

PeopleSoft®

Enterprise PeopleTools 8.45
PeopleBook: PeopleSoft Change
Assistant

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Change Assistant

SKU PT845CHA-B 0604

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About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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

PeopleSoft Application Prerequisites

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

See *Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications*.

You might also want to 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.

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

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().

Typographical Convention or Visual Cue	Description
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

See Appendix D, “ISO Country and Currency Codes,” ISO Country Codes.

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

See *About These PeopleBooks*, “ISO Country and Currency Codes,” ISO Currency Codes.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and Don't Run

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

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

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

Report Manager

Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor

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

Run

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

Request ID

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

User ID

An ID that represents the person who generates a transaction.

SetID

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

Short Description

Enter up to 15 characters of text.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

PeopleSoft Change Assistant Preface

This preface describes PeopleSoft Change Assistant.

PeopleSoft Change Assistant

PeopleSoft Change Assistant helps to expedite the software update process. This book explains the process of finding, analyzing, downloading and applying software patches and updates. PeopleSoft Change Assistant utilizes the Environment Management components. PeopleSoft recommends that you review the documentation and setup for your Environment Management components prior to using PeopleSoft Change Assistant for software updates.

CHAPTER 1

Getting Started with PeopleSoft Change Assistant

This chapter provides information to consider before you begin to use PeopleSoft Change Assistant. In addition to installation information presented in this section, take advantage of all PeopleSoft sources of information, including the installation guides, release notes, and PeopleBooks. You must verify that you can upload and download data from PeopleSoft Customer Connection.

This chapter describes or directs you to the following steps that you must complete before using PeopleSoft Change Assistant.

- Install PeopleSoft Change Assistant.
- Set the variable path.
- Scanning the workstation.
- Set up Environment Management components.
- Review and set up web services.
- Set PeopleSoft Change Assistant options.

Installing PeopleSoft Change Assistant

To install PeopleSoft Change Assistant:

Note. A Windows-based operating system (such as Windows 2000 or XP) is required to use PeopleSoft Change Assistant.

1. From the PS_HOME/Setup/psca directory, run Setup.exe.
2. On the Welcome screen, select Next.
The PeopleSoft Change Assistant screen appears.
3. Accept the default Destination Folder or specify another Destination Folder.
4. Select Next.
The Start Copying Files screen appears.
5. Click Back to review or change any settings.
If you are satisfied with your settings, click Next to begin copying files. PeopleSoft Change Assistant copies files to the designated directory.
6. Click Finish to complete the installation process.

Setting the Variable Path

After installing PeopleSoft Change Assistant, you need to set the path. To set the path:

1. Select Start, Settings, Control Panel.
2. Double-click the System icon.
The System Properties screen appears.
3. Select the Advanced tab.
4. Click the Environment Variables button.
5. Select the *Path* variable in the System Variables section, then click the Edit button.

The Edit System Variables screen appears.

6. Insert the following, in the Variable Value field, to the beginning of the path:

```
C:\PS_HOME\bin\client\winx86;
```

where PS_HOME is the name of the PeopleTools folder.

7. Click OK to save your settings.

Scanning the Workstation

The first time you use PeopleSoft Change Assistant, it automatically scans your workstation for applications that it will use in order to automate the steps. For example, it automatically finds the SQL Query tool and uses it to run SQL commands or scripts.

If you add a new application or update an existing application, PeopleSoft Change Assistant must perform a scan of the system in order to discover the changes. To perform this scan, select Tools, Scan Configuration.

Setting Up Environment Management Components

Before you can apply updates using PeopleSoft Change Assistant, you must properly configure the Environment Management Hub, which is the central repository for information gathered regarding PeopleSoft application environments. PeopleSoft Change Assistant interrogates the hub to identify the currently deployed databases, and then allows the user to choose to which environment or database to apply fixes. Environments include a database and all of the servers that service that database.

Typically, each database has at least one application server, one web server, and one Process Scheduler process to which it's associated. PeopleSoft Change Assistant needs to know about the database and the associated server environments. Environment Management agents are the devices by which environment information is identified and published to the hub. Agents must be started on the application, web, and Process Scheduler servers to publish the necessary environment information to the hub.

