.

   Leave the Menu Name field blank if you want to select all the menus in the system.

   If you want to work through the menus alphabetically, enter the first characters of the menu name in the Menu Name field. If you want to translate a specific menu, enter the menu name in the field or click the Search button to prompt for a specific record.

4. Click the **Get Menu Items** button to bring the menus into the Menu Item List.

5. Translate the bar label and item label into the target language.

   The base-language descriptions for each label appear on the left; enter the translations in the fields on the right.

   If you want to include accelerator keys for use with Windows client navigation, position the accelerator key ampersand to the left of the character that will serve as the accelerator key for the menu or menu group.

   After you translate a menu bar label and exit the field, you are asked if you want to use the same translation for all occurrences of this bar label:

   - Click **Yes** if you want the translation you just entered to be copied to each of the menu items in the list that share the same bar label. This is merely a data entry shortcut; no translations are saved until you explicitly save the page.

   - Click **No** if you want to leave some of the menu items untranslated.

   The translated menu bar label appears at runtime if:

   - The user's language preference is set to the target language.

   - One or more menu items that appear in the menu bar have a menu bar label translated into the target language.

6. Save the page.

Translating Folder Tabs in PeopleSoft Application Designer

Folder tabs should be translated directly in the Translate Components page. However, if you are familiar with design tools you can also translate folder tabs directly in the Application Designer, Translation Workbench.

Component definitions include two labels for each page in the component: an item label and a folder tab label. In the PeopleSoft Internet Architecture, only one of these is visible to the user. If a folder tab label exists, it is used on the folder tab for the corresponding page; the item label is ignored. If no folder tab label exists, the item label is used as the folder tab label.

To translate folder tab labels in PeopleSoft Application Designer:

1. Change the PeopleSoft Configuration Manager language preference setting to the target language.

2. Log in to PeopleSoft.

3. Open PeopleSoft Application Designer.

4. Open the component definition.

5. Translate the item labels and folder tab labels into the target language.

Edit the labels directly in the **Item Label** and **Folder Tab Label** columns on the grid.

If the cell in the folder tab label column is blank, the item label appears in the folder tab.

If there is both an item label and a folder tab label, be aware that only the folder tab label is visible in the PeopleSoft Internet Architecture. The item label appears only on Windows menus.

For items that users access in Windows menus, you may want to include ampersands within the item label text to create accelerator keys.

6. Save the component definition.

Translating Folder Tab Labels Using Translation Utilties

To translate folder tab labels using Translation Utilities:

1. Select PeopleTools, Translations, Translate System Definitions, Components to start the Translate Components utility.

   The Translate Components page enables you to select a set of component definitions and then translate the labels for the pages that make up the component.

   There are two translatable labels for each page in the component: an item label and a folder tab label.

   In the portal, only one of these labels appears to the user. If a folder tab label exists, it is used on the folder tab for the corresponding page. The item label is ignored. If no folder tab label exists, the item label is used as the folder tab label.

   In Windows, item labels become part of the navigational structure, so if the item label and folder tab label are different, they should both be translated. However, because folder tabs use the item label when the folder tab label is missing, it is common to have item labels only.

2. In the Target Language field, select the language into which to translate the component labels.

3. In the **Component Name** edit box, select a set of component definitions.

   Leave the Component Name field blank if you want to select all the components in the system.

   If you want to work through the components alphabetically, enter the first characters of the component name in the Component Name field. If you want to translate a specific component, enter the component name into the edit box or click the Search button to prompt for a specific record.

4. Click the **Get Component** button to bring the components into the component list.

   If a component item has no folder tab text, the item label appears in the folder tab. In these cases, you can leave the translation for the folder tab text blank.

5. Translate the item label and folder tab into the target language.

   The base-language descriptions for each label appear on the left; enter the translations in the fields on the right.

   If you want to include accelerator keys for use with Windows client navigation, position the accelerator key ampersand to the left of the character that will serve as the accelerator key for the menu or menu group.

6. Save the page.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Data Management,"PeopleTools Utilities

Translating Business Processes

Note. Translate menus before business processes, PeopleSoft Process Scheduler, and portals because the terms are related.

The following table lists where to translate business process objects:

Object	*Base Table*	*Related Language Table*	*Where to Translate*
Business Process Definition	PSBUSPROCDEFN	PSBUSPROCLANG	Application Designer
Activities	PSACTIVITYDEFN	PSACTIVITYLANG	Application Designer
Business Process Items	PSBUSPROCITEM	PSBUSPROCITEMLANG	Application Designer
Component Interfaces	PSBCDEFN	PSBCDEFNLANG	Translate Component Interfaces page
Message Channels	PSCHNLDEFN	PSCHNLDEFNLANG	Translate Message Channels page
Business Interlinks	PSIODEFN	PSIODEFNLANG	Translate Business Interlinks page

This section discusses how to:

- Translate Business Process Definitions (and their related objects)
- Translate component interface messages.
- Translate message channels.

- Translate business interlinks.

Translate Business Process Definitions (and their related objects)

To translate business process definitions:

1. Set your language in Configuration Manager.
2. Open Application Designer.
3. Open the Business Process Map.
4. Overwrite the English with the translation.
5. Save.

Translating Component Interface Messages

To translate component inferface messages:

1. Select PeopleTools, Translations, Translate System Definitions, Component Interfaces to start the Translate Component Interfaces utility.

   The Translate Component Interfaces page enables you to select a component interface and then translate the description of the component interface into a specific target language.

2. In the Target Language field, select the language into which to translate the message set.
3. In the **Name** field, enter a component interface.

   Click the Search button to prompt for a list of component interfaces.

4. Click the **Get Objects** button to bring the component interface into the definition list.

   A set of component interface names appears in the Object List.

5. Translate the component interface description into the target language.

   a. Click the **Update** button to display the Add Message Set page.

   b. Type descriptions for the message set in the target language.

   c. Click **OK** to accept the change and return to the Translate Component Interfaces page.

6. Save the page.

Translating Message Channels

To translate channels:

1. Select PeopleTools, Translations, Translate System Definitions, Message Channels to start the Translate Message Channels utility.

   The Message Channels page enables you to select a channel and then translate the descriptions of the channel into a specific target language.

2. In the Target Language field, select the language into which to translate the message set.

3. In the **Channel** field, enter a channel name.

   Click the Search button to prompt for a list of channel names.

4. Click the Get Objects button to bring the message channels into the definition list.

   A set of channel names appears in the Look Up List.

5. Translate the channel description into the target language.

   Enter descriptions for the message set in the target language.

6. Save the page.

Translating Business Interlinks

To translate interface objects:

1. Select PeopleTools, Translations, Translate System Definitions, Business Interlinks to start the Translate Business Interlinks utility.

   The Translate Business Interlinks page enables you to select the base description of an interface object name and then translate the description into a specific target language.

2. In the Target Language field, select the language into which to translate.

3. In the **IO Name** field, enter a Interface Object name.

   Click the Search button to prompt for a list of interface object names.

4. Click the Get Objects button to bring the interface object names into the definition list.

   A set of interface object names appears in the Look Up List.

5. Translate the base descriptions into the target language.

   Enter descriptions for the interface object name in the target language.

6. Save the page.

Translating PeopleSoft Process Scheduler

PeopleSoft Process Scheduler has three language-sensitive definitions:

- Process type definitions.
- Job definitions.
    - Process definitions.

The following table lists where to translate PeopleSoft Process Scheduler objects:

Object	*Base Table*	*Related Language Table*	*Where to Translate*
Process Definitions	PRCSDEFN	PRCSDEFNLANG	Translate Process Definitions page
Process Types	PRCSTYPEDEFN	PRCSTYPEDEFNLNG	PeopleTools, Process Scheduler, Process Types
Process Jobs	PRCSJOBDEFN	PRCSJOBDEFNLANG	PeopleTools, Process Scheduler, Jobs
Process Recurrences	PRCSRECUR	PRCSRECURLANG	PeopleTools, Process Scheduler, Recurrences

To translate a PeopleSoft Process Scheduler Types, Jobs and Recurrences definitions:

1. Sign on to PeopleSoft using the target language.
2. Select PeopleTools, Process Scheduler Manager to open PeopleSoft Process Scheduler.
3. Open the definition that you want to translate.
    - To open a process type definition, select Process Type.
    - To open a job definition, select Job.
    - To open a process definition, select Recurrences.
4. Translate the descriptive text fields into the target language.

    Translate the **Description** field.
5. Save the page.

Translating Process Definitions

To translate process definitions:

1. Select PeopleTools, Translations, Translate System Definitions, Process Definitions to start the Translate Process Definitions utility.

   The Process Definitions page enables you to select a process name and type and then translate the long descriptions of the Process Definitions into a specific target language.

2. In the Target Language field, select the language into which to translate the Process Definitions.

3. Enter **Process Name** and process type into the appropriate fields.

   Click the Search button to prompt for a list of names.

4. Click the Get Objects button to bring the Process Definitions into the definition list.

   A set of Process Definitions appears in the Look Up List.

5. Translate the Process Definitions description into the target language.

   Enter descriptions for the Process Definitions in the target language.

6. Save the page.

Translating Portals

The following table lists where to translate PeopleSoft portal objects:

Object	*Base Table*	*Related Language Table*	*Where to Translate*
Portal Structures	PSPRSMDEFN	PSPRSMDEFNLANG	Translate Portal Objects page
Portal Attribute Values	PSPRSMATTRVAL	PSPRSMATTRVALNG	Translate Portal Objects page
Portal Attributes	PSPRSMATTR	PSPRSMATTRLANG	Translate Portal Objects page

To translate portal objects:

1. Select PeopleTools, Translations, Translate System Definitions, Portal Objects to start the Translate Portal Objects utility.

   The Translate Portal Objects page enables you to select a portal objects name and portal reference type and then translate the label and description of the portal into a specific target language.

2. In the Target Language field, select the language into which to translate the Portal Objects.
3. Enter **Portal Object Name** and Portal Reference Type into the appropriate fields.

   Click the Search button to prompt for a list of names.
4. Click the Get Objects button to bring the Portal Objects into the definition list.

   A set of Portal Objects appears in the Look Up List.
5. Translate the Portal Objects description & label into the target language.

   Enter descriptions for the Portal Objects in the target language.
6. Save the page.

See Also

*PeopleTools 8.4 PeopleBook: PeopleSoft Portal Technology, "*Administering a PeopleSoft Portal," Managing Portal Objects

Translating Trees

The following table lists where to translate tree definitions:

Object	*Base Table*	*Related Language Table*	*Where to Translate*
Tree Definitions	PSTREEDEFN	PSTREEDEFNLANG	Tree Manager

In PeopleSoft Tree Manager, you can translate the tree description and the labels of nodes that correspond to language-sensitive record fields.

Definition	*Where Displayed*	*Where Translated With Design Tools*	*Where Translated With Translate Utilities*
Tree	Search dialogs in Tree Manager dialog boxes.	Tree definition in Tree Manager.	Reporting Tools, Trees, Tree Manager,
Tree Level	Tree Level label.	Application page accessed via edit level command in PeopleSoft Tree Manager.	Reporting Tools, Trees, Tree Manager
Tree Detail Value	Tree Detail Value label	Application page accessed via edit detail value command in PeopleSoft Tree Manager.	Reporting Tools, Trees, Tree Manager

Definition	*Where Displayed*	*Where Translated With Design Tools*	*Where Translated With Translate Utilities*
Tree node	Tree node label.	Application page accessed via edit tree node in PeopleSoft Tree Manager.	Reporting Tools, Trees, Tree Manager

The translated tree descriptions appear in PeopleSoft Tree Manager list boxes.

Descriptive labels on tree nodes are derived from description fields in the record associated with the node. If you double-click the tree node, PeopleTools transfers you to the page where the node's properties are defined. If the record is language-sensitive (that is, if it has an associated related language table), the tree nodes' descriptive text is language-sensitive and can be translated using this pagein the same way that you translate other application data.

This section discusses how to:

- Translate trees.
- Translate the tree structure description.

Translating Trees

To translate trees:

1. Ensure you have the specific language installed.
2. Log in to PeopleSoft in the target language.
3. Select Tree Manager.
4. Open the tree whose description you want to translate.
5. Select tree definition.
6. Translate the fields into the target language.

   Enter the desired translation into the node, levels, detail and tree description fields.
7. Click **OK.**

Translating the Tree Structure Description

To translate the tree structure description:

1. Ensure you have the specific language installed.
2. Log in to PeopleSoft in the target language.
3. Select Tree Manager.

4. Open the tree whose description you want to translate.

   Select Maintinain Tree Structure, and select the tree that you want to open.

5. Translate the description in the Structure tab into the target language.

6. Save the page.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Tree Manager, "Introduction to Tree Manager," Understanding Tree Manager

Translating Records

The following table lists where to translate record definitions:

Object	*Base Table*	*Related Language Table*	*Where to Translate*
Record Definitions	PSRECDEFN	PSRECDEFNLANG	Translate Records page

To translate record descriptions:

1. Select PeopleTools, Translations, Translate System Definitions, Records to start the Translate Records utility.

   The Translate Records page lets you select a set of record definitions and then translate the short and long descriptions for those records into a specific target language.

2. In the Target Language field, select the language into which to translate the record descriptions.

3. In the **Record** field, select a set of record definitions.

   Leave the Record field blank if you want to select all record definitions in the system.

   If you want to work through the records alphabetically, enter the first characters of the record name in the Record field. If you want to translate a specific record, enter the record name in the Record field or use the Search button to prompt for a specific record.

4. Click the **Get Record** button to bring the record descriptions into the record list.

   A set of record definitions appears in the **Record List** field based on the value you entered into the **Record** field.

5. Translate the short and long descriptions into the target language.

   The base-language descriptions for each record appear on the left; enter the translations in the fields on the right.

6. Save the page.

Translating Queries

The following table lists where to translate queries:

Object	*Base Table*	*Related Language Table*	*Where to Translate*
Query Definitions	PSQRYDEFN	PSQRYDEFNLANG	Translate Queries page
Query Fields	PSQRYFIELD	PSQRYFIELDLANG	Translate Queries page
Query Binds	PSQRYBIND	PSQRYBINDLANG	Translate Queries page

To translate queries using the Translate Query utility:

1. Select PeopleTools, Translations, Translate System Definition, Queries to start the Translate Query utility.

   The Queries page enables you to translate query descriptions, heading labels, and query prompt descriptions into a specific target language.

2. In the Target Language field, select the language into which to translate the query descriptions and labels.

3. In the **Query Name** field, select a query.

   Leave the Query Name field blank if you want to select all the queries in the system.

   If you want to work through the fields alphabetically, enter the first characters of the query name in the Query Name field. If you want to translate a specific query, enter the query name in the Query Name field, or click the Search button to prompt for a specific record.

4. Click the **Get Query** button to bring the query descriptions into the query list.

   A set of query descriptions appears in the Query List field based on the value that you entered in the Query Name field.

5. Translate the base-language descriptions into the target language.

   The base-language descriptions appear on the left; enter the translations in the fields on the right.

6. Translate query field headings and prompt names.

   Click the **Show Item Details** button to display the Query Headings page.

   By default, field headings in queries are derived from RFT Long or RFT Short field descriptions, which means that they are automatically language-sensitive (provided that the field descriptions have been translated). Query prompt names are similarly derived from the prompt table description. The Query Headings page displays any field heading labels and prompt descriptions that are *not* derived from field or table descriptions (that is, descriptions that have override text in the query definition).

Translate the description text for the field headings and prompt descriptions in the fields, and then click **OK** to accept the change and return to the Translate Query page.

7. Save the page.

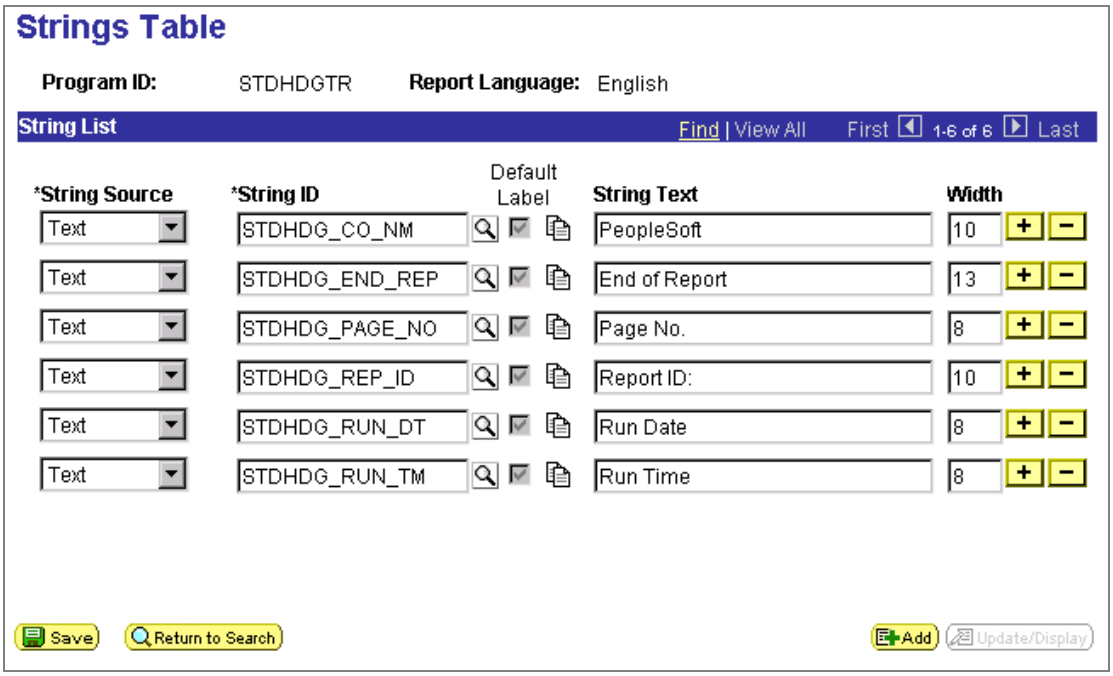
See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Query, "Introduction to PeopleSoft Query"

Translating Strings

The following table lists where to translate strings:

Object	*Base Table*	*Related Language Table*	*Where to translate*
Strings	STRINGS_TBL	STRINGS_LNG_TBL	Strings Table page



Strings Table page

Translating String Definitions into a Non-Base Language

To translate string definitions into a non-base language:

1. Log into the database as a user of the target language (the language into which you want to translate the string definitions).

To view or translate string definitions on the Strings Table page, you must log in to the database with the preferred language in your User Profile set to the target language. You can modify your User Profile preferences on the Maintain Security pages.

2. Select PeopleTools, Utilities, Use, String Table.

3. Search for an existing program ID.

   Use the standard search method to enter your program ID and access the Strings Table page.

   The Strings Table page appears, displaying a report language that is the same as the preferred language defined on the Maintain Security pages for the current user.

   The string text values for strings with a string source set to ***RFT Short*** or ***RFT Long*** are read-only. These values are copied from field description values stored in the field definition. If these values have not been translated into the target language, you must exit the String Table page, translate the description field in the field definition, and then return to the Strings Table utility to view the translated string.

4. Translate editable string text values into the target language.

   Overwrite the base-language text strings with target language strings.

5. Save the page.

See Also

"Global Reporting and Analysis," The Strings Table

Translating Application Engine Descriptions

The following table lists where to translate PeopleSoft Application Engine and Application Message definitions.

Object	*Base Table*	*Related Language Table*	*Where to translate*
App Engine Definitions	PSAEAPPLDEFN	PSAEAPPLLANG	Translate App Engine Programs page
App Message Definition	PSMSGDEFN	PSMSGDEFNLANG	Translate Message Definitions

Translating Application Engine Programs

To Translate Application Engine programs:

1. Select PeopleTools, Translations, Translate System Definition, Application Engine Programs.

This page enables you to translate Application Engine program descriptions into a specific target language.

2. In the Target Language field, select the language into which to translate.

3. In the Program field, select an Application Engine program.

   Leave the Program name field blank if you want to select all the programs in the system.

   If you want to work through the fields alphabetically, enter the first characters of the program name in the Program field. If you want to translate a specific Application Engine program, enter the program name in the Program field, or click the Search button to prompt for a specific record.

4. Click the Get Objects button to bring the program name and base descriptions into the object list.

   A set of base program descriptions appears in the Object List field based on the value that you entered in the Program field.

5. Translate the base-language descriptions into the target language.

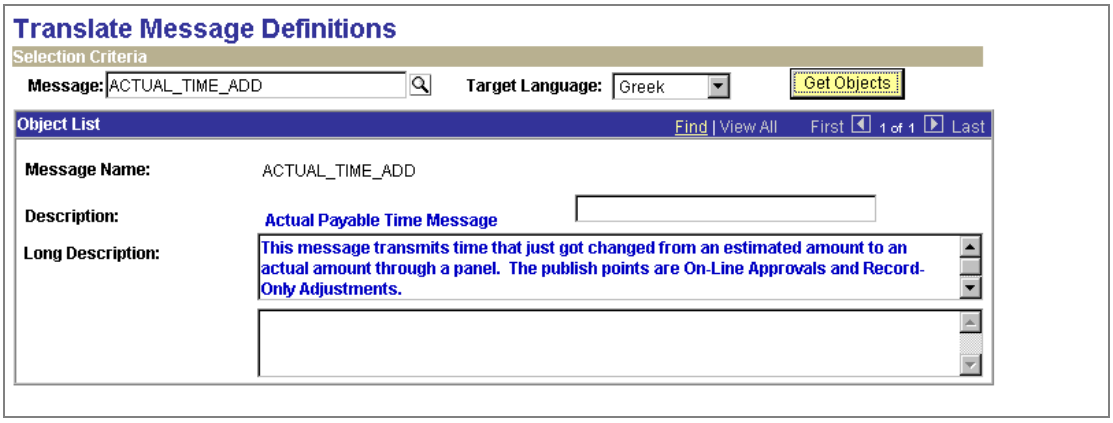
   The base-language descriptions appear on the left; enter the translations in the fields on the right.

6. Save the page.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Application Engine, "Introducing Application Engine"

Translating Message Definitions



Translate Message Definition page

To translate Message Definitions

1. Select PeopleTools, Translations, Translate System Definition, Translate Message Definitions.

   This page enables you to translate Message Definition descriptions into a specific target language.

2. In the Target Language field, select the language into which to translate.

3. In the Program field, select a Message Definition program.

   Leave the Message name field blank if you want to select from all the programs in the system.

4. Click the Get Objects button to bring the message definition, description and long descriptions into the object list.

   The Message name description appears in the Object List field based on the value that you entered in the Message field.

5. Translate the base-language descriptions into the target language.

   The descriptions appear on the left; enter the translations in the fields on the right.

6. Save the page.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Integration Broker, "Defining Messages," Understanding the Message Definition

Translating Review Page Text

Most page text is derived from language-sensitive field descriptions. Text derived from field descriptions is translated automatically when you clone the base-language page definition (provided that the field descriptions have already been translated). However, page control definitions give you the option to override the field description with a text description.

If you use the Translation Workbench to translate pages, you can translate all such override text right along with labels that are derived from field descriptions. This feature of the Translation Workbench helps to ensure that the entire page gets translated.

PeopleSoft also provides a Page Text inquiry page that identifies override text in pages to help you identify areas where you may have missed translating. You can translate the override text in the target-language page definition in PeopleSoft Application Designer.

To check for override text in pages:

1. Select PeopleTools, Translations, Translate System Definitions, Review Page Text to start the Page Text utility.

The Review Page Text page lets you generate a list of all override text (that is, text that is not derived from field descriptions) in a set of page definitions.

2. In the **Page Name** field, select a set of page names.

   Leave the Page Name field blank if you want to select all the pages in the system.

   If you want to work through the pages alphabetically, enter the first characters of the page name in the Page Name field. If you want to translate a specific page, enter the page name in the Page Name field, or click the **Search**button to prompt for a specific record.

3. In the **Language Code** field, select the language code of the page set.

   For example, if the Page Name field contains ***B,*** and the Language Code field contains ***French,*** the page set will consist of page definitions that begin with ***B*** and whose language code is ***FRA.***

4. Click the **Get Page Text** button to display the overridden page text.

   A set of page definitions appears based on the settings in the Page Name and Language Code fields.

   For each page that appears in the list, the label text is the override text on the page. Looking at the label text, you can tell whether it has been translated. If it hasn't been translated, use the Translation Workbench to do the translation.

   See Using the Translation Workbench.

5. Save the page.

Translating HTML Definitions

You typically translate HTML definitions when they contain hard-coded text. Most HTML Definitions should contain JavaScript and references to the Message Catalog only and therefore don't require separate translation, however it is possible to hardcode text into HTML definitions which may require translation using this method.

To translate an HTML definitions:

1. Change the PeopleSoft Configuration Manager language preference to the target language.
2. Log in to PeopleSoft.
3. Open PeopleSoft Application Designer.
4. Open the HTML definition.

   Choose File, Open, and select the HTML definition you want to open.

5. Edit any language-sensitive text in the HTML object.
6. Save the HTML object.

CHAPTER 13

Sorting in PeopleTools

Sorting data in English is a reasonably trivial exercise given the very well defined and simple sorting rules of the language. Additionally, most character sets are based on the ASCII standard which allocated characters to numerical codes in English alphabetical order; therefore when sorting ASCII data by its binary representation, you automatically get a sort that makes sense in English – data is sorted from ‘a’ to ‘z’, numerics are sorted from ‘0’ to ‘9’. However, sorting non-English languages is significantly more complex; some languages have special rules for sorting characters with diacritic marks, others such as Japanese and Thai can be sorted in several different orders depending on the usage or context of the sort.

In linguistic circles, “sorting” is also known as “collation” and in this book, the two terms are used interchangeably.

This chapter provides an overview of sorting in PeopleTools and PeopleTools-based applications and discusses how to:

- Sort in PeopleTools
- Set the sort order
- Force binary sort in SQL
- Sort in COBOL
- Sort in SQR

Understanding Sort Orders

A sort order identifies how PeopleTools will assemble, compare, and display data. For example, a sort order specifies whether 'a' is less than, equal to, or greater than 'z'. The simplest way of sorting data in a computer system is to sort it in the order that the characters appear in the character set. This is known as a “binary sort” as it is simply sorting the numerical codes of each character as they are stored in memory without any special sorting cases or linguistic considerations .A binary sort works well for sorting English language data; English sorting rules are very simple and can be implemented as a binary sort as long as the underlying character set is laid out from ‘a’ to ‘z’. English characters in ASCII, EBCDIC and Unicode are all laid out in this fashion, so a binary sort on data in any of these character sets is sufficient for sorting English data.

However, when sorting data in languages other than English, there are many more considerations that must be taken into account. These include:

- Sorting characters with diacritics. Should characters that have diacritic marks (such as á, ñ, and ö) be sorted after the letter 'z', or after the base character without the diacritic? In most character sets, these characters appear after the letter 'z' in binary order, however in most languages they sort after the base form of the character.

- Sorting special characters and ligatures. Some European languages use ligatures (such as æ and œ) and others use representative characters (such as ß). In most cases, these characters must be expanded to their full form before being sorted. For example, æ is often expanded to 'ae' when sorted.

- Sorting ideographic languages. The Chinese, Japanese and Korean languages use a very large repertoire of characters in their written languages; such that it would be impossible for the average person to remember an arbitrary sort order. Instead, several schemes exist for sorting Chinese, Japanese and Korean characters including sorting based on core, common parts of each character (radicals), or by counting the number of brush or pen strokes it takes to write the character (stroke count).

Unfortunately, most of these sorting schemes are very language specific, and sometimes even specific to a country in which a language is spoken. For example, the German sharp-S character (ß) is sorted in Germany as if it were written as "SS", but in Austria it is sorted as if it were written "SZ". Other times, multiple possible sort orders can be in use in a single country; in Spain, it is common to sort the character sequence "ch" after "cz" but before "d", however in more recent times many Spanish organizations have reverted to sorting the "ch" sequence as individual characters, and it would therefore appear between "cg" and "ci"; which is correct depends on personal or organizational preference.

In the majority of cases where data is sorted in PeopleTools, it relies on the host database management system to perform the sort via an ORDER BY clause in SQL, and the result is displayed directly to the user. It is therefore critical that when you create your database, you select an appropriate sort order based on the languages you plan to maintain in your database, the countries you plan to operate in, and any specific preferences or policies your organization maintains relating to sorting (such as which Spanish 'ch' sort is preferred). Most database systems require you to choose a sort order during database creation, as it will affect the way that SQL indexes are stored on disk in order to optimize sorting performance.

Note. Due to limitations in most database packages and for performance reasons, PeopleTools 8.4 supports only one sort order per database. Support for multiple sort orders when running against database systems supporting multiple sort orders is planned for a future release of PeopleTools.

In some cases, PeopleTools also sorts data in memory, and must use internal tables to determine the appropriate order for character data. This is particularly prevalent when sorting drop-down lists on pages displaying translate values, and within the PeopleSoft Query product. It is therefore important that you not only create your database with the appropriate sort order, but you also tell PeopleTools which sort order you have chosen for the database so it can emulate this sort for lists that are sorted in memory by PeopleTools.

Note. Sorting in PeopleTools is case-sensitive (lowercase letter ‘a’ sorts after uppercase letter ‘Z’) and accent-sensitive (the accented letter ‘á’ is considered distinct from the unaccented letter ‘a’). Sorting in PeopleTools is also kana-sensitive for Japanese data, meaning that certain forms of Japanese characters (hiragana and katakana) are considered distinct rather than equivalent. PeopleTools does not support case-insensitive, accent-insensitive or kana-insensitive sorting.

Sorting in PeopleTools

There are many different components of PeopleTools that sort character data, most of which rely on the database system to perform their sorting using a SQL ORDER BY clause. However PeopleTools does perform some sorting in memory, see PeopleTools In-Memory Sort. Other parts of PeopleTools support only a binary sort for logistical or performance reasons. The following table indicates each of the common areas of PeopleTools that presents sorted lists of data to the user, and which mechanism each uses to perform the sort.

Functional Area	***Sorting Engine***
Component Search Dialogs	Database-level SQL ORDER BY sort
Scroll Buffers	Database-level SQL ORDER BY sort
SQL Operations in PeopleSoft Query, nVision, Crystal and SQR	Database-level SQL ORDER BY sort
SQL functions called from PeopleCode (SQL Objects, ExecSQL) containing BETWEEN, <, >, MIN, MAX etc.	Database-level SQL ORDER BY sort
PeopleCode ScrollSelect( ) / ScrollSelectNew( ), RowScrollSelect( ) and RollScrollSelectNew( ) functions	Database-level SQL ORDER BY sort
Column-specific re-sort in PIA (by clicking on column heading)	PeopleTools in-memory sort
PeopleCode SortScroll( )	PeopleTools in-memory sort
Drop-down list of translate values	PeopleTools in-memory sort
PeopleCode binary comparison functions (<, >, =)	Binary sort
%BINARYSORT MetaSQL function	Binary sort

Functional Area	*Sorting Engine*
Greater than and less than COBOL operations	Binary sort
Greater than and less than comparisons in SQR	Binary sort

Database-level SQL ORDER BY sort

PeopleTools relies on the sorting capabilities of the host database system for each functional area as identified in the table above as using a Database-level SQL ORDER BY sort. In this case, the SQL statement used to retrieve the data to be displayed to the user is coded to include an ORDER BY statement, and the sort order of the database determines in which order the data is retrieved. Obviously, this relies on the database system being correctly configured for the appropriate linguistic sort you have determined is required for your database.

Each database management system has a different mechanism of determining the sort order for SQL ORDER BY statements. For example, Microsoft SQL Server requires the user to select a sort order when the server is installed, or when each database is created. Oracle allows the database administrator to specify the appropriate sort order in the init.ora parameter file. Refer to the documentation delivered by your database vendor along with the PeopleSoft Installation and Administration guide for your platform to determine how to correctly configure the sort order of your database system.

PeopleTools In-Memory Sort

To avoid round-trips to the database, PeopleTools performs some sorting in-memory; typically of short lists such as a list of translate values. PeopleTools supports a significant number of linguistic sorts for in-memory sorting, and which sort order is used for PeopleTools in-memory sorting is controlled by the "Sort Order Option" on the PeopleTools Options page. While PeopleTools cannot emulate exactly each sort order offered by your database vendor, it provides an appropriate sort order for most popular business languages. Select the sort order that most closely corresponds to the sort order of your database. Conflicting sort order selection between the database and PeopleTools will result in lists of values sorted by PeopleTools appearing in a significantly different order than lists of values sorted by the database. <<Alanda – link to "Setting the Sort Order" section below>>

Binary Sort

When comparing values in PeopleCode, SQR and COBOL using less than (<), greater than (>) or other character comparison operators, a binary sort is used. The specific sort performed will depend on the character set of data in memory at the time. For example, all binary sorts performed in PeopleCode, SQR syntax and Unicode COBOL will take place based on the Unicode binary order. Binary sorts performed in non-Unicode COBOL will take place in the non-Unicode character set of the batch server. Binary sorts performed by the %BINARYSORT PeopleCode Meta-SQL function will take place in the character set of the database engine.

Therefore, you should be very careful not to write code that depends on the sorting of data using binary operators matching the sorting of data by the database as the result of sorting operators in SQL statements.

For example, the following PeopleCode statement is performed as a Unicode binary comparison, and ‘á’ is located in the Unicode tables after the character ‘z’, so it will always return “true”:

```
if 'z' < 'á' then…
```

However, when the same comparison is executed in SQL (as in the example below), it is up to the database’s sort order to determine which character is greater. In a database configured for binary sorting, it will return “true”, however in a database configured for French sorting (where ‘á’ is sorted after ‘a’ but before ‘b’), it will return “false”

```
SELECT …
WHERE 'z' < 'á'
```

It is important that these functional areas use binary sorting instead of attempting to perform a linguistically-sensitive sort because:

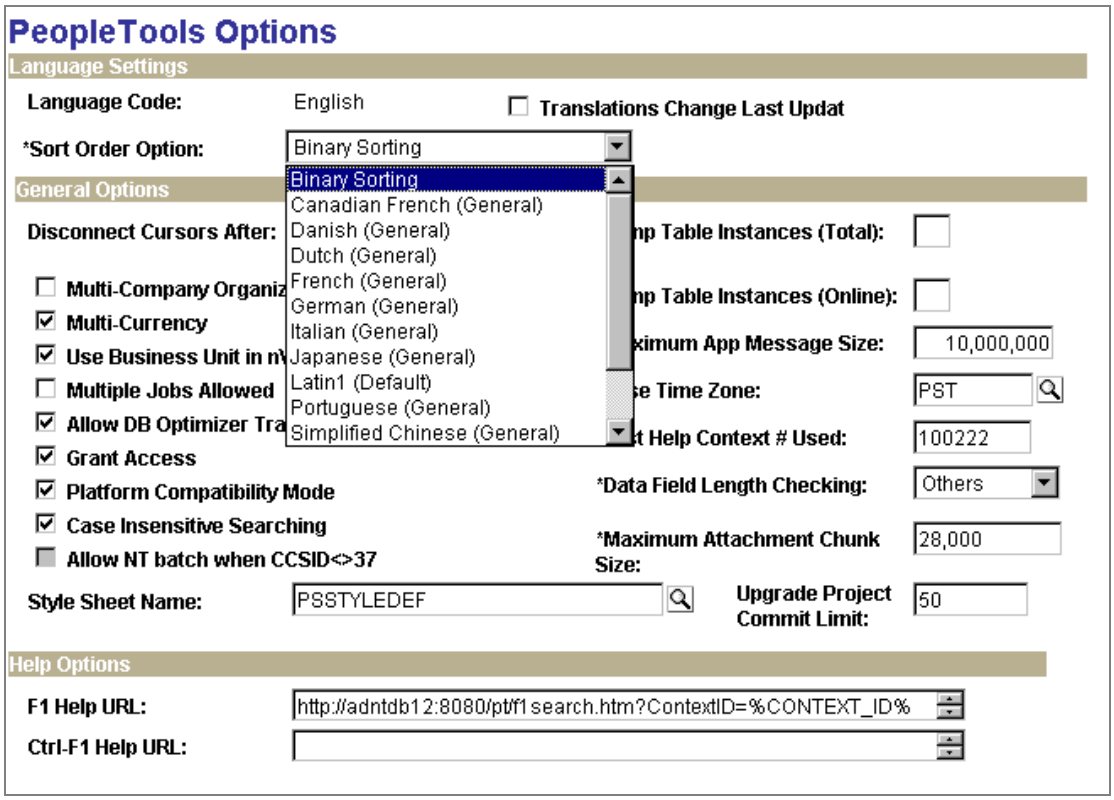
- Any linguistically-sensitive sort performed in-memory can only be an approximation of the sort that the database system would perform in the same situation given the large number of sort orders provided by database vendors and significant variations to these orders in minor versions of the database software. It should not be assumed that a binary sort performed in PeopleTools will match the sort of the same characters in a SQL statement using the <, > or BETWEEN operators.
- Performing a guaranteed database-compatible sort for each comparison in PeopleCode would require a round-trip to the database to perform the sorting, and would greatly impact performance of PeopleCode operations.

Setting the Sort Order

As noted previously in this chapter, some components of PeopleTools cannot rely on the database to sort data, and must do so in-memory. The Sort Order option on the PeopleTools Options page allows you to select which sort order should be used by PeopleTools when sorting data in-memory.

Generally, you should set this option soon after you have completed the installation of the database, and choose the option that most closely approximates the sort order you selected when creating your database.

Select PeopleTools, Utilities, Administration, PeopleTools Options.



Setting the sort order option in PeopleTools Options page

Forcing Binary Sort in SQL

When writing PeopleCode and other procedural logic, it is sometimes expected that sorting a list of data in-memory will produce the same results of sorting the same list in the database via a SQL ORDER BY statement. When working in some languages such as English, whose sorting logic is relatively simple, this equivalence may be taken for granted.

However, when running PeopleTools against a database that is using a linguistic sort, it is likely that a greater-than, less-than or between comparison of values in memory may produce different results then if the same comparison were performed by the database.

Take, for instance, the following PeopleCode syntax:

```
If START_NAME < END_NAME then
   Error("Start name must be less than end name");
End-If
```

As all character comparisons in PeopleCode are performed based on the binary value of the character in Unicode (and not on the linguistic weight of the character), this code may produce unexpected results in languages where binary sorting is not sufficient. For example, if START_NAME had a value of " Über" and END_NAME had a value of "Zeifang", this code would produce the error as in the Unicode character set, the uppercase U with umlaut (Ü) appears after the uppercase Z. However, in a German sort, Ü should precede Z. If the

database were created with a German sort order, this would be reflected by the database's sort if the same statement were reflected in SQL called from PeopleCode:

```
SQLExec("SELECT 'X' FROM PSLOCK WHERE :1 < :2"
        ,START_NAME, END_NAME, &X);


If &X != 'X' then
   Error("Start name must be less than end name");
End-If
```

As can be seen from this example, when using a linguistically sorted database, it is likely that these string comparisons may return different results when executed via the database using SQL than they may when performed in PeopleCode. Of course numerical values and dates will always sort equivalently – this behavior is limited to sorting of characters and character strings.

In some situations, you may want to disable the linguistic sort performed by the database on a statement-by-statement level, and have the database perform the comparison at a binary level.

To force a SQL query to return sort-sensitive results based on a binary sort instead of a linguistic sort, a MetaSQL token, %BINARYSORT, is provided. This token is used to wrap each column in an ORDER BY, less-than, greater-than or BETWEEN operation where a binary comparison is required. For example, to return all employee names ordered by last name in binary orderi, the following SQL would be used:

```
SELECT NAME FROM PS_PERSONAL_DATA
ORDER BY %BINARYSORT(NAME)
```

This may be useful if you are building an ordered array of names in memory that you plan to parse or manipulate with PeopleCode less-than or greater-than operators.