See [Chapter 2, "Using PeopleSoft Change Assistant," Setting Up Environment Management Hub Options, page 6.](#)

See Also

Enterprise PeopleTools 8.45 PeopleBook: System and Server Administration, “Using Environment Management Components”

Reviewing and Setting Up Web Services

Before you can begin applying software updates using PeopleSoft Change Assistant, you must set up the web services.

See [Chapter 2, “Using PeopleSoft Change Assistant,” Setting Up Web Services, page 7.](#)

Setting PeopleSoft Change Assistant Options

After you’ve installed PeopleSoft Change Assistant, you need to specify options.

See [Chapter 2, “Using PeopleSoft Change Assistant,” Specifying PeopleSoft Change Assistant Options, page 8.](#)

CHAPTER 2

Using PeopleSoft Change Assistant

This chapter provides an overview of PeopleSoft Change Assistant and discusses how to:

- Set Environment Management Hub options.
- Set web server options.
- Specify PeopleSoft Change Assistant options.
- Handle connection errors.
- View a PeopleSoft Change Assistant job.

Understanding PeopleSoft Change Assistant

PeopleSoft Change Assistant is a standalone application that enables you to assemble and organize the steps necessary to apply patches and fixes for maintenance updates.

In order to perform reliable and accurate updates, PeopleSoft Change Assistant gathers all the necessary information including the change log from the Environment Management Hub and uploads it to PeopleSoft Customer Connection. With the environment data available, PeopleSoft Customer Connection can determine what updates apply to your environment.

When you access PeopleSoft Customer Connection, you can obtain a list of all unapplied updates for a given application environment including all prerequisites. You can then download a set of change packages associated with the update IDs and install the patches and fixes with minimal effort.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer, “Using Change Packager,” Generating a Change Package

Common Elements Used in This Chapter



Cut

Click this icon to cut a chapter, task or step in the template or job.



Copy

Click this icon to copy a chapter, task or step in the template or job.















Paste

Click this icon to paste a chapter, task or step in the template or job.



Insert a Task

Click this icon to insert a task. If you select (highlight) a task, both the Insert Task icon and the Insert Step icon are enabled.

 Insert a Step	Click this icon to insert a step. This icon is located on the right side of the Insert a Task icon.
 Expand All	Click this icon to view the entire template tree or job tree, including the chapters, tasks, and steps.
 Collapse All	Click this icon to view only the chapters.
 Run	Click this icon to run a job. PeopleSoft Change Assistant will run the steps from top to bottom until it encounters a manual stop or encounters an error.
 Cancel	Click this icon to terminate or stop a process.
 Run	This icon indicates that PeopleSoft Change Assistant runs this step or process automatically without manual intervention.
 Stop	This icon indicates that PeopleSoft Change Assistant stops on this process. It also indicates that there may be manual steps to perform for this step. Review the documentation window for further instructions. .
 Restart	Indicates a restart process. If a step failed and you corrected the problem, you can set the step to restart from the point of failure.
 Processing	Indicates that the process is running.
 Failure	Indicates a failure has occurred that needs immediate attention. This appears if a Data Mover script, SQL script , or project copy step fails. Resolve the error before continuing with processing.
 Warning	Indicates a warning for this step which does not need immediate attention. The job continues processing with no adverse affects. After the job completes, review the steps in a warning state and evaluate for further action.
 Complete	Indicates that the step is complete.

Setting Up Environment Management Hub Options

Before you can upload environment data to PeopleSoft Customer Connection, you must set up the server URL for the Environment Management Hub.

Setting Server Options

You need to set the server URL for the Environment Management Hub. Select Options, Environment Management Hub, Server.

Server URL Displays the server URL to access the Environment Management Hub. Edit this field to point to the Environment Management Hub that is started for your environment. This is typically the hub URL that is used for the agent connections to the hub.



Click to verify a valid server URL. If you see “Service is off” to the right of this button, then you must correct the server URL and ping again until you see “Service is on.”

Specifying Hub Settings

You need to set hub setting options. Select Options, Environment Management Hub, Settings tab.

Chunk Size	This setting is used for deploying files during a software update. Default is 1024 * 1024 bytes. Typically this does not need to be changed unless there are a significant number of files greater than 1024KB in a software update.
Ping Interval	Ping interval is in milliseconds for PeopleSoft Change Assistant to contact the hub for new messages.
Drives to Crawl	Setting of drives to crawl to identify the configuration of the PeopleSoft Change Assistant machine. Windows directories need to use the forward slash (/) character. Include your local drive in this setting so that PeopleSoft Change Assistant can locate the SQL Query tool used for automating steps. Also include the path of the SQL Query tool.