Similarly, to fetch a list of names from the database where the NAME field is greater than START_NAME using a binary comparison parallel to that used in PeopleTools, the following syntax can be used:

```
SELECT NAME FROM PS_PERSONAL_DATA
WHERE %BINARYSORT(NAME) < %BINARYSORT(:1)
```

Similar constructs could be used with the BETWEEN predicate.

Note. The %BINARYSORT MetaSQL token ensures that the database will evaluate the column wrapped by the token based on its binary value in the character set of the database. The sorting of this representation will match its binary sort position in PeopleTools only if the character set of the database contains the character in the same order as Unicode which is used for binary representation of data in PeopleTools memory. Therefore, if you are running an ASCII, Latin-1 (ISO 8859-1) or Unicode database, the sorting of all alphabetic characters will match the Unicode sort in memory. However if you are running a database encoded in EBCDIC or in Japanese Shift-JIS, the order may be markedly different, and the %BINARYSORT MetaSQL token cannot be relied upon to match the binary order used within PeopleTools.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference Guide, "Meta-SQL", %BINARYSORT

Sorting in COBOL

Character string comparisons performed in COBOL are performed based on the binary representation of each character in the character set being used by the COBOL program. Typically, this will match the character set of your database, so any ORDER BY clause or string comparison performed by SQL statements called by your program that you wish to sort the same as it would in COBOL memory should be wrapped by the %BINARYSORT Meta-SQL token.

See Also

- "COBOL Globalization,"Sorting in COBOL

Sorting in SQR

Similar to PeopleCode, all string comparisons and sorting in SQR are performed based on a Unicode binary sort. However, as SQR does not process PeopleTools MetaSQL tokens, %BINARYSORT cannot be used from SQR, and allowances should be made in SQR programs not to depend on memory sorting matching the sort performed by the database in ORDER BY and similar SQL clauses.

CHAPTER 14

Global Development and Environment Considerations

When you implement a global PeopleSoft application, there are a number of factors related to globalization that can affect system performance and the efficiency of the implementation effort. This chapter discusses:

- Tips for developing easily translatable applications.
- Designing global-ready pages.
- Considering your options when adding or upgrading languages into your database.
- Accessing global documentation.

Tips for developing easily translatable applications

When designing application objects (especially pages):

- Avoid using page-based text in page element labels and other labels that can be derived from field labels (such as query heading names and string definitions in the Strings table). Overriding field labels on the page with page-based text associates a new label with a field that is specific to the current page; the new label cannot be shared with other pages in the system, so if it us used multiple times, it would require translation for each occurrence. Instead, associate the new label with the field that it is labeling, and choose your new label for the occurrence of the field on your page. That way, the label can be used on other pages without having to be re-translated.
- Design pages so that they have enough room to accommodate object labels that become longer when translated. A good rule of thumb if developing in English is to allow at least 15% extra space between a label and its field, and 50% extra space for abbreviations.
- Try to complete the layout of your pages early in the development cycle.
- Because the positions of fields and other objects on a page is stored individually for each language, you may need to reapply any changes you make to the page layout after the page has been translated. Translate field labels first.

  Translated field labels appear throughout the system in page element labels, search dialog box field labels, record field names, strings table definitions, query heading labels, and so on. Translating these labels before translating other objects will help you build a glossary

of terms for your application and give you a head-start in translating each page, as the majority of text on a page is derived from field labels.

Selective Translation

If you add custom functionality or data tables to a PeopleSoft application, you may want to translate the new PeopleTools objects and data fields for display in multiple languages. PeopleTools is designed to permit selective translation of the elements in an application database, depending on an organization's requirements and the time and resources it devotes to a translation project.

Because the system displays base-language versions of any language-sensitive elements for which no translation is provided, you can choose to translate only the pages, menus, messages, and so on that are required by the operators who are working in non-base languages. Often, customers building new pages can easily determine if the page will be accessed only by administrative staff who share a common language with the developers, or if it will be deployed widely to end-users, and will therefore require translation.

Just because an object is not translated into a user's preferred language doesn't mean that the user can't access that object—the user simply sees the object in the system's base language.

Designing Global-Ready Pages

You can simplify a global development project and make a global system easier to maintain by making your base-language pages as translation-ready as possible. This minimizes the work that is required to translate each page. Typically, you should strive to reduce or eliminate textual elements that are maintained on the page definition and, instead, derive those text strings from other PeopleTools objects such as field labels or messages. This way, a translator needs to translate a text string only once, and the new translation will take effect across all pages where that string is referenced.

Following are some tips for designing global-ready base language pages.

- Use page control labels that derive from field descriptions.

  On the Label tab of the Page Field Properties dialog box, use the RFT Short or RFT Long setting whenever possible. This cause the control labels, as well as the pushbutton tooltip text, to be derived from the language-sensitive descriptions that are stored in the field definition. Avoid using any other non-language-sensitive text on the page, such as page-based floating text labels.

- Associate group boxes with record fields

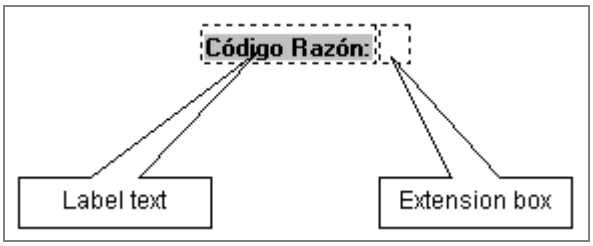
  Using the Page Field Properties dialog box, you can associate group boxes with record fields. In this way, the label for the group box can be derived from field's **RFT Short** or **RFT Long** value. The only effect of this association is the label derivation. It has no other effect on the page's operation.

- As much as possible, complete and freeze the layout of the pages early in your development cycle.

Adding and removing page objects and PeopleCode to a page takes effect across all languages, however the layout of a page is language-specific. Once you start translation of your pages, any alignment or page layout changes you make to the base language page will have to be re-applied to each translation of the page.

- Size and arrange the page controls so that there is enough space to accommodate data in non-base languages.

  English strings for both labels and data tend to be shorter than strings in other languages. As you work with pages, you will notice that when you select a field, the dotted boundary box has two components—the surround box for the label, and an extension box to the right of the label. This extension box is typically 10 percent of the label size and is a useful guide as to the *minimum* amount of space that you should leave between a field and its label to allow for expansion during translation. As much as possible, try to ensure that there is enough space between the field and the label so that the extension box doesn't overlap the field or other page controls.



Page control label and extension box

Considering Your Options When Adding or Upgrading Additional Languages Into Your Database

If you installed a PeopleSoft 8 English database and want to add PeopleSoft translations you have since licensed, you must determine how to perform your upgrade.

Choose the most appropriate option:

- Add the translations provided on the PeopleSoft Global Multi-Language CD-ROM to your existing PeopleSoft 8 English database.

  This option is available only if you have not customized PeopleTools-based objects in your existing PeopleSoft 8 English database. PeopleTools-based objects include any objects you maintain using the PeopleSoft Application Designer or the PeopleSoft Tree Manager (such as pages fields and menus). If you have *added* only new PeopleTools objects to your database without modifying existing definitions, you can use this option.

  See Adding Translations to an Existing PeopleSoft 8 English-Only Database .

- Add the translations to an existing *customized* PeopleSoft 8.x English database.

  If you customized the PeopleTools based objects in your database, you cannot simply add the translations contained on the PeopleSoft Global Multi-Language CD-ROM to your

existing database. You must create a new database containing all your licensed translations and use the PeopleSoft Application Designer's Upgrade process to copy the PeopleSoft translated objects from the multi-language database to the database that contains English and your customizations. In upgrade terminology, this database is referred to as your "copy of production" database.

See Upgrading Languages Into Your Customized PeopleSoft 8.x Database .

Note. We recommend that you install the PeopleSoft Global Multi-Language CD-ROM when you install the English release. This saves the extra effort of following one of these procedures to add a language after your initial database creation has been completed.

Adding or customizing system data, such as account codes, departments, and locations, is not considered a PeopleTools object change. If you have performed only these types of transactions against your English-only PeopleTools 8 database and have not modified any objects using the PeopleSoft Application Designer or PeopleSoft Tree Manager, you can use the first option mentioned above.

When using the upgrade functionality in PeopleSoft Application Designer, you have options to help you compare objects across databases. These comparisons are language-sensitive.

See Also

Upgrading With Application Designer

Adding Translations to an Existing PeopleSoft 8 English-Only Database

Note. Please read the instructions at the beginning of this chapter before performing the steps in this section. This upgrade path may not be available to you, depending on the customizations you have performed on your English-only database.

To add translations to an existing PeopleSoft 8 English-only database:

1. Load your PeopleSoft Multi-Language CD-ROM.

   Remember that this CD-ROM uses a different license code than the other PeopleSoft CD-ROMs.

   See *PeopleTools 8.4 Installation for Your Database Platform*, "Setting up the File Server."

2. Re-run the "Setting up the Batch Environment" steps.

   If you are running a Windows NT PeopleSoft Process Scheduler (PSNT), you must re-run the steps documented in *PeopleSoft Installation Guide,* "Setting up the Batch Environment." Because the PeopleSoft Global Multi-Language CD-ROM contains translations for your Crystal reports and nVision layouts, you must transfer these to your

Windows NT Process Scheduler. If you run only non-Windows NT Process Schedulers, you can skip this step.

3. Create PeopleSoft Data Mover import scripts (DMSs) using the PeopleSoft Database Setup program.

   See *PeopleTools 8.4 Installation for Your Database Platform*, "Creating a Database."

   You should see both the English database objects and your new translated objects in the Database Setup program. Be sure to enter the same database parameters you entered the first time you ran the Database Setup program to install your English database.

   Before clicking the **Create Scripts** button, select a directory for output scripts that differs from the directory you specified when you ran this program to install your English-only database. This way, the newly generated script won't overwrite any existing scripts you may have generated using the PeopleSoft Database Setup program.

4. Edit the DMS generated by the PeopleSoft Database Setup program.

   As PeopleSoft databases always contain English translations when shipped, the PeopleSoft Database Setup program automatically includes English translations in any DMS created. To import only the non-English data into your existing PeopleSoft database, you must remove the steps in the generated DMS script to remove the English load process.

   Locate the DMS in the directory specified in the PeopleSoft Database Setup program, for example, c:\pt840\scripts. The DMSs have the extension .DMS and contain statements to load data from .DAT files into your database. As you have already run PeopleSoft Data Mover to install English data, you must remove the lines from the DMS pertaining to ENG, or the PeopleSoft Data Mover script will fail.

   The following file excerpt is an example of a DMS file and the edits you must make. In this example for Spanish PeopleSoft HRMS, the PeopleSoft Database Setup program has created the file HCSYSORA.DMS. The parts you must remove are struck through. This DMS assumes that you'll load English (ENG) data. If you previously loaded English, you must remove all paragraphs in this file that include references to English language data files. Remember, if you are installing a DEMO database, there may be many paragraphs that load English data and you must remove them all. In addition, remove the "cleanup" steps at the end of the script. (The cleanup steps ran when you installed the English data files; you do not need to re-run them).

```
REM - HCSYSORA.DMS
REM - Created by DBSETUP 8.40.0   6/18/01 11:41:38 PM
/
~~REM   HRMS Demo Database  HCSYS US English Database import~~
~~/~~
~~set log c:\temp\hcengs.log;~~
~~set input c:\apps\pt750\data\hcengs.db;~~
~~set no view;~~
~~set no space;~~
~~set no trace;~~
~~set commit 30000;~~
```

```
import *;

REM - HRMS Language Objects  HLSYS Spanish Database import
/
set log c:\temp\hlesps.log;
set input c:\apps\pt840\data\hlesps.db;
set no view;
set no space;
set no trace;
set commit 30000;
import *;

REM  Final Database cleanup for Oracle installations.
/
insert into PS.PSDBOWNER values('HCSYS','SYSADM');
update PSLOCK set OWNERID = 'SYSADM';
update PSOPRDEFN set ACCESSID = 'SYSADM', ACCESSPSWD = 'SYSADM', OPERPSWD =
'0000000000000000' where OPRTYPE = 0;
update PSACCESSPRFL set ACCESSID = 'SYSADM', ACCESSPSWD = 'SYSADM', VERSION =
0, ENCRYPTED = 0;
update PS_INSTALLATION set
HR='Y',benefit_administrn='Y',fsa_claims='Y',installed_pay_na='Y',pa='Y',tl='Y
';
create view syskeys
 (ixcreator, ixname, colname, colno,
  colseq, ordering, function)
 as select
 a.ownerid, b.index_name, b.column_name,
 b.column_position, b.column_position, 'a', ' '
 from pslock a, user_ind_columns b
/
create view sysindexes
 (tbcreator, name, tbname, creator,
  uniquerule, colcount, ixtype, clusterrule, ixsize, percentfree)
 as select
 table_owner, index_name, table_name,
 table_owner, substr(uniqueness,1,1), 1, 'b', 'n', 1, pct_free
 from user_indexes
/
set log c:\temp\grant.log;
grant_user *;
encrypt_password *;
```

5. Run your modified DMS against your existing PeopleSoft database.

   See *PeopleTools 8.4 Installation for Your Database Platform,* "Creating a Database."

Because you already created your database and set up the appropriate database-specific objects, you can move directly to the tasks in the step entitled "Run Data Mover Import Scripts." Ensure that you run PeopleSoft Data Mover in bootstrap mode by logging in using your database's access ID.

6. Run the VERSION Application Engine program against your database to update your PeopleTools version numbers.

   This re-synchronizes the PeopleTools version numbers, taking the new translations into account.

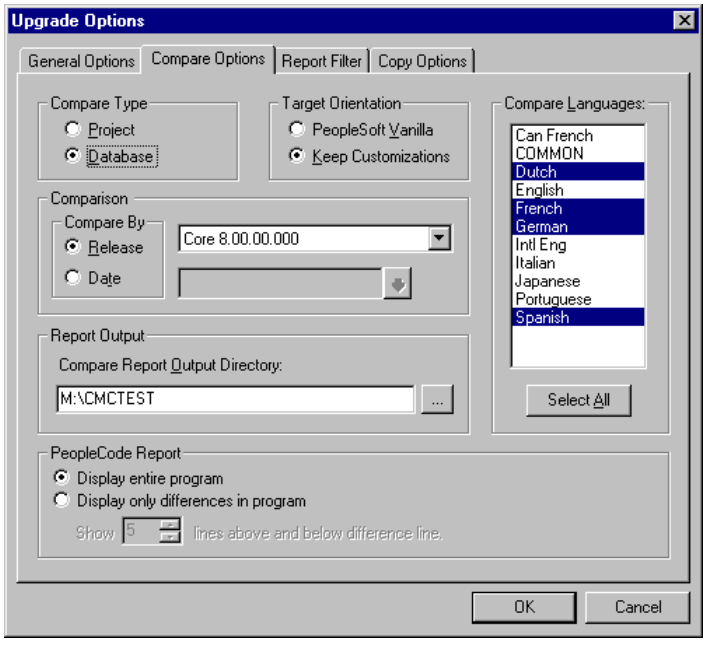
7. Swap your base language if you are planning on running with a non-English base language.

8. Re-run your database audits to ensure that your database is complete

   See *PeopleTools 8.4 Installation for Your Database Platform*, "Creating a Database," Check Database.

Upgrading Languages Into Your Customized PeopleSoft 8.x Database

Note. Please read the instructions at the beginning of this chapter before performing the steps in this section.



Upgrade Options dialog box

To upgrade languages into your customized PeopleSoft 8.x database:

1. Load your PeopleSoft Multi-Language CD-ROM.

   Remember that this CD-ROM uses a different license code than the other PeopleSoft CD-ROMs.

   See *PeopleTools 8.4 Installation for Your Database Platform,* "Setting up the File Server."

2. Re-run the "Setting up the Batch Environment" steps.

   If you are running a Windows NT PeopleSoft Process Scheduler (PSNT), you must re-run the steps documented in *PeopleSoft Installation Guide,* "Setting up the Batch Environment." Because the PeopleSoft Global Multi-Language CD-ROM contains translations for your Crystal reports and nVision layouts, you must transfer these to your Windows NT Process Scheduler. If you run only non-Windows NT Process Schedulers, you can skip this step.

3. Create and load your new PeopleSoft Multi-Language database.

   See PeopleTools 8.4 Installation for Your Database Platform, "Creating a Database.

   Keep in mind that you need to load the English objects provided by PeopleSoft, even if you don't plan to run your system in English. Follow all of the steps in "Creating a Database" chapter that are applicable to your installation, except the "Change Base Language" step. You cannot change the base language of your new database until you have copied your customizations into it.

4. Compare and copy languages into your customized PeopleSoft 8.x database.

   Using the PeopleSoft Application Designer's Upgrade Compare functionality, compare the PeopleSoft Multi-Language database to your "copy of production" or existing PeopleSoft 8 database. With the Upgrade Copy utility, copy the language objects from the new database to the copy or existing 8.x database. Remember that for this compare/copy process, your source database is the newly installed PeopleSoft Multi-Lingual database, and your target database (for the comparison) is the existing English database or database that does not contain the languages that you want to add.

   When performing the compare report, make sure that your compare options are set for the languages that you want to add. Also, make sure that the Target Orientation is set to *Keep Customizations.* This sets the compare statuses and actions so that objects delivered by PeopleSoft don't overwrite your customizations. You also must choose the appropriate comparison release. For PeopleSoft 8, you would choose 8.00.00. For the PeopleSoft 8 (SP1), you would choose 8.10.00 as the comparison release.

   The Compare process generates a project that contains all of the language objects that are to be copied to your customized database. Use the Upgrade Copy functionality to copy the project that contains these languages objects into your customized database.

   For the Copy process make sure that the Copy Language options on the Upgrade Options dialog box: Copy Options tab are set the same as they were for the compare process.

Remember that during the Upgrade Copy process, your source database is the newly installed PeopleSoft Multi-Lingual database, and your target database is the existing English database or database that does not contain the translations that you want to add.

5. Run the VERSION Application Engine program against your database to update your PeopleTools version numbers.

   This re-synchronizes the PeopleTools version numbers, taking the new translations into account.

6. If you decide to run your database in a non-English base language, swap your base language.

   See *PeopleSoft Globalization PeopleBook,* "Global Configuration Considerations."

   Before running this step, ensure that you have copied all of your customizations into your new PeopleSoft Multi-Language database. After you have swapped the base language of your new database, you can't copy any more objects from your existing English-only database unless you also swap the base language of this database.

7. Re-run your database audits to ensure that your database is complete.

   See *PeopleTools Installation Guide,* "Creating a Database," Check Database.

See Also

PeopleSoft 8 PeopleTools PeopleBook: Application Designer, "Upgrading with Application Designer"

Accessing Global Documentation

If a user accesses a document from a PeopleSoft application by clicking Help in a PeopleSoft page or by pressing F1 from the Windows client, the system opens the version of the document that corresponds to the database's current language preference. If the system doesn't find a version of the documentation in the appropriate language, it brings up the English documentation (if available).

Glossary

The terms in this glossary are used among multiple Financials and Supply Chain Management applications.

Numbers

401(a)(17) Limits

The limitations on the earnings that may be included in the calculation of benefits under qualified U.S. pension plans.

1st Year Amount

In PeopleSoft Workforce Analytics, 1st Year Amount is an employee-level compensation amount, totaling the calculations for the first calendar year's worth of accounting periods, in a compensation scenario.

A

Abend

Abnormal End (to a process).

ABM (Activity-Based Management)

See PeopleSoft Activity-Based Management.

ABPS (Activity-Based Planning and Simulation)

See Activity-Based Planning and Simulation.

Absence

An absence occurs when an employee is not at work (absent) during a normally scheduled work period. Absences may be scheduled or non-scheduled, compensated or uncompensated, excused or unexcused. An absence may occur for a variety of reasons like illness, family emergency, civic obligations (e.g. Military duty or jury duty), or vacation.

Absence Entitlement

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

Absence Take

Element which defines the conditions that must be met before a payee is entitled to take paid time off.

Accepted Exception

An exception that has been reviewed and validated (see Time Management).

Accommodations

Accommodations are efforts your organization is able to make for employees or applicants with disabilities, such as purchasing special equipment or making structural changes to a work environment.

Account Management

In PeopleSoft Demand Planning, a feature that enables you to divide a centrally held corporate forecast into multiple subsections for easier maintenance and management. These subsections are separate databases that can be distributed to account managers for use and updates, then rejoined with the main database at a later date.

Account

A code for recording and summarizing financial transactions as expenditures, revenues, assets, or liabilities balances. This is a delivered PeopleSoft ChartField, specific use of which is typically defined by the organization during implementation of PeopleSoft General Ledger.

Account Type

A name for one of the different kinds of accounts used in a PeopleSoft General Ledger, such as Asset, Liability, Equity, Revenue, and Expense.

Accounting Class

In PeopleSoft Enterprise Performance Management, an attribute that defines how the particular resource would be treated for generally accepted accounting practices. Inventory denotes whether a Resource will become part of a balance sheet account such as inventory or fixed assets, while Non-inventory denotes that the Resource will be treated as an expense of the period during which it occurs.

Accounting Date

The date that a transaction is recognized as opposed to the date the transaction actually occurred—the **Transaction Date** (although the two dates can be the same). The accounting date determines the period in the general ledger to which the transaction is to be posted. You

can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date. In PeopleSoft Asset Management, the difference between accounting date and transaction date determines whether prior period depreciation must be calculated, and how much. Accounting Date must be later than or equal to Transaction Date.

Accounting Entry

A set of related debits and credits. An Accounting Entry is made up of multiple ***Accounting Lines.*** In most PeopleSoft applications, accounting entries are always balanced (debits = credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in general ledger, and so forth (depending on the application).

Accounting Entry Template

A user-defined table that controls the use of system-generated accounting lines in the posting processes.

Accounting Split

Method indicating how expenses are allocated or divided among one or more sets of accounting ChartFields.

Accredited Education

Education above the high school level completed in a U.S. college, university, or other educational institution that has been credited by one of the accrediting agencies or associations recognized by the Secretary, U.S. Department of Education.

Accrual

Any hours that employees accumulate for use at another time in the form of earned vacation time or sick leave, for example.

Accrual Basis Accounting

Accounting that records the impact of a business event as it occurs, regardless of whether the transaction affected cash.

Accrual Class Codes

Classes or categories of accruals.

Accrual Type

Defines an accrual such as annual leave or sick leave.

Accumulate Demand

In PeopleSoft Demand Planning, a transfer process function that adds demand quantities for an item to any quantities that already exist for the period.

Accumulator

Element which allows you to combine several elements. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated. See also Time Administration.

Accumulator [Global Payroll]

Element which provides a means for storing the cumulative values of defined items as they are processed. As you make payments, take deductions, and perform calculations, you'll use accumulators to track accumulated amounts, or balances. You can accumulate a single value over time or multiple values over time, as your requirements specify. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

Action

In PeopleSoft Deduction Manangement, 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'oeuvre)

In France, companies are required to submit the Annual Workforce Survey by Nationality and Professional Category to the Ministry of Labor. This report provides an analysis of the company's foreign workforce, which includes any employee who does not have French citizenship.

Annualized Tax Method

A payroll tax calculation method that divides the tax on an annualized amount by the number of pay periods in the year to find withholding for a given pay period, based on the number of withholding allowances. Annualized is the most common tax method.

Annuitant Amount

The gross monthly annuity a federally retired employee receives.

Annuitant CSA Number

A unique number assigned by OPM for a retired employee.

Annuitant Indicator

A code used to indicate the status of an annuitant appointed to a position in the Federal civilian service. Text for the codes is as follows:

1. Reemployed annuitant - Civil Service/FERS
2. Retired military officer receiving pay
3. Retired military non-officer (enlisted) receiving pay
4. Retired military officer receiving pay and a reemployed annuitant - Civil Service

5. Retired military non-officer (enlisted) receiving pay and a reemployed annuitant - Civil Service

6. Not applicable (none of the above)

Annuitant Indicator (cont)

A. Reemployed Annuitant – FERS

B. Former Annuitant - FERS

C. Retired Officer/Reemployed Annuitant - FERS

D. Retired Officer/Former Annuitant - FERS

E. Retired Enlisted/Reemployed Annuitant - FERS

F. Retired Enlisted/Former Annuitant - FERS

Annuity

A series of periodic payments made to an individual. Under a pension plan, these payments are generally made monthly.

Anti-Dilutive

Typically, options or shares where the price is greater than the current fair market value of the security.

APE (Activité Principale Exercée) Codes

APE codes classify the type of industry or activity your French company is in, such as software, banking or insurance. The APE codes are a normalized set of codes that are required by law and are used in regulatory reporting.

API

An Application Programming Interface (API) is the technology that a software product supplies so you can control it or communicate with it from another application. PeopleSoft APIs enable the user to perform desired actions upon PeopleSoft data without having to know the internal logic or rules of the program.

Applicant Hire Process

The procedure of hiring an applicant who has been tracked and administered in the Recruitment pages. Once you assign an Employee ID, the system uses recruitment data to populate the fields in the Personal Data pages.

Application agent

An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.

Application Designer

The integrated development environment used to develop PeopleSoft applications.

Application Engine

PeopleTools batch processes consisting of a set of defined SQL statements. Application Engine processes is more efficient than COBOL or SQR, since they operate within the database system, and don't rely on external processing.

Application Journal Template

A set of rules and default values to control the creation of journals from accounting entries.

Application Processor

The Application Processor is the PeopleTools runtime engine that controls processing of the application from the time the user requests a panel group from an application menu through the time that the database is updated and processing of the panel group is complete.

Application Server

The application server is the centerpiece of PeopleSoft's three-tier architecture. It utilizes Tuxedo, BEA Systems' transaction monitor, to manage client transactions and provide the business rules and workflow capabilities of PeopleSoft's enterprise applications.

Application Server Domain

The collection of server processes and associated resource managers defined by a single PSTUXCFG configuration file. Each application server domain is configured to connect to a single database. Multiple application server domains can exist on the same server machine.

Appointing Authority

The basis that authorized the appointing officer to effect personnel actions on an employee.

Appointing Officer

Denotes if the employee has appointment authority based on laws and regulations.

Approve Time

The Time and Labor feature that approves all employee daily time before it can be sent to payroll for processing. You can approve time by group or by individual employee. You can also unapprove previously approved time.

Approving Official

Individual with the delegated authority responsible for signing the action(s) taken on an employee.

Array

An ordered grouping of data by period and year. PeopleSoft Demand Planning uses arrays in forecasting demand.

Array

Element which enables you to extract information based on a column value. One way of thinking of an array is that it is a SQL statement that retrieves data from an existing table.

Array Dimension

Determines which inventory-stocking possibilities are included in a **Cube View**. This standard one-level dimension consists of the key fields that include, for example, order quantity, safety stock, and turn rate.

Arrears Balance

An amount owed to either the employer or employee, usually the result of a deduction not fully taken.

Ask Price

The price at which someone who owns a security offers to sell it; also known as the asked price.

As-of-Dated

Refers to a snapshot of the data at a given point in time.

Asset Assignment

A streamlined means of associating project costs to assets or asset profiles within PeopleSoft Projects.

Asset Budgeting

Budget for planned asset acquisitions and the associated depreciation expense that can be associated with a Capital Acquisition Plan (CAP).

Asset Catalog

A list of asset profiles which includes information about that asset type, including Cost, Life, Salvage Value, Depreciation Method, Currency Code, and Asset and Depreciation Account.

Asset Category

A standard group of assets. Typical asset categories include Furniture and Fixtures, Machinery and Equipment, Land, Buildings, Leasehold Improvements, and the like. These generally correspond to General Ledger asset accounts. Assets in one category usually share some depreciation characteristics, such as estimated service life and depreciation limits.

Asset Class

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

Asset Liability Management

See PeopleSoft Asset Liability Management.

Asset Life

The number of years an asset will depreciate, after which time it might be kept or sold for its Salvage Value. Also *see* Useful Life.

Asset Profile

A template that contains standard depreciation criteria for an asset type and its corresponding asset books. You can use the information in asset profiles as default values when adding assets.

Assignment of Life Insurance

Effective 10/3/94, Federal employees can assign their Basic, Option A and Option B insurance to another person(s), firm(s), or trust(s); Option C is excluded. The assignment of benefits transfers ownership of the FEGLI coverage to the assignee(s). The insured no longer has control over his/her insurance coverage and can no longer designate beneficiaries. Assignment is irrevocable. Either all or none of the insurance can be assigned. Assignment does not have to be to the same person or firm. Assignments must be made in percentages of total insurance versus an assignment of Basic Insurance to one person and Option A to another. Additionally, terminally ill employees can assign their insurance to a Viatical Settlement Firm in exchange for cash (approx. 60% - 85% of the face value of the coverage). Life Expectancy is usually 24 months or less for a Viatical Settlement Agreement.

Assignment Type

This defines the behavior of the object, (resource, activity, or cost object) within PeopleSoft Activity-Based Management. If the object is identified as a source then costs may be allocated from that object to another object, which must be identified as a target. If an object ID is identified as a target it may be allocated costs from another object ID but may not allocate costs. An object ID can be both a source and a target, thereby having the functionality of each.

Associated Primary BOM

With multiple outputs, it's possible that a given co-product can be created in more than one way – in other words, an item is a co-product on more than one items' primary BOM. By assigning an associated primary BOM to a co-product, you are telling the system which BOM to use in exploding the co-product to the next level.

AT Section

In France, this stands for Section Accident du Travail, or Work Accident Section. It is information needed to identify the establishment risk code for insurance purposes.

ATP Reserved Order

An order that has been promised against future supply. The user has an obligation to the customer to fulfill the order quantity by a certain date. ATP-reserved orders are also referred to as *promised orders.*

Attendance

A component of time reporting application whose purpose is to apply business rules related to Benefit Entitlement and Administration and Organizational Administration to time reported as worked or not worked, and to satisfy a variety of reporting needs.

Attendance Reporting

A Time and Labor report that indicates an employee's attendance record. It includes sick leave, vacation time, and other leaves taken.

Attribute

An attribute is an element within a dimension. For example, the element "Store" is an attribute of the dimension "Geography" for the retail industry. An attribute is also a column heading on an analysis and reporting template.

Audit Trail

See Drill-Back Calculation.

Auditor

Person designated to review expense sheets and cash advances before payment.

Automatic Revision Incrementing (Auto Rev)

The ability to automatically set up revision control and generate revisions for revision-controlled items at the business unit level. This includes setting up a revision scheme or a predetermined, ordered list of revision names.

Automatic Spouse Benefit

A joint and survivor pension benefit provided without any actuarial reduction to a pension benefit. The automatic benefit is a n% joint and survivor; the employee is still entitled to choose any optional form of payment and any beneficiary for the remainder of the benefit.

Availability Date

The date a lot becomes acceptable for fulfillment in PeopleSoft Inventory or for consumption in PeopleSoft Production Management. (Availability Date = Creation Date + Availability Lead Time)

Available to Promise (ATP)

The projected supply of a product less the actual demand, which informs the sales and marketing department of the products that can still be sold without modifying the master schedule. ATP isn't cumulative – it's calculated for each period.

Average Daily Balancing

A feature in PeopleSoft General Ledger that enables you to target the ChartFields on which you base average balance calculations, summarize amounts for selected ChartField values according to your reporting requirements, and define the periods for these calculations.

Used by the financial analytic applications in Enterprise Performance Management. For a reporting period (usually monthly) this refers to the average daily balance of an account as opposed to the month-end-balance, which is the balance as of the last day of the month.

Average Daily Balance Ledger (ADB_Ledger)

In the PeopleSoft Enterprise Warehouse, the Average Daily Balance Ledger table (PF_ADB_LEDGER_F00) is similar to the functionality of the PF Ledger table (PF_LEDGER_F00), in that it too supports reporting. However, the Average Daily Balance Ledger is used for average daily balances. It is a table that is used mostly for processes associated with the financial services industry.

Average Inventory

In PeopleSoft Inventory Planning, one half of the average lot size plus the safety stock when demand and lot sizes are expected to be relatively uniform over time. When demand and lot sizes are not uniform, the stock level versus time can be charted to determine the average.

Average Price

The average price derived from either the bid and ask prices (for bid/ask/average) or from the high and low prices (for high/low/average).

Average Static Calc Flag

In PeopleSoft Inventory Planning, a method used with static policies. The average method sets the static policy equal to the weighted-average, time-phased policy over the next argument periods.

Award

A special payment to an employee for certain prescribed kinds of activities or accomplishments.

B

Back Pay Interest

Under certain circumstances, an employee can be eligible to receive additional pay relative to a delayed receipt in salary caused by administrative error in processing a personnel action. The U.S. Office of Personnel Management has established guidelines for Federal agencies on when and how to make these calculations.

Background Process

Any task or process that is grouped with another and runs in the background. Background processes are usually scheduled to run on a regular basis. All background processes are executed through process-specific COBOL programs run outside the Windows environment.

Backlog Reason Code

An identifier indicating the reason an item could not be shipped. Example codes might include out of stock, discontinued, or seasonal.

BAD Forecast Ratio

In PeopleSoft Demand Planning,the maximum acceptable value of the ratio of the and the base component (Standard Deviation/Base Component). When this value is exceeded, the system automatically resets forecast model parameters. The higher the value, the less likely it is that the system will reset the parameters. In most organizations, a BAD ratio of 1.00 or lower is appropriate for most items.

Balance Segmentation

Balance Segmentation is used in Funds Transfer Pricing to divide balances in deposit accounts between core (stable) and non-core (volatile) segments. Core funds represent the minimum balances that are retained on a long-term basis, building a relatively reliable source of funding to the bank. Non-core funds are temporary in nature due to their volatility caused by customer preferences for liquidity, and cannot be utilized on a long-term basis.

Balance Type

Balance Type is a lookup code used to define the type of instrument balances that will be stored in the PeopleSoft Enterprise Warehouse and processed by the analytic applications. Examples of different Balance are Current Balance, Average Daily Balance, Period Ending Balance, or Commitment Balance.

Balanced Scorecard

See PeopleSoft Balanced Scorecard.

BAM

Business Analysis Model. XXX I think this term is incorrect because we use BAM to refer to the application. If we were referring to the business analysis model, we would say BAM model (that is, Business Analysis Modeler model.)

BAM Model

The BAM database published from the template. The model contains both the data and analytic structure used in the application. The BAM database is physically separate from the Enterprise Warehouse database. Data is sent to the model through migration processes.

BAM Template

A file created using BAM design tools, representing the model prior to its creation as a database. This file has an extension of .MDL. This file is published to a BAM database once the model design process is complete. Each application using BAM will deliver templates which the customer will review and publish to a database in their environment.

Bank Identification Number (BIN)

In PeopleSoft Payables, a part of the bank information that identifies business unit banks.

Base Budget

The initial budget defined by the Budget Coordinator. The base budget is distributed as a starting point for Budget to review and edit. The base budget can be zero-based or incremental.

Base Compensation

In PeopleSoft Workforce Analytics, Cash Compensation that is typically categorized as fixed. It includes base pay and shift differentials as well as associated merit, equity, and step increases.

Base Currency

Base Currency is used to consolidate and report financial results of a multinational company. When a company transacts its business operations in different transaction currencies, those currencies are translated to the base currency for reporting purposes.

Base Currency Equivalent (BCE) Amount

If the monetary amount is in a currency other than the base currency, either the Extract-Transform-Load (ETL) process or the Multi Currency Engine can be used to convert the monetary amount to the Base Currency Equivalent (BCE) Amount.

Base Factor

In PeopleSoft Demand Planning, an element of a smoothing constant simulation set that controls base component smoothing in the Model Reset Simulation process.

Base Metric

Metric found on a fact table. A base metric usually contains an aggregate operator, for example “sum” or “count”.

Base Pay

A pay component included in the job comp (job compensation rate) calculation. It is pay for a regularly assigned workweek. For example, you can set up a regular hourly rate plus a shift rate, a union-negotiated rate for hazardous work, and so on.

Base Pay Structure

A PeopleSoft Workforce Rewards module you use to create or revise pay structures, and to assess the cost and impact of implementing new structures.

Base Time Zone

Customer defined time zone used for converting reported time to a common time zone for ease of applying rules (see Time Administration).

Batch

Batch systems are used when realtime updates are not needed. Batch-oriented data collection applications, developed in-house or by a third-party vendor, produce transactions that are collected in an ASCII text file. The text file is fed to a PeopleSoft SQR program that loads the transactions into the database.

Batch Processes

Any of the background programs in the client/server environment of PeopleSoft applications. Batch processes perform operations—such as pay confirmation, deduction calculation, and so forth—on groups of records, and are usually scheduled to run on a regular basis. You run these processes from the Process Scheduler, and they are executed through process-specific COBOL programs.

Before-Tax Deduction

Deduction that reduces net pay and FWT taxable gross, applied prior to the calculation of federal and state/provincial withholding taxes. Also called “pre-tax” deductions.

Begin Calc Date

The date on which PeopleSoft Asset Management begins to deduct from an asset's life.

Begin Depr Date

The date on which PeopleSoft Asset Management begins to calculate depreciation for an asset. Begin Depr Date is calculated using In-Service Date and Prorate convention.

Benchmark Job

In PeopleSoft Workforce Analytics, this refers to a Job Code for which there is corresponding salary survey data from published, third party sources. Jobs for which there is no corresponding salary survey data are referred to as non-benchmark jobs.

Benefit Commencement Date (BCD)

The date on which a pension payee elects to begin receiving payments.

Benefit Deduction

Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.

Benefit Eligibility

The PeopleSoft Pension Administration function that determines if an employee is eligible for retirement or ancillary benefits. A plan may have several retirement types—normal, early, late, death, and disability—each with its own eligibility criteria.

Benefit Entitlement

Any rules governing the circumstances under which employees are entitled to receive certain benefits. Typically, entitlement to benefits is based on type of employee (for example, full time, part time, occasional), length of employment, and specific rules which apply thereto, i. e., work group affiliation, and compensation base. Other criteria may also apply, such as reasons-for-claiming or job performance.

Benefit Formula

The formula that determines a participant's pension benefit in a defined benefit plan, as well as the PeopleSoft Pension Administration function that calculates the benefit.

Benefit Group

Part of a group of defaults assigned to job codes. Benefit group may include medical, dental, and health benefits dependent on individual company parameters.

Benefit Plan

A specific benefit within a plan type. For example, your company's life plan type might include benefit plans of one times salary, two times salary, and three times salary.

Benefit Plan Type

Any category of benefit, such as health, life, or savings.

Benefit Program

A set of benefits and deductions valid for an employee or group of employees. A single company may have any number of programs. An individual employee may belong to only

one program; the deductions and benefits contained in that program are the only valid deductions and benefits for that employee.

Benefit Tables

Any of the tables that contain employee benefits information. These are often relevant to payroll processing.

Benefits Base

The salary used for benefit calculations. The benefits base will be either the employee Annual Rate or Annual Benefits Base Rate.

Benefits Compensation

In PeopleSoft Workforce Analytics, Benefits Compensation is value associated with employment benefits. It can include benefits types for Health and Welfare (Medical, Life Insurance), Retirement (annuities, savings plans, pensions), and Paid Time Off (Vacation Leave, Sick Leave). Benefits compensation is sometimes fixed, and sometimes variable, depending upon the benefit type.

Betriebszählung (Company Statistics Report)

Also called the OFIAMT report. This report provides statistics required by the Swiss Federal Department of Statistics (BFS).