Setting Up Web Services

This section describes the options that need to be set for PeopleSoft Change Assistant to connect to PeopleSoft for uploading environment information and downloading updates. By default, these settings are correct for connecting to PeopleSoft.

Setting Up HTTP

Access the Web Services page, then the HTTP tab.

Host (Optional) Enter the name of the proxy server if you want to run PeopleSoft Change Assistant behind the firewall using a proxy server.

Note. PeopleSoft Change Assistant supports only anonymous connections to the proxy server. If your proxy server is configured to require authentication, ask your network administrator to allow anonymous access to the proxy server from the machine running PeopleSoft Change Assistant.

Port (Optional) Enter the port number for the proxy server.

Logon Site Default value of a logon site that is used to authenticate your access to PeopleSoft Customer Connection to download change packages or upload environment data. If the URL changes, you need to edit this field.

Logon Action Default value of an action URL that is used to authenticate your access to PeopleSoft Customer Connection to download change packages or upload environment data. If the URL changes, you need to edit this field.

Logon Target	Default value of a target URL that is used to authenticate your access to PeopleSoft Customer Connection to download change packages or upload environment data. If the URL changes, you need to edit this field.
Update Search	Default value of the PeopleSoft Customer Connection update search page. You can launch PeopleSoft Customer Connection update search using the Upload Environment option or the Go to Customer Connection option on the Tools menu. If the URL changes, you need to edit this field.

Setting Up Web Services

Access the Web Services page, then the Web Services tab. Enter the server URL.

Specifying PeopleSoft Change Assistant Options

This section describes options to set in PeopleSoft Change Assistant.

Setting General Options

Select Options, Change Assistant, General.

Send Email Notifications	Select this check box to receive email notifications if there are errors in the update process. PeopleSoft Change Assistant also sends you a completion message when it encounters a <i>Stop</i> in the update process.
SMTP Server	Enter the SMTP mail server from which you receive the error or completion messages.
Port	Enter the port where you want to access the email.
Send To	Enter the address to which you want the email sent.
Return Address	Enter the email address of the sender. Use this to identify who sent the notification.
Test	Click to validate that email is sent to the designated recipients and is working correctly.
Advanced Options	Click to access the Advanced Options page where you can select either a template or job mode.

Setting Change Assistant Options

Select Options, Change Assistant, Directories.

Download and Apply Directory	Enter the full path of the location to which you want to download your Change Packages.
-------------------------------------	---

Specifying Directories

Access the Directories screen.

PS_HOME Directory	Enter the full path where you installed PeopleTools.
Change Assistant Staging Directory	Enter the directory where you would like to stage all the PeopleSoft Change Assistant update files. This is the location that Change Assistant will store files to be used during the apply update process.
Change Assistant Output Directory	Enter the directory where you want the log files generated by the update process to reside.

Exporting Jobs to XML, HTML, or Microsoft Excel Format

PeopleSoft Change Assistant allows users to export jobs to XML, HTML, or Microsoft Excel file formats. Do this by selecting File, Export Job in PeopleSoft Change Assistant. Then enter the desired exported filename and the select the desired file type format.

Handling Connection Errors

If you are unable to upload or download data successfully, it may be caused by configuration errors in the Environment Management Hub or in your system's firewall settings.

Resolving Environment Management Hub Connection Errors

If PeopleSoft Change Assistant cannot communicate with the hub, it may be for one of the following reasons:

- PeopleSoft Change Assistant is started but the hub is not started.
Try to reconnect once the hub is started.
- PeopleSoft Change Assistant is started but the web server is configured to run on a different machine.
Edit the hub URL in Options, Environment Management Hub screen and change the serverURL parameter.
- PeopleSoft Change Assistant is started but the web server is configured to listen on a different port.
Edit the hub URL in Options, Environment Management Hub and change the port number for the serverURL parameter.

Ensuring the Correct Configuration

To ensure that you've configured the PeopleSoft Change Assistant to properly connect with the hub, try each of the following actions in turn:

- Ping the hub host machine.
At a command prompt, enter `ping machinename`, using the machine name configured in the server URL setting. You should see messages indicating a reply from the machine.
- Ping the hub host domain.
At a command prompt, enter `ping hostdomain`, using the fully qualified domain name as it's configured in the serverURL setting; for example, `mymachine.mydomain.com`. You should see messages indicating a reply from the machine.
- Use an IP address in the server URL.
In `configuration.properties`, replace the domain name in the server URL setting with the machine's IP address, then restart the peer.

- Ensure that you specify the right port number in the serverURL.

In configuration.properties, the port number in the server URL setting must be 80 if you set up PIA for a single server, and it must be 8001 if you set up PIA for multiple servers.

Verifying Firewall Settings

You may be prevented from uploading your environment or downloading fixes because of your system's firewall settings. PeopleSoft has identified firewall settings that need to be reviewed and possibly modified at your site. PeopleSoft domain and IP names that are used externally for PeopleSoft Customer Connection and for identifying software updates should not be filtered by a firewall.

- Domains are *www.peoplesoft.com* and *update.peoplesoft.com*.
- IP Addresses are 192.206.43.114 and 192.206.43.105.

When setting trust rules or bypass rules on your proxy server, or in browser security, it is easier to maintain rules by domain or IP subnet. PeopleSoft recommends that domain rules **.peoplesoft.com* and IP rules be set at the subnet 192.206.43.0.

PeopleSoft Change Assistant uses SSL to connect at all times, but when you log in to PeopleSoft Customer Connection or the Update Wizard through a browser, the login page is Secure Socket Layer (SSL). Check to make sure you are limiting SSL to *www.peoplesoft.com/corp/en/login.jsp*.

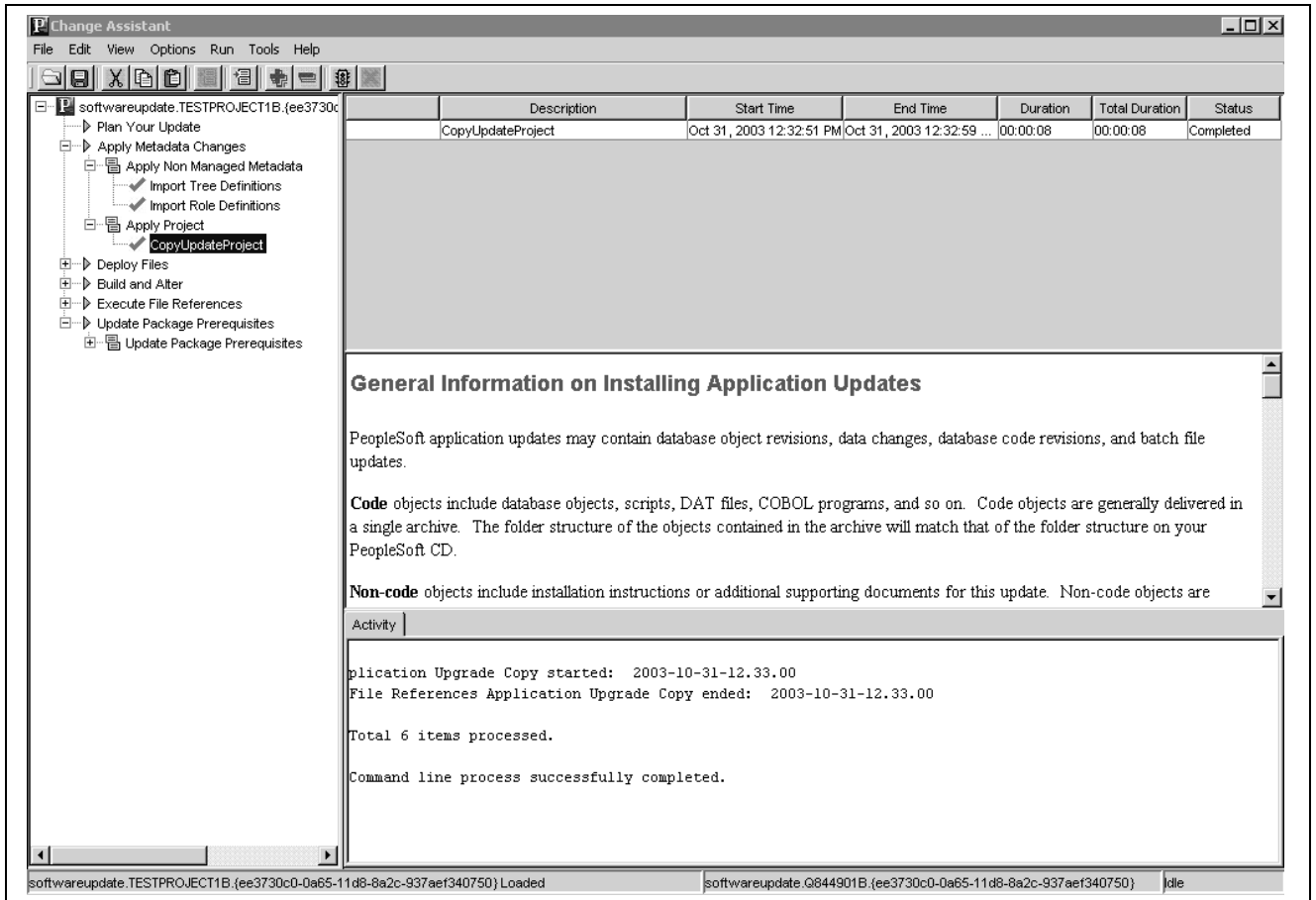
Configure your firewall to allow both inbound and outbound HTTP requests from *www.peoplesoft.com*. The user authentication and environment upload processes are going over HTTPS through the SSL. The downloading change package is redirected to the HTTP request to improve performance.