Bias Signal Limit

In PeopleSoft Demand Planning, a number between one and six that indicates how many **Forecast Period** to test for bias. If the bias test is violated, the system records a **Tracking Signals** error in the period up to the number of periods determined by the bias signal limit.

Bias Test

In PeopleSoft Demand Planning, a forecasting test that sets the limit for tripping a **Tracking Signals**. The lower the value, the more likely it is that a tracking signal is set.

Bid Price

The price a prospective buyer is prepared to pay at a particular time for trading a unit of a given security.

BIF file

This is the bulk insert file (input.bif) used with the Verity search engine to specify the documents to be submitted to a collection (search index). It contains a unique key, document size (in bytes), field names and values, and document location in the file system.

Bilan Social Report

See Employee Survey Report.

Bill

In PeopleSoft Billing, any group of bill lines.

Bill Adjustment

The process of making credit or credit and rebill adjustments to an invoiced billing activity.

Bill By Identifier

The Bill By Identifier is used to define how billing activity is grouped when added to a bill through the billing interface or the Populate Billing process.

Bill Header

The record containing information that pertains to the bill as a whole. Each bill has a unique bill header that identifies it within the system.

Bill Inquiry Phone

Bill Inquiry Phone is the number printed on your invoices for your customers to call if they have any questions about their bill.

Bill Line

The basic unit of billing activity representing a billable charge, including the charge identifier, quantity, price, and any other information regarding an individual transaction. Every bill line is related to a bill header that may have one or more bill lines related to it.

Bill Search

A method of finding a bill or bill line when you don't have enough information to call up the bill directly. ***Customer Bill Search*** enables you to locate a bill by Customer Name. You can also choose other parameters to limit your search. With ***Bill Line Search*** you first search for a particular bill and then a line on that bill. Parameters for bill line search include Reference, Date, and Amount.

Bill Source

The point where billing activity originates. Bill sources may be external to the system (imported through the billing interface) or entered directly online. Examples of bill sources include order management, project costing, and contract administration.

Bill To Customer

A customer who receives an invoice.

Bill Type

A category of billing activity variety. Examples of Bill Types include standard and custom order activities.

Bill Update

The process that adjusts bills that have either been entered manually or generated within the system.

Billable Indicator

A status flag that identifies an item as eligible for billing to a customer.

Billback Discount (BB)

A per unit discount which typically requires a customer to perform one or more merchandising activities to receive the discount. A BB discount is not deducted from the customer invoice, but once the customer performs the merchandising activity, a sales representative or broker can approve payment for the discount amount. Billback discounts can originate from a National Allowance or Customer Promotion, and are passed to PeopleSoft Order Management for informational purposes only. Billback discounts are recognized as a liability when the product is shipped.

Billing Location

A number identifying a customer address. Each customer may have multiple locations, but must have one *Primary Location* at which you contact them.

Blackout Period

The period of time, determined by the company, which prohibits certain activity in the company stock. Blackout Periods can affect the trading of some key individuals or can be placed on the entire company.

Bonus Tax Method

Annualizes your year-to-date earnings by multiplying them by the number of pay periods in the year. This method is used for Canadian tax processing.

Book

In PeopleSoft Asset Management, a data location storing financial information—like cost, depreciation attributes, and retirement information—on assets.

Borrow/Loan

The temporary reassignment of an employee to other task reporting or compensation requirements to allow the business to meet unexpected, short-term, fluctuations in staffing or work load. Typically, this kind of reassignment is done informally at a local level, where HR isn't involved and a new job record isn't created. Companies may have specific rules about how long an employee may be borrowed/loaned, how and where productive, non-productive, and compensated absence time will be charged, and what business rules to apply to the borrowed employee's time for the purpose of compensation and benefit entitlement and administration. See also Casual work Assignment.

Bracket

Brackets are a way to look up and retrieve database table values. After you've defined a table, the system finds a corresponding row on that table and returns the value of the bracket. The result is then available for use in other items such as formulas.

Branch

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

Branch Of Military Service

Identifies, if any, military service in which the employee served.

Breadcrumbs

Breadcrumbs show the navigation path to the current web page location. As you drill down through the different levels of the registry, a "breadcumb trail" appears that shows the path you've selected. Each registry level is separated by an angled brace (>), and you can select any level to navigate directly back to that level.

A typical Breadcrumb would look like this:

```
Home > HR > Administer Workforce > Benefits
```

Break Funding

Charges assessed for mortgages that are paid off before maturity. In the Funds Transfer Pricing (FTP) application, Break Funding charges are factored into the transfer price for a loan that may be prepaid.

Break in Service

A period of time for which an employee does not meet stated service requirements.

Break Price

The price used to determine which options are eligible for repricing. For example, if the break price is $36, then all outstanding option with a grant price of $36 and greater are eligible for repricing.

Break Punch

An in/out punch of when a time reporter takes a break.

Brokers

Individuals or organizations who buy and sell securities. Often they are account executives who work for firms registered with the Stock Exchanges and the SEC. Unlike Transfer Agents, (who are not responsible for sales) Brokers do not maintain records on all your company's certificates. They maintain only sales records and stocks for their clients.

BSC (Balanced Scorecard)

See PeopleSoft Balanced Scorecard.

Budget Activity

A type of activity peformed using PeopleSoft Budget Planning. Budget activities include Line Item Budgeting, Line Item Mass Adjustments, Budget Allocations, and Position Budgeting. PeopleSoft Budget Planing-specific.

Budget Amount Ledger

Stores budget amounts and is updated by posting budget entries, transfers, and adjustments.

Budget Analyst

A role within PeopleSoft Budgeting. Budget Analysts are typically people within an organization responsible for reviewing and analyzing a prepared budget before submitting it to the Budget Coordinator. PeopleSoft Budgeting-specific.

Budgetary Account Only

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

Budget Category

A set of related expenses that are accumulated for proposal budgets and reporting to a sponsor. The estimated cost for a set or class of accounts.

Budget Category

Numeric/alpha identification given to each category of positions.

Budget Center

In PeopleSoft Budgets, any entity responsible for producing or reviewing budget data. For example, a Budget Center might be the individual departments responsible for producing budgets.

Budget Center Dimension

In PeopleSoft Budgets, the dimension by which you distribute budget data. If you budget by department, your department dimension will be your Budget Center Dimension. You'll assign Budgets Users to the nodes and detail values on the tree you use to build your Budgets Center Dimension.

Budget Check

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

Budget Check Override

Selective suspension of Budget Processing. With this feature you can override the controlled budget for a transaction that failed budget checking due to insufficient funds; or override the tolerance limits for a transaction rejected due to exceeded tolerance limits. When you push the Override button, the system flags the transaction to allow the Budget Processor to process successfully regardless of available funding. You can cancel the override any time before the Budget Processor is run by clicking the Cancel Override button.

Budget Control

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

Budget Coordinator

A role within PeopleSoft Budgeting. Budget coordinators are responsible for monitoring the budget process. The Budget Coordinator is typically located within an organization's central budget office and builds the budgeting model. PeopleSoft Budgeting-specific.

Budget Detail

A level of itemization that when combined makes up a major budget category.

Budgeted Rates

In PeopleSoft Activity-Based Management, the rate your organization uses based on the budget.

Budget Error Exception

A transaction that fails budget checking, causing an Error or Warning to be issued. See **Error Exception** and **Warning Exception**.

Budgeting Functions

PeopleSoft Budgeting's six main action categories, including: system administration, budgeting setup, budgeting preparation, budgeting analysis, data integration and my profile. Your user role determines how many of these functions display and are available.

Budgeting Model

The framework for an organization's budget development process. Business unit defines a Budgeting Model. The Budget Coordinator typically defines the model and includes the time period of a budget cycle, time period for phases within a budget cycle, the sources of data that will be available to budget users, the methods that will apply to line-item budgets, and other budget options and control parameters. PeopleSoft Budgeting-specific.

Budgeting Type

Associated with the budget ledger type set definition, a budget type is an indication of whether the organization uses a standard budget ledger, project budget ledger, or controlled budget ledger for budgeting.

Budget Justification

Written explanation further defining the what and why of a budget category.

Budget Period

The period in which you define plans to meet your organizations training requirements.

The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary, and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

Budget Phase

In PeopleSoft Budgets, a span of time during which a budget or portion of a budget is to be completed. You'll filter dimensions, assign alternate Budgets Users, enable Position and Asset budgeting, and specify Budgets User notification options at the Phase level.

Budget Plan

In PeopleSoft Workforce Rewards, when working with a Compensation Planning BAM model. A budget plan is a rollup of like compensation rules. For example, for base pay rules budget plans are a rollup of values for like Action Reasons. For variable pay rules budget plans are a rollup of the values for like Variable Compensation Plan IDs.

Budget Preparer

A role within PeopleSoft Budgeting. Budget preparers are typically people within an organization responsible for developing the detailed budget for a Budget Center and submitting it to a Budget Reviewer or Analyst for review and approval. PeopleSoft Budgeting-specific.

Budget Reviewer

A role within PeopleSoft Budgeting. Budget reviewers are typically people within an organization responsible for reviewing and approving a prepared budget submitted by a Budget Preparer. PeopleSoft Budgeting-specific.

Budget Seeding

Represents a new budget or forecast, such as historical data that is manipulated to develop a more current representation for a proposed budget. Uses detail data as the budget seed or basis to create the base budget that represent the level of detail in which budget numbers are prepared.

Budget Translation Trees

Trees translate (summarize) source transactions into the appropriate levels for processing against control budgets. This is because you usually budget above the level of your source transaction ChartFields on a tree.

Budget Type

Indicates whether a budget is for expenditures or revenues.

Budget Warning

See **Warning Exception**.

Budgets User

In PeopleSoft Budgets, any user who needs to gain access to the Budgets. You'll designate Budgets Users on the Budgets Users page through the Coordinate Budgets window. You'll also assign these users to the tree representing your Budget Center Dimension.

Budget View

A user-defined view where selected dimensions, columns and rows of data determine the layout of line-item budgets affecting the view or entry of data.

Budget Year

The institutionally defined, consecutive, 12-month period to which a financial transaction or summary applies.

Build Option

A detailed PeopleSoft Planning model that specifies a method of building an assembly item. This model specifies the routing, resources, and materials that are necessary to produce the item.

Built-in function

Prior to PeopleTools 8.0, there were only built-in functions, like FetchValue, ScrollSelect, etc. A built-in function, in your code, is on a line by itself, and doesn't (generally) have any dependencies. You don't have to instantiate anything before you can use a built-in.

Business Interlink Definition

A definition encapsulating an external Transaction or Query and providing a set of generically typed input/outputs that can be assigned to PeopleCode variable or Record Fields at runtime. A Business Interlink Definition is added to the Application Designer's objects at the same level as Fields, Records, Panels, etc.

Business Interlink Design-Time Plug-in

An XML file that, when coded for an external system, encapsulate that external system and provide a catalog of Transactions, Classes and Criteria specific and meaningful to that external system.

Business Interlink Framework

The framework for integrating any external system with PeopleTools application objects. It is composed of the following components:

1) An External System, 2) Generic definitions for a Transaction/Query command interfaces, 4) Business Interlink Definitions, 4) Business Interlink Plug-in.

Business Interlink Object

An instantiation based on a Business Interlink Definition. Actual data can be added to the inputs of the Business Interlink Objects once the appropriate bindings are provided. The Business Interlink Object can be executed to perform the external service. Once a Business Interlink Object is executed, the user of that object can retrieve the outputs of the external service. The Business Interlink Objects use buffers to receive input and send output. When a Business Interlink Object is executed, the transaction/query/class associated to the Business Interlink Object will be executed once per each row of the input buffers corresponding to the input Records. If there is only one row, after appropriate substitution by the driver, it is executed only once.

Business Interlink Runtime Plug-in

A set of C++, Visual Basic, or other high-level language methods that, when coded for an external system, encapsulate that external system and provide the execution methods to match the Business Interlink Design-Time Plug-in. (The catalog of Transactions, Classes and Criteria provided by the Design-Time Plug-in can also be provided by the Runtime Plug-in.)

Business Objects

A way of identifying those mass changes that have been designed to be referenced by a flexible formula and provide them with a shorter name to simplify the creation of flexible formulas.

Business Planning

The type of planning that focuses on elimination activities that are not needed by changing the drivers.

Business Rules

Rules that can process information differently depending on the values of data in the PeopleSoft Enterprise Warehouse.

Business Unit

A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions. PeopleSoft General Ledger business units typically comprise individual entities for accounting purposes.

Business units in PeopleSoft Projects represent operational structures but not necessarily independent financial units.

PeopleSoft Payables business units are either *Vouching* (have payables accrued to them) or *Charge to* (have voucher expense distributions charged to them), and pass journals to general ledger units.

PeopleSoft Purchasing business units share vendor, purchase order, and receiving information with PeopleSoft Payables units in the same SetID.

A PeopleSoft Inventory business unit is a storage facility that maintains its own replenishment and costing methods, as well as its own definitions and guidelines.

The Manufacturing business unit must be identical to the Inventory business unit in order to link the manufacturing and inventory processes.

The Order Management business unit controls certain order processing parameters (tax and freight calculation methods, base currency, credit card hold options, and so on) for its associated PeopleSoft eStore and Mobile Order Management merchant variants.

Business Unit Audit List

One or more business units specifically targeted for expense report and cash advance audits.

Buying Agreement

You can structure flexible and easy-to-use buying agreements for customers or groups of customers. You can set up maximum amounts and specify the minimum dollar value per order placed against it. You can automatically generate sales orders or create sales orders online from buying agreements. Rebate and penalty calculations can be implemented for buying agreements.

C

Cafeteria-Style Benefits

Any programs offering several benefit plans from which participants make elections. Cafeteria-style benefits may or may not include flexible credits.

Calculation

In PeopleSoft Pension Administration, the determination of a participant's pension benefit.

Calculation Rule

Criteria for calculating benefits, including as-of dates for age, service, premium, and coverage calculations; rounding rules; and minimum and maximum coverage amounts. Any number of program and plan combinations can use a single set of calculation rules.

Calculation Rule [Global Payroll]

Any rule you develop using combinations of elements to command the system to perform a type of calculation.

Calendar

In PeopleSoft Manufacturing, a list defining the days your enterprise is available and the hours of operation for each day. The system first looks to see whether you are using a work center specific calendar. If none is defined, it looks at the production calendar. If no production calendar is defined, planning and scheduling functions base start and due dates on a five-day workweek.

In PeopleSoft Demand Planning and Inventory Planning, a list defining the start and end dates for each time-phased period. It also contains daily weights for distributing raw data into different period buckets.

In PeopleSoft General Ledger, your accounting calendar defines the time periods to which you post transactions for different ledger group and business unit combinations. You can have multiple calendars, so you can keep a calendar for actuals, another for budget and forecast activity, and still others for special reporting or transitional needs.

Calendar Group ID

Allows you to group together multiple Calendars that you want to run together at the same time. It also controls the order in which the Calendars are processed. You can only group calendars together that are for the same country (based on pay entity country).

Calendar Scope

A time period type (Day-Factored, Month-Factored, or Week-Factored) for use in building your time period calendar.

Canada Academic Teaching Surveys

Statistics Canada requires that all Canadian universities (all degree granting institutions) produce full-time and part-time *Canada Academic Teaching Surveys*. These reports are a legislative requirement. PeopleSoft HRMS 8 provides you with the functionality to code HRMS information using Statistics Canada codes and create both the full-time and part-time Academic Teaching Surveys.

Canadian Industrial Sector

The Canadian industrial classification code with which employees are associated for Canadian employment equity reporting purposes.

Canadian National Occupational Classification (NOC) Codes

NOC codes are occupational classification codes for Canadian companies provided by the government.

Canadian Standard Occupational Classification (SOC) Codes

SOC codes are occupational classification codes for Canadian companies provided by the government.

Cancellation

A process that terminates stock fulfillment requests, allowing reserved and allocated items to be returned to inventory.

Cancellation

In the context of an employee stock plan, a transaction (usually triggered by a specific event, such as a termination of employment) in which outstanding securities are declared void and inactive and returned to the pool of securities reserved for issuance under the plan or retired.

Candidate Keys

In PeopleSoft Demand Planning, elements of data that can be used to construct the **Forecast Item** key field at different levels of the forecast.

Capacity Rate

A rate you assign to a capacity cost object. This enables you to track and report on excess capacity.

Capacity Fence

A time fence that indicates that date and time after which PeopleSoft Enterprise Planning or Production Planning solvers ignore capacity violations. The solvers do not use this date in processing capacity violations.

Capacity Multipliers

A multiple used in PeopleSoft Enterprise Planning and Production Planning to determine the available capacity on a resource. Since a capacity multiplier is effective-dated, you can use it to vary the resource's available capacity over time.

Capital Acquisition Plan (CAP)

A method of projecting and tracking capital expenditures for a project. Budgeted assets and actual expenditures can be associated with a CAP Plan so the owner can track planned against actual costs.

Capital Gain

The difference between an asset's purchase price and selling price, when the difference is positive. Capital gains can be either short-term (where the capital asset was held for 12 months or less) or long-term (where the capital asset was held for 12 months or more).

Capital Gains Tax

A tax on profits from appreciation in owned real property, recognized at the time the property is sold; real property includes owned company shares.

Capitalization

The total types and amount of the outstanding securities that have been issued by a corporation. Generally includes both equity and debt securities.

Capital Markets Instrument

In the financial services industry, Capital Market Instruments are assorted financial instruments issued by organizations to raise capital for funding operations. Participants are made up of interested parties that choose to supply or acquire the capital funding through such vehicles. Derivatives, debt instruments, equities and foreign exchange instruments that are traded in highly liquid markets represent the instruments. In the PeopleSoft financial analytic applications, Capital Market securities refer to instruments that are bought/sold by the institution for its own investment account. The capital markets set the product prices and interest rates.

CAP Sequence Number

The number that distinguishes a small project belonging to a CAP plan. Budgeted assets can be associated with an overall CAP Plan and a CAP Sequence, if that level of detailed tracking is desired.

Carry-Forward

Residual contributions that remain in a stock purchase participant's account after the purchase of shares that are used toward future purchases.

Carrying Cost

In PeopleSoft Inventory Planning, a value that shows the cost associated with holding a dollar of inventory for one year. The value is presented as a percentage.

Case Officer

In Germany employees in your company are designated as Case Officers, and have responsibilities for handling health and safety incidents.

Cash Balance Accounts

The PeopleSoft Pension Administration function that tracks the activity in an employee's hypothetical account under a cash balance plan.

Cash Balance Plan

A defined benefit plan designed to look like a defined contributory plan. The plan periodically credits a percentage of pay to each employee's hypothetical account.

Cash Compensation

In PeopleSoft Workforce Analytics, Cash Compensation is a component of direct compensation. Cash Compensation consists of direct cash payments made to an employee for base compensation and short-term variable compensation.

Cash Exercise

At the time of exercise, the optionee is required to pay in cash the total option price plus any withholding taxes due to the company.

Cash Flow Generator

This is a support module for the PeopleSoft financial services analytic applications. It generates actual and projected cash flows for financial instruments by using output from the other support modules, such as loan prepayment rates, deposit runoff rates, product pricing indices, discount rates, and product definitions (such as start and end dates, balance amount, interest rate, term, payment dates, repricing and compounding frequency, and accrual basis) to generate the cash flows. The Financial Performance Measures module accesses the cash flow results to calculate the required financial measures.

Casual Preparer

An additional user role at the lowest level of budget preparation for a budget center. This user performs the same activities as the Budget Preparer role when access is granted. The system does not, however, enable the Casual Preparer role to define their own private views for line-item budgeting.

Casual Work Assignment

The temporary assignment of an employee to a work position or location to meet the needs of the business. Typically, there is no Human Resource activity to support the work assignment (that is, a new Job record is NOT created). Often compensation rules that accrue to the temporary assignment override the compensation rules that apply to the employee's normal work assignment. See also Borrow/Loan.

Catalog

The list of transactions, classes, and queries used to interface to the external system. Integration users are presented with this list when they pick the type of Business Interlink Plug-in they are going to use. There are four types of catalogs: transaction, class, operator, and configuration parameter.

Catalog

A way of organizing your training courses into classifications for increased flexibility. Catalogs consist of categories and subcategories.

Category

Categories are the primary level of a two-tier structure of training courses. Categories can consist of subcategories that provide further course definition.

Category Tree

A hierarchical structure that groups products by category to control how they are displayed in PeopleSoft eStore web pages. Used also by Mobile Order Management to enable product information to be accessed by a wireless device.

CBM

See PeopleSoft Customer Behavior Modeling.

Census Metropolitan Area (CMA) Code

In Canada this code is prescribed by the government and refers to the area of an urbanized core with a population of at least 100,000.

Central Personnel Data File (CPDF)

Two types of reporting made by agencies to the OPM include the Dynamic and Status files (quarterly and monthly, respectively) covering a range of employee personnel/payroll data.

Certain and Continuous Payment Option

A form of pension payment where the benefit is paid out for the lifetime of the participant with a specified number of payments guaranteed so that a beneficiary will receive payments until the end of the guarantee period if the employee dies before the guaranteed payments are complete. For example, under a ten-year certain and continuous payment option, a retiree who lives less than ten years receives payments until death, then the retiree's beneficiary continues to receive payments for the remainder of the ten year period. A retiree who lives longer than ten years continues receiving payments after the ten year period until death. Also 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—with no ongoing payments after the specified period. If the retiree dies before payment period is over, the remaining payments are made to a beneficiary. Also known as a "Term Certain" payment option.

Change To Lower Grade

- For positions under the General Schedule or under the same wage grade schedule, a change-to-lower grade changes the employee to a lower grade; and
- When both the old and new positions are under the same type ungraded wage schedule, or in different pay-method categories, a change-to-lower grade changes the employee to a position with a lower rate of basic pay.

Charge Out

A **Material Issue** used when the item is scheduled for future return.

ChartField

A field storing a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField Balancing

PeopleSoft enables you to set up ChartFields and indicate that you want specific ChartFields to match (balance) on the debit and the credit side of a transaction. When you work with Controlled Budgets, the Fund and Budget Period are already set up in the system to balance (match). For example, suppose you want to balance by Class and Program. You indicate that these on a panel that these ChartFields are required, along with Fund and Budget Period which should already be selected. When you enter a transaction, you must enter the same Class, Program, Fund, and Budget Period ChartFields on both sides of the accounting entry. but you can modify any ChartFields, other than these four, on the user-defined line. The system always requires that total debits equal credits.

ChartField Combination Edit

Also called *Combo Edit.* The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey

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

ChartViews

Charts of data in the model, presented through the Worksheet which retains the ability to drag dimensions on the chart as desired.

Check In/ Check Out

The process of retrieving planning activities from the BAM database (check out) and posting changes and results back into the database (check in).

Child

A node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes—projects, customers, and so on—can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.

Child

A node or detail of a tree linked to another, higher-level node referred to as the parent. Child nodes can be rolled up into their parent. A node can be a child and a parent at the same time depending on its location within the tree.

Chunking

Chunking is a PeopleSoft Enterprise Warehouse mechanism that makes voluminous processing easier through the use of multiple small parallel processes. By enabling chunking, multiple jobs are spawned from one Jobstream. These jobs run in parallel (behind the scenes) to process data efficiently.

Citizenship Code

Numeric indicator as to whether the employee is a U.S. citizen or a foreign national serving in the U.S. The codes are:

- citizen
- other

Civil Service Retirement System (CSRS)

A retirement plan available to employees of the federal government. CSRS covers all employees appointed to a position in the federal government before January 1, 1984. Coverage includes a basic annuity plan with employee contributions and the Medicare Hospital Insurance component (1.45%) of the Social Security tax.

Class catalog

Lists classes used to interface to an external system. A class contains data members of basic types and/or objects that are typed after another class. A Class can also contain lists of basic types or objects.

Class ChartField

A ChartField value that identifies a unique appropriation budget key when you combine it with a Fund, DeptID, and Program Code as well as a Budget Period. Formerly called “sub-classification.

Classification Code

Need App A code that categorizes an engineering change. Example classification codes include the following: Mandatory, Optional, Upgrade, Quality, and Safety.

Clock Hour Reporting

Method of reporting time by recording actual times in and out (start and stop) (see Time Reporting).

Clone

To create a unique copy of an object. When used in PeopleCode, clone will always mean to make a unique copy. Copy, on the other hand, may or may not mean making a unique copy. Copy may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

Cloning

The process that enables you to copy run controls to create employee schedules from existing Run Control ID's that have already been executed and saved.

Close Date

The date in which time entry is no longer allowed for a given pay period. Defined as an offset number of days to the pay period end date.

Close Price

The price of the final trade for a security at the end of the trading day.

Closure Calendar

A calendar that establishes closure dates for shipping, receiving, and materials management operations for a specific **Business Unit**. Typically, application processes account for these closure dates when determining Lead Time and dates for anticipated fulfillment processing dates (scheduled shipment dates, scheduled arrival dates, and lot retest dates, for example).

CMA (Census Metropolitan Area) Code

In PeopleSoft Workforce Analytics, the CMA code is prescribed by Statistics Canada, and refers to the main labor market area of an urbanized core with a population of at least 100,000.

COBRA (Consolidated Omnibus Budget Reconciliation Act)

In PeopleSoft Workforce Analytics, this refers to legislation that requires employers to offer continued health care coverage to employees, and their dependents, who lose benefits coverage under certain defined conditions such as voluntary termination, divorce, becoming an overage dependent, or retirement. Any individual, whether employee or dependent, that is covered under a health plan at the time of a qualifying event, has the option to elect COBRA coverage.

Codepage

One character set.

Collection

To make a set of documents available for searching in Verity, you must first create one or more collections. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents matching various search criteria. A collection is a set of statistics and pointers to the source documents, stored

in a proprietary format on a file server. Since a collection can only store information for a single locale, PeopleSoft maintains a set of collocations (one per language code) for each search index object.

Combined Federal Campaign (CFC)

A vehicle used by federal employees to contribute to a charity or charities of their choice.

Commercial-Off-The-Shelf (COTS)

Equipment or software that is currently sold commercially to at least one customer.

Commission Tax Method

A payroll tax calculation method that adds year-to-date earnings to earnings for this pay period and finds the annualized gross by multiplying by the number of pay periods in the year; the gross is then divided by the number of tax periods specified on the paysheet. This method is used for Canadian processing only.

Commitment Control

Commitment control includes budget control and commitment accounting functionality.

Common Shares Issued and Outstanding

Represents the residual ownership interests in the corporation. This is the composite number of shares available and tradable on the open market.

Community Background

In the United Kingdom Community Background refers to the religious category, such as Catholic or Protestant, of employees, job applicants or appointees. See the Northern Ireland Report for more information.

Compa-Ratio

In PeopleSoft Workforce Analytics, Compa-Ratio is most commonly defined as the relationship between current pay and the midpoint calculated as: (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 it's own start/end date, location, and instructor. For example, if you have a course that runs for two days a week for a month, you would divide the course session into four cut sessions, each of which is two days long.

Cycle Count

A manual counting event that does not cover an entire inventory business unit. Usually includes every item (and lot, if applicable) in a location or family.

Cycle Interval

The number of days between cycle counts.

Cycle Procedures

Inventory planning tasks that need to be performed on a regular basis to ensure an up-to-date **Inventory Policy**. The tasks can be performed either at the end of a processing period or within the period, and should always be performed if the forecast or **Control Group** or **Policy Item** parameters change. Tasks include generating a policy and reviewing **Work Queue** messages.

D

DAT file

A text file (input.dat) used with the Verity search engine that contains all of the information from documents that will be searchable but not returned in the results list.

Data Elements

Data elements, at their most simple level, define a subset of data and the rules by which to group it.

For PeopleSoft Balanced Scorecard, data elements are used as the basis for key performance indicators, and as target values for Key Performance Indicator (KPI) objects.

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

Data Entry Access List

Used to present a concise list of often-performed data entry tasks to a user. You can assign multiple control plans to a single data entry access list.

Data Extract

A report that creates a file used to transmit data to a third party on magnetic media. There is no meaningful printed output for this type of report.

Data Loader

Data Loader is a PeopleSoft Enterprise Warehouse utility that moves data from the Operational Data Store staging area to either the ODS reporting area or the Data Warehouse. The Data Loader utility is made up of several pages that allow you to enter Metadata to define your source and target records and your transformation rules and then perform the load by running an Application Engine.

Data Loader Map

Defines how to extract data from the Operational Data Store (ODS), transform it, and load to a Target Table. The target table can reside in the warehouse or the ODS layer.

Data Manager

A PeopleSoft Enterprise Warehouse engine that distributes revenue, expense, analytical application engine results, statistical quantities and other measures across business units, departments, products, customers and channels—any field or logical group in the chart of accounts. You can define a number of types and options within this engine. It is also used as a means of posting to the Performance Ledger.

Data Manager Rules

In the PeopleSoft Enterprise Warehouse, Data Manager rules use Constraints to specify the source as well as the target tables for moving, aggregating, or multidimensionalizing your engine output. Rules use Data Manager methods to enrich the PeopleSoft Enterprise Warehouse data.

See Data Manager Methods.

Data Manager Methods

There are several methods: Copy, GL Mapper, Prorata, Spread Even, and Tree Aggregation. Each method enables you to move and/or enrich engine output.

Data Mart

A Data Mart is a data structure that uses a central fact table and related dimension tables to generate a "relational cube" or directly generate an Insight report.

Data Mart Builder

The Data Mart Builder is a multiple Application Engine (AE) process, that is, a framework of procedural programs, that creates a Data Mart.

DataMaps

Information that builds upon the data captured in the TableMap records. DataMaps enable you to define a logical view of the physical PeopleSoft Enterprise Warehouse tables. DataMaps bring together information from many different tables and fields and define it all as one entity or table.

Data Row

Contains the entries for each field in a table. To identify each data row uniquely, the system uses a key consisting of one or more fields in the table.

DataSet

DataSets are used as input for various engines and processes, for instance, the Analytic Forecasting component, the Data Manager, user defined functions, drivers in Activity-Based Management, and data elements in the Key Performance Indicator Manager. DataSets provide a user defined set of information to the engines. DataSets use Constraints to restrict used columns and restrict returned rows. Each DataSet is created by a process specific setup. However, the underlying logic is the same, enabling you to more easily understand the functional aspects of the process.

Data Warehouse

A large database containing data summarized from one or more transactional systems, optimized to support the analysis needs of the enterprise. An ideal data warehouse contains all the data necessary to make business decisions. Users analyze the data in the warehouse using Online Analytical Processing (OLAP) tools and ad hoc query/reporting tools. An increasing

number of organizations have "virtual" data warehouses, where the data warehouse is not one physical database, but rather a collection of specialized (and distributed) data marts.

See also PeopleSoft Enterprise Warehouse.

Data Warehouse Tables

Data Warehouse tables act as the portal for getting data into the PeopleSoft Enterprise Warehouse from PeopleSoft, OLTP applications or other “outside” sources. These tables are used:

- As targets for loading operational data.
- For error detection and handling
- For data validation.
- For aggregation.

Database Alias

The PeopleSoft Pension Administration utility that looks up employee data.

Dataset

A file containing data to be analyzed by the Quality Server program. The dataset is similar in content to a spreadsheet.
In PeopleSoft Planning, a file that stores schedule information such as tasks, resources, calendars, and so on.

Date

See **Accounting Date Transaction Date** or **Effective Date**.

Date

If you want to either include a date in a calculation, or determine a new date by taking a starting date and either adding or subtracting a period of time to come up with another date, you use a date element.

Date Classified

Date the Position Description is approved by Management/Position Management.

Date Eligible To Retire

Date an employee is eligible to optionally retire based on the combination of age and service that meets legal requirements.

Date Under Report

The date (day) in PeopleSoft Time and Labor for which time is being reported. The Date Under Report does not have to equal today's date.

Day Breaker

Customer defined time that is used to determine when one day becomes the next. It's used to determine the "logical" date of a punch. (See Understanding Workgroups.)

Days Supply

In PeopleSoft Inventory Planning, a method that can be used with several types of **Inventory Policy**. Using this method, a specific number of days of supply for an item should be used to calculate the item's inventory policy.

Deal Type

PeopleSoft Treasury has categorized deals into several basic deal types from which you can choose when defining an instrument.

Death Coverage

The PeopleSoft Pension Administration function that determines the factor used to reduce an employee's benefit when the plan charges for PRSA coverage.

Decompressed Split

In PeopleSoft Demand Planning, a function for returning a compressed split database to its original form. See also Compressed Split.

Deduction

Any amount taken from an employee's pay check each pay period. Deductions may include health or medical benefits, union dues, and so on. See also Benefit Deduction and General Deduction.

Deduction Date

The as of date for the deduction item in PeopleSoft Receivables.

Deduction Item

An individual item that you created in receivables and is an open receivable on the customers account due to a deduction that they took in a payment for a receivable item.

Deduction Reason

Code that describes the type of deduction. When assigned to a write-off resolution, it determines what accounting entries to create.

Deduction Specialist

The individual responsible for tracking and resolving deductions in PeopleSoft Deduction Management.

Deduction Subset

A group of deductions selected from a company's standard set of deductions. Deduction subsets minimize data entry time in special processing situations such as bonus check runs.

Default Mode (DM) model

In the financial services industry, an approach used by financial institutions to predict a decline in portfolio value. Only two outcomes are considered – default or non-default. If the debt does not default, there is no change in the value. If the debt does default, then the loss is calculated as the difference between what was contractually owed and the value of any collateral recovered.

Defection Analysis

In PeopleSoft Workforce Analytics, the identification of employees who are likely to leave the organization based on predefined assessment criteria.

Deferred Compensation

Compensation payments that are payable to an individual in the future such as pension plan payments, annuities, stock awards and profit sharing. Note: Profit sharing can be considered direct pay if paid out in cash on a periodic basis or deferred pay if cumulative with the intention of payment in the long-term future.

Deferred Vesting

The adjustment made to the original option's vesting schedule that pushes the vesting into the future.

Defined Benefit Plan (DB Plan)

A retirement income plan (usually called a pension plan) where the employee's benefit is definitely determinable based on a plan-specified benefit formula.

Definition or Function Definition

The parameters for any of PeopleSoft Pension Administration's nineteen core functions. A definition has to be explicitly associated with an employee Group Definition before it can be applied.

Dekit

The ability to return material issued in kits to inventory. This is used when entire kits need to be returned; individual components are handled through kit issues/returns.

Delete Non-Matching Items

In PeopleSoft Inventory Planning, an option used in the Generation process to delete Inventory Planning items that don't have corresponding items in Demand Planning. The item deletion occurs when the system generates the policy.

Delta

When retroactive processing occurs for a given payee, the system recalculates each element generated for the payee. The system compares the recalculated results to the original results. The difference between these results is typically referred to as the retro "delta." A retro delta can represent either an underpayment or an overpayment that results in an adjustment to the payee's earnings.

Demand

Collection of training requests. This could be an employee demand, a departmental one or a company-wide demand.

Demand Filter Width

In PeopleSoft Demand Planning, specifies the confidence interval within which demand is considered to be reasonable. Actual demand that is outside the confidence interval is automatically filtered and replaced by the value at the edge of the interval. The value is expressed as a percentage.

Demand Filtering

In PeopleSoft Demand Planning, provides a way to detect and highlight unusual demands and forecast errors. If the demand falls outside of a band that is considered reasonable, the system automatically adjusts it to the level of the boundary and logs a message to the **Work Queue**.

Demand Number

The configured product sub-component sequence number.

Demand Planning

In PeopleSoft Activity-Based Management, this type of planning focuses on studying the impact of cost objects and activity volumes.

Demand Priority

The placing of importance on independent demand. The Planning engine uses the demand priority value to determine the order in which you fulfill the demand. You can set a demand priority from 1 to 998 with 1 being the most important level. The priority value of 999 is reserved for the system.

Demand Priority Rules

In PeopleSoft Inventory, a set of rules that will sort demand so the most important demand will have the first opportunity to reserve available inventory. If demand priority rules have

been defined, the Material Reservations process (INPLDMND) sequences orders by priority rank, processing those with the lowest rank value first.

Deplete Cost Method

Determines how you cost a depletions transaction within a book. The deplete cost methods available include Actual, Non-Cost, Perpetual Weighted Average, Periodic Weighted Average, and Value at Current Standard.

Depreciate When in Service

A switch that indicates whether PeopleSoft Asset Management should allocate depreciation as of the date an asset was placed in service. This is valid only in the year the asset was acquired.

Depreciation - Declining Balance

Budgeting calculates this as: Cost minus Accumulated Depreciation divided by Life divided by number of periods per year. It results in a higher depreciation expense in the early years of an asset, which decreases as you near the end of its useful life.

Depreciation - Double Declining Balance

Budgeting calculates this as: Cost minus Accumulated Depreciation multiplied by 2 divided by Life divided by number of periods per year. It results in a higher depreciation expense in the early years of an asset, which decreases as you near the end of its useful life.

Depreciation Methods

The various methods of spreading the aquisition 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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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.

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 the define a relationship between the driver and a financial result. The driver values and the defined relationship then combine to produce a projection of the financial result. For example, a projection of the number of square feet used (driver) and the price per square foot paid in rent (driver) can combine to produce a projection of rent expense (financial result).

DRO

See Domestic Relations Order.

DSS (Decision Support System)

A DSS is a workstation-based analysis and reporting system, typically aimed at analysts and line managers. OLAP tools provide a powerful DSS.

Duration

In PeopleSoft Pension Administration, the utility that calculates the length of time between two dates.

Duration [Global Payroll]

An element type that calculates a period of time between two dates. For example, if you want to determine a payee's age, you can calculate the duration between his birth date and the calendar period end date.

Dynamic Group

A group in Time and Labor that enables you to establish criteria or attributes for a group of employees. All employees who fit this criteria at processing time belong to the group.

Dynamic Tree

A tree that takes its detail values—*Dynamic Details*—directly from a table in the database, rather than from a range of values entered by the user.

Dynamic Views

In PeopleSoft Demand Planning, a **Forecast View** that allows interaction with the forecast data using an alternate key structure. By using dynamic views, you streamline the working view and can complete the working-view design without having to anticipate all conceivable adjustments.

E

Earliest Change Date

Determines both the range of dates and the amount of data that will be processed for each time reporter (see Batch Processing)

Early Punch

A punch that is more than the predefined number of hours/minutes before a scheduled punch where a time reporter is warned

Early Retirement Date (ERD)

A retirement date earlier than a plan-specified “normal” retirement date. Employees usually must meet age and/or service requirements to be eligible for early retirement, and early retirement benefits are often reduced to compensate for the longer duration of payments.

Early Retirement Factor

The reduction made to an employee's benefit if the employee elects for early retirement.

Early Warning

In commitment control, warning of possible future budget exceptions. You can specify that you are to receive a warning when commitments and expenditures reach a predetermined percentage of budget. For example, you can instruct the system to let you know when commitments and expenditures reach 50%, 80%, or some other percent of a budget.

Early/Late Adjustments

The PeopleSoft Pension Administration function that calculates early retirement factors or late retirement factors.

Earning Group

Part of a group of defaults assigned to job codes. Earnings group may include non-salaried items such as holidays and bonus pay dependent on individual company parameters.

Earnings

The amount owed to an employee based on salary, hours worked, or other calculation routines, plus other types of compensation and holiday, vacation, and bonus pay.

Earnings [Global Payroll]

An element type that defines the different types of compensation that are added to a person's pay. Examples include salary, commission, bonuses, and retirement pay.

Earnings Accrual Class

Categorizes a set of accruable earnings.

Earnings Code

Codes that represent the various types of earnings such as regular, overtime or leave.