Note. For security reasons, your network infrastructure may re-route the inbound request to a different port.

Viewing a PeopleSoft Change Assistant Job

The job tree displays the status of each step and enables you to modify and restart steps; it is the main interface for software updates processing. The status grid displays the current step or process and provides information about it. The job view contains menus that enable you to complete the entire update process.

Access the job view.



Sample PeopleSoft Change Assistant Job

CHAPTER 3

Using PeopleSoft Change Assistant for Updates

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

- Upload environment data.
- Find the updates.
- Download change packages.
- Apply updates.
- View and edit the change log.

Understanding the Update Process

Before the update process begins, you must first upload the environment data, including the patch history, to PeopleSoft Customer Connection. Using the application environment data provided by PeopleSoft Change Assistant, PeopleSoft Customer Connection can identify all the unapplied updates in a given environment.

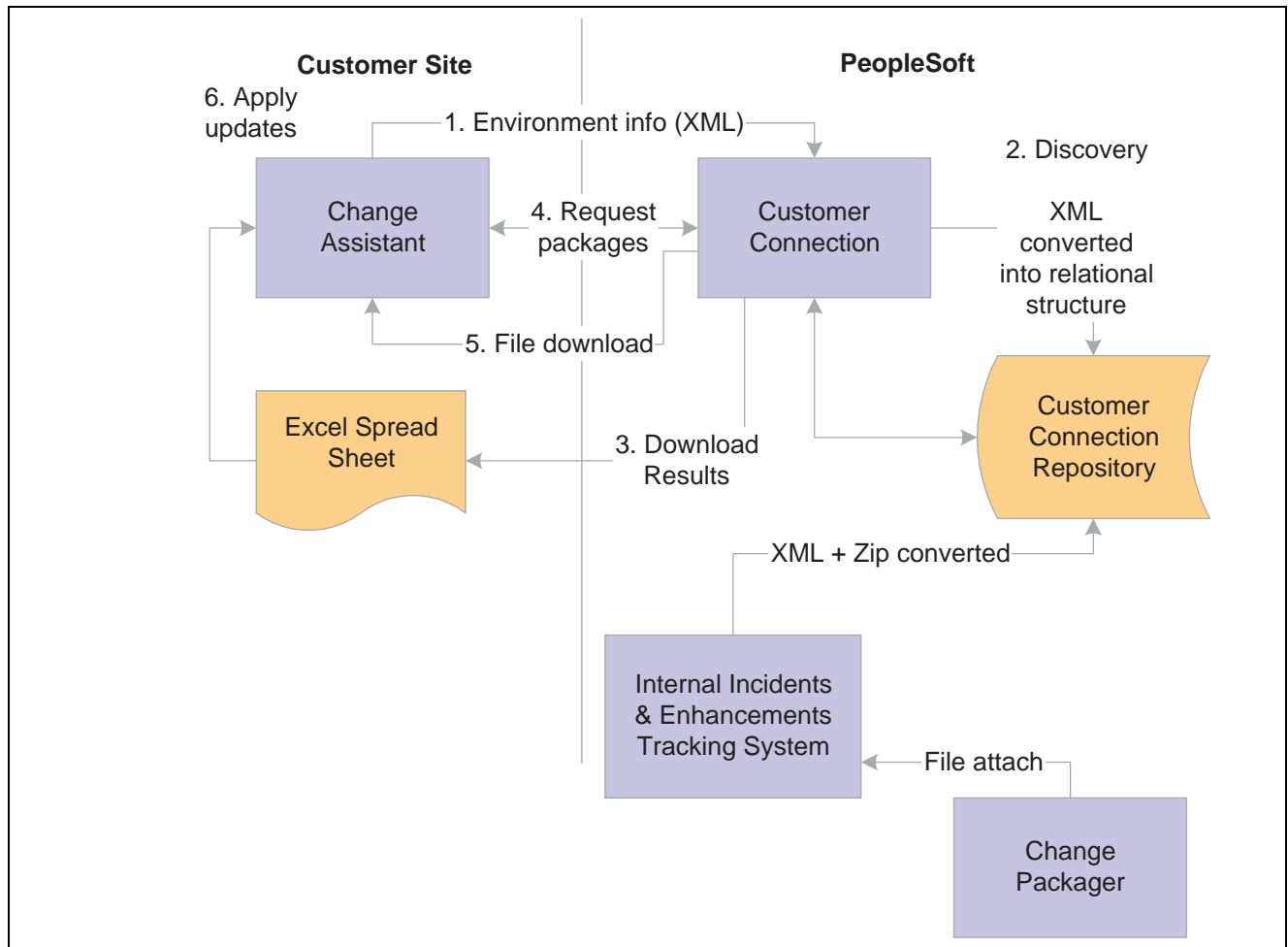
As a PeopleSoft Change Assistant user, you can access PeopleSoft Customer Connection to obtain a list of update IDs. You can download those update IDs to an Excel spreadsheet and review them offline.

Once you have determined which updates you want to apply, then use PeopleSoft Change Assistant to download all the change packages associated with the selected update IDs. You can download an individual change package or multiple change packages.

After you have downloaded the change packages, you can then apply them in a batch or individually. If prerequisites are required, they will be included in the list as well.

Note. Updates to application shipped on PeopleTools 8.40 through 8.43 will continue to be distributed with updates and fixes and applied with the documentation available in updates and fixes. PeopleTools 8.45 tools-only upgrades are to be performed using PeopleSoft Upgrade Assistant.

The following diagram provides an overview of the update process:



Software updates architecture

Update Scenarios

Typical scenarios for applying updates are:

Postinstallation or Upgrade

In most cases you will need to apply patches to a newly installed system. These updates are an addition to the updates required for the installation.

Problem Resolution

These types of updates are used primarily to fix problems under the following circumstances:

- Respond to an issue.
PeopleSoft informs the customer that a fix is available to solve the problem.
- Search for a resolution.
Use the Update Wizard on PeopleSoft Customer Connection to find the appropriate solution.
- Apply a specific update or updates.
At the request of the PeopleSoft Global Support Center (GSC), download a specific update to fix a particular problem.

Preventive Maintenance

For preventive maintenance, updates can be used under these conditions:

- Respond to a critical bulletin.

PeopleSoft may recommend that you apply an update to the products in use. You may also apply an important update, as desired.

- Perform periodic maintenance.

At any time interval, you may need to search, analyze, and apply maintenance to your system.

Uploading Environment Data

PeopleSoft Change Assistant provides PeopleSoft Customer Connection with the most up-to-date application environment data of the customer. Using the Environment Management Hub, PeopleSoft Change Assistant sends the license codes, update history (change log), and environment configurations to PeopleSoft Customer Connection.

To perform the upload environment operation:

1. Select Upload Environment from the Tools menu in PeopleSoft Change Assistant.
2. Select the check box at the lower left of the screen to agree to the terms of the Privacy Policy consent notice.
If you do not select the check box, you cannot continue the upload process.
3. You are prompted to launch the PeopleSoft Customer Connection update search after the upload is completed, or you can choose to access it later. Select one of these options, then click Next.
4. Enter your PeopleSoft Customer Connection user ID and password.