Earnings Per Share (EPS)

The portion of a company's profit allocated to each outstanding share of common stock. Net income (reported or estimated) for a period of time is divided by the total number of shares outstanding during that period.

Earnings Type

An abbreviated and encrypted set of business instructions containing compensation instructions. Earnings Type may also contain Benefit Entitlement and Administration instructions, taxation instructions, Financial Accounting instructions, Organizational Administration instructions, work group and labor affiliation instructions, and other instructions.

Economic Loss

In Funds Transfer Pricing, this refers to the break fund economic loss, calculated by applying the theoretical value of the interest rate differential (IRD) against a cash flow stream, based on the amount of the prepayment or cancelled draw-down.

Economic Value Added

In the financial services industry, Economic Value Added is a financial metric that factors into the measurement of an activity's profitability the cost of economic capital assigned to that activity.

EDGAR (Electronic Data Gathering, Analysis, and Retrieval)

An electronic system implemented by the SEC that enables companies to file documents in conjunction with disclosure requirements mandated by the SEC.

EDI Agent

Used in EDI processing, the inbound EDI Agent loads trading partner data (flat files) into the PeopleSoft database using transaction, map, and trading partner definitions set up using EDI Manager. The outbound EDI Agent extracts information from the PeopleSoft database and generates data files that can then be processed for transmission to a trading partner.

EDI Manager

A suite of online pages used to define transaction sets, trading partner profiles, and translation maps for EDI transactions.

Edit Table

A table on the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

EEO Company Code

In the United States companies are assigned this federal code for 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 Date

A method of dating information in your system. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. The Effective Date usually defaults to your system's current date.

Effective Periods

In PeopleSoft Demand Planning, the number of periods of historical demand used in the Model Reset process. The value can be used to exclude older, possibly unrepresentative historical demand data from model **Optimization**.

Effective Sequence

A system-generated number assigned to distinguish between two job entries with the same effective date.

Effective Tax Rate

The ratio of income tax paid over gross income, showing the percentage of income actually paid in taxes.

Effectivity Date

The date on which a component can be added or substituted in production, typically specified on an item's bill of material.

EIS (Executive Information System)

An EIS is a workstation-based analysis and reporting system for executives. An EIS provides a higher-level view of the data than a DSS, and typically requires less knowledge about the underlying transactional systems. OLAP tools provide a powerful EIS.

Elapsed Schedule

A method of scheduling a time reporter's time that is based on TRC and duration. This method can be used for scheduling of elapsed time reporters (see Scheduling.)

Elapsed Time

Reporting non-clock time in increments of hours or partial hours (see Managing Time / Understanding Time Reporting).

Elapsed Time Service

A method of calculating a period of service that uses only the start and end dates of the period to determine the amount of service. Hours worked or other measures of the actual work performed during the period are not taken into account.

Electronic Certification System (ECS)

An automated Payment Voucher authorized by the Certifying Officer for use within the Treasury Department, Financial Management Service's financial system. PeopleSoft provides a method to record and generate data files for on- and off-cycle processed payments.

Element

In PeopleSoft Global Payroll, an element refers to both primary elements and supporting elements. Primary elements are comprised of earnings, deductions, absence entitlements, and absence take elements. Supporting elements are element components that are combined to create primary elements.

In PeopleSoft Enterprise Performance Management, elements are used to create a Profile. An Element can be one or more columns of data in an Enterprise Warehouse table, associated with a single dimension (for example, Customer, Product, Department, or Channel). An Element can also be KPI, Population, subscription data from a third party, preexisting Profiles, and data mining scores.

Element Group

Element Group identifies a group of elements to provide eligibility. You can then use this as a notational shortcut—instead of having to list each element, you can use the element group name. Element Group's expedite the process of manipulating earnings and deductions.

Element Name

Name assigned by the user for data fields, rules, formulas, and tables. For example, the names you give to new rules, elements, or objects.

Element Segment

When an element changes mid-period, requiring the affected element (and perhaps a subset of other elements) to be calculated multiple times on either side of the date on which the change takes place, element segmentation is used. Unlike period segmentation, the system segments only the elements you select, and creates separate result columns only for the specified elements. In element segmentation, there is only one gross-to-net result set.

Eligibility Group

Eligibility groups define the possible earnings, deduction, absence entitlement, and absence take elements that a payee might be eligible to receive. This enables you to group payees so as to assign eligibility for certain pay elements.

Eligibility Rule

PeopleSoft Benefits Administration uses eligibility rules during Benefits Administration processing to determine which benefit programs and options an employee is eligible for. Eligibility rules are closely associated with event rules: they determine what options an employee can *have,* while event rules determine which of those options an employee will actually be able to *choose.*

Elimination Set

See **Consolidations-Elimination Set**.

Email Template

Pre-defined parameters that establish automatic email generation during budget submittal, rejection, publishing, and/or targeting.

Employee

An individual employed by an organization and administered as an employee in the PeopleSoft Human Resources system.

Employee Accounts

The PeopleSoft Pension Administration function that tracks employee contributions to a pension plan.

Employee ID

A unique identification code for an individual associated with your organization.

Employee Paid Benefit

The portion of a pension benefit funded by the employee's own contributions to the pension plan. Also, the PeopleSoft Pension Administration function that determines this amount.

Employee Profile

This PeopleSoft Activity-Based Management feature enables time and labor information to be part of an analysis.

Employee Stock Purchase Plan

A type of statutory stock option plan through which employers grant options to their employees in order to provide them with additional forms of compensation.

Employee Survey

In PeopleSoft Workforce Analytics, a method for capturing information about the activities performed by a given employee as well as the amount of time they spend performing each activity to perform activity-based management.

Employee Survey Report

The Employee Survey Report is an annual regulatory report that the French government requires from employers with more than 200 employees. In French it is called "Le Bilan Social". The report is communicated to both labor unions and the government. It provides a snapshot view of the company over the past 3 years for about 200 indicators.

Employee Training Cost

Amount budgeted to pay for students' salaries while on training courses.

Employer Identification Number (EIN)

In the United States a company is typically defined as a business enterprise that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes.

Employer's Liability Insurance Associations (Berufsgenossenschaften)

Social Insurance in Germany is maintained and administered by private organizations that act as employer's liability insurance associations. Employers pay out premiums to these associations, who administer and pay out funds to workers who are injured on the job.

Employment Cost Index (ECI) Adjustment

Annual increase to wages established/permitted by statute.

Employment Equity Computerized Reporting System (EECRS)

Canadian companies are required to report to the Federal Government on employment equity. PeopleSoft Human Resources contains the Canadian Employment Equity report (PER101CN), which creates a data interface file to the federal government's Employment Equity Computerized Reporting System (EECRS).

Employment Record Number (EMPL RCD#)

A field in PeopleSoft Human Resources Management Systems and PeopleSoft Workforce Analytics that indicates an employee has multiple job records in the system. A numeric value (0, 1, 2) is assigned to each job as a way to uniquely identify that job record.

Encumbrance

A claim against funds. It is a projection of future expenses based on the situation, as we know it today. Encumbering funds is not the same as spending them or even guaranteeing that you will spend them. It just means that if the situation as it exists today does not change, you will spend all of those funds by the end of the fiscal year.

Engineering Bill of Material (EBOM)

A listing of all the parts, raw materials, and subassemblies that form the basis of all item and product structures. EBOMs differ from MBOMs (Manufacturing Bills of Material) in that they are not visible within Production Planning or Production Management and are isolated from Manufacturing.

Engineering Change Order (ECO)

A revision to a blueprint or design, released by engineering to modify or correct a part and/or bill of material. PeopleSoft Engineering uses ECOs to manage and document required assembly and component changes.

Engineering Change Request (ECR)

A document that allows you to request manufacturing process improvements and report product defects directly to the engineering department. When workflow is enabled, ECRs can also be routed for review and approval, after which they change into ECOs.

Engineering Cost Version

The process of generating cost versions for new and modified configurations based on engineering bills of material (EBOM) and costing data.

Engineering Workbench

An engineering environment, separate from production, consisting of engineering bills of material (EBOM), engineering change requests, engineering change orders, EBOM cost roll-up capability, online BOM comparisons, and seamless integration to a document management vault.

Engineering Workbench

An engineering environment, separate from production, consisting of engineering bills of material (EBOM), engineering routings, engineering change requests, engineering change orders, EBOM cost roll-up capability, online BOM comparisons, and seamless integration to a document management vault.

Enterprise

In PeopleSoft Time and Labor, all of the business units of the installation site.

Enterprise Performance Management (EPM)

See PeopleSoft Enterprise Performance Management

Enterprise Portal

The PeopleSoft Enterprise Portal is a separate product offering purchased independently of any other PeopleSoft applications. It can be used with or without any PeopleSoft application. It can be used as a standalone corporate portal that does not access PeopleSoft data at all.

Enterprise Resource Planning (ERP)

The encompassing term for all the transaction-oriented database applications an organization deploys across it's 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.

F

Fact

Facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

Fact Table

A fact table is where facts are stored in the PeopleSoft Enterprise Warehouse.

Fair Labor Standards Act (FLSA)

A federal regulation governing several time and labor issues. *FLSA Overtime* requires that all nonexempt employees be paid at a rate of time-and-one-half for all hours over 40 physically worked during a workweek. This requirement may be superseded by state or local laws when the lesser law is to the greater benefit of the employee, or by union contract. An *FSLA Workweek* is a permanently established, regular workweek for a group of employees.

Fair Market Value (FMV)

The price of a company stock based on the current market value as determined by supply and demand, or a valuation method. The stock market sets the fair market value for a public company. For a private company the fair market value is more subjective, but typically determined by financial factors or set by an outside valuation company.

Fair Market Value Tracking Methods

Methods used to track and report trading activity on various exchanges (i.e. NYSE, AMEX, NASDAQ, etc…).

Family Medical Leave Act (FMLA)

A federal regulation that protects health benefits and job restoration for employees who must take a leave from work to care for themselves or family members. FMLA regulations contain provisions regarding employer coverage, employee eligibility and entitlement, notice and certification, continuation of health benefits, and job restoration. PeopleSoft Benefits applications offer FMLA Plans that help employers and employees determine FMLA eligibility and schedule and track FMLA leave requests.

Federal Employee Group Life Insurance Program (FEGLI)

Generally, if the employee has Federal retirement coverage or is on a temporary appointment exceeding one year, he/she is eligible to participate in the FEGLI program. Once eligible, he/she is covered automatically for Basic Life Insurance and premiums will be deducted from gross salary unless coverage is waived within the first period of eligibility. The program offers Basic Insurance coverage and three types of optional coverage: Option A (Standard), Option B (Additional), and Option C (Family).

Federal Employee Pay Comparability Act (FEPCA)

This law provides a structure and methodology to determine and authorize locality-based pay adjustments to Federal employees in order to elevate their basic pay to be commensurate with private sector employees working in the same occupations in the same geographic localities. It also includes a feature to authorize agencies to make advance salary payments to attract candidates for open positions which have consistently been hard-to-fill in certain geographic areas.

Federal Employees' Compensation Act (FECA)

This law provides compensation and medical benefits to civilian employees of the United States for disability due to personal injury or disease sustained while in the performance of duty. A feature of this law provides for the continuation of pay (COP) without charge to leave for up to 45 calendar days due to disability and/or medical treatment following a traumatic injury. Employees file claims with the U.S. Department of Labor, Office of Worker's Compensation, which adjudicates the claims and compensates the employing agencies for the employee's pay and benefits during the claim period.

Federal Employees Health Benefits (FEHB)

Generally, the employee is entitled to coverage by the FEHB program if appointed to a position with Federal retirement coverage or has been on the rolls on a temporary appointment for more than one year. The Federal employer shares the cost of the premium (about 75%); actual premiums depend on the plan selected. If under a temporary appointment, the employee pays both the employer and employee shares. If the position is part-time, the employee pays the employee share and a portion of the employer’s share.

Federal Employees Retirement System (FERS)

A retirement plan available to employees of the federal government. FERS covers all employees appointed to a position in the federal government after January 1, 1987. Coverage includes Social Security, a basic annuity plan, and a TSP.

Federal Employer Identification Number (EIN)

Used to identify the tax accounts of businesses. Businesses, which have employees or operate business as a partnership or corporation, must obtain an EIN.

Federal Insurance Compensation Act (FICA)

Employee and employer contributions to Social Security.

Federal Reserve Transit Number

A unique identifier for U.S.-based banks, allowing banks to transfer funds within the Federal Reserve system.

Feeder Line

A type of production line replenishment used in PeopleSoft Flow Production. If you are using feeder line replenishment, smaller production lines create subassemblies that feed directly to your production line.

FEGLI Living Benefits Act

Beginning 7/25/95, a Federal employee who is terminally ill may elect to receive a lump-sum payment equal to the full amount of basic life insurance only, or a limited portion designated in multiples of $1000. An election to receive this benefit is irrevocable; the individual is considered terminally ill if his /her life expectancy is 9 months or less.

FICA (Federal Insurance Contributions Act)

FICA consists of both a Social Security (retirement) payroll tax and a Medicare (hospital insurance) tax. The tax is levied on employers, employees, and certain self-employed individuals.

Fictitious Calculations

Fictitious calculation rules perform temporary calculations. A fictitious calculation is a sub-calculation run during a normal calculation to determine a net that would have been computed if certain parameters were used. This result is then used for further processing in the normal calculation. A fictitious calculation is always started from inside a normal calculation, run for one payee, and run for a specified set of periods.

FIFO (First In First Out)

Method used by companies to record Disqualifying Disposition Income. If a company uses this method they record the optionees disposition of shares by attributing the shares to the earliest exercise, purchase or release dates for which shares remain available for sale.

Fill-In Employment

Employment held by persons during the time period after leaving their regular occupation in anticipation of, but before entering, military service.

Filter

A filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.

Final Average Earnings (FAE)

The PeopleSoft Pension Administration function that averages earnings from a specified period of an employee's career. The result is used as a component of the pension benefit formula.

Final Forecast

The final forecast is the prorated version of the adjusted forecast, summarized to all levels of the product hierarchy. This is the best-guess version of the forecast that is used to make all decisions dependent on the forecast.

Final Table Merge Engine

Final Table Merge Engine is used by the PeopleSoft Enterprise Warehouse; it moves enriched data from one table into another. When you run a job in a jobstream, the immediate results are stored in temporary tables. At the end of the jobstream, the Merge Engine runs and merges the output temporary tables into the final tables, where processing can continue.

Financial Accounting

The accounting for a business entity's assets, liabilities, revenues, and expenses to determine its net worth and to produce financial statements. Within Generally Accepted Accounting Principles, a business has some latitude as to when and how to record its financial transactions, as long as it continues to meet its legal and regulatory requirements. A business' financial accounting requirements are not necessarily the same as its cost accounting requirements. The one should not be mistaken for the other (i.e. the extent to which a company's financial accounting system meets its cost accounting needs depends on how it has chosen to describe its chart of accounts and the level at which it has chosen to record financial transactions.

Financial Instrument

In the financial services industry, a specific product or service sold by a financial institution to its customers. In terms of the reporting hierarchy, a product falls under a ledger account, while an instrument falls under a product. A product may be treated like a generic description or category, while an instrument is a specific instance of a category.

Financial Performance Measures (FPM)

For the financial services industry, the Financial Performance Measures program performs calculations on financial instruments based on the rules defined in the Financial Calculation Rules module, and using input from the Cash Flow Generator, Stratification engine, Product Pricing, and Curve Generator. Its calculations include: measures of duration, option-adjusted spread and option-adjusted cost for PeopleSoft Funds Transfer Pricing, and Monte Carlo simulation for PeopleSoft Asset Liability Management.

Financial Product

In the financial services industry, a product or service sold by a financial institution to its customers. In terms of the reporting hierarchy, a product falls under a ledger account, while an instrument falls under a product. A product may be treated like a generic description or category, while an instrument is a specific instance of a category.

Financial Services Instrument

In the financial services industry, products created by financial institutions and sold to retail customers. Product prices and interest rates are set by the financial institutions and take into account its customers' behavioral models.

Financial Statement Simulation

A facility within Planning & Simulation which establishes rules for simulating future period, or pro-forma, financial statements. The user defines corporate financial policies, such as corporate tax rates, dividend distribution frequency, and force balancing rules, which are then applied to cash flows for a given future accounting period. The Financial Statement Simulator engine drives costs and revenues to accounts on PF_LEDGER_F00 via a scenario.

Financials Warehouse

See Warehouses.

First Year Amount

See 1st Year Amount.

Fixed Basis

The basis option enables you to create the data for the Basis online, as part of the rule. Fixed Basis is used with the Allocation Manager only. It is available with all methods except when Period-Based Allocation is being used. The Fixed Basis is a predetermined table that can be populated online.

Fixed Offering

The offering type is fixed when the end date of each offering is the same for all employees regardless of the employee's grant dates.

Fixed Percentage

A fixed percentage value. The source pool amount will be split based on this percentage to get the target amount. Used with the Allocation Manager.

Fixed Period Requirements

In PeopleSoft Enterprise Planning and Production Planning, a lot-sizing technique that sets the order quantity to the demand for a given length of time.

Fixed Picking Bin

A dedicated picking location for an inventory item. Fixed picking bins are replenished from bulk locations when the available quantity falls below the optimal quantity.

Fixed Plan

A stock purchase offering period where the ending offering date will be the same as the purchase date. Eligible employees will always purchase stock on the specific purchase dates and by the purchase rules you define.

Fixed Quantity

An **Inventory Policy** method that defines a fixed amount of an item to be ordered to meet replenishment needs. This method can be selected as an inventory policy for order quantity, safety stock, **Reorder Point**, and minimum and maximum parameters.

Fixed Source

The fixed source option enables you to create the data for the Source online, as part of the rule. Fixed Source is used with the Allocation Manager only. It is available with all methods except when Period-Based Allocation is being used. The Fixed Source is a predetermined table that can be populated online.

Flexible Credit

Any credit associated with a given benefits program, plan, or type of coverage. Credits based on an entire program can be applied toward the benefit costs however the employee chooses.

Flexible Hours

Hours during the workday, workweek or pay period during which a time reporter covered by a flexible work schedule may choose to vary his times of arrival and departure from the worksite (see Scheduling)

Flexible Spending Account (FSA)

An account to which an employee and (optionally) an employer pledge an annual amount for a plan year. The employee then submits claims for authorized expenses.

Flexible TimeSpan

A user-defined period into which costs can be collected. Flexible TimeSpans can be as long or as short as you like—covering multiple years or a single day. The main purpose of Flexible TimeSpans is to assist you in analyzing costs.

Flexible Work Schedule

A method of scheduling a time reporter's time that is based on a range of flex hours of start and stop times and core work hours. This method can be used for scheduling clock and elapsed time reporters (see Scheduling)

FLSA Status

A PeopleSoft Human Resources term that is used to indicate whether a job is exempt or nonexempt according to the Fair Labor Standards Act. All employees associated with a

particular job will receive that job's FLSA Status. FLSA Status is an eligibility determination factor for PeopleSoft Benefits Administration.

Forecast Attribution

A FSI (financial services industry) transformation process through which forecasted product originations are pooled and run through the cash flow engine for future periods.

Forecast Calculation Process

In PeopleSoft Demand Planning, the process by which a **Statistical Forecast** is generated for each item at each level of the view. When a **Forecast Item** is set to recalculate, the system tries several forecast calculation methods and picks the one with the least amount of error. This process also makes adjustments for promotions and filters for abnormal demand.

Forecast Definition

Forecast definitions are a set of forecasting rules that generally govern multiple forecasts distinguished by key properties such as products, customers, channels, and so forth.

Forecast Element

Each forecast within a single definition is called a Forecast Element.

Forecast Fulfillment

In PeopleSoft Demand Planning, a process used to manage forecasted demand over a period of time. The process makes it possible to divide the total forecast demand into portions so that certain portions can be met, even if the total forecast cannot be met entirely.

Forecast Item

In PeopleSoft Demand Planning, a logical item used as the basis to forecast demand. The components of a forecast item key are defined for each level in a forecast view.

Forecast Level

See Level.

Forecast Period

A period in time as defined by the calendar for which data is processed through the PeopleSoft Demand Planning model.

Forecast Start Period/Year

Determines the most recent period for which demand data is available for a forecast view. This period can also be described as the last actual demand period to have had an impact on the forecast.

Forecast View

See **View**.

Foreign Education

Education acquired outside of any state of the U.S., the District of Columbia, the Commonwealth of Puerto Rico, a Trust Territory of the Pacific Islands, or any territory or possession of the U.S.

Form 10-K

A form used for annual reports pursuant to Section 13 or 15(d) of the Securities Exchange Act of 1934 for which no other form is prescribed.

Form 10-Q

A form used for quarterly reports under Section 13 or 15(d) of the Securities Exchange Act of 1934, filed pursuant to Rules 13a-13 or Rule 15d-13. This report, which public companies are required to file quarterly with the SEC, provides unaudited financial information and other selected material.

Form 5500 Participant Count Extract

A PeopleSoft Pension Administration data extract containing data that a plan administrator needs in order to complete IRS Form 5500, used to report on the number of plan participants.

Form S-8

A form used to register securities offered by a reporting company under its employee benefits plans, including stock option plans. Also called the Registration Statement under the Securities Act of 1933.

Form W-2

A form used by employers to provide workers with a statement of wages, tips and other compensation from the previous year. This form, distributed employees by January 31 of each year, reflects state and federal taxes, social security, Medicare wages, and tips withheld.

Formula

Element which enables you to define your own formulas for use—gives further flexibility to define complex organizational needs.

Formula Plan

This compensation distribution plan type is based on a pay out rule, as the pay out rule is defined. The pay out rule can be based on a flat amount, a percentage, or a data element. Whereas a Target Plan distributes pay out based on a comparison of a performance measure against a target, in a Formula Plan the pay out is based just on the pay out rule.

French Professional Elections

French companies employing a certain number of employees must hold elections for selecting personnel representatives (Délégués du personnel), and members of the Work Council (Comité d'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 Item**s and Inventory Planning **Policy Item**.

Generic Process Type

This term applies to Process Scheduler. Process types are identified by a generic process type. For example, the generic process type "SQR" includes all SQR process types, such as "SQR Process," "SQR Report," and so on.

Geo RSZ Code

This code is for Belgian employers to track the geographical location for RSZ codes.

Geographic Location Code

In Canada this code is prescribed by the government and refers to the location a business is in.

Giveaway Adjustment Type

In PeopleSoft Order Management, the price break tables are set up to indicate what product the user receives as a free premium based on defined quantities or prices. The giveaway item does not have to be the same product that the customer is purchasing. For instance, you may set up a price break that indicates that a purchase of 100 widgets entitles the customer to one or more free T-shirts. The system automatically adds an order line for the free item. Giveaways cannot be applied to the total order.

Goals Matrix

In PeopleSoft Workforce Analytics, a matrix used to create calculation rules for group or employee performance goals. You can combine and standardize multiple performance goals into a single, weighted, goal score, against which actual performance is compared. A Goals Matrix can be used to in conjunction with a pay out distribution plan called a Target Plan.

Grace Period

A period that is a number of hours or minutes before or after a scheduled punch where a time reporter’s punch is accepted. For Stock Administration, the period of time an optionee has to exercise an option after termination and before the option expires.

Grade

A range of pay in a graduated scale that includes positions of different occupational groups. The work performed should be equivalent as to the level of difficulty and responsibility and the level of qualification requirements of the work. The levels are established and designated within a specific pay plan by law or regulation.

Graduate Education

Successfully completed education in a graduate program for which a bachelor's or higher degree is normally required for admission. To be creditable, such education must show evidence of progress through a set curriculum, i.e., it is part of a program leading to a master's or higher degree, and not education consisting of undergraduate and/or continuing education courses that do not lead to an advanced degree.

Grandfathered Benefit

A benefit that an employee was entitled to prior to a change in the plan and that defines the employee's new minimum level of benefits. The change might be caused by a plan merger, new legislation, or a plan amendment.

Grant

A contractual right giving an individual the option to purchase a specified number of shares of stock through an Equity Compensation Plan. Also known as an option.

Grant Agreement

The legal document issued by a company defining the number of shares granted, grant price, vesting schedule and other terms and conditions of the stock option or stock award.

Grant Date

The date the individual begins participating in a stock purchase offering. The date on which an option or other award is granted. The date the company enters into the grant agreement. The underlying stock's fair market value on this date generally derives the option price.

Grant Price

The price per share at which the stock option was granted. This is the price per share the individual must pay when exercising the option.

Gross Salary

The sum of an employee's salary and earnings defined as part of gross salary. The gross salary is used to calculate budget amounts for benefit plans defined as a percentage of an employee's salary.

Gross-up

The process used to calculate taxes and resultant gross pay from a check for an exact net amount.

Group

In PeopleSoft Billing, a specific term for a posting entity composed of one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

Group

Any set of records associated under a single name or variable in order to run various calculations in PeopleSoft Business Processes. In Time and Labor, for example, employees are placed in groups for time reporting purposes, while in Administer Variable Compensation, groups identify which employees are eligible for what forms of compensation. In PeopleSoft Pension Administration, you'll use Custom Statements to define criteria for grouping employees, then by associating calculation rules (Definitions) with specific Groups, you can vary rules for different classes of employees.

Group Asset

A financial asset with no cost information. It is used to depreciate the sum of the costs of its associated group member assets.

Group Asset Depreciation

The depreciation of a group asset calculated using an average service life set by a local regulatory agency and a calculated group depreciation rate.

Group Coverage (Or Generic) Qualification Standards

Standards prescribed for groups of occupational series that have a common pattern of education, experience, and/or other requirements.

Group Member Asset

A financial asset with cost information. Cost information for all group members of a group asset is summed up to the group asset level, where depreciation is calculated.

Group Security

The ability to grant or deny access to groups. You can set up group security by Group ID or by user ID.

Group Security [Time and Labor]

The ability to grant access to employee time, by providing security through Time and Labor's groups functionality. For example, you might want your employees to only access their own records, or allow your supervisors who handle all of the time input for have access to specific groups. You can restrict the user from accessing everyone, or allow the user to be able to access only their own records, or only a specific group. This feature also provides the ability for employees to report their own time.

Group Type

An indicator of the activity that created the billing group: billing, maintenance, payment, transfers, or unposted.

H

Handicap Code

A code that identifies a type of physical or mental impairment that substantially limits one or more of an employee's major life activities.

Hazard/Disposal Code

An inventory item group sharing a disposal routine.

Headcount

The number of people represented by a given Employee Survey record in the PeopleSoft Enterprise Performance Management product line.

Health and Safety Executive (HSE)

Health and Safety reporting for your UK operations is sent to the local office of the HSE per the requirements of the RIDDOR (Reporting of Injuries, Diseases, and Dangerous Occurrences Regulations).

Health Benefits Code

An alpha/numeric code that identifies each Health Benefit plan.

Health Benefits Effective Date

Date the health benefit plan goes into effect or the effective date of cancellation.

Hierarchy

Hierarchy refers to the relationship between the levels in a dimension.

Highly Compensated Employee (HCE)

An IRS employee category applied to employees who are considered “highly compensated” according to a federally set standard. This distinction is used for the purposes of nondiscrimination tests, to determine that Section 401 and Section 129 plans do not discriminate in favor of highly compensated employees.

HIPAA

The Health Insurance Portability and Accountability Act of 1996. PeopleSoft Benefits applications enable you to comply with this act, which requires that employers provide Certificates of Group Health Plan Coverage to employees who have their health coverage terminated. This certificate lists group health coverage an employee had for the twelve month period prior to the date coverage ended as a result of termination of coverage. The HIPAA certificate will be used by subsequent health coverage carriers to evaluate pre-existing condition clauses, if applicable.

Historical Periods

In PeopleSoft Demand Planning, a component that indicates the maximum number of periods of historical demand maintained for a **Forecast Item** within a **Forecast View**. Historical periods must be a minimum of two years in order to support the development of seasonal models based on an item's demand history.

Historical Rules

An element used to set up rules that retrieve data from prior periods. Historical rules can be used in formulas and fictitious calculations.

Historical Usage Calculation Method

In PeopleSoft Inventory Planning, a method that defines the set safety stock or minimum inventory level. The usage is based on the review of historical demand over the number of effective periods. The historical demand quantity is determined by one of four methods; maximum possible usage, Lead Time, estimated daily or period use, and static values calculations.

Hold Grade/Step

Grade/step the employee was in prior to receiving a temporary promotion.

Hold Last Equivalent Increase (LEI)

Date held by an employee for this event prior to receiving a temporary promotion. Necessary in order to establish the WGI due date if returning to original grade/step.

Hold Position Description

The new position description number that is the result of a reclassification action prior to the NOA being processed.

Hold Purchase

A flag that tells the system to keep this participant in the purchase process. The hold flag is maintained at the contribution page.

Hold Within Grade Increase (WGI) Due Date

WGI due date prior to an employee receiving a temporary promotion.

Holding Period

Typically refers to the holding period required for ISO's and Qualified Section 423 Purchase Plans, to receive preferential tax treatment on a disposition of shares. See Disqualifying Disposition.

Hours Counting Service

A service calculation that uses actual or generated hours to determine the service credited to a pension plan participant.

Hours Equivalence Service

A service calculation that uses hours to determine service, but that uses a set number of hours per day, week, or other period worked rather than counting actual hours.

HR Action/Reason Category

A group of related job actions—for example, hire and rehire—treated similarly for pension purposes in PeopleSoft Pension Administration.

HRMS Warehouse

See Warehouses.

I

Ignore Plan

Complex event processing feature of PeopleSoft Benefits Administration that enables the user to designate plan types linked to a particular Event Rules/Event Classification combination as being unaffected by Benefits Administration processing.

Ignore Violations

The ability to report over capacity violations but not to score or repair them during the optimization process.

Imputed Income

Theoretical income that a company pays on behalf of an employee but the individual does not actually receive. This “theoretical income” must be added to the employee’s gross wages. In general, imputed income refers to the value of excess Group Term Life or Dependent Life coverage.

In Punch

Indicates start of a shift.

In the Money Option

When the fair market value of the stock is greater than the grant price of an option.

INAIL code

In Italy, the INAIL code is used to classify jobs according to the level of risk associated with the job and the related risk insurance required by the employer. INAIL codes are defined by the employer.

Incentive Pay Plans

In PeopleSoft Workforce Analytics, pay plans that are formula-driven based on the expected results defined at the beginning of a performance cycle. Incentive plans are designed for the individual worker, or for group levels such as teams, business units, divisions, or company-wide. Incentive plans are used for a variety of reasons; including cost control, alignment of employee and shareholder interests, and increased focus on specific performance indicators.

Incentive Plans

Pay plans that are formula-driven based on the expected results defined at the beginning of a performance cycle. Incentive plans can be designed for the individual worker or at group levels such as teams, business units, divisions or company wide.

Incentive Stock Option (ISO)

For an option to be considered an Incentive Stock Option, it must have the following characteristics:

- The option must be granted pursuant to a plan which includes the aggregate number of shares which may be issued under options and the employees (or class of employees) eligible to receive options, and which is approved by the stockholders of the granting corporation within 12 months before or after the date such plan is adopted;
- The option must be granted within 10 years from the date such plan is adopted, or the date such plan is approved by stockholders, whichever is earlier;
- The option is not exercisable after the expiration of 10 years from the date such option is granted;
- The option price is not less than the fair market value of the stock at the time such option is granted;
- The option is not transferable by such individual otherwise than by will or the laws of descent and distribution, and is exercisable, during his lifetime, only by him, and;
- The optionee, at the time the option is granted, does not own stock possessing more than 10% of the total combined voting power of all classes of stock of the employer corporation or of its parent or subsidiary corporation.

Incomplete Punch

A punch that cannot be processed (i.e. missing employee ID, invalid date or time).

Incremental Budgeting

A budgeting option during budget development that uses prior year actual or budget values as a basis and then applies a percentage that increments the base. PeopleSoft Budgeting-specific.

Incumbent

An employee currently assigned to a position.

Indirect Compensation

Typically involves non-cash types of compensation awarded to the individual in exchange for their contribution to the organization. Common types of indirect pay include health and welfare benefits (for example, medical, dental, vision, long-term disability, short-term disability, unemployment insurance), payment for time not worked (for example, holiday, vacation, sick), and employee services and perquisites (for example, club memberships, parking, holiday gifts).

Indirect Cost

A cost that is assigned by management to an activity or a cost object. An example is the cost of office space assigned to an activity.

Individual Occupational Requirements

Requirements, e.g., experience or education, for particular occupational series of positions within a series and are used in conjunction with a group coverage (generic) standard.

Individual Retirement Record (IRR)

Used by the Office of Personnel Management (OPM) as the basic record for determining the retirement benefits payable to separated federal employees and their survivors. Employees covered by the CSRS retirement plan require SF-2806. Employees covered by the FERS retirement plan require SF-3100. In addition, the SF-2806-1 and SF-3101 are used for corrections to the IRR. See also Correction to IRR.

Inherit Control Group Policies

In PeopleSoft Inventory Planning, a feature that controls whether the policy for an item is set explicitly or defaults from the associated **Policy Control Group**. A series of check boxes enable you to define which policies to inherit.

Initial COBRA Events

The event which makes an individual eligible for COBRA coverage. Typical initial COBRA events include loss of benefits eligibility due to termination, reduction in hours, retirement, and military leave, as well as divorce, death of employee, and Medicare entitlement. See COBRA and Secondary COBRA Events.

INSEE (National Institute for Statistical and Economical Studies) Codes

INSEE is an official statistics and economics organization in France. INSEE codes for your French company's organizations are used in regulatory reporting.

INSEE PCS (Classification par Catégorie Socio-Professionnelle) Code

Each PeopleSoft Human Resources French Jobcode is linked to a four-digit INSEE PCS, or social/professional classification code.

In-Service Date

In PeopleSoft Asset Management, the date upon which an asset is placed in service. In-service date is used in conjunction with an asset's prorate convention to determine Begin Depr Date.

Inservice Placement

Includes a noncompetitive action in which a position is filled with a current or former competitive service employee through promotion, reassignment, change to lower grade, transfer, reinstatement, reemployment, or restorations. Inservice placement also includes noncompetitive conversion 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.

J

Java Server Handlers (JSH)

The JSH manages network connectivity, making service requests from the Jolt Repository, and translating Tuxedo buffer data into the Jolt buffer.

Java Station Listeners (JSL)

The JSL handles the work of the client connection, tracking client messages, and session handoff.

Job Code

An ID for a job as defined on the Job Code table.

Job Code Components

The pay components assigned to a job code by associating rate codes with job codes on the Default Compensation page or the Non-Base Compensation page of the Job Code table.

Job Code Cost

Evaluation of salaries for specific job codes.

Job Compensation Rate

The compensation rate of the corresponding job row.

Job Events

Actions relevant to an employee's employment—such as a hire, transfer, or termination—that can affect benefit program or plan eligibility. Used by PeopleSoft Benefits Administration. See Event Class.

Job Order Cost Accounting

A cost accounting method that attempts to develop a discrete cost for each job performed or product produced. Only the material, labor, and overhead required to complete the job are attributed to the job cost.

Joint and Survivor Payment Option

A form of pension payment in which benefits are paid for the life of the participant and a beneficiary. Should the beneficiary outlive the participant, the benefit continues (often in a reduced amount) for the life of the beneficiary.

Joint Staffing Report

In the United Kingdom governmental agencies are required submit the Joint Staffing Report. Although it is mainly designed for government sector organizations, commercial organizations may also use this SQR to provide a summary of their staffing by department, job code, gender and full/part time employment status.

Jolt

A BEA/Tuxedo companion product that runs on an application server domain and is used to listen for Web Client Java requests and transfer them to Tuxedo.

Journal Code

The second highest level of three categories for defining a financial transaction (or document), necessary when using document sequencing. Examples of journal code are domestic sales and export sales. This category is preceded by journal type and followed by document type.

Journal Generator Template

A table containing defaults to be used in journal generation. PeopleSoft Asset Management and Billing require one journal generator template for each transaction type.

Journal Line

A record storing a double-sided, balanced entry for a given journal. A single journal usually includes multiple lines. The sum of the monetary amounts for the journal lines in one journal totals zero (debits = credits).

Journal Template

A list of the characteristics of the general ledger journal entries that will be created from your PeopleSoft Receivables system.

Journal Type

The highest level of three categories for defining a financial transaction (or document), necessary when using document sequencing. Examples of journal types are sales journal and purchase journal. This category is followed by journal code, then document type within the journal code.

Journal Voucher

A PeopleSoft Payables voucher that enables you to make accounting entry modifications while keeping your PeopleSoft General Ledger and Payables systems in sync. Like the adjustment voucher, the journal voucher is linked to an existing voucher.

K

Kanban ID

A unique identifier used to track Kanban cards and replenishment requests when using PeopleSoft Flow Production.

Keep Ledgers in Sync

An option in PeopleSoft General Ledger that defines how a transaction should be posted—to all ledgers in a ledger group as opposed to only a single specified ledger.

Key

See **ChartKey**.

Key

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

Key Performance Indicator (KPI)

KPI is used by the PeopleSoft Performance Management analytical applications. KPIs are high-level measurements of how well an organization is doing in achieving critical success factors. A KPI defines the data value or calculation from the Data Warehouse tables upon which an assessment is determined.

KPI (Key Performance Indicator)

See Key Performance Indicator.

Knowledge, Skills, And Abilities (KSA)

Also known as Competencies, these are attributes required to perform a job and are generally demonstrated through qualifying experience, education, or training. *Knowledge* is a body of information applied directly to the performance of a function. *Skill* is an observable

competence to perform a learned psychomotor act. *Ability* is competence to perform an observable behavior or a behavior that results in an observable product.

L

Labor Costs

Actual expenditures associated with *salary* portion of time reporter expense.

Labor Dilution

A process that occurs after the Labor Distribution process in PeopleSoft Time and Labor. The labor dilution process takes the costs that the payroll system has calculated for payable time, determines an average or rate per hour, and applies the average amount evenly across all reported hours for the day.

Labor Distribution

The process of distributing payroll expense to the corresponding payable time entries generated in PeopleSoft Time and Labor.

Labor Distribution Amount

An actual labor cost associated with reported time.

Last Equivalent Increase (LEI)

Reflects the effective date of the last step received in grade or the last promotion, whichever is most current (does not include QSI). Used as the basis to establish an employee's WGI due date.

Last Physical Counting Event

The last date the inventory item was counted. This information is stored with each inventory item.

Last Purchase Date

The item's most recent purchase date in the inventory business unit.

Last Putaway Date

The item's most recent putaway date in the inventory business unit.

Last Putaway Document Number

The item's most recent putaway document identification number in the inventory business unit.

Last Receiving Date

The item's most recent receipt date in the inventory business unit.

Last Shipping Date

The item's most recent ship date in the inventory business unit.

Last Shipping Document Number

The item's most recent shipping document identification number in the inventory business unit.

Law Enforcement Officers (LEOs)

Positions within the Federal government involving law enforcement. Under FEPCA, many of these positions are entitled to additional special pays.

Lead-Time Estimated Usage

An inventory planning method for calculating historical usage of an item. The historical demand is prorated on a daily basis and then multiplied by the number of days lead time for each effective historical period. The maximum period value is then used as the safety stock or minimum stock level. This method should be used for items that have a steady demand pattern throughout each period.

Lead-Time Period Usage

An inventory planning method for calculating historical usage of an item. The purchase lead time is rounded up to a specified number of periods. The historical demand is calculated as the maximum usage during these periods and the safety stock or minimum-stock level is set to this value.