Note. Each PeopleSoft Customer Connection user ID is associated with a customer name and ID. PeopleSoft stores the uploaded application environment data with the customer ID of the user performing the upload. If a PeopleSoft Customer Connection user is authorized to represent more than one customer, this user must verify that the customer ID to which he or she is currently associated is the correct customer for which the upload is performed.

Select the View XML link to view all the environment data to be uploaded to PeopleSoft Customer Connection. Each environment is displayed in a tab identified by its short name, or a unique environment ID if no short name has been defined.

5. When the Confirm Customer screen appears, review the Authorized User, Company Name, and Customer ID fields before you click the Upload button.
6. If you have selected to launch PeopleSoft Customer Connection upon the completion of the upload process, you will be directed to the PeopleSoft Customer Connection search page in a default browser window.

Finding the Updates

This section provides overviews of PeopleSoft Customer Connection Update Wizard and the Change Packager, and discusses how to identify the updates.

Understanding PeopleSoft Customer Connection Update Wizard

While you are using PeopleSoft Change Assistant, you can access PeopleSoft Customer Connection Update Wizard at any time by selecting the Go to Customer Connection option on the Tools menu.

PeopleSoft Customer Connection:

- Receives environment information from PeopleSoft Change Assistant and provides PeopleSoft Change Assistant with data required to download the correct updates to apply.
- Enables you to find out what new updates have been released for each environment or application.
- Automatically calculates what updates are needed for each environment.

Understanding Change Packages

Change packages are zip files that contain the update project and all the associated files for the update. Using the PeopleSoft Customer Connection Update Wizard, you can discover the change packages that you need to download to PeopleSoft Change Assistant based on the update IDs.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer, “Using Change Packager,” Generating a Change Package

Identifying Software Updates and Change Packages That You Need

To identify the software updates or change packages that you need:

1. Log on to PeopleSoft Customer Connection by selecting Go to Customer Connection on the Tools menu in PeopleSoft Change Assistant.
2. Select a scope from the following options:

Find all updates that have not yet been installed

Select this to search for all updates that meet the environment and time frame criteria, including bundles, tax updates and updates required for upgrade and install. By default, this search returns the requisites of every update that meets the search criteria.

Find specific updates by Update ID

Select this to search for specific updates by update ID. Update IDs appear only if they match the user’s environment information. By default, this search returns the requisites of each update ID that is found.

Verify prerequisites and post-requisites for specific updates

Select this to search for all unapplied requisites for specific updates. Use this search to verify that for any unapplied update ID, you have the current list of requisites .

Note. PeopleSoft Customer Connection provides search results based on whether an update is a translated update or not. If it’s a translated update, then PeopleSoft Update Wizard determines whether the update should include English data.

3. Click Next.
4. Select an environment, then click Next; you can select only one environment at a time.

If you want to enter the environment information manually, click the *Manually enter environment information* link to access a screen where you can enter environment information and languages. Keep in mind that if you choose to manually enter environment information, you won't be able to filter updates for the environment based on patch history.

Note. The environment information that appears is what has been uploaded through PeopleSoft Change Assistant; likewise, if nothing has been uploaded, there will be no environments available on this page from which to select. The information displayed here is the description of the environment, the type of environment, and the time of the upload. Other information stored (but not displayed) include the license code, list of all update IDs applied, database type, and installed languages of this environment.

5. Select the applications that you want to apply the updates to, then click Next.

If you are not using the applications or have not installed the applications, de-select them.

Note. If you selected to search for updates not yet applied in step 1 of the Update Wizard, then the select applications page will appear.

6. Select from the following options:

Update Type

If you selected to search for updates not yet applied in step 1 of the Update Wizard, a page requesting information on the type of updates to search for appears.

Select the type of update to search.

- *All Updates* This option returns all updates meeting the search criteria, regardless of the type of update. Updates that are included in bundles will not appear in the search results (if the bundle is displayed in the search results). Also, updates that are required for upgrade, will not appear in this type of search.
- *Bundled Updates only* This option returns bundles that meet the search criteria. If requisites are included in the search results, it is possible that a requisite is not a bundle. Even though the requisite is not a bundle, it will appear in the search results.
- *Tax or regulatory updates only* This option returns any tax or regulatory updates that meet the search criteria.
- *Required for completing a fresh install* This options returns any updates required for install that meet the search criteria.
- *Documentation updates only* This option returns any documentation updates that meet the search criteria.
- *Required for completing an upgrade* This option return any updates required for upgrade that meet the search criteria. Updates *required* for upgrade only appear with this search option.