Leave

Time entitled to an employee as a benefit, such as, Sick, Vacation, STD, and LTD. This process is managed by HRMS (see Time Reporting).

Leave Accrual Processing

Processing of leave accruals is used to maintain employee leave balances. All leave benefit plans accrue leave by length of service or number of hours worked. Leave accrual processing is used to determine the employee's leave accrual award and resulting leave balance.

Leave Accruals

Hours that employees earn to use at another time, such as annual leave and sick leave.

Leave Plan

A method for earning and managing leave time.

Leave Without Pay (LWOP) Total (Cumulative)

An employee's cumulative number of hours of leave without pay (LWOP).

Ledger Group

In PeopleSoft General Ledger, a group of ledgers consisting of one primary ledger andsecondary ledgers.

Ledger Mapping

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

Ledger Template

A table containing records and fields common to all ledgers that ensures that all ledgers specified in a ledger group share the same physical layout.

Ledger Type

The unique combination of a single ledger, scenario, and fiscal year. Multiple ledger types make up a ledger type set.

Ledger Type Set

A collection of ledger types, the members of which will represent the members of your ledger type dimension.

Legend ID

A way of recording information that is displayed upon the Issuance Instruction Report. Can be used to record a notice that should appear on the back of a stock certificate indicating that the shares represented are "Restricted Securities." Can also be used to indicate how shares should be processed, as in the case of Swaps, Trades, Repurchases and SAR Exercises.

Level

A section of a tree that organizes groups of nodes.

Defines a set of **Forecast Item** with a common key structure. Each level is related in a hierarchical definition with other levels in the view. A level definition contains descriptive and control data that relates to the operation of the forecast at each level within the view.

Level

The section of a tree that organizes groups of nodes.

Level Income Payment Option

An annuity form of pension payment in which payments are increased in early years (prior to eligibility for Social Security benefits) and decreased in later years when Social Security benefits are also received. The goal is to provide a relatively constant total retirement income both before and after Social Security eligibility.

Life Profile

In PeopleSoft Demand Planning, a feature that enables you to establish product forecasts based on predefined patterns in an item's life cycle.

Lifecycle (of Reported Time)

A representation of time through the various stages of Time and Labor; includes processing of current, future, and previous period time from scheduling and time capture through Time Administration and distribution.

LIFO (Last In First Out)

Method used by companies to record Disqualifying Disposition Income. If a company uses this method they record the optionees disposition of shares by attributing the shares to the most recent exercise, purchase or release dates for which shares remain available for sale.

Line-Item Budgets

The budget amounts associated with ChartField distributions that make up an organization's budget. Line-item budgets include personnel costs as well as operating and maintenance costs. They also include revenue estimates. PeopleSoft Budgeting-specific.

Line Schedule Editor (LSE)

PeopleSoft Production Planning utility or tool that displays production tasks for multiple products on multiple resources across multiple periods of time.

Literal Mapping

In PeopleSoft Demand Planning, a mapping option for formatting data that is common to all records being imported. This enables you to set an available field value for all the loaded rows.

Load

The feature that initiates a process to automatically load information into a PeopleSoft application—for example, populating the PeopleSoft Benefits database with plan-level election information.

Load Activation

Load Activation enables you to specify exactly which part of your Data Mart to build, including security. You set up load activation on the Load Activation page.

Load Planning

The PeopleSoft Inventory feature that picks, packs, and ships orders by Load ID. Load Planning is also used to estimate shipping weight, volume, and charges.

Loader Table

Any table in PeopleSoft Asset Management used to store load lines before they are loaded into the system as open transactions. The loader tables comprise INTFC_FIN, INTFC_PHY_A, and INTFC_PHY_B.

Loan Exercise

A form of cash exercise, typically requiring a loan agreement and a promissory note.

Local Code

In PeopleSoft Demand Planning, a type of validation used for a user-defined field code. If a user-defined field is marked to require local table validation, **User-Field Code** are used to determine the list of valid values for the field.

Local Functionality

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

Location Accounting

An accounting method that captures and records material movement within the warehouse, providing accounting visibility based on where the inventory resides. You can designate certain **Storage Area** as raw material, WIP, or finished goods by assigning the corresponding account ChartField (account, department, product, and project ID) to the storage area. All inventory locations in a storage area use the storage area account.

Location Code

Locations enable you to indicate the different types of addresses a company has—for example, one to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each of these addresses has a different location number. Every customer role must have a primary location, which will be used throughout the system on all panels that display a customer address. The primary location—indicated by a *1*—is the address you use most often when contacting the customer, and may be different from the customer's main address.

Location Summary

A Picking Plan option that sorts the picking plan according to the highest-level sort options defined and prints the order lines and the total item quantity to pick from each **Storage Location**. Because the layout of the printed report reflects the actual positions of stock to be picked, personnel can follow a serpentine path through the warehouse, fulfilling all orders on the picking plan without revisiting locations.

Lock for Confirm

A flag on the Pay Line record that enables users to access the database 7 days a week, 24 hours a day, without affecting or interrupting payroll processing. Issues a warning message "A payroll is currently in process for this employee. This data will not be processed until the next payroll."

Log file

One way that you can monitor the build process is to review the log files that the build process automatically generates. Keep in mind that the log file is entirely separate from the script file; do not confuse the two. How much information that the log file contains is up to you. You can set up your logging so that all status (both good and bad) appears in the log, or you can specify that just the errors or warnings appear in the log. This section describes the options you can specify in regards to the Build log file.

Long-Term Variable Compensation

In PeopleSoft Workforce Analytics, a component of direct compensation that consists of long-term payments to an employee in the form of stock programs, and deferred compensation.

Lookup Codes

In the financial services industry, these are user-defined codes that enable the system to define and categorize incoming Instrument table information. They also provide a means for you to report on specific data, such as treasury position, balance type, and ledger account.

Lot Status

The status assigned to a lot. In PeopleSoft Inventory, a lot's status can be Hold, Open, Rejected, or Restricted.

Lump Sum

A tax method that determines withholding based on the Canadian Lump-Sum tax table.

Lump Sum Payment Option

A form of pension payment in which some or all of a participant's benefit is paid as a single sum.

Lump Sum Reporting

A Time and Labor process that enables you to report time in a lump sum of hours or units for a single Time Reporting Code, and quantities of time. The system uses a batch process to gather the information you enter, perform edits, and update the daily time tables. The system uses the default assignments you establish for workgroups, taskgroups, shifts and so on.

M

Maintenance Worksheet

A work space for creating write-offs, matches, or adjustments to clean up posted items.

Manage Base Pay Structure

See Base Pay Structure

Manage Compensation Planning

A PeopleSoft Workforce Rewards module that facilitates modeling and analysis of compensation costs across organization units, specific job classifications, or groups. You can focus on the impact of changes to workforce size, or on changes to fixed and variable compensation elements, and determine their effects on current and future payroll costs.

Manage Market Compensation

A PeopleSoft Workforce Rewards module you use to match your company's jobs to similar jobs found in published market compensation surveys. You then calculate a target market rate based on a weighted average from multiple surveys. This market rate is then used to assess your company's gap to market and to perform cost impact analysis.

Manage Retention Planning

A PeopleSoft Workforce Rewards module that enables organizations to analyze the factors that lead to employee turnover, and how retention of key employees affects business performance and goals.

Manual Checks

Any checks calculated and prepared outside of the PeopleSoft Payroll system that you must enter into the system manually.

Manual Count

A PeopleSoft Inventory procedure in which you enter the actual count data and then create the counting event with its header, item records, and count quantities.

Manual Events

Events that are inserted by the user manually through the BAS Activity table. Events are actions that occur, which potentially change employee benefit coverage eligibility—see Event Class for more information. Used by PeopleSoft Benefits Administration.

Manufacturing Cost Element

A particular category of an item's cost. For example, when you produce a subassembly that has a cost of $100, the cost can be broken down further into material costs, labor costs, and overhead costs.

Manufacturing Execution Systems (MES)

Third-party system that enables detailed planning and execution of production activities from production order release to completing finished goods. PeopleSoft Manufacturing integrates to MES.

Manufacturing Task

Any job that can be performed within your manufacturing facility. A manufacturing task is associated with the work center in which the task is completed.

Map File

A file that defines the relationship between fields in a third-party system and PeopleSoft Demand Planning tables.

Mapper Type

This defines whether you are mapping actual or budgeted general ledger line items to resource ID within PeopleSoft Enterprise Performance Management.

Marginal Tax Rate

The tax rate that applies to the next dollar of income generated.

Market Compensation

A compensation review process in which you match your company’s jobs to similar jobs found in published market compensation surveys, for the purpose of establishing new target market rates. Also referred to as Market Based Pricing or Market Analysis.

Market Capitalization

The value of a corporation as determined by the fair market value of its issued and outstanding common stock. It is calculated by multiplying the number of outstanding shares by the current fair market value of a share. Analysts look at market capitalization in relation to book, or accounting, value for an indication of how investor’s value a company’s future prospects.

Market Rate

Compensation rates, usually for regular base compensation or total cash compensation, found in published salary surveys. You use the Market Compensation module in PeopleSoft Workforce Rewards to age and weight this data, to create market rates you can compare against your organization's current pay rates.

Mark-to-Market (MTM) Model

In the financial services industry, the reevaluation of a portfolio's position at current market levels.

Market Variance

A comparison of the difference between an individual's, or group's, actual compensation, and available market compensation data for a comparable population in industry. Market compensation data is usually tied to job codes, and comparisons are usually made between similar jobs. Although the variance to market can be evaluated for any of the compensation components in the Compensation tree hierarchy (such as Total, Direct, or Base), market compensation data is most typically available for, and used in evaluating Base Pay (Base Salary). The main point of reviewing the market variance is to evaluate how well your workforce is paid in comparison to both prevailing compensation in industry, and your own organization's compensation strategy.

Mass Adjustment

A process of applying an amount or percentage change to one or many line item budgets at once. PeopleSoft Budgeting-specific.

Mass Cancellation of Requisitions and Purchase Orders

A utility that allows you to select and cancel groups of requisitions and purchase orders. You can use this utility during the year as well as at year-end in preparation for closing. The utility enables you to specify ChartField criteria for selecting documents for cancellation. For example, you can select all requisitions or purchase orders for a particular fund and organization, which have a remaining balance. Then you may select a subset of those records to approve for cancellation.

Mass Change

A user-configurable entity that defines the movement of data between the tables that store your business information. Mass Changes enable you to define the criteria by which you move or replace data in your tables. Based on the configuration of your system, Mass Change dynamically builds data access and gives you complete control over your system processing.

Mass Change Template

The foundation for defining mass changes. Mass change templates enable you to control which fields will be available for the operator to specify when defining a mass change, and whether those fields will be used as selection criteria or defaults.

Mass Change Type

The building blocks used in defining mass change templates. Mass change types specify which records the resulting mass change will select From the database, alter, and subsequently write back To the database. They also set up system field defaults that run behind the scenes to ensure that this mass change is processed correctly.

Mass Validate Metadata Utility

A PeopleSoft Enterprise Warehouse utility that enables you to validate, but not compile, Metadata objects. Mass Validate certifies all "as of dates" created for Filters, Constraints and DataSets for the specified run date. This utility helps ensure that your Metadata is valid at run time and increases your chance of a successful engine run.

Match

A process in PeopleSoft Workforce Planning, by which the system compares the roles, competencies, and accomplishments in the current competency inventory, with the requirements of a given competency strategy.

Matched Punches

A period between two consecutive punches during which some activity happens measured intervals.

Match-Funding

In the financial services industry, Match Funding refers to funding an asset with a like (term to maturity) liability. This helps an organization apply the appropriate funds transfer price. Although the actual asset might be funded with shorter-term liabilities, it does provide a better measure of financial performance for that asset, such as Risk Adjusted Return on Capital.

Material Costing

An inventory accounting method that assigns a cost to items in inventory. These costs can be assigned equally across all items or tracked individually for each item.

Material Issue

An event that triggers stock fulfillment requests for items in inventory.

Material News

Company news that could be expected to affect the value of a company's securities or influence investors' decisions. Material news includes information regarding corporate events of an unusual and non-recurring nature, news of tender offers, unusually good or bad earnings reports, and a stock split or stock dividend.

Material Release

A PeopleSoft Manufacturing process that—after material has been picked—decrements on hand inventory balances for the inventory storage areas and increments inventory to the WIP

locations defined by the routing or production area. The process also changes the production ID's or production schedule's status from Released to In Process.

MAX Method

See Maximum Method Policy.

Maximum Compensation Hours

The greatest number of hours to be paid for a specified TRC (see Time Reporting).

Maximum Lead-Time Usage

In PeopleSoft Inventory Planning, a policy control value that sets the safety stock level to the maximum quantity required during the lead time. This method is normally used when the demand for an item is low or intermittent but sufficient stock must always be available.

Maximum Method Policy

In PeopleSoft Inventory Planning, a policy that controls the way in which the system determines a reasonable high limit for the maximum inventory level of an item. The system provides warning messages when the inventory level exceeds the maximum level.

Maximum Taxable Wage Base

An annual earnings threshold used for Social Security purposes. Pension plans sometimes provide different levels of pension benefits for earnings above and below the Maximum Taxable Wage Base.

Measure

A measure represents the amounts brought into a cube—the numerical data.

In data warehousing, a Measure is a field type used interchangeably with fact. Measures are types of amounts. Any numeric field you want to apply a Data Manager rule against should be a measure.

Measure ID

In the Define Market Compensation module of PeopleSoft Workforce Rewards, a Measure ID is the identification code for a measure. For market compensation surveys, the Measure ID describes the percentile for each type of pay, as well as the regression statistic type. In PeopleSoft Workforce Analytics, for Benchmark Surveys, the Measure ID describes the type of benchmark.

Measure Value

In PeopleSoft Workforce Rewards, Measure Value is the calculated market rate value from market compensation surveys for a given percentile of a market rate, and for a given scenario and job code. This is the annual rate you compare against the compensation paid for similar jobs in your company. The Measure value can also be the regression statistic value used for

Regressing Market rates. In PeopleSoft Workforce Analytics, for Benchmark Surveys, the Measure Value is the delivered Benchmark Ratio.

Member

A member is the OLAP equivalent of a node or detail value on a PeopleSoft tree. A member is a single item within a dimension, such as a single product name, department ID, or part number. Member names must be unique, even across dimensions. Cube Manager uses the term Dimension Field Mapping to identify members, dimension parents, and label mappings.

Merchant

In PeopleSoft eStore and Mobile Order Management, a level of online (web or wireless device) display and order processing controls set by the seller. See also Merchant Variant.

Merchant Variant

Associated with a user ID, a subordinate level of merchant controls that enable customers to access different variations of the same PeopleSoft eStore website. In PeopleSoft Mobile Order Management, variations are primarily used to differentiate order processing options and fulfillment methods or locations.

Merit Matrix

In PeopleSoft Workforce Analytics, a matrix used to define the amount rules for base compensation increases for your workers. A Merit Matrix provides the salary increase parameters for each review rating in a rating scale. The salary increase parameters are expressed in terms of a percentage. The percentage increase amounts are usually structured to express the company's pay strategy relative to employee performance, and the employee's degree of range penetration in their salary range.

Merit Matrix Increase

In PeopleSoft Workforce Analytics, an increase to an employee's base pay awarded based upon a Merit Matrix.

Message definition

The object definition specified in Application Designer which contains message information for PeopleSoft's Application Messaging system.

Metadata

Information about data. Metadata is the information a database or application stores to describe your business data. At its simplest, metadata defines the structure of a data field—its data type and size, for example. Metadata can also describe more complex data relationships, such as the rollup structure for a chart of accounts. Reporting and analysis tools should be able to use this metadata to let users access data just as they would from within the application, without having to understand how it is stored.

For Enterprise Performance Management, metadata is used to describe the data stored in the PeopleSoft Enterprise Warehouse. There are different types of metadata, for example, TableMaps, DataMaps, and constraints. You typically define these when you set up the warehouse; however, Metadata (particularly constraints and DataMaps) is used to develop business rules that manageaspects 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.

N

National Association of Securities Dealers, Inc. (NASD)

Self-regulatory organization of the securities industry responsible for the regulation of The NASDAQ Stock Market and the over-the-counter markets. The NASD operates under the authority granted it by the 1938 Maloney Act Amendment to the Securities Exchange Act of 1934.

National ID Number

Different countries track some form of National ID for payroll, identification or benefits purposes. For example, German workers are assigned a Social Insurance Number, UK workers have a National Insurance Code, and US laborers have a Social Security Number. Each of these different types of National IDs has unique formatting requirements associated with them as well.

Nature Of Action (NOA) Code

Indicates the type of personnel action being processed.

Nature Of Action Description

Describes the NOA code.

Nature Of Action Effective Date

The date the personnel action is effective.

Negative Amortization

Occurs when a loan payment does not cover the interest due on the loan payment, resulting in an increase of the principal amount.

Net-To-Zero Adjustment

A prior period adjustment where no compensation affecting fields on the pre-existing (original) record are changed by the adjustment.

New Hire Report

In the United States the Personal Responsibility and Work Opportunity Act of 1996 (the so-called Deadbeat Dads law) requires employers to report new hires to specified agencies within a pre-determined number of days from the hire date.

Next Level Item

In PeopleSoft Demand Planning, the **Forecast Item** at the next level that contains the current item as a child. This is the key of the group item at the next level up and is always within the same view.

Next Year

PeopleSoft Benefits term referring to the next open enrollment processing year.

NIC (Numéro Interne de Classement) Code

In France NIC numbers identify the entities inside the same enterprise, and represent an Internal Filing Number.

No Control

A target control that allows the user to submit a budget even if it is not within the planning target and the tolerance levels. The system tracks the budget against the defined planning targets but does not generate any warnings or validations. Users can still compare their planning targets against their budget amounts on the Planning Targets page in Line Item Budgeting.

Node

An individual item on a tree. Nodes summarize detail values or other nodes, and may or may not roll up into other nodes or levels.

Node

A node is a name that you can use to refer to some source of HTML content. In more practical terms, a node is a URI string that defines the database and server to be used when the portal servlet attempts to retrieve content, proxy addresses, and assemble pages.

Non-Base Pay

A pay component not included in the job comp rate calculation. It is used by payroll only in the paysheet calculation. For example, non-base pay can be set up for additional work, holiday pay, bonuses, and so on.

Non-Benchmark Jobs

See Benchmark Jobs.

Noncompetitive Action

An appointment or placement in a position in the competitive service that is not made by selection from an open competitive examination, and that is usually based on current or prior Federal service. A noncompetitive action includes:

- All of the types of actions described under inservice placement, above
- Appointments of non-Federal employees whose public or private enterprise positions brought into the competitive service under Title 5 CFR 316.701; and
- Appointments and conversions to career and career-conditional employment made under special authorities covered in 5 CFR 315, Subpart F.

Nondiscrimination Tests (NDT Tests)

Tests used to help employers ensure that their organization's 401(k), 401(m), and Section 129 dependent care reimbursement plans do not discriminate in favor of highly compensated employees. See Highly Compensated Employees.

Non-Employee

Those workforce resources hired to perform a specific job and/or hired for a specific period of time. Although non-employee time will be entered into Time and Labor for the purposes of managing their Task time, non-employee earnings will not be updated to Payroll and they will not be paid through the Payroll system.

Non-HR Employee [Time and Labor]

An individual employed by the corporation who is administered outside of the PeopleSoft Human Resources system.

Non-Job Event

Actions which result in changes to an employee's personal or demographic information that also affect benefit program and plan eligibility—such as an a state or postal code change, a family status change like a divorce, or a birthdate change. Used by PeopleSoft Benefits Administration. See Event Class.

Non-Productive Time

Any employee scheduled work time spent on tasks (or non-tasks) other than those which the employee was hired to perform. This could include time spent in training, time spent in meetings, travel time, and time spent reporting time.

Non-Qualified Dependent

Dependents such as domestic partners, their children, and other people who do not meet the definition of qualified dependents as presented in IRS Section 152. PeopleSoft Benefits applications enable the creation of benefit programs that offer health and life coverage to non-qualified dependents.

Nonqualified Plan

A plan that doesn't conform to ERISA rules. Employers cannot take a tax deduction for contributions to a nonqualified plan; instead, plan benefits are generally paid directly from the employer's assets.

Nonqualified Stock Option (NQ)

Any option that does not satisfy the conditions of a statutory stock option under the Internal Revenue Code and therefore does not qualify for preferential tax treatment. Generally, companies can design nonqualified options in almost any way they like. Features are:

- The grant price may be less than fair market value (with some exceptions under state law).
- Grants are not limited to employee of the company or subsidiary.
- No taxable income is recognized at the time of grant.
- Options can be granted to anyone (Employees, Consultants and Board of Directors).
- Difference between the fair market value on the date of exercise and the grant price is treated as compensation income.
- In the U.S., withholding tax obligation arises at the time of exercise.
- Company receives a tax deduction equal to the compensation income recognized.

Nontaxable Benefits

Any employer contributions that are not subject to Federal Withholding Tax, such as an employer's portion of a 401(k) plan.

Normal Form of Payment

The payment form associated with the amount calculated by the benefit formula. Pension Administration uses it as a basis for converting to optional forms of payment.

Normal Hours

The hours an employee is normally expected to be at work for any given workweek.

Normal Line Of Promotion (Career Ladder)

The pattern of upward movement from one grade to another for a position or group of positions in an organization.

Normal Retirement Date (NRD)

The date on which an employee is eligible to retire and begin receiving pension benefits. Eligibility for normal retirement is typically based on age only.

Normalized database

A normalized table adheres to certain standards designed to improve the productivity of the database user. Normalization makes the database much more flexible, allowing data to be combined in many different ways.

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

Normalized Loss

In the financial services industry, Normalized Loss is the expected loss on a loan and is netted out of the profit and loss statement for management accounting or profitability measurement purposes. Similar to the bank's loan loss reserve, it enables the institution to analyze and account for expected losses on a more detailed level, by financial product.

Northern Ireland Report

In the United Kingdom the Fair Employment (Northern Ireland) Act of 1989 requires private sector employers with more than 10 employees to submit the Northern Ireland report to the Fair Employment Commission annually. The report indicates the religious composition (referred to as Community Background—Catholic, Protestant, Other) of the workforce, job applicants and appointees.

Not To Exceed (NTE) Date

Types are as follows:

- Appointment NTE Date: Indicates the length of time a person may serve in a position.
- Classification Temporary NTE Date: Established temporary date that is used for a temporary classification of a unique position.
- Hospitalization coverage.
- LWOP NTE Date: NTE date is the last day the employee is in leave without pay status. The employee is scheduled to return to duty the next workday.
- Position NTE Date: Indicates the length of time a position is available for use.
- Promotion NTE Date: Specific NTE Date: Specific time for an increase in grade on a temporary basis.
- Suspension NTE Date: Specific time an employee is to be on suspension. No salary is paid for the period.

nPlosion

A PS/ nVision feature that enables you to expand rows and columns in your spreadsheet to underlying details, as in drilldown.

Numeric constant

Numeric constants are any decimal number used in PeopleCode.

O

Object-Based Modeling

Object-Based modeling technology enables you to create parent and child models. In the PeopleSoft Enterprise Warehouse, you set up such models using the Scenario Manager.

Object reference

An object reference is one that uses the current object. For example, in the case of a component, pages within the component are related objects. The menus that use the component are its object references.

Occupant Of Position/Vice

Indicates new position or former occupant of a position.

Occupational Series Code

Designates a grouping of positions similar in work and qualification requirements. They are designated by a title and four digit number (e.g., the Accounting Series, GS-0510).

Off Date

A specific date that is defined as an off day (see Scheduling).

Off Day

A 24-hour period rounded by daybreaker with no associated shifts (see Scheduling).

Off Day Type

A classification of off days (i.e. holiday, plant shutdown) (see Scheduling).

Off-Cycle Processing

The process of calculating and creating a paycheck for one or more employees aside from the normally-scheduled *(on-cycle*) payroll run for their pay group. You typically use off-cycle payroll processing for employees who are being terminated, new hires who weren't entered into the system in time for the last on-cycle payroll run, and employees who received an incorrect paycheck during a normal on-cycle payroll.

Offer Period

This is the period of time in which an employee’s ESPP share price is determined.

Officer

An insider who sits on the Board of Directors and who is also an employee of the corporation. Examples include CEO, CIO, CTO, CFO, COO, Corporate Secretary, and Treasurer.

Official Forwarding Address

An employee's mailing address following separation.

Official Languages Act (OLA)

Canadian federal institutions are required to report on the official languages used in their departments, in accordance with the Official Languages Act (OLA).

Official Personnel Folder (OPF)

The repository of a Federal employee's official documents related to Personnel history.

Official Personnel Folder (OPF) Address

Indicates the address where the Official Personnel Folder is maintained.

Off-Invoice Discount (OI)

A per unit discount deducted from the customer invoice and given by a manufacturer for promotional activities. Off-invoice discounts can originate from a National Allowance or Customer Promotion, and are passed to PeopleSoft Order Management so the discounts are applied correctly during order entry.

Offset Plan

A pension plan where the benefit formula includes an offset of a portion of the participant's Social Security benefits.

OLAP

Online Analytical Processing. OLAP is the multidimensional analysis of application data, performed interactively. The acronym contrasts with OLTP (Online Transaction Processing), which is what most production business application systems do.

OLTP (Online Transaction Processing)

OLTP refers to the applications that perform the business transactions that keep your company running, such as processing invoices or enrolling employees in benefits programs.

Ontario Employment Equity Commission (OEEC)

The OEEC requires employers in Ontario to complete workforce surveys.

Open Enrollment

The scheduled annual re-enrollment of plan participants into appropriate benefit programs and, within those programs, benefit options.

Open Price

The price at which a security starts a trading day.

Open Season

A time period during which Federal employees are open to re-enroll in a specific benefit plan and option. Open Seasons can be scheduled at varying times throughout the year and multiple Open Seasons can occur concurrently with each other. For FEHB processing, it is generally the time period from mid-November through mid-December. For Thrift Savings Plan (TSP) processing, these are semi-annual and are generally held from May 15 - July 31 and November 15 - January 31. Open seasons for FEGLI are infrequent and special notification from the OPM would be issued to all Federal employees should they occur.

Open Transaction

A transaction that has not yet been processed in PeopleSoft Asset Management.

Operation

In PeopleSoft Manufacturing, a job or task performed in a specified amount of time, done in one work center, and using one or more resources.

Operational Data Store (ODS)

A staging area in PeopleSoft Enterprise Warehouse for source application data and pre-processed data for tables optimized for reporting.

OPF Code

Indicates where the OPF is maintained.

OPM

Office of Personnel Management.

Optimization

In PeopleSoft Demand Planning, the process of evaluating and improving forecast model parameters.

Optimize

The process of creating a new PeopleSoft Planning schedule by repairing the violated constraints in a schedule automatically. The Optimizer can be prioritized for meeting due dates, for minimizing overtime costs, and so on.

Option

A contractual right that gives the individual the option to purchase a specified number of shares of stock through an Equity Compensation Plan. Also known as a grant. Regulatory agencies also refer to an option as the right to purchase stock in an employee stock purchase plan. These options are considered granted on the offering begin date.

Option Adjusted Cost (OAC)

In the financial services industry, the difference in the average expected return between an instrument without embedded options that are otherwise identical to the fully loaded instrument and the instrument fully loaded with embedded options.

Option Adjusted Spread (OAS)

In the financial services industry, the average return expected for an instrument, over the short-term risk-free rate, for all projected interest rate paths generated using Monte Carlo simulation.

Option Types

Types of stock options. PeopleSoft Stock Administration supports the following stock option types. Incentive Stock Options (ISO), Nonqualified Stock Options (NQ), Tandem Incentive Stock Options/Stock Appreciation Right (ISO/SAR), Tandem Nonqualified Stock Option/Stock Appreciation Right (NQ/SAR), Restricted Stock Award (RSA).

Optional Forms of Payment

Any alternative forms of payment available to a participant retiring under a pension plan. These can include: annuity options paid over the participant's (and possibly a beneficiary's) lifetime; certain term options paid over a specified number of years; and lump sum options paid out in a single payment.

Options Outstanding

The total number of option shares held by optionees. It is the number of Grants less the number of Exercises, Cancellations, and Expirations.

Order Group

Order groups link order terms that default into sales orders and quotes when you select an order group code.

Order Line Number

The line associated with an order identification number. The order line identifies an item and the requested quantity.

Order Quantity Policy

In PeopleSoft Inventory Planning, a policy that determines how replenishment order quantities are calculated for an item. For example, you can use a static number, provide upper and lower limits, or use an economic order quantity calculated by the system.

Ordinary Income Tax

An individual's tax on earnings from wages, tips, and all other sources except capital gains. Includes option profits upon exercise of non-statutory options.

Origin ID

A code that identifies the location of a payment deposit in PeopleSoft Billing. Origin ID also distinguishes the method of the payment's entry: online, external, or lock box interface. Billing origin ID identifies the remit to origin for billing. This function is mainly used for specifying where the customer should send payment.

Original Option

A stock option that is eligible for repricing. This option has a grant price greater than the current FMV.

OSHA 200 Occupational Injury and Illness Recordkeeping Log

In the United States this record-keeping logbook meets reporting requirements for reporting occupational injuries and illnesses to the Occupational Safety and Health Administration (OSHA). It lists the case numbers and details of each injury and illness that occurred during a calendar year.

Out Punch

Indicates the end of a shift.

Out-of-the-Money

A term used to describe an employee stock option when the current market price is below the option grant price. When an option is out-of-the-money, it costs more to exercise than the underlying stock is worth. Such options are also described as being "underwater."

Output Result Tables

Refer to the database tables that are populated with information at the end of each pay calculation.

Output VAT

VAT collected on sales or outputs.

Outside Scope of VAT

A transaction determined as not subject to VAT. No VAT code is associated with this type of transaction. The transaction is still logged in the VAT transaction table, but no tax is applied.

Outside The Register Appointment

An appointment in the competitive service made under an agency's applicant supply system because either there is not a sufficient number of eligibles on the appropriate register or no competitor inventory exists. Agencies are also authorized to make temporary limited appointments outside the register at grades GS-12 and below.

Outstanding Option

A stock option that still has unexercised (vested or unvested) uncancelled or unexpired shares. Options with a "pending" status are not included. Only options with a status of 'active' or 'suspended' are considered outstanding.

Overlapping Promotions

Multiple customer promotions related to the same customer, and the same product, at the same time.

Override Rate

Cost per hour or unit reported with time used to replace the time reporter's default rate. (see Time Reporting)

Override text

Text not derived from field descriptions.

P

Package level

The top level of organization is the package level. The package is the entire transaction set file, addressed to your company much as a mail package would be.

Page

A page defined in Application Designer as part of a PeopleSoft Internet Architecture application.

Page Assembly

Page assembly is one of the functions of the portal servlet. Page assembly involves intercepting the user's content request, retrieving the content, and properly formatting it using a pre-defined portal template. To complete the page assembly process, the portal servlet merges content from any HTML documents that it retrieves along with the defined template

HTML. The assembled page is then sent back to the user's web browser as a single HTML document.

Page buffer

Consists of rows of buffer fields that hold data for the various records associated with page controls, including the primary records, related display records, derived/work records, and translate table records.

Pagelet

A page designed to appear on a customized homepage. A pagelet is smaller than the typical page dimensions in many PeopleSoft applications. It can be based on either a page designed in Application Designer or on an iScript.

Paired Punches

Two punches for the same employee in chronological order that exists for the purpose of determining the duration between the punches.

Par Value

The nominal or face value of a security. It establishes a price floor below which shares may not be issued. With common stock, the company issuing the stock sets par value. Par value has no relation to fair market value. Some companies issue no par value stock.

Parallel Processing

In the PeopleSoft Enterprise Warehouse, parallel processing is a system function that "locks in" the information you use for processing. This enables the system to run identical or similar processes at the same time without impacting your results. Running concurrent processes greatly reduces the amount of time it takes to run within the system.

Parent Budget

In commitment control, you can build a hierarchy between different budgets, such as summary and detail budgets. Specifying a relationship of parent and child between a summary and a detail budget for purposes of budget inquiries enables you to retrieve information about either budget through the other.

Parent/Child Models

Object based modeling technology enables you to create parent and child models. In the PeopleSoft Enterprise Warehouse, you set up such models using the Scenario Manager.

Parent node

A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.

Parent Task

A higher-level Planning task in a schedule's hierarchy that drills down into subtasks. Its start time is the start time of its earliest subtask, and its end time is the end time of its latest subtask. Planning tasks are distinct from Manufacturing tasks.

Partial Pay

The pay processed whenever a job record has an effective date in the middle of a pay period. Typically, this happens whenever you hire, terminate, transfer, or change the rate of pay for an employee mid-period.

Participants

Individuals who elect to participate in the stock purchase plan.

Participation

The PeopleSoft Pension Administration function that determines whether an eligible employee has met the plan's rules for joining the plan. Generally, these rules are based on age and service criteria.

Participation ID

In the financial services industry, this is a lookup code used by the financial analytic applications to identify the participants (syndicators) involved in, or responsible for, a financial instrument or group of instruments.

Passive Control

A target control allowing the user to submit a budget even if it is not within the planning target and tolerance rules. The system responds by sending an email to the user of the next budget center level indicating that the budget exceeded planning target tolerance levels.

Passive Events

Events that are initiated by a change that has taken place over time, rather than by a direct data entry action. Events are actions that potentially change benefit coverage eligibility. Examples of passive events include an employee’s reaching the age of retirement. See Event Class for more information.

Pattern Reporting

A Time and Labor process that enables you to report a start and stop date, a pattern of one or several time reporting codes, associated hours, amounts, or units and task information once for an employee. The system transforms the information into instances of daily time for each scheduled employee work day based on the employee’s schedule.

Pay

Types of "pay" are as follows:

- Basic Pay: generally, the total amount of pay received during any one calendar year at the rate fixed by law or administrative action for the position held by the employee or judicial official prior to any deductions and not including any special payments or premium pay.
- Gross Pay: total compensation earned by an employee, annuitant, or survivor of a judicial official prior to any deductions. Includes basic pay plus locality pay; availability pay (if any) for LEOs; special payments (if any); an annuity (if any); plus awards (if any).
- Premium Pay: pay provided to an employee as a regular addition to basic pay (e.g., administratively uncontrollable overtime (AUO), availability pay, overtime, night differential, holiday pay, etc.).

Pay Basis

A code indicating the principal condition in terms of time, procedures or criteria, that serves as a basis for computing an employee's pay.

Pay Calculation

Formula that calculates an employee's gross to net.

Pay Calendar

Payroll processing cycle for a given pay group.

Pay Components.

Rows in the compensation record. They build the compensation packages in the compensation record.

Pay Confirmation

Process in which the system updates all to-date totals on the database for earnings, deductions, and taxes for pay groups assigned to a given Pay Run ID.

Pay Entity

A pay entity is the organization responsible for making payments to payees. You can also use a pay entity to define the type of currency to be used when processing calculations. The pay entity is a legal definition of an organization from a payroll perspective. In many cases, an organization and a pay entity are the same. However, PeopleSoft Global Payroll does not define a relationship between an organization and a pay entity.

Pay Frequency

Defines how often employees in a pay group are paid—weekly, biweekly, monthly, and so on.

Pay Group

A set of employees grouped together for payroll processing. It's a way of "bundling" payees for more efficient processing. A pay group is made of payees that the system processes at the same time during a pay run.

Pay Period

The established time segments for which employees in a pay group are paid. Pay Periods are defined by their beginning and ending dates.

Pay Plan

A code that denotes the pay schedule under which an employee is paid , e.g., JS, UG, UJ, etc.

Pay Slip

Either an actual check or an advice notice of a direct deposit. You build these to match your organization's needs. A pay slip is the details of a payment you've made.

Pay Structure

In PeopleSoft Workforce Analytics, Pay Structure consists of a series of pay ranges or grades, each with a minimum and maximum. You develop pay structures to support and reinforce your company's pay strategy (for example, to target the market 50th percentile).

Payable Date

The date that a corporate distribution, such as a dividend, is payable to the record holders of a corporation's securities.

Payable Time

Time that is ready to be collected by the payroll system (see Time Reporting).

PayCycle

A set of rules that define to PeopleSoft Payables the criteria by which it should select scheduled payments for payment creation.

Payee

Any payroll recipient. A payee can be an employee or a non-employee of an organization.

Payee Process Stat Record

A record created for each payee during the payroll process. The system creates one Process Stat record per payee for each calendar.

Payee Section

Type of section that can be added to a process list. A payee section defines a set of elements that is to be resolved for a particular payee.

Payline

Record containing standard payroll information for an employee, such as the amount of regular pay, number of regular hours, additional pay (if any), and tax information and job data.

Payment Interface

An Application Engine process that loads payment information from the Banks Statement tables and the Staging tables to the Application tables and performs various checking and default operations.

Payment Predictor

PeopleSoft Receivables' automatic cash application feature that pairs open items with unapplied payments based on predefined algorithms.

Payment Schedule

A schedule of payment dates for leased assets.

Payment Selection

A process by which PeopleSoft Payables selects scheduled payments that are eligible to be paid in a pay cycle.

Payment Worksheet

The work space in which open items are paired with unapplied payments.

Payroll Certifying Officer

The individual with the delegated authority for approving all items relating to payroll for those employees under his/her authority.

Payroll Process Tables.

Records holding data necessary to process a payroll, such as employee, company, and tax information.

Paysheets

Repository for the raw data necessary to calculate pay for employees, including earnings, hours, deductions, taxes, and accounting data.

PBGC Rates and PBGC Grading

The interest rates published monthly by the Pension Benefit Guaranty Corporation. There is an "immediate" rate that applies once benefits commence as well as a series of "graded" rates—calculated based on the immediate rate—that are used during the time between benefit determination and a deferred benefit commencement.

Pegged Chain

A method the PeopleSoft Enterprise Planning and Production Planning solvers use to determine feasible plans. The method ties tasks together in order to explicitly record which supplies are being used to satisfy which demands. Through this process, the Planning engine first determines which independent demand has the highest priority. Then, it determines the lateness preference ranking for dependent demand tasks.

Penalty

A user-assigned value for constraints that can be violated, determining how the schedule's score will be calculated. Setting the penalty configures the constraint to your priority. Use the Control Page to assign a higher penalty to violations that are more critical to your schedule or a lower penalty to constraints that you can deal with externally.

Pending Exception

Any known exception to an employee's scheduled workday. Pending Exceptions are future dated (future is defined to be for a date under report beyond the last date of the employee's current pay period).

Pending Item

Information in PeopleSoft Receivables that has been entered in or created by the system, but hasn't yet been posted. During the Receivable Update process, the system uses the pending items to update customer balances—either by creating new items or by adding item activity lines to existing items.

Pending Time

Time that has been reported or is assumed to have been reported (based on employee work schedule and calendar date) that has not been used by the business entity. Pending Time may be for past, current, and future pay periods. It is the label for those time transactions that are waiting to be used by the business (for example, approved and unapproved time not yet updated to Paysheets).

Pension Status

An employee's standing with regard to a particular pension plan. For example, employees can be active participants, terminated deferred vested, or in pay status.

PeopleCode

PeopleSoft's proprietary language; it is executed by the PeopleSoft Application Processor. PeopleCode generates results based upon specific actions, based upon existing data or the

actions of a user. Business Interlink Objects are executed by calling the execute() method from PeopleCode. This makes external services available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode Event

An action that an end-user takes upon an object, usually a Record Field, that is referenced within a PeopleSoft page.

PeopleSoft Activity-Based Management (ABM)

A PeopleSoft Analytic Application that aligns organizational costs with operational activities, enabling a coordinated approach to expense and PeopleSoft Activity-Based Management. PeopleSoft Activity-Based Management identifies and assigns operational activities to products, customers, or services.

PeopleSoft Analytic Applications

These are applications within Enterprise Performance Management (EPM) that help you enrich the data in the PeopleSoft Enterprise Warehouse and perform forward looking simulations and scenarios. These applications include: PeopleSoft Activity-Based Management (ABM), PeopleSoft Asset Liability Management (ALM), PeopleSoft Balanced Scorecard (BSC), PeopleSoft Funds Transfer Pricing (FTP), PeopleSoft Risk Weighted Capital (RWC), and PeopleSoft Workforce Rewards. PeopleSoft Funds Transfer Pricing and PeopleSoft Risk Weighted Capital are applications that target the financial services industry (FSI).

PeopleSoft Asset Liability Management (ALM)

PeopleSoft Asset Liability Management provides financial service institutions with the analytical tools to define, measure, monitor and manage interest rate risk, liquidity risk, options risk, and to some extent exchange rate risk. The primary audience for PeopleSoft Asset Liability Management is the financial institution's Asset/Liability Committee (ALCO).

PeopleSoft Balanced Scorecard (BSC)

PeopleSoft Balanced Scorecard converts an organization's vision and strategy into a comprehensive set of performance and action measures that provide the basis for a strategic management system.

PeopleSoft Budgeting

A budgeting application that is a combination of Education and Government (E&G) Budget Planning and Budgets (commercial). This application resides on the EPM database, primarily using the ODS layer of the PeopleSoft Enterprise Warehouse for its data.

PeopleSoft Business Analysis Modeler (BAM)

A multi-dimensional modeling tool used to support several analytic applications.

PeopleSoft Business Planning

A planning application that enables financial executives to model various alternatives and set corporate financial targets to achieve their strategic goals. PeopleSoft Business Planning integrates with PeopleSoft Analytic Forecasting, PeopleSoft Activity Based Management, PeopleSoft Workforce Analytics, and PeopleSoft Budgeting applications.

PeopleSoft Customer Behavior Modeling

A PeopleSoft application that enables you to: a) create a customer profile by extracting customer data from the Enterprise Warehouse; b) create segments and samples from the profile to efficiently target marketing campaigns and further analyze customer behavior; c) append to it additional data from external sources such as demographic, credit or psychographic information; d) use a data mining tool to create a predictive model; e) score the customers in your profile using the predictive model. You can then publish the results to another transactional application.

PeopleSoft Customer Scorecard

A product that provides a pre-defined set of customer-oriented key performance indicators (KPIs), to help you build a scorecard specific to your organization. This scorecard facilitates the measurement and communication of customer satisfaction, customer activity, and objectives across your organization.

See also PeopleSoft Balanced Scorecard

PeopleSoft Enterprise Performance Management (EPM)

Enterprise Performance Management is a comprehensive, integrated analytic business solution designed to increase the value of organizations by enabling people to make better decisions. The PeopleSoft Enterprise Performance Management product line consists of the PeopleSoft Enterprise Warehouse and optional analytic applications and Data Mart products.

PeopleSoft Enterprise Warehouse (EW)

PeopleSoft's data warehousing solution. The PeopleSoft Enterprise Warehouse provides the tools necessary to query, analyze, and present information to provide the optimal environment for business intelligence. It is the central repository for data that will be used with the analytic applications in the Enterprise Performance Management product line, and can also serve as a standalone data warehouse. The PeopleSoft Enterprise Warehouse consists of dimension, fact, reference, and error tables, reporting and ETL tools (Informatica PowerMart), as well as the Operational Data Store (ODS). The tables in the PeopleSoft Enterprise Warehouse are maintained separately from your transaction-based systems to allow for comprehensive analysis of data originating from any Online Transaction Processing (OLTP) or legacy system.

PeopleSoft Funds Transfer Pricing (FTP)

A PeopleSoft Analytic Application that enables an institution to accurately measure and tune profitability. PeopleSoft Funds Transfer Pricing is an interest rate that represents the value of an asset or liability to the institution. PeopleSoft Funds Transfer Pricing is based on market rates, adjusted for risk and cost variables, specific to the institution. By assigning PeopleSoft Funds Transfer Pricing to each item on the balance sheet, the institution can remove the

effects of interest rate volatility from business units, so that profitability measurements are based on factors within their control, that is, credit quality, pricing and product strategy.

PeopleSoft Operations Data Stores (PODS)

See Data Warehouse Tables

PeopleSoft Marketing Insight

A tool that helps you analyze your marketing campaigns and activities. It helps you determine the effectiveness of marketing events based on factors such as number of leads generated, profiles of respondents, campaign return on investment, and campaign forecasted costs to complete.

PeopleSoft Risk Weighted Capital (RWC)

A PeopleSoft Analytic Application that enables the financial services industry to accurately measure capital that has accounted for risk. RWC allocates capital to various levels within a financial institution according to risk, providing the opportunity to measure performance based on how well each business unit, product, customer, or transaction generates income given its perceived level of risk as quantified by the allocation of capital.

PeopleSoft Sales Activity Insight

A tool that helps you analyze key components of the sales process, such as pipeline status, discount analysis, and sales process.

PeopleSoft Support Insight

A tool that helps you determine the effectiveness of your customer service organization. It helps you answer questions such as: Are we effectively handling customer issues? Has contact center performance changed from last year to this year? Which product quality issues are most prevalent?

PeopleSoft Workforce Analytics (WFA)

PeopleSoft's complete workforce analysis solution, which includes the PeopleSoft Workforce Rewards analytical application and the PeopleSoft Workforce Analysis Insight. The complete solution set includes the PeopleSoft Enterprise Warehouse and PeopleSoft Balanced Scorecard products. It helps to manage strategic employee compensation, goals, and competencies, as well as retention.

PeopleSoft Workforce Rewards

PeopleSoft Workforce Rewards is an analytical application you use to align your workforce compensation and retention initiatives with the strategic objectives of your organization. Modules include Market Compensation, Base Pay Structure, Compensation Planning, Workforce Simulation, and Retention Management. You integrate data from multiple internal and external sources, enrich it using rules you define based on any data in your PeopleSoft Enterprise Warehouse, and simulate multiple scenarios of future workforce compensation and

retention activity. You then analyze and evaluate your scenarios, and make actionable decisions you can communicate back to your PeopleSoft ERP systems for execution.

PeopleSoft Portal

The portal bundled with every PeopleSoft 8 application. It provides a simple navigation system, based on existing menu definitions that have been imported into the portal registry. Navigation to content outside of PeopleSoft applications is not provided.

Percent Cycles Without a Shortage

In PeopleSoft Inventory Planning, a method used with safety stock policies. The value is derived from the percentage of replenishment cycles that will complete without a stockout.

Percent Demand Fill

In PeopleSoft Inventory Planning, a method that can be used with safety stock policies. This method defines the percentage of the total quantity ordered that must be filled without a backorder.

Percentage Tolerance

The acceptable percentage difference between expected cycle count quantities and actual quantities counted in PeopleSoft Inventory. This value provides a margin of error for an item during cycle count reconciliation count quantities.

Performance Appraisal Code

Indicates the level of performance of an employee.

Performance Appraisal Due Date

Date established based on the WGI or LEI for the yearly appraisal of an employee.

Period Closing Offset

In Time and Labor, the closing date beyond which this pay period is not considered current any longer, if the period's closing date is different from its end date. You can enter a positive or negative number of days.

Period Method

In PeopleSoft Inventory Planning, a method used to determine how a single static policy value is to be calculated from time-phased results with static policies.

Period of Interest

The maximum period of time containing the data needed to run all the rules in a rule program (see Batch Processing)

Period Segmentation

When an element (like compensation rate) changes mid-period, requiring all other elements in the process list to be calculated multiple times on either side of the date on which the change took place, period segmentation is used. The system calculates each element more than once, using the components that were effective during the different time slices. The system keeps the results of these calculations separate with the object of creating two gross-to-net result sets.

Periodic Processing

In PeopleSoft Pension Administration, any of several batch processes that a plan administrator must run on a regular basis—for example, consolidation of payroll data.

Personal List

A user-created list of products defined in PeopleSoft eStore, used to quickly populate the shopping cart when creating a new order in either PeopleSoft eStore or Mobile Order Management.

Personal Register (Registre Unique du Personnel)

In France, companies are required to be able to produce, at any given time, a Personal Register. For a given establishment, this report lists current employees and employees who left up to 5 years ago.

Personnel Action

Personnel actions are changes to employee data or status resulting from such activities as promotions, transfers, terminations, salary increases, and leaves of absence.

Personnel Representatives (Délégués du personnel)

In France it is mandatory for companies with more than 11 employees to elect personnel representatives who will represent all of the employees before management.

Perspective

In PeopleSoft Balanced Scorecard, a category for organizing critical success factors and key performance indicators. Usually there are four: financial, customer, internal process, learning and growth.

PF Ledger

The PF Ledger (PF_LEDGER_F00) is an important fact table within the PeopleSoft Enterprise Warehouse. The primary function of the PF Ledger table is to support PeopleSoft Enterprise Performance Management reporting. The data that gets posted to the PF Ledger must be accurate and clean.

PF Business Unit

PF Business Units differ from other PeopleSoft Business Units in that they represent functional or strategic areas of an organization, rather than separate legal entities.

Phase Type

A label for the different phases you want to define for a project. Costs can then be calculated by project phases. Examples include planning, startup, construction, and cleanup.

Physical Accounting

The PeopleSoft Inventory feature that updates tables based on count result input, regardless of how the count was created or the data collected.

Physical Inventory Process

In PeopleSoft Asset Management, the process by which you extract asset data from the Asset Management database to load into your bar code scanning device. You then scan the assets and load the data gathered during the actual physical inventory into Asset Management, enabling you to generate physical inventory results for review. You perform matching and generate transactions to reconcile the data in Asset Management with the results of your physical inventory.

PIA

PeopleSoft Internet Architecture. This is the fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a web server, and a browser.

Piece Work

Method of compensating time reporters based on units completed rather than hours worked

PIN

Technical term for an element. In PeopleSoft Global Payroll, PIN is often referred to in the online object names and within the batch code. PIN stands for Pay Item Name.

Placeholder

A temporary location designator in an engineering bill of material for a component item that has yet to exist. These temporary placeholders have to change into approved items before transferring engineering bills of material (EBOM) to manufacturing bills of material (MBOM).

Plan Administrator

The person selected by the employer to perform the administration of a plan under PeopleSoft Pension Administration.

Plan Eligibility

The PeopleSoft Pension Administration function that uses job data to determine whether an employee may participate in a pension plan. An employee can be eligible based on job data but not be participating because of an unmet service or age requirement.

Plan Type

A unique ranges of codes used during payroll calculation to determine deduction processing rules. See also Benefit Plan Type.

Plan Year

The annual period that a pension plan uses to measure service, earnings, and benefits. Generally, the pension plan year will match the fiscal year of the plan sponsor.

Planning Item

A non-inventory item designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material or planning routing, and can exist as a component on a planning bill of material. A planning item cannot be specified on a production or engineering BOM or routing, nor used as a component in production. Quantity on hand will never be maintained.

Planning Level

The level ona dimension's tree used for planning. Typically, a customer will choose not to plan at the lowest level of available detail, such as the individual product level. Instead, the individual products are mapped to their corresponding product group and the planning is done at the product group level.

Planning Targets

The amount the budget must equal, such as a budget spending limit or cap for expenses where users can not exceed the amount. Planning Targets are presented at a summary level. This term is interchangeable with Spending Limits.

Planning Target Tolerance

The percentage and/or amount a user can be over or under the planned budget target.

Planning Target Control

Values set at the user role level, including no control, active control, and passive control. For more information see no control, active control, and passive control.

Planning Task

Any activity in PeopleSoft Planning that creates a schedule.

PODS (PeopleSoft Operations Data Stores)

See Data Warehouse Tables

POI. Personnel Office Identifier.

Also known as Submitting Office Number (SON). These are codes assigned by the OPM to the office(s) delegated authority within an agency to process personnel actions on Federal employees.

Pointers

A pointer is an "address" of a driver quantity, or value, within the Enterprise Performance Management product line. Pointers are used as a means of defining where driver quantities exist in tables that reside in the PeopleSoft Enterprise Warehouse. Pointers enable you to extract values from any location in the warehouse and then use these values as driver quantities. There are three different kinds of pointers: explicit, implicit, and multidimensional.

Policy Control Group

In PeopleSoft Inventory Planning, a feature for setting up order quantity, safety stock, reorder quantity, and maximum and minimum policies. The **Control Group** is assigned to a set of **Planning Item**. The policies of the associated planning items can be set explicitly or defaulted from the policies on the policy control group.

Policy Generation

In PeopleSoft Inventory Planning, a set of run options used to control the functions and behavior of the Policy Generation program.

Policy Item

An item record which is related to a location and for which **Inventory Policy** is held. A policy set, **Planning Item** ID, and Location ID uniquely identify a policy item. The combination of an item and a location is called a stockkeeping unit.

Policy Set

Defines a set of the items for which **Inventory Policy** is to be calculated. Each policy set is assigned a unique ID and includes information that defines, for example, the associated **Forecast View**, time periods, and planning horizon.

Policy Simulation

In PeopleSoft Inventory Planning, a feature that simulates the effects of various stocking scenarios, compares current policy with simulated policy, and determines the best inventory investment strategy.

Population

A Population is defined on top of DataMaps created using Enterprise Warehouse metadata. The Population builder allows you to easily format a SQL statement, using filters, to select

rows from one or more tables joined together in a DataMap. You can view the results of a Population directly from the browser.

Pop Up Payment Option

A variation on a joint and survivor payment option under which the benefit payable to the participant is increased if the beneficiary should die prior to the participant.

Portal

A portal is a web site that helps you navigate to other web-based applications and content. Users often consider a portal their "entry point"—the place they typically visit first after launching their web browser.

Portal Registry

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

Portal Registry API

The Registry API is provided for accessing each portal registry from PeopleCode, COM, Java, or C programs. Providing the same kind of registry management capability as the online administration pages, it can be used by external systems to update the registry to reflect changes in the content reference URL, taxonomy, and effective dates. The Registry API is fully described in the PeopleCode documentation.

Portal Servlet

A Java servlet that runs on a web server. The portal servlet intercepts user requests for content, retrieves content, and builds a single HTML document to be displayed in the user's browser.

Portal Solutions

Portal Solutions are separate product offerings from PeopleSoft that consist of pre-built, packaged solutions focused at different audiences (customers, suppliers, and employees). Because they are both pre-built, supported application products, Portal Solutions can be deployed swiftly and easily, saving significant resources when compared to other custom-built solutions.

Position

The officially assigned duties and responsibilities that make up the work performed by an employee. Positions are linked to Job Codes, which can be considered the electronic version of the Position Description. There can be a many-to-one relationship between the Position and Job Code.

Position Budgeting

The budget amounts (salary, benefits, and earnings) associated with positions within an organization. Position budgeting can be calculated based on position information loaded from a human resource system. Position budgets are used to generate line-item budgets for personnel costs. PeopleSoft Budgeting-specific.

Position Change

A move by an employee to another position during the employee's continuous service under the same appointment within the same agency.

Position Date Created

Date the position was created for use in the agency.

Position Description (PD)

In accordance with OPM guidelines, an official description, authorized and approved by an agency official, describing duties and responsibilities to be performed. Position classification standards are used to describe the work, classify the work components by occupational series, and factors (e.g. supervisory control, scope, complexity, competencies required) are used to determine the grade level (i.e., salary range) for the position.

Position Description Number

A number assigned to identify various types of Position Descriptions.

Position Description Required

Identifies those positions for which a position description must be maintained.

Position Number

A number that identifies an authorized Position.

Positive Input

Data such as hours worked or a bonus amount entered for elements that change each pay period. Positive input can be entered manually, generated by the system, or received from other applications.

Positive Task Reporting

A method of time reporting in which all required task elements must be provided (see Time Reporting)

Positive Time Reporting

A method of time reporting in which all elements of time must be provided (see Time Reporting)

Post Differential Percent

Additional compensation that may be paid to certain employees who work in Guam or the Northern Mariana Islands.

Post Differential, Non-Foreign

A differential payable to an employee at a location in a non-foreign area if conditions of environment differ substantially from conditions of environment in the contiguous United States and warrant its payment as a recruitment incentive.

Post-56 Military Deposit

The OPM provides guidelines to Federal agencies on how to calculate and process these voluntary employee deductions from pay toward the employee's current retirement fund for those periods of eligible military service.

Posting

In PeopleSoft the process by which accounting entries are created or updated based on user transaction input and accounting entry templates. In PeopleSoft Receivables, posting is also known as Receivable Update.

These posted accounting entries in the feeder systems,such as accounts receivable or accounts payable, must be further processed by the Journal Generator to create journal entries before posting to the General Ledger occurs.

Post-Tax Deductions

See After-Tax Deductions

Pre-encumbrance

An encumbrance that occurs before an employee/employer relationship exists. You encumber funds for an employee you have on staff; you pre-encumber funds for an employee that you anticipate hiring. For example, you would pre-encumber funds for a new position that has just been approved but not filled.

Pre-encumbrance Ledger

Stores pre-encumbrance amounts. Updated by posting pre-encumbrances, such as purchase- or hiring-requisition source transactions (including journal entries).

Premium

Any additional compensation for extra hours worked, often expressed in terms of factor-above-normal-per-hour pay, such as time and a half (where one-half is premium pay), double time or triple time. Also, any additional pay provided to a time reporter based on compensation rules (see Time Administration in your *PeopleSoft Time and Labor* PeopleBook).

Prenote

A prenotification or waiting period requested by banks before processing payroll direct deposits.

Pre-Retirement Survivor Annuity (PRSA)

A benefit paid to a beneficiary if a pension plan participant dies before commencing benefits. Qualified plans must offer a pre-retirement survivor annuity, although the employee can be required to pay for the coverage with a reduction in the benefit.

Pre-Tax Deductions

See Before-Tax Deductions

Previous Day's Close

The previous trading day's last reported trade.

Price Break

Defined in PeopleSoft Order Management, and linked with price sets, a price break defines the actual adjustments that are made to the list price. They are valid only within a time frame you establish.

Price Rule

Used in conjunction with price sets, rules are essentially a decision tree that establishes the search order the system uses in reviewing sets for a match on the variables they reference for price adjustments.

Price Set

Linked with price breaks, a price set specifies the parameters for your price adjustment. It establishes selection criteria, determines whether the break is based on quantity or price, and defines how the adjustment is applied.

Price Source

A service provider or publication that reports the trading activity for a stock traded on stock exchanges. Examples include Wall Street Journal and Bloomberg.

Primary event code

Primary event codes, also called purpose codes, specify the status of the transaction: whether it's a new transaction, a cancellation, a duplicate, a status request, and so on. Every transaction has a primary event code assigned to it.

Primary Insurance Amount (PIA)

The benefit amount calculated under the Social Security benefit formula.

Primary scroll record

Primary scroll records are the principal SQL table or view associated with a page scroll level. A primary scroll record uniquely identifies a scroll level in the context of its page: each scroll level can have only one primary scroll record; and the same primary scroll record cannot occur on more than one scroll at the same level of the page.

Prior Period

In Time and Labor, any payroll period before the current one.

Prior Period Adjustment

A change or correction to previously reported time or task information, or an insertion of time or task information. Often requires the original report to be offset (reversed) and the correct information to be recorded. (see Time Reporting)

Priority Rank

The numeric value assigned to inventory **Demand Priority Rules**. The lower the number, the higher priority of the rule and the orders matching that rule.

Private

A tracking method used by a privately held company to track their daily prices. The Board of Directors typically establishes a price for a period of time. Stock of a privately held company is not traded on an exchange.

Private Views

User-defined views available only to the user who created them. For more information, *see* Budget Views.

Process

See Batch Processes.

Process Definition

Process Definitions are created in the Process Scheduler Manager pages to define each specific run request. A Process Definition is comprised of a variety of variables including panels associated with a request, Process Groups, output parameters, run locations, and many more.

Process Group

Used to associate specific Process Definitions with a Class Profile in Security Administrator. This allows administrators to restrict an operator's ability to initiate requests.

Process Instance

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

Process Job

Multiple Process Definitions can be logically linked into a job request to process each request serially or in parallel, and optionally initiate subsequent processes based on the return code from each prior request.

Process List

The set of instructions the system uses during a payroll process to determine which elements to resolve. A process list is comprised of sections that identify the sets of elements to be resolved. You build process lists and attach them to calendars.

Process List Manager

The program used during batch processing that reads the Process List and calls the PIN Manager to resolve elements on the list.

Process Request

A single "run request," such as an SQR, a COBOL program, or a Crystal report that you run through Process Scheduler.

Process Run Control

A PeopleTools variable used to retain Process Scheduler-defined values needed at runtime for all requests referencing a run control ID. This is not to be confused with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

Process Scheduler

A PeopleTool that performs tasks behind the scenes of your application. It can run several kinds of processes, such as COBOL, SQR, and Application Engine programs. You can schedule processes to run on a regular schedule or at your request. Processes can run on your workstation or on a server.

Process Scheduler Server Agent

The server-based program (PTPUPRCS) that manages the selection, validation, and initiation of all queued requests for each defined server within your batch environment (Process Scheduler).

Process Type

A global process definition under which related process definitions are grouped. This allows for easy maintenance of Process Definitions that share common parameters.

Processing group

In order to partition application processing between the client and the application server, it is necessary to define units that, as a whole, run in one location or the other. We call these units processing groups.

Processing groups can encompass one or more PeopleCode events. Some processing groups can run either on the client or on the application server, such as Component Build and Component Save.

Product

A commodity primarily defined in PeopleSoft Order Management. It may be: 1) The Order Management view of an inventory item that has attributes the same as or different from those of its inventory counterpart. 2) A commodity that is not a stocked inventory item such as a product kit or a service. 3) A tangible commodity that is drop shipped from another vendor and is never stocked in inventory.

Product Alternate

Alternative products that can replace the product ordered when it's out of stock or a problem with a particular product temporarily prevents shipment.

Product Catalog

A configurable list of available products that may be of interest to a specific customer. You can create two types of catalogs—inclusive catalogs that contain all the products you want made available to a customer and exclusive catalogs that contain the products you want to withhold from your customer. By attaching product catalogs to a Sold To customer, you define the products they can buy.

Product Definitions

This support module describes how other support modules process the instruments that belong to a particular product. For example, different products have different cash flow characteristics and may be stratified differently, or may react differently to changes in interest rates. This module enables you to specify each of these actions for each instrument.

Product Kit

A commodity that consists of a fixed set of components that are sold together. It appears as a single line on an order, but is represented by multiple lines on shipping documents. Product kits may comprise inventory items, non-stockable products, or a combination of both.

Product Kit Component

A commodity that is part of a product kit. It may be an inventory item or a non-stockable product such as a service.

Product Pricing Model

In the financial services industry, this defines models that describe indices upon which future rates are paid or charged for an individual product.

Product Tree

A user-defined graphical representation of a company's product structure. A product tree defines how products are promoted and determines what users have authority to promote those products.

Production Maintenance Spreadsheets

A set of spreadsheets generated by an nVision process, containing production ID and production schedule data extracted from PeopleSoft Production Management. You can add and maintain production quantity data using these spreadsheets and then import the data back to Production Management.

Production Option

Effective-dated combinations of BOM codes and routing codes. You can create multiple effective-dated BOM code/routing code combinations (or production options) for an item. These combinations can be extracted to PeopleSoft Production Planning. They enable the specification of multiple production variations for an item and provide control of seasonal variations by effective date.

Production Option Cost

A cost based on a specific BOM/routing combination (also known as a production option). The Production Option Cost utility rolls up production options costs based on specific BOM/routing combinations, enabling you to cost individual production options and later to have the DataLink pass this cost to the Planning engine. If this utility isn't run, the Planning engine will use the standard item cost based solely on the primary BOM and routing instead.

Productive Time

Employee scheduled time spent performing any task for which a position was created; work performed on behalf of a business entity that is required for that entity to fulfill its business purpose. Employees doing the work they or someone else was hired to do.

Productive Unit

In Italy employers organize employees into productive units based on agreements between the unions and the employer.

Profile

A data set that you aggregate from the Enterprise Warehouse, according to the filters you specify, the Key Performance Indicators you select, and the 3rd party demographic data you include.

Profile Factor

In PeopleSoft Demand Planning, the weight index assigned to each **Forecast Period** to take into account seasonal fluctuations in demand. The factor or index typically measures the percentage of difference between the base demand and the expected actual demand in the period.

Profiles

Group of employees defined according to a list of job codes and departments. You can use these profiles to ascertain training demands within your organization based on set criteria.

Profit Manager

The Profit Manager is a set of integrated tools that enable true profitability reporting. Profit Manager features are tightly integrated with the PeopleSoft Analytic Applications and provide you with ways to ensure data integrity, edit data, and post data to the Performance Ledger table.

Project

The highest level of hierarchical organization within PeopleSoft Projects. Projects provide the structure to which activities and resources are added. Each node on a Projects tree represents a project. Projects can contain other projects as well as activities and resources. This provides a hierarchical relationship between projects and facilitates cost roll-ups.

In Enterprise Performance Management you use a Project to create or modify a Profile. A Project contains pointers to data elements that you include in a Profile.

Project

In PeopleSoft Time and Labor, a specific endeavor undertaken to achieve a specific goal. Typically, projects are approved and undertaken with level of cost, schedule, and performance already agreed upon. A project is composed of a set of tasks, each of which requires staffing, provisioning, and/or scheduling. Project progress is often measured in terms of task completion.

Project ID

The name or number by which a project is to be identified in all tables and pages.

Project Type

A user-definable grouping of projects. Project types are optional.

Projected Run Date

In PeopleSoft Demand Planning, a calculation made that projects a life volume for a period based on a calculated run rate or performance ratio.

Projection.

An estimated pension benefit calculated as of a future date or any estimated data used as the basis for such a calculation.

Promotion

- For positions under the same type job classification system and pay schedule, a promotion changes the employee to a higher grade level or makes permanent a Promotion NTE;
- When the old and new positions are under different job classification systems and pay schedules, a promotion changes the employee to a position with a higher rate of basic pay or makes permanent a Promotion NTE.

Promotion Pattern

In PeopleSoft Demand Planning, an **Event** function that enables you to apply weights to promotions across a range of **Forecast Period**.

Prompting Profile

A task profile usually used by account managers as a way of creating task profiles for employees who report task time differently by customer. For example, you might have an account manager who has fifty customers; when the account manager comes in each day to report time, the system will display all the customers, and indicate which customers it will use as a default if she doesn't manually report time.

Prorated

In Enterprise Planning and Simulation, prorated is when the computed forecast and the summarized forecast are two different versions of the statistical forecast. In addition, the forecast at the product family level can be allocated down to the individual products. Usually this allocation is done in proportion to the calculated product forecasts at that level. This version of the (statistical) forecast is called the allocated or prorated statistical forecast.

Pro-Rate Purchase

A purchase in which the number of shares to be purchased is prorated according to a specified factor. This may occur when the total number of shares to be purchased is greater than the number of shares allocated to the stock plan from the treasury.

Prorated Forecast

In PeopleSoft Demand Planning, a forecast developed by factoring the group forecast down one level at a time to make the sum of the item forecast equal to the aggregate forecast. The prorated forecast tends to be more accurate than the **Statistical Forecast**.

Proration Rule

Element that defines how you want to prorate an item. You use proration rules in numerous places—for instance you could prorate an earning, deduction, or many of the elements that make up an earning or deduction.

Proration Threshold Ratios

In PeopleSoft Demand Planning, the upper and lower ratios used as thresholds for **Reasonableness** checks when a forecast is developed using proration.

Provider

An entity, such as an insurance company, that provides one or more of the benefits your company offers. For example, Metropolitan Life Insurance Company is a provider to companies that use a Metropolitan life plan.

Proxy Person

A highly compensated executive. Corporations must include information regarding the most highly compensated executive officers in their proxy reporting.

Proxy Statement

The document that must accompany a solicitation of proxy appointment under SEC regulations. The purpose of a proxy statement is to provide shareholders with the appropriate information to make an intelligent decision.

PSADMIN

A PeopleSoft utility providing a menu interface to create, configure and administer application server domains and the Process Scheduler Server Agent (Batch Server).

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A PeopleSoft utility providing a menu interface to create, configure and administer application server domains and the Process Scheduler Server Agent (Batch Server).

PSAPPSRV

PSAPPSRV is the main server process running within a domain. PSSAPPSRV performs the functional requests, such as building and loading components. It also manages the memory and disk-caching for PeopleTools objects on the application server. Each PSAPPSRV process maintains its own memory and disk cache.

It provides authentication services for incoming users. For instance, it checks the PeopleSoft OPRID against the directory server or PSOPRDEFN table.

PSQCKSRV

Essentially, PSQCKSRV is a copy of the PSAPPSRV. It performs quick, read-only SQL requests. It is an optional Server Process designed to improve performance by handling items in the PSAPPSRV transaction request queue.

PSQRYSRV

Like the PSQCKSRV server process, PSQRYSRV is designed to alleviate the workload of PSAPPSRV. PSQRYSRV is designed to specifically handle all user-generated queries submitted by PeopleSoft Query (PSQED.EXE). This server process is designed to improve overall application server performance whether or not you have PSQCKSRV configured. It is specifically, and exclusively designed to process PeopleSoft Query transactions, which can be very SQL intensive.

PSSAMSRV

It processes conversational SQL transactions primarily for Application Designer.

Public Company

A company that has held an initial public offering and whose shares are traded on a stock exchange or in the over-the-counter market. Public companies are subject to periodic filing and other obligations under the federal securities laws.

Public Views

Coordinator-defined views, available to anyone using the application. For more information, *see* Budget Views.

Publish/Subscribe

Publish/Subscribe type messaging is performed with PeopleTools Application Messaging technology. You can send data from one PeopleSoft system to another in an asynchronous mode—meaning the two systems don't have to be sending and receiving at the same time. This is possible because the message transfer is accomplished through a Web server with an "http: gateway."

Pull List

Similar to a pick list, a pull list contains multiple replenishment requests, including the location, quantity, and item quantity required in a specific sorting sequence. You use pull lists in PeopleSoft Flow Production with Inventory replenishment.

Pull Ticket

A document containing the details of a single request replenishment request, including Kanban ID, item, quantity, source, and To locations. You use pull tickets in PeopleSoft Flow Production with Inventory replenishment.

Punch

Precise instances of date and time recorded for a user and measured in seconds, minutes, hours, day, month and year and time zone (see Time Reporting)

Punch Duration

Length of time between two punches in increments of hours or partial hours (see Time Reporting)

Punch Matching

Area of the application which converts paired punches to punch duration by processing rounding rules and assigning the tasks to the appropriate logical day based on rules established by the user

Punch Restriction

The facility to constrain a time reporter's ability to create a punch that deviates from the schedule (see Time Reporting)

Punch Type

A user defined classification of punches, i.e. In, Out, Start, Stop (see Time Reporting)

Purchase

The issuance or purchase of shares through a stock purchase program. The purchase is made using current contributions from a participant and any carry-forward remaining for the participant from previous purchases.

Purchase Price

The discounted price paid for the shares at the end of a purchase period.

Purchase Price Variance

A PeopleSoft Payables matching feature that compares purchase order and inventory prices for any variance in the prices.

Purge Rules

The rules that define criteria to clear data you no longer need from previous open enrollment processing cycles in PeopleSoft Benefits Administration.

Pyramiding

A computer calculation enabling an individual owner of one share of stock to use the stock-swap technique to exercise a stock option of any size without using cash. Not many corporations permit pyramiding.

Q

QDRO

See Qualified Domestic Relations Order.

QDRO Alternate Payee

A former spouse who is entitled to a portion of a participant's pension benefits as a result of a court order.

QJSA (Qualified Joint and Survivor Annuity)

A post-retirement death benefit for a spouse. Plans subject to this requirement must provide an annuity for the life of the participant with a survivor annuity for the life of the participant's spouse.

QMCSO (Qualified Medical Child Support Order)

A QMCSO is a court order that requires a group health care plan to provide benefits to the child of a participant as part of a child support arrangement on the behalf of that participant. Base Benefits enables the tracking of QMCSOs for dependents.

Qualified Domestic Relations Order (QDRO)

A court order ordering a division of a participant's pension benefits. This is normally the result of a divorce and gives a portion of the pension benefits to the former spouse.

Qualified Plan

A pension plan for which the employer can take tax deductions for contributions to the plan. Investment income of the plan trust fund is not taxable to the employer. Tax law places restrictions on the plan rules.

Qualifying Dispositions

A transaction whereby a participant sells shares acquired through a stock purchase plan two years after the grant date and one year after the purchase date.

Quality Function

A level of configuration that enables you to define the fields and attendant information that provides a base level for inspection plan and integration. Quality functions enable you to map process-specific field information into PeopleSoft Quality for identification, tracking, and analysis.

Quality Ranking Factors

Knowledge, skills, and abilities that could be expected to enhance significantly performance in a position, but are not essential for satisfactory performance. Applicants who possess such

KSAs may be ranked above those who do not, but no one may be rated ineligible solely for failure to possess such KSAs.

Quality Server

A PeopleTools-based analysis and graphing program.

Quality Step Increase (QSI)

A step increase awarded to an employee for sustained high quality performance.

Quantity Allocation Method

In PeopleSoft Inventory, the method used to determine how available quantity will be allocated to prioritized demand lines when using the online reservations page.

Quantity Precision Rules

A set of rules specifying whether item quantities for a given unit of measure are expressed as whole numbers or as decimals. Quantity precision is set at the inventory **SetID** and item-UOM levels.

Query

A set of data members that are selected from a Class catalog (provided by the Business Interlink Plug-in) as well as a generic form of Criteria. The criteria are composed of <left-hand-side> <Relational Operator> <right-hand-side> statements that can be concatenated using a set of logical operators. All operators and class catalogs are dynamically provided through the Business Interlink Plug-in.

R

Race And National Origin Code

A code that identifies the employee's basic racial and national origin category.

Range of Dates Reporting

A Time and Labor process that enables you to report a start and stop date, a time reporting code and task information for a single employee. The system transforms the information into instances of daily time based on the employee's schedule or default work schedule, replacing the scheduled time with the entered Time Reporting code and the number of scheduled hours on a day-to-day basis.

Range Penetration

In PeopleSoft Workforce Analytics, Range Penetration is the degree to which an employee's actual pay has progressed through their salary grade, and is expressed as a percentage. The calculation is:

Range penetration = (Employee Base Pay – Range Minimum)/(Range Maximum – Range Minimum).

Range Width

In PeopleSoft Workforce Analytics, the difference between the maximum and the minimum values of the pay range calculated using the following formula (and expressed as a percentage):

(Maximum – Minimum)/Minimum.

Rapid Time Entry

The process that enables you to enter daily time for single employees without the system editing your field entries. The system populates temporary tables, which are used by a batch process that reads, edits and moves the data into the appropriate time and labor tables. You cannot prompt for valid values in any of the fields, and the online system does not edit any of the data you enter against other tables.

Rate Code

Alphanumeric reference to the cost per hour or unit of time reported to a specific TRC.

Rate Code [Global Payroll]

IDs for pay components. Rate codes define rates of pay and are set up in the Comp Rate Code table. Rate codes are then used to represent pay components in pages and when you configure compensation packages in the compensation record.

Rate Code Group

A rate code group is a number of pay components (represented by rate codes) bundled into a subset of a compensation package. The rate code group is used to calculate percentage-based components that do not apply the percentage to all pay components in the compensation package. Rate code groups are constructed on the Rate Code Groups page.

Rate Code Type

Defines how the monetary value of the rate code is calculated. The compensation rate code type is defined on the Comp Rate Code table. Valid values are Flat Amount, Hourly Rate + Flat Amount, Hourly Rate, Percent, and Points.

Rate Combinations

The combination of rate types and conversion rates with account types that is linked to your budgeting model. Typical rate types are current, commercial, floating, average, and historical. Effective dates define different rates for different budget periods. There are several conversion rates for any pair of currencies including not only the current rate, but others rates such as average, historical, asking, and so on. These different types of rates are appropriate for different types of accounts.

Rates

The arrays of values used to calculate the cost of a plan to an employee. Rates can be age-graded, service-related, or general, depending upon the benefit plan type. Any number of benefit program and benefit plan combinations can use each set of rates.

In Enterprise Performance Management, a rate is determined by the user and specifies the dollar amounts to be calculated for each model. This is a financial services industry term.

Rating Model

The scale used by your company to measure competency proficiency. The default rating model is the PSCM (PeopleSoft Competency Management) Rating Model that PeopleSoft delivers with your PeopleSoft Human Resources System.

Raw Punches

See Actual Punch; typically this is distinguished from a rounded punch (see Time Reporting)

Reason Code

Reason Codes provide explanations for occurrences such as returned stock and changes to order headers, lines, or schedules.

Reason Code

A code describing employee time such as comments for sick time or travel time.

Reasonableness

In PeopleSoft Demand Planning, a technique that checks the trend and projected annual growth to make sure that a forecast is realistic. If a forecast falls outside either boundary, the system automatically adjusts it and sends a warning message.

Reassignment

Change of an employee from one position to another without promotion or change to lower grade.

Recalculate Forecast

In PeopleSoft Demand Planning, a forecasting feature that uses the existing model and its associated parameters to create a new forecast.

Recalculate VAT at Payment

Allows the VAT amount to be adjusted at the time of payment if an early payment discount is taken. This calculation option is only valid when VAT is calculated at Gross.

Receipt Cost Method

Determines how you cost receipts. Receipt cost methods include Actual, Non-Cost, and Standard.

Receipt Line

A line associated with a Receipt ID that identifies an item and quantity. If the respective tracking is activated, the lot, lot suffix, and serial number are also identified.

Receivable Update

See **Posting**

Receivables Item

An individual receivable. An item can be an invoice, credit memo, or debit memo. Items and payments combined comprise a customer's balance.

Reconciliation

Within PeopleSoft Enterprise Performance Management, reconciliation differs slightly when it is performed within the PeopleSoft Enterprise Warehouse and when it is performed within the PeopleSoft Analytic Applications.

In PeopleSoft Funds Transfer Pricing (FTP) and PeopleSoft Risk Weighted Capital (RWC), reconciliation identifies differences between Performance Ledger balances and the instrument or position balances, which are risk weighted according to the basis rules you have assigned. The first step in reconciling basis rule balances is to reconcile the individual balances for accounts, instruments, and positions. Reconciling the total balances is the second step. This means that you reconcile the difference between Account/Instrument balances, and the difference between Account/Position balances.

In the PeopleSoft Enterprise Warehouse, reconciliation is a period-end process that posts journal entries to the Performance Ledger for the discrepancies found when you reconciled the individual balances. Typically, you'll run the PF Reconciliation engine after a period to compare "to and from amounts" between tables such as REVENUE_F00 and PF_LEDGER, or the GL_LEDGER and the PF-LEDGER.

Record Date

The date a stockholder must officially own shares in order to vote at the meeting or to derive an adjustment resulting from a stock split or a stock dividend. The Board of Directors sets the Record Date.

Record Definition

A logical grouping of data elements.

Record field

Once a field is inserted into a record definition it becomes known as a Record Field within the record.

Record Group

A set of logically and functionally related control tables and views. Record groups exist for two basic reasons:

- To save you time—with Record Groups, TableSet sharing can be accomplished quickly and easily, eliminating an enormous amount of redundant data entry
- To act as a safety net—Record Groups ensure that that TableSet sharing is applied consistently across all related tables and views in your system.

Record Input VAT Flag

Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the Record Output VAT Flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is being tracked on a transaction, this flag is always set to Yes. This flag is not used in Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in Employee Expenses, where it is assumed that you are always recording only input VAT.

Record Output VAT Flag

For certain transactions within PeopleSoft Purchasing, Payables, and General Ledger, it may be necessary to record both input VAT and output VAT on the same transaction. Generally, this would be a situation where the purchaser was required to self-assess VAT. Within these situations, this flag indicates that you are recording output VAT on the transaction. This flag, in conjunction with the Record Input VAT Flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. This flag is not used in Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in Employee Expenses, where it is assumed that you are always recording only input VAT.

Record Owner

The "Stockholder of Record" of the stock. This may be different from the "Beneficial Owner" of the stock.

Record Suites

Record suites are temporary tables that enable the system to track how many processes are running. These temporary tables leave the fact tables accessible for processing other jobs simultaneously without impacting your processing.

Reduction In Force (RIF)

Method used to reduce the number of government workers in an agency.

Reemployed Annuitant

An employee who has retired from Federal employment and is receiving an annuity. His/her salary is reduced by the amount of the annuity.

Reference Designators

A user-defined alphanumeric identifier that determines where a component is placed in an assembly.

Reference Transaction

In People Soft commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

Referential Integrity

Issues that occur when an update to an instance of one object invalidates one or more instances in a related object. In other words, when you make a change to one area of the application, referential integrity makes sure the changes do not adversely affect another area of the application.

Refresh Time

The process that retrieves the appropriate current version of objects related to employee time (such as task profiles or work schedules) and associates them with that time.

Region Codes

Regions may or may not be physical entities, they may simply be another way to geographically categorize an area. When a region does represent a physical entity, the region code has the same characteristics as a business, that is, an address and a language spoken.

Register of Separations and Transfers (ROST)

The ROST is a regulatory compliance document used by federal agencies to summarize the information in an employee's Individual Retirement Record (IRR). The ROST is a one-page cover sheet that accompanies a batch of IRRs being submitted to the Office of Personnel Management (OPM) at the time of an employee's separation from a federal agency. Employees covered by the CSRS retirement plan require SF-2807. Employees covered by the FERS retirement plan require SF-3103.

Registration

The name or names that appear on the stock certificate to indicate who owns the stock.

Registration Statement

The document that must be filed to permit registration of an issue of securities under the Securities Act of 1933. A major component of the registration statement is the prospectus that is to be supplied to prospective purchasers of securities.

Regression Analysis

A statistical technique that determines the relationship between two or more variables. Regression predicts the value of one variable (the dependent variable) based on one or more independent variables.

Regular Base Compensation

In PeopleSoft Workforce Analytics, the annualized, quoted, compensation rate for a job. Consists of fixed compensation, does not include variable compensation.

Regular Time

An employee's normal (scheduled/shift) work hours.

Regular Time

In PeopleSoft Workforce Analytics, an employee's normal (scheduled/shift) work hours.

Regulation T

Federal Reserve Board regulations governing the extension of credit by brokers or dealers, including their participation in same-day sale transactions and sell to cover exercise.

Regulatory Region

The Regulatory Region functionality in PeopleSoft HRMS is designed for use in performing regulatory and regional edits. You'll use Regulatory Region to drive PeopleCode edits, perform set processing, and control what codes and values the operator sees. A Regulatory Region can be any country (or province or state) where there are specific laws and regulations addressed by functionality in PeopleSoft HRMS.

In Enterprise Performance Management, a Regulatory Region is a region with a common regulatory framework; such as a country (CAN for Canada), or a smaller state or provincial entity (CANBC for British Columbia).

Related Education

Education above the high school level that has equipped the applicant with the KSAs to perform successfully the duties of the position being filled. Education may relate to the duties of a specific position 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 on-line allocation and reservation.

Reserved

A flag indicating that the inventory item is reserved for stock fulfillment in the inventory business unit.

Reserved Orders

Orders that have been reserved against on-hand available quantity at the business unit-item level. Reserved orders are found in the DEMAND_INV table.

Reset

In PeopleSoft Demand Planning, a function of the **Forecast Calculation Process** that determines which forecast model will produce the best forecast, meaning the model with the lowest ratio of error.

Resolution

An activity that closes or partially closes a deduction, such as matching it to a deduction authorization, writing it off, or sending it back to PeopleSoft Receivables.

Resolution Entry Type

Code that identifies how to process activities for items in PeopleSoft Deduction Management and how to create accounting entries.

Resolution Method

A set of rules that defines how to automatically match or write-off deductions in PeopleSoft Deduction Management.

Resolution Worksheet

The workspace in which deduction items are paired with offset items and resolved or written off in PeopleSoft Deduction Management.

Resource

In PeopleSoft Manufacturing, any crews, machines, and tools that can optionally be used at work centers to complete tasks. In PeopleSoft Performance Measurement, any homogeneous grouping of general ledger line items.

Resources

Resources are the economic elements that are required to perform the activities associated with your business. Resources are consumed in the performance of these activities, and thus denote operating costs. In PeopleSoft Activity-Based Management, resources are typically regarded as the groupings of one or more general ledger accounts. In a service business, resources might include salaries, office rentals, and costs of capital such as information systems, depreciation, real estate taxes, and other associated costs.

Resource Amount

The monetary amount of a single, specific resource transaction. The Resource Amount maps to the Posted Total Amount when posted to the general ledger.

Resource Category

A field for defining individual resource types more specifically. For example, if you have a resource type of labor but want to break it down further for tracking purposes, you might define resource categories of architect hours, carpenter hours, plumber hours, and electrician hours. Resource categories are optional.

Resource Driver

In Activity-Based Management, a Resource Driver defines the quantity of resources used by an activity.

Resource Group

A category of resource types. You can define relationships between the resource types within a resource group to facilitate analysis of project costs. For example, if you had resource types for standard labor and overtime labor, you could group them together in a resource group to calculate total labor.

Resource Planning

In PeopleSoft Activity-Based Management, Resource Planning focuses on resources allocations that create expected results like driver rates and cost object costs.

Resource Quantity

A field on each resource transaction that identifies nonmonetary quantity. For example, on a resource line for 12 ball valves the quantity would be 12.

Resource Source

A field on each resource transaction that identifies the system in which the cost originated. For example, PeopleSoft Payables would be the resource source for a resource transaction created from a voucher in that system.

Resource Subcategory

A field for defining individual resource types and categories more specifically. For example, if you have a resource type of labor, and resource categories of architect hours, carpenter hours, and plumber hours, you might want resource subcategories of regular hours and overtime hours. Resource subcategories are optional.

Resource Supplied

An attribute that enables you define a resource as committed or flexible. A committed resource is one that will not likely change in the short term. A flexible resource is more likely to change within the short term.

Resource Transaction

An individual cost line within PeopleSoft Projects. It is through resource transactions that individual costs and types of costs are tracked. Each resource transaction contains a cost and a quantity and as many identifiers of that cost as necessary. Resource transactions are created when you receive information from other systems, run allocations with project resources as the target, or perform internal transactions such as billing, project closure, or adjustments.

Resource Type

The resource transaction field in PeopleSoft Projects that identifies the resource associated with a given cost. Resource types may be very general or very specific depending on your needs; they are used in conjunction with resource categories, resource subcategories, and resource groups.

Resource Use

Resource Use defines the behavior of a resource within PeopleSoft Enterprise Performance Management. An intermediate resource is a grouping of general ledger line items that may be allocated to another intermediate resource or to a primary resource.

Restricted Punch

A punch which is not accepted because it occurs outside of the predefined number of hours and minutes before or after a scheduled (Understanding Time Collecting Device)

Restricted Securities

Securities issued privately by the company, without the benefit of a registration statement. Restricted securities are subject to a holding period before they can be sold under Rule 144.

Restricted Stock Awards (RSA)

An award of shares of stock to an individual, typically granted at the par value or for no consideration. The shares are awarded on the basis of some future performance goal, either the passage of time (vesting) or the attainment of a specific goal. When the goal is achieved, the vesting occurs. The individual, typically, has all other shareholder rights over these shares such as, voting and dividend rights. The shares are issued in the name of the individual at the time of the award and are held in escrow until vesting occurs. If an employee terminates prior to the vesting of the shares then the company normally repurchases the unvested shares.

Retained Grade Effective Date

Date employee became eligible or began receiving a retained grade and pay.

Retained Grade Expiration Date

Expiration date of an employee's retained grade and pay.

Retest Date

In PeopleSoft Inventory, the date a lot should be inspected to determine whether it is still acceptable for fulfillment or consumption. (Retest Date = Creation Date + Retest Lead Time)

Retirement

Types of retirement are:

- Mandatory Retirement.
- Disability Retirement.
- Voluntary Retirement.
- Special Option Retirement.
- ILIA (In Lieu of Involuntary Action) Retirement.

Retirement Coverage Code

A code used to denote an employee's retirement coverage. The major ones include the following:

- Civil Service (CSRS)
- Federal Employees Retirement System (FERS) and FICA
- Foreign Service (FS)

- CSRS Offset
- CSRS - Special (for LEOs)
- FERS and FICA - Special (for LEOs)
- Social Security System
- None

Retroactive Benefits/Deductions

Deductions taken or benefits granted due to a recalculation of previous benefits and deductions. Late or modified union contracts, late paperwork, and delays in benefit enrollment processing may all result in a need for benefit/deduction recalculation.

Return Type Code

A designator on returned material authorizations (RMAs) that indicates what actions the return initiates. This may include replacement of the product or the creation of a credit memo in PeopleSoft Billing.

Reverse Split

A reduction in the number of outstanding shares of a corporation's stock, with a corresponding increase in the stock's value.

Reversionary Annuity

A form of pension payment where the retiree foregoes all benefit during his or her lifetime so that the entire benefit is paid as an annuity to a beneficiary after the retiree's death. If the beneficiary predeceases the retiree, the benefit is forfeited.

RIDDOR (Reporting of Injuries, Diseases, and Dangerous Occurrences Regulations)

Health and safety regulations in the United Kingdom requiring employers to report certain types of health and safety incidents to the Health and Safety Executive (HSE).

Rider

A special court-ordered or regulatory provision that may be applied to an enrollment to expand or limit any dependent or beneficiary coverage.

Risk Function

In Risk Weighted Capital, this is a user-defined formula that the system uses to derive risk weights.

Risk RuleSet

Used to assign a number of rules to a basis, for processing by the PeopleSoft Risk Weighted Capital Application. Used to group together a number of rules that frequently apply to the same type of balance.

Risk Type

In Risk Weighted Capital, this defines the types of risk associated with your business or activity. For example catastrophic, credit, legal, operational, regulatory, foreign exchange, market, interest rate.

Risk Weight

In Risk Weighted Capital, the risk weight is assigned by risk type, and is used to calculate capital allocation or normalized loss for the account or activity.

Risk Weighted Capital (RWC)

See PeopleSoft Risk Weighted Capital

RIZIV Code

This code is for Belgian employers to track the Federal Institute for Illness and Disability Insurance category.

ROE (Record of Employment) Reason Codes

ROE codes are defined by the Canadian government for employers to record employment actions such as Return to School or Pregnancy Leave.

ROLAP (Relational Online Analytical Processing)

ROLAP refers to the analytical processing and analysis of a relational Data Mart cube. ROLAP, is a form of OLAP that leverages the power and flexibility of relational databases.

Role

A role consists of a designated set of tasks, competencies and accomplishments required for a job code or a position.

Role user

A PeopleSoft Workflow user. A person's Role User ID serves much the same purpose as their Operator ID does in other parts of the system. It allows the system to uniquely identify the user and to determine what data the user has access to.

PeopleSoft Workflow uses Role User IDs rather than Operator IDs because it needs different kinds of user information than the rest of the system does. Specifically, it needs to know how to route work items to the user---an email address, for example---and what role the user plays in the workflow. Plus, you can include role users in your workflow who aren't PeopleSoft application users and who don't have Operator IDs.

Roles

Roles describe how people fit into the workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

Roll Forward

In commitment control, rolling budget balances forward from the budget ledger you are closing (the source budget ledger) into the new (target) budget ledger.

In PeopleSoft Enterprise Planning and Production Planning, a utility that moves tasks from the past to a valid point in the future using time periods rather than fixed dates.

Roll Up

The act of totaling sums based on information tree hierarchies. You can roll up data for any group of details that you have defined as dependent with the Tree Manager.

Rolling Plan

An ESPP offering period where the purchase date is measured from the offer start date. If at the purchase date, the current stock price is lower than the last stock purchase price, you may elect to reset your employees to the new lower purchase price. The offering period is now based of the new purchase date.

Rollup

In PeopleSoft Demand Planning, the process of adding up the demand and forecast **Array** from one level to the next from child to parent. Information such as caption, description, and unit of measure can also be rolled up. The process is also referred to as summarization.

Rounded Punch

A punch that has a company's rounding requirements applied to it (see Time Administration)

Rounding Rule

Defines a rounding rule. You use rounding rules in numerous places—for instance you could round an earning, deduction, or many of the elements that make up an earning or deduction.

Routing (Manufacturing and Engineering)

A set of information detailing the method to manufacture a particular item. It consists of sequentially numbered operations that reference the task to be performed, the work center in which the task is to be performed, the resources to be used, and the time required to complete the task. Engineering Routings differ from Manufacturing Routings in that they are not visible within Production Planning or Production Management and are isolated from Manufacturing.

Routing Option

In PeopleSoft Planning, a valid method for replenishing supply for an item. There are two types of routing options: build options and purchase options. An item may have more than one routing option.

Routing Transit Number (RTN)

A number that identifies the financial institution to which an electronic payment should be sent for deposit.

Routings

Routings connect the activities in the workflow. They are the system's means of moving information from one place to another, from one step to the next. Routings specify where the information goes and what form it takes—email message, electronic form, or worklist entry.

RSZ (Rijksdienst Sociale Zekerheid) Category Codes

These government defined Social Insurance category codes are used to maintain social security records for your Belgian employees. RSZ Categories are associated with a Contract Type, Statute and Substitute for Claeys Formula calculations.

Rule

Representation of a company’s compensation, task allocation, or exception requirements (see Creating Rule)

Rule 10b-5

A SEC rule that prohibits trading by insiders on material non-public information. This is also the rule under which a company may be sued for false or misleading disclosure.

Rule 144

A SEC rule that applies to public re-sales of restricted securities as well as all sales by affiliates. The requirements include (1) current public information about the issuer, (2) a one-year holding period for "Restricted Securities," (3) unsolicited brokers' transactions, (4) an amount limitation. the greater of 1% of the outstanding stock or the average weekly trading volume may be sold during any three-month period, and (5) a Form 144 filing.

Rule Actions

Functions that can be used in the creation and application of a rule (see Time Administration)

Rule Elements

Customer defined pieces of information which are passed to Time Administration in order to apply and evaluate rules (see Time Administration)

Rule Period

A Time & Labor period used in the evaluation and application of a rule (see Time Administration).

Rule Program

Specifies the set of rules the Time Administration process will execute and the order in which it will execute the rules.

Rule Results

Net effect of the application of a rule; for instance, the creation of time, initiation of workflow, modification of reported tasks (see Time Administration)

Rule Templates

Templates used to quickly create a variety of rules for the Time Administration program to execute when processing reported and/or scheduled time. Some examples are. compensation rules for overtime and holidays, notification rules for irregular attendance, and rules for just about any other time-reporting situation that requires special processing.

Rules

Rules are your company's business practices captured in software. Rules determine what activities are required to process your business data.

Rule Set

Rule Sets enable you to apply basis rules to your PeopleSoft Analytic Application in the sequence that you prefer. This is particularly helpful if there are multiple basis rules for the same account node, product node, or position source code. Rule Sets can control the execution sequence of your rule combinations, filter combinations, or both. The first occurrence on the node will be applied and any other occurrence will be ignored. Rule Sets are also used with the Data Manager, and with the Currency Conversion engine.

Rules/Time Administration

A physical implementation or execution of a company’s compensation, exception and task rules (see Time Administration)

Run Control

A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start some type of program that manipulates data in some way.

Run Control ID

A unique ID to associate each operator with their own run control table entries. Process Scheduler.

Run ID

Code that uniquely identifies a Run Control for batch processes.

RWC (Risk Weighted Capital)

See PeopleSoft Risk Weighted Capital

S

Safety Stock Policy

In PeopleSoft Inventory Planning, a policy that determines how safety stock quantities are calculated for an item. The policy has several methods that include days supply and percentage of demand fill.

Salary

Rate of compensation received by an employee.

Salary Group

Part of a group of defaults assigned to job codes. A salary group may include items such as steps and grades dependent on individual company parameters.

Salary Plan

A plan of salary defaults, grades, and step components

Salary Step Components

Pay components assigned to a salary step by entering the corresponding rate codes on the Salary Step Components page.

Salvage Value

An estimate of the amount of money one might receive upon selling an asset once that asset reaches its useful life. Salvage value is used in several depreciation calculations, including Straight Line.

Sales Order Rebate and Penalties

Rebates or penalties that are calculated against sales orders independent of **Buying Agreement**.

Sales Person

A required field used in PeopleSoft Receivables, Billing, Order Management, and Deduction Management when working with items. Each item must be assigned to a credit analyst. If no

credit analyst is assigned to an item, the credit analyst assigned to the customer is used as the default.

Sales UOM

The only units of measure that can be referenced on sales orders and quotes. You establish them on the Product Attributes by UOM page.

Same-Day Sale

An exercise and sale occurring on the same day. The exercise of the option and sale of the underlying shares take place simultaneously. The broker uses the proceeds of the sale to pay the company the exercise price and any tax withholding and the optionee the net cash (less any brokerage commission/fees).

Sample Method

One method of entering characteristic readings for a quality control plan. Using this method, for one given control plan you inspect all the characteristics for the first sample, then all the characteristics for the next sample and so on.

Scale

On a Goals Matrix (In PeopleSoft Workforce Analytics), a scale that defines the lowest, middle, and highest levels of performance needed to achieve associated minimum, midpoint, and maximum levels of compensation pay out. These are referred to as the Threshold, Target, and Stretch levels, respectively. The scale can be used to standardize multiple performance goals to a common scale of measurement.

Scenario

A scenario is a particular outcome you are analyzing when you run in Scenario Manager. Scenarios enable you to study various changes in organization models you created. For each parent and child model you want to study, you create a scenario ID that you use with all run controls.

There are two types of scenarios defined in the Scenario Manager: Historical and Forecast. In the case of an Historical Scenario all future looking fields will be display only and the Scenario Manager component serves as a wrapper to run any analytic engines. In the case of a Forecast Scenario, the Scenario Manager refers to all the business rules, forecasts, and economic assumptions that make up the scenario.

In PeopleSoft Budgeting a scenario is a ChartField used in PeopleSoft Budgeting to identify different budget iterations that use different assumptions.

Schedule

Specific task, date, and time to be worked by a Time Reporter (see Scheduling)

Schedule 13D or 13G

Disclosure forms required to be filed with the SEC and the company by a shareholder (or shareholders) that own(s) more than 5% of a public company. Schedule 13G is a short-form version of the 13D and may generally (but not always) be used only by institutional investors.

Schedule Group

A category of employees or employee groups associated for purposes of time scheduling.

Schedule Line Number

The line associated with an Order ID. The schedule line identifies an item and scheduled ship quantity that may be different from the requested quantity due to item availability.

Schedule Number

A number identifying the salary table form that an employee's pay is computed. Also has a second meaning related to the Payment Voucher processing for the ECS.

Schedule Reconciliation

In PeopleSoft Payables, the process of reconciling scheduled payments by Payment Schedule ID. Schedule Reconciliation helps U.S. federal agencies meet their requirement to schedule or group together payment orders for submission to the Treasury Disbursing Office.

Schedule Template

An ordered pattern of workday(s) and/or off day(s) used in scheduling (see Scheduling)

Schedule Type

In PeopleSoft Payables, an indicator of the nature of items purchased with a Payment Schedule**.**

Scheduled Punch.

A time reporter’s expected punch (see Scheduling)

Scheduling

A function of PeopleSoft Time and Labor and PeopleSoft Global Payroll that enables you to create work schedules and assign them to employees.

Scorecard

A weighted sum of constraint violations in a schedule that evaluates the schedule's validity (that is, acceptability). The score is calculated by adding the value for each relevant violated constraint. See also **Penalty, Weight** and **Relevant Constraint.**

In PeopleSoft Balanced Scorecard, views of a strategy tree’s components and Key Performance Indicators with red, yellow, or green scores that show its assessments.

Scrap

Any material outside of specifications and possessing characteristics that make rework impractical.

SearchIndex

A set of objects that give the programmer the ability to create, delete, insert, and update a search index and the items within it. Search index items contain a set of statistics about the document that has been indexed (keywords, number of occurrences, proximity to other words, and so on) as well as a key that can be used to point to the document (a URL, database key, or file path).

SearchQuery

A set of objects that allow the programmer to pass a query string and operators to the search engine and receive a set of matching results with keys to the source documents from the search index in return.

Seasonal Index

In PeopleSoft Demand Planning, measures the amount by which a forecasting period is influenced by seasonal effects. The index typically measures the percentage of difference between the base demand in the period and the expected actual demand in the period. An index of 100 indicates an average period in a seasonal cycle.

Seasonal Profile

In PeopleSoft Demand Planning,identifies the weight index assigned to a forecast time period to take in account seasonal fluctuations in the demand.

Seasonality Group

In PeopleSoft Demand Planning, a group of **Forecast Items** with a repetitive pattern of demand from year to year where some periods are higher than others. Typically a group of items is designated as a contributor to the seasonality group. Contributors are chosen because they are representative of the group, are stable, and have at least two years of demand history. The seasonality group profile is more stable than individual profiles of the contributors because the Aggregation process smoothes out random errors.

In Enterprise Planning and Simulation, a Seasonality group is a group of items with similar seasonal patterns. To determine if a forecast element is seasonal or nonseasonal, by averaging their history values over a year and determining where they were above and below average. Seasonality groups capture means seasonal behavior among related products.

Secondary COBRA Events

COBRA qualifying events that extend the amount of time a participant is eligible for COBRA coverage. For an event to qualify as a secondary COBRA event, it must fulfill the following qualifications: The participant must already be enrolled in COBRA coverage as a result of an initial COBRA event, the initial COBRA event must be one that is associated with a change to the employee's job status (such as a reduction in hours, termination, or retirement), and the

secondary event must be one of the COBRA event classifications that involves loss of coverage for the dependent (such as divorce, marriage of dependent, or death of employee). See COBRA and Initial COBRA Events.

Secondary event code

Secondary event codes, also called transaction codes, specify the type of transaction in detail. For example, a transaction's secondary event code could say that the transaction is a catalog order, a rush order, or a request for a sample. Not all transaction types include secondary event codes.

Section

A set of logically related elements that are to be resolved during the payroll process. You define your payroll process by creating sections and adding them to process lists. You can create four different types of sections: standard, generate positive input, sub-process, and payee.

Section 16(a)

Provision of the Securities Exchange Act of 1934 that requires company insiders to file changes in beneficial ownership of the company’s equity securities and periodic reports disclosing their holdings.

Section 16(b)

Provision of the Securities Exchange Act of 1934 that requires that any profit realized by a company insider from the purchase and sale, or sale and purchase, of the company’s equity securities within a period of less than six months must be returned to the company. It is also known as the "short-swing profit" rule.

Section 423

The Internal Revenue Code section that regulates Employee Stock Purchase Plans.

Section 83(b) Election

A tax filing within 30 days of grant that allows employees granted restricted stock to pay taxes on the exercise date, rather than the date when restrictions lapse. If an employee files the election, taxes are based on the fair market value on the exercise date, with any future appreciation taxed as a capital gain. If the employee does not file an election, taxes are based on the fair market value on the date the restrictions lapse, which will be higher assuming the stock has appreciated in value.

Securities Act of 1933

Often referred to as the "truth in securities" law, the act requires that investors receive financial and other significant information concerning securities being offered for public sale; and prohibits deceit, misrepresentations, and other fraud in the sale of securities.

Securities Exchange Act of 1934

The Congressional act that created the Securities and Exchange Commission. The Act empowers the SEC with broad authority over all aspects of the securities industry. This includes the power to register, regulate, and oversee brokerage firms, transfer agents, and clearing agencies as well as the nation's securities self regulatory organizations (SROs). The various stock exchanges, such as the New York Stock Exchange, and American Stock Exchange are SROs. The National Association of Securities Dealers, which operates the NASDAQ system, is also an SRO. The Act also identifies and prohibits certain types of conduct in the markets and provides the Commission with disciplinary powers over regulated entities and persons associated with them. The Act also empowers the SEC to require periodic reporting of information by companies with publicly traded securities.

Security Clearance

Security Clearances (Classified, Secret, Top Secret) are granted to employees by government agencies and are usually associated with jobs that bring employees into contact with classified government projects or sensitive technologies.

Security Event

In commitment control, events that trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

Segmentation

You can “segment” components of pay based on such events as changes in compensation, employee status, or job changes during a pay period. For example, if an individual changes jobs in the middle of a pay period and your organization has a practice of separating components earned in the first job from those earned in the second job, you can set up your system to trigger segmentation of earnings results on the pay slip when there is a change to the job change action/reason field.

Selective Factors

Knowledge, skills, abilities or special qualifications that are in addition to the minimum requirements in a qualification standard, but are determined to be essential to perform the duties and responsibilities of a particular position. Applicants who do not meet a selective factor are ineligible for further consideration.

Selective Merge

In PeopleSoft Enterprise Warehouse the selective merge allows for an additional WHERE clause when you delete a merge.

Self-Service Application

Another name for PeopleSoft's HRMS and ERP applications accessed using a browser.

Sell to Cover Exercise

When an optionee sells a portion of the option shares to cover the exercise cost and any applicable taxes.

Seniority Pay

A premium paid for seniority or for the length of time an employee works for an organization.

Seniority Pay Components

Pay components whose rate codes are assigned to the seniority rate code class SENPAY (provided by PeopleSoft) on the Comp Rate Code page, allowing you to access the seniority pay functionality.

Seniority Rate Codes

A premium paid for seniority or for the length of time an employee works for an organization.

Separate Debit and Credit

A feature in PeopleSoft General Ledger that captures and reports in greater detail the accounting information that resides in balance sheet accounts. It shows the gross debit/credit balances in addition to the net balance for each account stored in the ledger. This feature also supports reversing—debit and reversing—credit journal entries for error correction.

Server Process

A server process is executable code that receives incoming client requests on the application server. The server process carries out a client request by making calls to a service that executes SQL against the database.

Service

A service performs a particular task of an application. Examples of services are 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.

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Sick Leave

Sick leave is accrued by full-time permanent/seasonal employees at the rate of 4 hours every biweekly pay period; for part-time permanent/seasonal employees, it is accrued at one hour for every 20 hours worked.

Simulated Workforce

In the PeopleSoft Workforce Rewards product, Manage Compensation module, the calculated Simulated Workforce = Existing Employees + New Simulated Employees + Reduced-Employees.

Single Life Annuity

A benefit payable during the lifetime of the participant, with no payments made after the death of the participant. Also referred to as a "life only annuity" or a "straight life annuity."

Single Signon

This refers to the process by which a user can, after being authenticated by one PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

SIREN Code (Système Informatique pour le Répertoire des Entreprises)

This stands for the Electronic List of Enterprises. The SIREN code is assigned to a company when it registers as a business with the French government, and identifies the purpose of the establishment for regulatory reporting purposes in France.

SIRET (Système Informatique pour le Répertoire des Établissements)

This stands for Electronic List of Entities. In France the SIRET is an identifying number given to a French business by the INSEE, an official statistics and economics organization in France. The SIRET number is a combination of the SIREN and NIC numbers. This number is used by the tax and social security authorities to identify a business enterprise and its entities.

Site Tree

In PeopleSoft eStore, a hierarchical structure that controls navigation, as well as content and behavior within the header, footer, and left margin areas of the web page template.

Slice

The span of time into which an element is segmented as a result of element segmentation. Unlike a segment (or period), a slice does not represent a separate gross-to-net process since it affects only a limited set of elements within a period or segment. Like segments, slices have their own begin and end dates.

Slice Dimension

A model dimension used to restrict user access to the system. For example, a product manager's access to the system can be restricted to only the products he or she is responsible for by defining "Products" as a slice dimension, and assigning this person the members of the "Products" dimension he or she can access.

Slice and Dice

Another term for multidimensional analysis. When your data has three (or more) dimensions, you can think of it as being arranged in a cube (or hypercube), with each side representing a dimension. When you analyze the data, you "slice" off part of the cube or "dice" it to get to an individual cell.

Slotting

In PeopleSoft Workforce Rewards, a process by which the system establishes the target market compensation rates to use for compensating workers in non-benchmark jobs.

Social Security Number

Nine numeric digits assigned to an individual by the Social Security Administration. Also known as a Taxpayer Identification Number (TIN).

Source

The Source table stores valid journal entry and posting sources. These can include job titles (such as CFO), user IDs (such as CLERK123), PeopleSoft General Ledger processes (such as Consolidations), or other applications (such as PeopleSoft Payables).

Source Transaction

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

Sparsity/Density

A multi-dimensional concept of whether data exists at intersections of dimensions. If a cube has many dimensions, but little or no data in some of those dimensions, the cube is considered sparse. Sparse cubes take up unnecessary disk space and reduce calculation performance. The goal is to create dense cubes and only use dimension intersections where data actually exists.

Special Accumulator

A device that accumulates earnings from different sources for a specific purpose. 401(k), pension and retirement plans use special accumulators. A 401(k) plan might use a special accumulator to calculate a deduction using regular, vacation, and overtime earnings. Special accumulators can add to or subtract from a pool of earnings.

Special Payments

A payment that occurs once or under special circumstances (e.g., back pay interest, lump sum leave, bond refund, longevity bonus, compensatory time reimbursement, death payment, severance pay, separation bonus, etc.).

Special Rates

Higher salary rates for specific grade levels and occupational groups determined by OPM for employees working in specific geographic areas. Each area is assigned a separate Schedule Number.

Specialist

A member of a stock exchange who maintains a fair and orderly market in one or more securities. A specialist or specialist unit performs two main functions. executing limit orders on behalf of other exchange members for a portion of the floor broker's commission, and buying or selling for the specialist's own account to counteract temporary imbalances in supply and demand, preventing wide swings in stock prices.

Specialized Experience

Experience that has equipped the applicant with the particular knowledge, skills, and abilities to perform successfully the duties of the position and is typically in or related to the work of the position to be filled.

SpeedChart

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

SpeedType

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

Spending Limits

See Planning Targets.

Split and Join

In PeopleSoft Demand Planning,the process of subdividing a forecast so that multiple users can make changes to their portions of the forecast. After changes are complete, the portions are joined back into a single forecast.

Split Deduction

Deduction that you create by splitting an existing deduction into two deduction items. The new deduction retains the original item ID with an added suffix number.

Split Shift

Periods of productive time split up by period of non-working time; example. a time reporter comes to work as a busboy for the lunch shift from 12-2 p.m. and then returns to work from 6-8 for the dinner shift (see Scheduling*)*

Split Stream Processing

The matching of a payment's cash information with the payment advice information when they have been received as separate transmissions through EDI and lockbox.

The uniting of the payment cash with the payment advice when they have been received as separate information through EDI.

Spokesmen Committee (Sprecherausschusse)

In Germany the Spokesmen Committee represents the interest of the management in your company before the ownership. The Spokesmen's Committee is consultative in nature, although they play a co-determination role on individual employment contracts, hiring, and dismissals. They also play a role in monitoring employment fairness, equity, and non-discrimination in terms of nationality, race, religion, sex, and age.

Spouse Demonstration J&S

In the PeopleSoft Pension Administration system, an informational-only form of pension payment that tells what the spouse's total benefit would have been if the retiree had chosen the spouse as the beneficiary rather than a nonspouse beneficiary. You cannot pay pension benefits based on this form because it is informational only.

Spouse Eligibility Alias

In PeopleSoft Pension Administration, a Custom Statement that defines any criteria that must be met before the plan will provide an Automatic Spouse Benefit. For example, the plan may require that the employee and spouse be married a full year before they are eligible for an automatic spouse benefit.

Spouse Eligibility Statement

See Spouse Eligibility Alias.

Spread

Depending on the context, either (1) the difference between the bid and asked prices for an over-the-counter stock, or (2) the difference between an option's exercise price and the market price at the time of exercise (i.e., the profit component of the exercise).

SQL Objects

Used to create rules that are more complicated than templates or actions and conditions allow—select statements, insert statements, table joins, and sub-queries

ST (Strategic Trust)

See Strategic Thrust

Staged Date

The date an item was received into the inventory business unit.

Staging ID

An identifier for a putaway plan. The inventory system sequentially assigns Staging IDs when it creates the putaway plan.

Standard Cost

A predetermined, fixed cost associated with an **Inventory Item** or **Forecast Item**, representing detailed estimates of each element of cost entering into the purchasing or manufacturing of an item. Standard cost is used when minor variations in an item's cost are not needed. The use of standard costs also enables management to determine how much an item should cost (Standard), look at how much it does cost (Actual), analyze the differences between the two and their causes (Variances), and compute economic order quantity.

Standard Form (SF)

A standardized form for interagency use by the Federal government. The SF prefix is the most common but not exclusive one in usage.

Standard Price

In PeopleSoft Demand Planning, the standard selling price associated with a **Forecast Item**. The price can be introduced into the system directly in forecast item maintenance or indirectly using the demand transfer interface. At higher levels in the view where there is no standard price available, the summarization function can be set up to develop one.

Standard Unit of Measure

The smallest unit of an item that a PeopleSoft application tracks.

Startup Data

In PeopleSoft Pension Administration, accrued Service, Cash Balance Account, or Employee Account data loaded into the system in the form of an opening balance and "as of" date. The alternative would be to load the entire accrual history.

State Record

The State Record is a PeopleSoft record, keyed by process instance, that must be created and maintained for each Application Engine program. The State Record defines the fields that an Application Engine program uses to pass values from one SQL statement to another.

Static Group

An employee group in Time and Labor that enables you to control its creation and maintenance. The group remains the same at all times until you change it.

Static Policy Controls

Determines how a static (versus time-phased) **Inventory Policy** is to be calculated. Static controls use period and average methods and their arguments.

Statistical Account

An account that has an associated unit of measure, used for tracking and monitoring statistical data. For example, the Workstations account uses EA (each) as a generic unit of measure, while the Floor Space statistical account might use square feet and the Work Days account would use days.

Statistical Code

The unit of measure used for tracking and monitoring statistical data. For example, using a statistical code of WS may represent the number of Workstations.

Statistical Forecast

In PeopleSoft Demand Planning,, a forecast developed at each level of the forecast pyramid and that considers the item's history in isolation.

Status Checking

In PeopleSoft Projects, a control feature that can be applied to transactions coming into Projects from cost feeder systems. If the incoming transaction does not conform to predetermined status and analysis conditions, an online warning will display or the transaction will be rejected.

Status Position Code

A code that identifies the various conditions of a position, e.g., frozen, classified, etc.

Statutory Account

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

Step

A secondary level or subcategory within the primary pay level (depending upon pay plan, different employees may have a different number of steps within their primary pay level).

Step Progression

In PeopleSoft Workforce Analytics, a pay increase granted to an employee or group whose salary plan includes steps within grades. Each step increase is a step up the pay range for the employee.

Stock

In corporate finance, the form in which an owner's interest is represented, distributed in units known as shares.

Stock Administrator

An individual who administers and manages the corporation's benefits and/or equity compensation plans. This individual serves as the contact for transfer agent and broker inquiries. Stock Administrators manage Stock Option Plans, Employee Stock Purchase Plans, Restricted Stock Award Plans, and Stock Bonus Plans.

Stock Appreciation Rights (SAR)

A contractual right to receive, either in cash or employer stock, the appreciation in the value of the employer's stock over a certain period of time. A SAR can be used alone or in tandem with Incentive Stock Options (ISO/SAR) or Nonqualified Stock Options (NQ/SAR). PeopleSoft Stock Administration supports only tandem SAR's.

Stock Awards

Stock allocations that are processed in the Manage Variable Compensation business process. Stock Administration creates stock grants from finalized stock awards.

Stock Exchange

An organized marketplace in which bonds, stocks, and common stock equivalents are traded by members of the exchange, acting as agents (brokers) and as principals (dealers or traders). Such exchanges have a physical location where brokers and dealers meet to execute orders to buy and sell securities. Each exchange sets its own requirements for membership.

Stock Option

A contractual right granted by the company, generally under a stock option plan, to purchase a specified number of shares of the company's stock at a specified price (the exercise price) for a specified period of time (generally five or ten years). Assuming that the exercise price is the

same as the fair market value on the grant date, the option will become more valuable if the fair market value goes up, because the option effectively gives the optionee the right to buy stock in the future at a discount.

Stock Price

The price per share of a company's stock. See, also, "share price.

Stock Purchase Participant

An individual who participates in the corporation's Stock Purchase Plan.

Stock Purchase Plan

A type of broad-based stock plan that permits participants to use payroll deductions accumulated over a period of time to acquire stock from the company.

Stock Split

A change in the capitalization of an issuer that increases or decreases the number of securities outstanding, and adjusts the value of the securities accordingly, without a corresponding change in the assets or capital of the issuer. For example, if an employee has options to purchase 25 shares at $10 per share and the company has a 2-for-1 stock split, the employee thereafter has the option to purchase 50 shares at $5 per share.

Stock Swaps

A payment method that can be used to cover the cost of the exercise price and taxes depending on whether it is allowed by the plan. When an employee elects to exercise a stock option by means of a stock swap, they surrender already-owned shares of stock to pay the total required option exercise price and/or taxes for the option being purchased. The surrendered shares are usually valued at the fair market value of the company's stock on the date of exercise.

Stock Trading Symbol

The three or four letter symbol used to identify a company's stock on the stock exchange where it trades. Also known as a "ticker symbol".

Stock Withholding

A cashless method of satisfying the withholding taxes due upon the exercise of a stock option by authorizing the company to withhold from the shares being exercised a number of shares equal to the taxes.

Stockholder of Record

Person or entity, often a broker or the Depository Trust Company, named on the issuer's or transfer agent's stock record books as the owner of shares held in "street name." The stockholder of record acts in part as a way of safekeeping stock certificates that might otherwise be lost by the beneficial owner, and also in order to keep the identity of the beneficial owner confidential from the company.

Stock-In Probability

A replenishment option for defining transfer parameters for PeopleSoft Demand Planning or Inventory Planning upload files. The option is the percentage of time you want to have the item on hand for the **Business Unit** and is used to calculate safety stock.

Stop Time

Out punch

Storage Area

A division of a **Business Unit** used to store material and to track **Inventory Transaction**. Storage areas might include shipping and receiving docks, staging areas, warehouse zones, and inspection and quality control departments. Each storage area can be divided into a maximum of four levels, with each level representing a physical subdivision of the area.

Storage Level

A hierarchical subdivision of a storage area.

Storage Location

The combination of a storage area and that area's most detailed storage level. This is the smallest definable physical space within an **Inventory Business Unit**.

Strategic Initiatives

In PeopleSoft Balanced Scorecard, actions the organization must take to implement strategy. May be temporary or short-term in nature.

Strategic Thrust (ST)

In PeopleSoft Balanced Scorecard, four to five statements or paragraphs that summarize the core components of an organization’s strategy. Strategic thrusts describe the key areas across which a scorecard is balanced. They are themes or goals your organization is striving to achieve; more specific descriptions of what you must do to achieve that goal are defined by critical success factors. Key performance indicators may be attached to strategic thrusts as long as there aren’t critical success factors below them, but typically strategic thrusts aren’t directly associated with key performance indicators.

Strategy Tree

In PeopleSoft Balanced Scorecard, the hierarchical relationships of the objectives your organization is striving to achieve. Used as the foundation for a scorecard, and typically balanced across four major categories: Financial, Customer, Learning and Growth, and Internal Processes. These are made up of Vision, Strategic Thrusts, and Critical Success Factors.

Stratification Engine

A support module that structures the volume of financial accounts and balances at a large financial institution to a manageable scale for processing by the PeopleSoft Funds Transfer Pricing (FTP) and PeopleSoft Risk Weighted Capital (RWC) applications. It categorizes data by a range of values and summarizes data based on rules you define for FTP and RWC.

Stratification Wizard

Stratification Wizard is a tool you can use to quickly create new stratification rules or update the existing rules. Stratification Wizard prompts you for each of the possible source and destination fields, grouping operations, and summarization actions to be performed. Stratification Wizard enables you to stratify your data according to tiers, discrete values, periodic increments, and numeric increments. It also enables you to leave the data aggregated.

Streams

An optional feature that enables you to reduce processing time by processing groups of payees simultaneously.

Street Name

See "Stockholder of Record".

Stretch

In a Goals Matrix performance scale (In PeopleSoft Workforce Analytics), this is the level of performance for which an employee achieves maximum pay out. Performance above this level receives no greater pay out.

Strike Price

The price per share which must be paid in order to exercise the stock option. The strike price is typically the fair market value of the stock on the grant date. Also known as the "exercise" or "grant" price.

String constant

String constants are delimited in PeopleCode by using either single (‘) or double (") quote marks.

Strip Funding

One of several methodologies used by PeopleSoft Funds Transfer Pricing (FTP) to derive maturity when calculating FTP rates based on matched maturity funding. This approach matches the projected cash for the instrument in each time period, with a specific cost of funds rate for that cash flow. The FTP rate for the instrument is then calculated by weighting the cost of funds rate for the cash flow in each time period by the term of the cash flow.

Structured Query Report (SQR)

A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.

Style File (Verity)

Collection style refers to a set of configuration options that are used to create the indexes associated with a collection. A collection has one collection style and it is defined in a set of style files before creating the collection.

SubCustomer Qualifier

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

Sub-Process Section

A type of section you can add to a process list. Sub-process sections are especially useful for performing iterative processes such as gross ups (calculating the gross amount for a given net amount). You can include conditional logic within a sub-process section.

Subscription

The process of mapping fields, selecting data parameters and submitting the information to an outside vendor.

Substitute Item

In PeopleSoft Manufacturing, an item that can be used when there are no primary components available in inventory or when there is a long-term shortage of the original item. The substitute item can be defined at three levels: setID, business unit/item, and bill of material/engineering bill of material.

Subtask

A lower-level Planning task in a schedule's hierarchy that rolls up into a parent task. For example, an operation performed on a production ID would be a subtask of the production order.

Summarization Process

See Rollup.

Summary ChartField

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

Summary Forecast

In PeopleSoft Demand Planning, a type of forecast that results from adding up the adjusted forecast totals from the next lower level, meaning the sum of the children's forecasts for the parent. The summary forecast at level one (1) is always zero since there is not a logical lower level.

Summary Ledger

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

Summary Tree

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

Summed Adjustment Type

When the system finds multiple summed discounts, they are added together, and applied once.

Super Tree Utility

A PeopleSoft Enterprise Warehouse utility that enables you to combine multiple effective dates of a tree into one. This super tree contains all tree changes for a certain period of time enabling you to analyze effective dated trees more easily.

Supplemental IRR

An IRR type used when a federal employee's retirement deductions were originally under-reported. An agency can create a Supplemental IRR to report the difference in the retirement deduction amount to the Office of Personnel Management (OPM).

Supplemental Tax Method

A payroll tax calculation method that uses a straight percent rather than allowances. The percentage depends on state requirements.

Supply Chain Warehouse

See Warehouses.

Support Costs

Activity costs not directly connected to production.

Support Modules

The support modules are a collection of engines and analysis models that derive values, rates, financial calculations, and prices. PeopleSoft Analytic Applications take this data and use it for further processing. The support modules perform processes that are used in the financial services industry. They are only utilized by two of the PeopleSoft Analytic Applications: Risk Weighted Capital (RWC) and Funds Transfer Pricing (FTP).

Support Team

A group of people working together to sell to and/or support a customer. You can assemble support teams and associate them with ship to customers, quotes, sales orders, and **Buying Agreement**.

Supporting Element Overrides

Provide a mechanism to override various supporting element types, such as brackets, dates, durations, formulas, and variables, at various different levels.

Supporting Elements

Supporting elements are building blocks for other elements. In PeopleSoft Global Payroll, they are used in combination with other elements to create rules. They are not stand-alone. Typical supporting elements are arrays, brackets, rounding rules, and fictitious calculations.

Suspend Exercise

As a condition of a leave of absence, a company may stipulate to restrict the exercise of shares during the leave or for a period of time. Only applicable if the Stock Action is LOA.

Suspend Vesting

As a condition of a leave of absence, a company may stipulate to suspend vesting of shares. Only applicable if the Stock Action is LOA. If a company does not Suspend Vesting then the Vest Deferral Grace Period and Service Rule are not applicable.

Suspended Item

In PeopleSoft Demand Planning, an item suspended by the system. The suspension is due to the lack of demand for the number of periods defined for the item's **Control Group**.

System Element

In PeopleSoft Global Payroll, system elements are delivered and maintained by Peoplesoft. There are two types of system elements: database system elements and system-computed elements. Database system elements contain payee-related data that can be used frequently in a calculation, such as department ID, location, and personal data. System-computed elements are automatically populated by the payroll process.

System Functions

A list of all activities that the system supports, along with their associated General Ledger distributions.

System-Defined Count

The PeopleSoft Inventory feature that employs user-defined criteria to begin the count creation process.

System-Defined History

Any statistical information updated by the posting and aging programs, maintained to reflect customer credit standing.

T

T+3

The obligation in the brokerage business to settle securities trades by the third day following the trade date. "Settlement" occurs when the seller receives the sales price (less the broker's commission) and the buyer receives the shares.

Table

The underlying format in which data is stored by columns (fields) and rows (records, or instances).

Table Lookup

A utility in PeopleSoft Pension Administration that finds an unknown value based on a known one in your data set. For example, you can look up an interest rate based on a year, or an actuarial factor based on an employee's age.

TableMaps

In the PeopleSoft Enterprise Warehouse, TableMaps define the physical relationships between related tables. TableMaps allow you to define "families" of related tables and the columns that define the key relationships between the tables.

TableSet

A group of rows across control tables identified by the same SetID.

TableSet Sharing

Specifying the control table data for each business unit so that redundancy is eliminated.

Tardy

The circumstance when a time reporter reports for work after the scheduled start time

Target

In a Goals Matrix performance scale (In PeopleSoft Workforce Analytics), this is the performance level your organization establishes as the norm for performance and pay out.

Target Cost

A desired target cost (for production, engineering or marketing) is found by subtracting the desired profit margin from a competitive or estimated price.

Target Currency

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

Target End Date

The intended end date for employee schedules in Time and Labor reporting. You establish a target end date, and depending on the work schedule templates, the application determines what the actual end date should be.

Target Grade

Highest obtainable grade for a position.

Target Matrix

In PeopleSoft Workforce Rewards, the Target Matrix defines the level of award to be paid based upon a predetermined level of performance that a defined measure is evaluated against.

Target Plan

In PeopleSoft Workforce Rewards, a plan for distributing compensation awards, in which the level of the award is linked directly to a predetermined level of performance that a defined measure is evaluated against. For example, a Target Plan for a Sales group might be as follows: "As a group, increase the business unit's net income by 10% and each member of the group will be eligible for an award equal to 5% of base pay."

Target Rate

In PeopleSoft Workforce Rewards, calculated market rates you choose to use as new target pay rates for the jobs in your organization. Think of these target rates as pay guidelines, in support of your company's overall pay strategy.

Target View

In PeopleSoft Demand Planning, the of the views being reconciled during the **Cross-View Reconciliation** process. During the process, fields for reconciliation are defined for both a source and target view.

Tariff

In Germany a Tariff is a contract between the employee's unions and the employers' association, defining labor agreements on issues such as standard working hours, income, and vacation. This contract is valid for all of Germany for the business or industrial sector the company is working in (such as ***Banking*** or ***Metal***).

Tariff Area

In Germany, additional labor agreement terms beyond those in the Tariff, such as salary plans or employee reviews, can also be applied based upon the Tariff Area. The Tariff Area is often split along regional lines (such as ***Bavaria*** or ***Berlin***).

Task

See **Manufacturing Task** and **Planning Task**

Task

A piece of work assigned to or demanded of a person; a unit of work (see Time Reporting)

Task Entity

Individual component of a task; for example, Project ID, Activity ID, Work order, Department, Company, Business Unit (see Time Reporting).

Task Profile

A way of viewing or establishing where to allocate employee task information for a day and time. The task profile fields that appear on the page are established by the *Task Profile Template.*

Task Profile

Entity that establishes the default values for optional and required task elements. This can be for single or multiple tasks. (i.e. default values based on hours allocation, percentage distribution, equally distributed or by prompt) (see Time Reporting)

Task Rules

A methodology that is applied to scheduled, reported and payable time to allocate or redistribute task assignments (see Time Administration)

Task Transfer

Department transfer

Task Values

The customer defined value for a specific task element i.e. Customer 1, project 1, etc (see Time Reporting)

Taskgroup

Identifies the default time reporting templates, task template, and task profile(s) for time reporters that share the same task reporting requirements.

Taxable Benefits

Any employer contributions that are subject to Federal Withholding Tax.

TDS (Transfert de Données Sociales)

In France the TDS is a social security transfer report, submitted on magnetic media to the government.

Team Member

An individual who is part of a support team. Each team member may be in a commissionable or non-commissionable role.

Technical Scenario

In PeopleSoft Enterprise Warehouse technical scenarios allow you to set up the object type values that the Resolver uses to chunk the record/TableMap you'll resolve. Technical scenarios allow technical users to define chunking criteria that enable chunks to run in parallel. This allows for parallel data processing.

Template

A portal template is simply HTML code, associated with a web page, to define the style and layout of the page. Templates allow a developer to build an HTML page by combining HTML from a number of sources. Templates do two basic things: define the layout of the page, and define where to get HTML for each part of the page.

Template Pagelet

One piece of an overall template. For example, in a given template, there may be one template pagelet for the universal navigation header and one template pagelet for the target content.

Temporal Constraint

A relationship between Planning tasks that defines their sequence and timing in a schedule. Temporal constraints cannot be violated by the Optimizer. PeopleSoft Planning constraints include finish to start, start to start, finish to finish, start to finish.

Temporary Continuation of Coverage (TCC)

The TCC program, as prescribed by the OPM, requires Federal agencies to provide to separating Federal employees the opportunity to temporarily continue their FEHB coverage for up to 18 months (unless involuntarily separated because of gross misconduct), provided the individual pays the full cost of coverage, including both the employee and government share and a two percent administrative charge. Agencies may elect to provide this service in-house or enter into cross-servicing agreements with another Federal agency.

Tenor

Used by the PeopleSoft Funds Transfer Pricing (FTP) application to refer to the maturity of an instrument. It represents the length of time an instrument is available as either a source or use of funds. The FTP application calculates the transfer price for an instrument, based on the marginal cost of funds of similar liquidity and tenor.

Term Certain and Continuous Payment Option

See Certain and Continuous Payment Option.

Term Certain Payment Option

See Certain Only Payment Option.

Termination

A transaction in which an employee ceases to be an employee of the corporation.

Threshold

In a Goals Matrix performance scale (In PeopleSoft Workforce Analytics), this is the minimum threshold for adequate performance, the designated level of performance below which it is inappropriate to pay incentives.

Think-time process

Think-time functions suspend processing either until the user has taken some action (such as clicking a button in a message box), or until an external process has run to completion (for example, a remote process).

Three-Tier

A three-tier architecture introduces an intermediary application server between the client workstation and the database server to improve performance. Within PeopleSoft, the application server sends the SQL to the database and then returns results to the client in the form of lightweight Tuxedo messages.

Threshold Checking

In PeopleSoft Projects, a control feature that can be applied to transactions entered directly into Projects or integrated into Projects via the INTFC_PROJ_RES table. If the transaction exceeds a predefined tolerance, a warning will display or the transaction will be rejected.

Thrift Savings Plan (TSP)

A voluntary retirement savings and investment plan for Federal employees administered by the Federal Thrift Investment Board.

Ticker Symbol

The three or four letter symbol used to identify a company's stock on the stock exchange where it trades. Also known as a "stock trading symbol".

Tiers

In the financial services industry, Tiers are ranges that you set up for stratifying your instrument data (such as amounts, rates, and numbers) into specific groups. You define Tiers within Stratification Engine.

Time Administration

A process which provides four [separate] different online tools for creating, maintaining, and applying an organization's compensation, task, and exception rules to both reported and scheduled time. templates, actions and condition, SQL objects, and user exits

Time and Labor Period

A distinct, configurable period of time used by all the PeopleSoft Time and Labor processes (see Time Reporting)

Time and Labor User

Either a Time Reporter or a Time Manager

Time Capture Device

Third party system or methodology for collecting elapsed or time capture device time, i.e., time capture device, IVR, Fax, etc. (see Time Reporting)

Time Collection

A Time and Labor feature that collects positive and exception time reports, applies appropriate business rules and edits to the reported time to ensure validity and reasonableness, and returns errors and questionable items to the time reporter for correction or scrutiny. Time collection is also responsible for scrutinizing future (previously) posted time information for correctness when those reports are ready for use.

Time Collection Device

A group of time collection device lumped together and named for ease of assignment to employees. In other words. clock group 1 is made up of clock 1, and clock 2. Employee 123 is assigned to clock group 1 and can then punch in at either clock 1 or clock 2. (see Understanding Time Collection Device)

Time Collection Device time

Reporting time by recording actual starts and stop times (see Time Reporting)

Time Dimension

Determines how date-related information is presented in a **Cube View**. This dimension defaults to a two-level hierarchy consisting of the **Inventory Policy** year and a standard period, such as monthly.

Time Fence

In PeopleSoft Planning, a user-defined parameter that specifies the business rules to be used in the generation of the plan. PeopleSoft Planning time-fence types include start of time, end of time, planning close date (demand time fence), purchase order fence, leveling fence, action message cutoff, and planning time fence.

Time Manager

An individual who supervises Time Reporters

Time Period

A period of Time used in Time and Labor rules processing. You can categorize time periods in terms of days, weeks, or months. You establish day, week, or month-type periods for use when you apply rules for compensation, holidays, and so on.

Time Report

A payroll time and/or labor distribution time report for an employee for any date within the employee's current period.

Time Reporter

Any employee or contractor for who time is reported or generated in PeopleSoft Time and Labor.

Time Reporter Information

Values associated with the Time Reporter that are displayed when entering or viewing reported time and facilitate the processes of Time Reporting and Time Management (see Time Reporting)

Time Reporting

Any information required by a business unit that can be attributed to an individual employee (worker/contractor) and can be expressed in hours.

Time Reporting Code

A hybrid of two PeopleSoft objects: the Payroll Earnings Type and the Human Resources Absence Type. The Time Reporting Code represents the level at which a business actually needs to track employee time to support all of its administrative and compensation needs.

Time Reporting Code Type

Categorization of a time reporting code. Valid categories include. units, amounts, hours or a combination of hours and amounts (see Time Reporting)

Time Reporting Group

See Group [Time and Labor].

Time Segment

For Service, Cash Balance Accounts, and Employee Accounts, employees can accrue benefits differently at different times. The period of time during which employees use a particular rule is that rule's time segment.

TimeSpans

Relative periods, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a "rolling" time frame, rather than a specific date, is required. TimeSpans can also be used with Flexible Formulas in PeopleSoft Projects.

Tolerance

In PeopleSoft Projects, a value that is defined at either the project or activity level as either a percentage of a project's funding or an actual amount.

In commitment control, the percentage over budget that you allow, excluding revenues applied to increase budget limits, before the system creates an exception.

Total Authorized But Unissued

The combined total number of shares from Shares Available to Issue plus Total Options Outstanding.

Total Compensation

In PeopleSoft Workforce Analytics, this is generally the officially recognized compensation provided an employee in the course of their employment with an organization; includes both direct compensation and benefits compensation.

Total Compensation Management

The ability to track and report on all types of cash programs, non-cash programs, benefits and deferred compensation for all current workers, ex-workers and individuals associated with ex-workers who receive compensation due to the employment of the ex-worker.

Total Non-Compensation

In PeopleSoft Workforce Analytics, generally, this is the often unrecognized compensation an employee receives in the course of their employment with an organization; it includes Learning and Development compensation such as training, and Workplace Environment Compensation such as telecommuting privileges or other prerequisites.

Total Options Outstanding

The number of company shares currently held by shareholders as tracked by the transfer agent. Derived by using the number of Prior Outstanding plus Grants, less Exercises and less Cancellations.

Total Rewards

In PeopleSoft Workforce Analytics, this is the total rewards provided to an employee by their employment with an organization; it includes their officially recognized total compensation, and less often recognized total non-compensation.

Tour of Duty

The scheduled days and hours per day of attendance at a duty station for an employee.

Tracking Signals

PeopleSoft Demand Planning,a forecasting tool that detects bias in the forecast and provides an early warning of an unstable forecast. There are six tracking signals associated with each **Forecast Item** that correspond to the six most recent historical periods.

Trade Payment

An authorization for a customer deduction in a Promotion application.

Training Report 2483

The Training Report 2483 is a French regulatory report used to declare vocational training your company has provided to your employees. It is also known as the Declaration 2483 Report. The purpose of the report is to receive tax deductions from the government based upon the amount of money your company has spent on training.

Transaction

A named command with optional named and typed inputs and outputs. The associated external system or the Business Interlink Plug-in understands this command. The types of inputs and outputs are based on a set of generic types.

Transaction

A named command with optional named and typed inputs and outputs. The associated external system or the Business Interlink Plug-in understands this command. The types of inputs and outputs are based on a set of generic types.

See also **Inventory Transaction** or, for PeopleSoft Projects, **Resource Transaction.**

Transaction catalog

Lists transactions used to interface to the external system.

Transaction Code

In PeopleSoft Projects, an additional field on each resource transaction that is used in conjunction with accounting entry templates. Transaction codes enable you to deal with exceptions to your accounting entry templates without having to create additional transaction types. You can set up separate accounting entry templates for resource transactions containing the transaction codes you create. The accounting entry templates for those resource transactions lines can then use the same transaction types, but specify different accounts.

In PeopleSoft Asset Management, transaction codes identify special asset transactions and are used in conjunction with transaction type to create accounting entries.

Transaction Code

Identifies what action has taken place against the position.

Transaction Costing

See Multidimensional Costing

Transaction Currency

In the financial services industry, the original currency in which a company conducts its business activities. When a company has multinational operations, it may use different transaction currencies. These are translated to the base currency for consolidation and reporting of financial results.

Transaction Date

The date a transaction actually occurred as opposed to the date the transaction is recognized—the accounting date (although the two dates can be the same).

Transaction Dated

Data aggregated over a date range.

Transaction group

The package can contain one or more transaction groups. Each transaction group is a set of transactions of the same type, with the same trading partners involved.

Transaction Loader

The SQR in PeopleSoft Asset Management that transfers load lines from the Loader tables into the PeopleSoft Asset Management Tables as assets and open transactions.

Transaction Tables

In the PeopleSoft Enterprise Warehouse, these are tables that contain dynamic information and are keyed by business units.

Transaction Type

The building blocks of accounting entry templates in PeopleSoft Asset Management and Projects. For each transaction type you create you define specific transaction lines. The transaction lines are then transferred into accounting entry templates. In the accounting entry templates each transaction line is assigned a specific general ledger account.

Transactional System

A business application for performing the business transactions that keep your company running. Transactional applications, and the databases that support them, are optimized for quick transaction processing. Because they are constantly changing and are not optimized for data retrieval, transactional system databases are not usually the best source of data for analysis.

Transfer Agent

An individual or firm who that keeps a record of your shareholders and the number of shares they own. Transfer Agents also issue new share certificates and cancel old certificates. Unlike Brokers, Transfer Agents are not responsible for selling stocks. Instead they are primarily concerned with maintaining records on all stocks which your company has issued.

Transfer Forecast

In PeopleSoft Inventory Planning, a Generation process option that transfers the forecast from the target view in Demand Planning forecasts. The process only transfers items from Demand Planning that have been set to update the **Inventory Policy**.

Transfer Punch

The start of a work period that specifically denotes a change in task and usually compensation-related characteristics

Transfer Type

An interunit transfer setting PeopleSoft Production Planning and Enterprise Planning use to determine where it will obtain item data for transfer tasks. If the type is a supply or demand transfer task, the Planning engine only processes the transfer item for a single location, reducing the time for plan processing. If the transfer type value is both, the Planning engine processes the transfer item using data from both the To and From units.

Transfer Worksheet

A work space for transferring an open item from one customer to another.

Transferable Stock Options

Options that may be transferred by the optionee, generally only to a family member or to a trust, limited partnership or other entity for the benefit of family members, or to a charity.

Translate Table

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

Translate Table

A system edit table that stores codes and translate values for the miscellaneous fields on the database that do not warrant individual edit tables of their own. In most cases PeopleSoft maintains the Translate Table.

Transport Rate

The Transport is a statutory deduction in France. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. This deduction is used by the region to subsidize transportation, and maintain and build roads.

Transportation Lead Times

The transportation lead time is the in-transit interval from the date and time a shipment leaves your warehouse (**Inventory Business Unit**) to the date and time it arrives at your customer's receiving dock. The transportation lead time is used in calculating the scheduled shipment and scheduled arrival dates on the order when you enter either a requested arrival date or a requested shipment date.

Travel And Relocation Date

Length of time an employee must remain in the Government after the Government has paid to relocate him/her from one official duty station to another or for initial appointment.

TRC Program

A program that runs the level at which an organization actually needs to track employee time to support all of its administrative and compensation needs. TRCs are assigned to TRC Programs, which are ultimately assigned to workgroups. Multiple Workgroups can share these TRC Programs.

Treasury Interface files

These are DOS-based files generated by PeopleSoft in accordance with FMS file layouts for transmission of payment data to one of the FMS' Regional Financial Centers.

Treasury Position Code

In the financial services industry, this is a lookup code used for off-balance sheet treasury position accounts, such as foreign exchange, derivatives, precious metals, or any other account position that is the result of trading room and treasury operations.

Treasury Stock

Shares of a company's stock that have been repurchased or otherwise reacquired by the company and are "held in treasury." Whether the treasury shares count as "issued" or as "outstanding" shares of the company is a matter of state corporate law. Generally, a company may not vote its own shares held in treasury.

Treasury Stock Method

The method of calculating primary and fully diluted earnings per share when common stock equivalents such as unexercised stock options exist. Required under generally accepted accounting principles.

Tree

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

Tree Compare Utility

A PeopleSoft Enterprise Warehouse utility that enables you to compare effective dates for trees. The results page shows nodes that have been added, deleted, or moved from one parent to another. You may also view the detail objects that have changed.

Tree control

Tree Control is a hierarchical search tool that you can 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.

U

Underlying Security

The security underlying a stock option that an optionee has the right to buy, or the security underlying a convertible security.

Underpayment Adjustment Limit

The maximum amount or percent above which underpayment adjustments are not allowed for a given business unit.

Underwater Option

When the current market price is below the option exercise price. When an option is underwater, it would cost more than the underlying stock is worth to exercise the option. Such options are also described as being "out-of-the-money."

Underwriter

An investment banking firm that actually buys the shares from the company in a public offering and then resells them (at a slightly higher price) to its customers.

Unexpected Losses

In the financial services industry, these occur when the economic capital is exhausted and the insolvency rate is exceeded. Unexpected losses are determined by a targeted insolvency rate (confidence level); for example, a 99.7% confidence level indicates that there is a 0.03% estimated probability that the unexpected losses will exceed economic capital (or shareholder equity).

Union Code

Part of a group of defaults assigned to job codes. Union code may be used by human resources to group similar jobs or bargaining units together, dependent on individual company parameters.

Unit Code

In the financial services industry, Unit Code is used as an alternate means of measuring the relative size of companies participating in external surveys. A typical measure would be the number of employees in a company. The concept of unit is generic enough that the units can be other measures besides number of employees. For example, in the hospital industry the unit could be the number of hospital beds. Or in the hotel industry the unit could be the number of rooms.

Unit of Measure (UOM)

A type of unit used for quantifying in PeopleSoft systems. Depending on the application, units of measure might describe dimensions, weights, volumes, or amounts of locations, containers, or business activities. Examples include inches, pounds, workhours, and standard cost dollars.

Unit of work

Each transaction group includes one or more individual units of work. A unit of work is a single transaction that you want to commit or rollback as a whole.

Unitize Assets

The process of unitizing a single load line, usually originating from a different application, into multiple assets in PeopleSoft Asset Management.

Univariate Forecasting Technique

In Enterprise Planning and Simulation, the Univariate Forecasting Technique is a forecasting method that uses only the recorded history for the value to forecast its future.

Universal Navigation Header

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

Unscheduled Punch

A punch that is made be 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.

V

Valuation

The way a company represents the value of a non-monetary award such as stock.

Value allocation

A process in PeopleSoft Workforce Planning, by which you assign an overall monetary value to a competency strategy for your organization, and assign a weight or importance to the roles,

competencies and accomplishments in the strategy. The system then allocates a breakdown of the value to roles, competencies, and accomplishments in the strategy based on their relative weighting or importance.

Value Object

In the PeopleSoft Enterprise Warehouse, Value Objects are a metadata layer that provides descriptive information about fields and values. Value Objects are used as constants in Data Manager target object definition.

Variable

Temporary storage for use or defined information used in the creation and application of rules (see Time Administration)

Variable [Global Payroll]

An element type that defines and stores values such as a character, date, or number. You can use variables to create generic formulas for situations where you use the same values over and over again in a calculation.

Variable Compensation

In PeopleSoft Workforce Analytics, direct compensation that is not fixed, that is paid out in variable amounts, such as bonuses and commissions.

Variable Plan.

A plan in which either the number of shares and/or the price at which they will be issued is not known on the grant date.

VAT Account Type

A code that identifies the different types of accounting entries that must be created for VAT transactions. These codes are also used to categorize transactions in the VAT transaction table. The account type is used in conjunction with the VAT code and VAT transaction type to determine the VAT ChartFields used for a given VAT accounting entry.

VAT Apportionment

For mixed activity, VAT apportionment is the mechanism that allows you to specify the ratio of taxable activity to exempt activity for individual ChartFields.

VAT Calculation Method

Options are Net or Gross. When calculating VAT at net, the early payment discount is applied to the goods amount before calculating the VAT. The amount of VAT calculated using this method is the amount that is to be paid, regardless of whether the early payment discount is actually taken at time of payment. When calculating VAT at gross, the VAT is initially calculated based on the gross transaction amount. The early payment discount is not taken

into account at this point. However, in some countries an adjustment is made to the VAT amount at the time of payment, if the early payment discount is taken.

VAT Calculation Type

Options include Exclusive or Inclusive. If exclusive, the VAT amount is stated separately from the goods amount. If inclusive, the VAT is not stated separately but is included with the goods amount.

VAT Code

The tax code used to define a percentage the system uses to determine the VAT amount. The VAT code is similar to the sales and use tax code, with a few exceptions. The tax authority tied to the VAT code generally consists of a single authority, and the ChartFields for a VAT code don't reside with the tax authority but are determined by the combination of the VAT code, VAT account type, and VAT transaction type.

VAT Declaration Point

When VAT transaction information is declarable for reporting purposes. Options include Invoice or Payment. If you choose invoice, the system will recognize VAT at invoice time; if you choose payment, the system will recognize VAT at the time of payment.

VAT Entity

The level or entity within an organization at which VAT reporting is performed. VAT entities can be registered for VAT in multiple countries, but only one country can be designated as the VAT entity's home country. VAT and Intrastat reporting information and VAT default information are defined for each country in which the VAT entity is registered. You may also specify any VAT exceptions—either exoneration or suspension from paying VAT—for any country in which the entity is registered.

VAT Exempt Supply or Purchase

A transaction where the product or item is non-taxable or exempt from VAT. No VAT code is associated with the transaction. Although no tax is applied to the transaction, the transaction is still logged in the VAT transaction table.

VAT Exonerated

A transaction where the purchaser has been determined as not subject to VAT. For these cases, there may be an exoneration certificate number tied to the purchasing entity (either the customer or the VAT entity) as proof of exoneration. A zero-rated VAT code should be associated with transactions where exoneration applies. The transaction is still logged in the VAT transaction table, but no tax is applied.

VAT Rebate Percent

Within Canada, for Public Service Bodies, the percentage of VAT that is not normally recoverable but which may be refunded in the form of a tax rebate.

VAT Recoverability Percent

The percent of VAT that's recoverable.

VAT Registration Countries

Country codes associated with a VAT registration number for a particular customer or VAT entity.

VAT Transaction Table

Stores detailed transaction information for VAT reporting. It is the primary source of information for all VAT reports. Each application is responsible for writing to this table and also to a cross-reference table used to link entries in the VAT transaction table with entries within each application.

VAT Transaction Type

Used to categorize VAT transactions according to particular VAT accounting and reporting requirements. The VAT code and the VAT transaction type are used in conjunction with the VAT account type to obtain the ChartFields for accounting entries.

VAT Treatment

A description of how the transaction must be treated for VAT purposes. This is used to determine how VAT defaults are applied, what accounting entries are required, and how and if the transaction is reported on the VAT return.

VAT Use ID

A code used to identify the type of activity in which a purchased good or service will be used, and therefore to determine a recoverability percent and a rebate percent (when applicable) that will be applied to a transaction line. Activities are categorized as taxable, exempt, or mixed. Where activity is mixed, you may associate either the ratio of taxable activity to exempt activity directly with the Use ID, or you may indicate that this ratio is determined at the ChartField level.

VdkVgwKey

A key within a Verity BIF file for every document to be indexed. VdkVgwKey values must be unique across all collections that will be searched in any one application.

Vendor Draft

A draft issued by a vendor. PeopleSoft Receivables generates vendor drafts, provides a flexible worksheet environment for approval management, and enables discounted or standard submission for bank processing. PeopleSoft Payables receives vendor drafts and associates the appropriate vouchers.

Verity

The third-party search engine integrated with the PeopleSoft Portal.

Verity Fields

Verity fields are stored in the collection for retrieval and searching, and can be returned on a results list. Fields are defined in the BIF file and stored in the collection for retrieval and searching, and can be returned on a results list. Fields, like date and numeric fields can be used with the comparison operators (<,<=,>,>=).

Verity Thesaurus

The custom thesaurus consists of lists of synonyms defined in a synonym control file and can be used for synonym searching. After defining synonym lists in the control file, you use the mksyd utility to create a custom thesaurus (a control file which has the .syd extension) that the search engine uses.

Verity Topics

Verity applications can provide end users with predefined search criteria called *topics*. A topic is a named object that represents a concept, or subject area and can be used for synonym searching. It consists of words and phrases grouped together using the Verity query language in a tree-like structure. When provided, topics can be shared by all users.

Verity Zones

Zones are specific regions of a document to which searches can be limited. When the zone filter is used, the Verity engine builds zone information into the collection's full-word index. The index, enhanced with zone information, permits quick and efficient searches over zones. Searching a zone is faster than field searching. Zones are defined in the DAT file. The contents of a zone cannot be returned in the results list of an application.

Version

There can be up to five budget versions for each Budget Center level in a Budgeting Model. Budget versions are used to perform what-if analysis and comparisons of budget amounts before the user selects one version to submit as the Budget Center's budget plan. PeopleSoft Budgeting-specific.

Vest Deferral Grace Period

The specified period of time within which an optionee must return from leave to avoid having the vesting 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 are we deliver are: PeopleSoft Financials Warehouse, PeopleSoft HRMS Warehouse, PeopleSoft CRM Warehouse, and PeopleSoft Supply Chain Warehouse.

Warning Exception

A transaction that exceeds the available funds but is allowed to continue to be posted against the budget. Warnings are informational only.

Warrant

A type of security, usually issued together with a bond or preferred stock, that entitles the holder to buy a proportionate amount of common stock at a specified price, usually higher than the market price at the time of issuance, for a period of years or to perpetuity. A warrant is usually issued as a sweetener, to enhance the marketability of the accompanying fixed income securities. Warrants are freely transferable and are traded on the major exchanges.

WCB

In Canadian provinces the Worker's Compensation Board (WCB) operates as an independent board, and thus would have different requirements in each province. For example, in British Columbia the organization is called the Worker's Compensation Board of British Columbia and in the Province of Quebec, the board is known as Commission de la Santé et de la Sécurité du Travail (CSST).

Weight

In PeopleSoft Planning, a user-defined value for the constraints that can be violated, determining how the schedules score will be calculated. Violations that are more critical to your schedule merit a higher weight.

Weight and Volume Pricing

You can price shipments by weight or volume to create price prices. Weight and Volume pricing requires using estimated shipments.

Weighted Average Cost of Funds

The projected principle payments for an instrument are used to derive a series of matched maturity funding rates, which in turn are used to calculate the overall base PeopleSoft Funds Transfer Pricing (FTP) rate. The Weighted Average Cost of Funds (WACF) method calculates a weighted average FTP rate where each of the funding rates is weighted by the principle payment amount and the term to maturity of the payment.

WFA (Workforce Analytics)

See PeopleSoft Workforce Analytics

WGI Due Date

Identifies the date of an employee's next within grade increase. Current policy is that the step increase is implemented on this date automatically unless prevented by the processing of an unsatisfactory performance appraisal.

WGI Non-Creditable Days

Total number of days that cause the WGI due date to be adjusted forward.

Whole Calendar Month

An instruction telling the system to use every day in each month for this time period. The system fills in the last day of the period according to the information you have entered.

Wildcard

You can replace the right-hand characters in a search field with a percent (%) wild card to query a range of values beginning with the remaining, left-hand characters. For example, by entering '2%' in a six-character field, you will receive a range of available values, such as 200000 through 299999 or 2aaaaa through 2zzzzz.

Window Period

The ten-day period, from the third to twelfth day after public release of a company's financial statement, when insiders may exercise their stock-appreciation rights without violating Securities and Exchange Commission rules for short-term trading.

Windows Client

Traditional PeopleSoft 32-bit client. Windows clients connect to the application server domain (Tuxedo) using a port number (or connection string) specified in PeopleSoft Configuration Manager.

WIP Replenishment Method

Designates how the PeopleSoft Flow Production request is communicated. For a replenishment method of Inventory, the Workflow, Pull Ticket, and Pull List replenishment methods are available. With feeder line replenishment, you can only use Pull Tickets.

WIP Replenishment Mode

Determines how PeopleSoft Flow Production is triggered to generate a replenishment request for an item. Replenishment options include Backflush, Manual, and Kanban Card.

WIP Replenishment Source

Determines where you send your PeopleSoft Flow Production replenishment request and what source supplies your WIP location. Options include Feeder, Inventory, and Vendor.

Withdrawal

An election not to continue participation in a stock purchase plan.

Withdrawal of Contributions

In a pension plan, the act of returning pension contributions, with interest, to an employee who is terminating. An employee who withdraws contributions typically forfeits all service associated with those contributions. If the employee is later rehired, repayment of contributions and interest typically reinstates the forfeited service.

Withholding

A deduction taken by employers out of taxable income of an individual. Typical withholding taxes include federal income taxes, federal social security, Medicare taxes, and state and local income taxes.

Within Grade Increase (WGI)

A longevity-based increase in salary based on predetermined time in grade requirements and acceptable performance.

Work Council (Comité d'Enterprise)

In France it is mandatory for companies with more than 50 employees to elect a Work Council to represent the employees in negotiations with management.

Work Effort

See Activity Type.

Worker

In PeopleSoft Workforce Analytics, workers are defined as anyone who performs functions for the organization, and receives compensation from the organization's operating expense funds in return. Workers can be direct employees or independent contractors. This includes individuals contracting business directly from the company or through an agency.

Work Group

In PeopleSoft Enterprise Performance Management, the work group is a grouping of employees that share a similar activity profile.

Work Period

A Days On/Days Off template; the smallest unit of time that a business uses to communicate with their employees regarding when to be and/or not to be at work (that is, time working and time not working). The work period can be any number of hours. Until clock hour reporting is implemented, the application does not care about the number of hours. The initial Time and Labor product will apply the work period to a calendar day.

Work Queue

In PeopleSoft Demand Planning and Inventory Planning, a feature for reviewing and working with exceptions created during the processing of forecasting and inventory data.

Work Schedule

A template consisting of a sequence of work periods (days) on and off, and the number of scheduled hours per work period. Work Schedules and Work Periods should not be confused with calendar days.

Worksheet

A way of presenting data to the user through a BAM interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

Work Templates

Work templates describe your employee's work patterns. Work templates could apply to individuals or entire organizations. For instance, 9 AM to 5 PM, Monday through Friday is a fairly standard working week in organizations.

Workday

A 24-hour period rounded by daybreaker with one or more associated shifts (see Scheduling)

Workday Override

A function that allows a Time Manager to override a Time Reporter's schedule for a single workday. For example, Jane's long-term schedule assignment is Monday – Friday, 8.00 to 17.00. Due to an increase in production demand, her manager needs to schedule her to work 7.00 to 18.00 on Thursday, 16 March 2000. Her manager needs to be able to make this change to her schedule in the PeopleSoft Time and Labor system, so when Jane checks her schedule for this week, she'll see the revised schedule.

Worker

Workers can be defined as anyone who performs functions for the organization and receives compensation from the organization's operating expense funds in return. Workers can be direct employees or independent contractors (includes individuals contracting business directly from the company or through an agency).

Workers Compensation

The days an employee is on LWOP due to sustaining an injury or illness while on the job.

Workflow

The background process that creates a list of administrative actions based on your selection criteria and specifies the procedure associated with each action.

Workflow

The background process that creates a list of administrative actions based on your selection criteria and specifies the procedure associated with each action.

Workforce Monthly Report (Déclaration Mensuelle Obligatoire des Mouvements de Main D'oeuvre)

In France, companies that employ 50 or more employees are required to submit the Workforce Monthly Report to the Administrative Division of the Ministry of Work and Social Relations. The report contains workforce information for a given establishment of a company, including

the total number of employees and details of employees who have joined or left the establishment during the month.

Workgroup

A user-defined group of employees who share identical compensation rules. A workgroup may be equivalent to all the employees in a business enterprise, all employees in a Paygroup, all employees belonging to the same Union or Union Local, or all employees who work at a specific work location.

Worklist

The automated "to do" list that Workflow creates. From the Worklist you can directly access the panels you need to perform the next action, and then return to the Worklist for another item.

Worklist

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

Works Councils (Betriebsrat)

In Germany, the works councils for your company are internal committees elected by the employees that represent the interests of salaried and hourly paid employees, other than management. Every work location in your company has 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.

X

Y

Yearly Maximum Pensionable Earnings (YMPE)

Amount set by the government upon which Canadian Pension Plan (CPP) contributions are made.

Z

Zero-Based Budgeting

A budgeting option that builds a budget from the ground up starting with zero values. This is in contrast to an incremental budget that is based upon using prior year actual or budget values as starting point. PeopleSoft Budgeting-specific.

Zero-Rated VAT

A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

Zip Code

The term for postal codes in the United States.

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