Date Posted

Select *Anytime* to search for all posting dates. If you select *Within this time period*, then select a From and To date using the date selector.

Include prerequisites and postrequisites not already applied to selected environment

Select this check box if you want to include all the requisites that have not been applied to the selected environment for the date and time criteria.




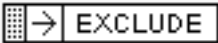
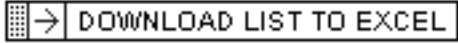
7. Click Next.
8. When the Candidate Updates screen appears, you may do the following:
 - Review and analyze the list of update IDs and evaluate the associated prerequisites and post-requisites.
 - Select the update ID link to view the details of the update. The update ID column indicates the updates that were found during the search.
 - Click Exclude if you want to remove the update ID from the list. By doing this, these are removed: 1) any updates that are required by the excluded update; and 2) any update that is only part of the search results, because it is a requisite of the excluded update.

A confirmation page appears, listing all updates that will be excluded by this action. You can choose to accept or cancel any exclusion.

Note. PeopleSoft recommends that you include all update IDs. Excluding some update IDs may cause problems because of the dependencies between updates.

9. Click Next to see a preview of what will be downloaded.

You can click Download List to Microsoft Excel to populate an Excel spreadsheet with all of the update IDs. You can then review and analyze the Excel spreadsheet offline. The search results grid has several columns that help you review the results.

Update ID	Displays the update ID associated with the change package. You can click the related link to obtain a detailed description of each update.
Type	Indicates whether the update is a primary update or a requisite of another update. A primary update indicates that the update ID meets the search criteria. An update can be both a primary and a requisite. The grid default sort order places all primary updates first, followed by updates that are both primary and requisite, and finally requisite updates. All are sorted in descending order by the post date. The icon adjacent to the type indicates whether the update is a <i>Bundle</i> , <i>Standalone Update</i> , or a <i>Standalone Update within a Bundle</i> .
 Bundle	Indicates that the update is a bundle. When a bundle is applied, all updates contained in the bundle are applied.
 Standalone	Indicates a stand-alone update, not included in a bundle.
 Standalone Update within a Bundle	Indicates a standalone update contained in a bundle; however, the bundle is not included in the search results.
	Click this button to exclude the update ID from the results list. Any updates that are required by the excluded update and any update that is only part of the search results, because it is a requisite of the excluded update, are also removed.
	Click this button to download a list of update IDs into a Microsoft Excel file.
Description	Displays the description of the update.
Posted	Displays the date that the update was originally posted.

Pre/Post-requisites

Displays the update IDs for the associated prerequisites and post-requisites. The requisites column displays the list of requests for the update. This column only displays the first level of requisites for the update. Each requisite in this list also appears in the update ID column, thus being included in the search results. This list shows those requisites which have not already been applied. It always displays the appropriate requisite for multilingual users and the appropriate requisite if a supersede occurred. This list does not appear if you have selected not to include requisites.

Note. There can be situations where a requisite in this list is not displayed in the update ID column. For example, if the requisite is contained in a bundle that is already included in the search results (appearing in the update ID column).

If You Manually Enter Environment Information

If you selected to manually enter environment information, the Update Wizard does not know the license code of your environment. In this case, every application for the specified product line appears. Therefore, you will have to determine which applications are appropriate for your environment. You will not be prompted to select applications in step 1 of the Update Wizard. Instead, a page appears that allows you to search for a specific update ID. When you are searching for specific updates, the checkbox in the lower part of the page labeled “Include pre-requisites and post-requisites not already applied to selected environment”, is selected by default. Select this checkbox (uncheck it) if you do not want to see requisites included in the search results. Leave the checkbox activated if you want the tree of requisites that have not yet been applied to display in the search results.

Downloading Change Packages

Once you’ve downloaded the Excel file with all the update IDs, you need to review each update ID before you download the associated change packages. You may decide not to download certain updates upon further review.

Performing the Download Process

To perform the download process:

1. Select the Download Change Packages option from the Tools menu in PeopleSoft Change Assistant.

The system prompts you to select the download directory.

Note. If the Environment Management Hub is unavailable, you will see an error and the operation will be canceled. If the PeopleSoft Customer Connection URL options data is missing, you will see an error that this option data is required and the operation will be canceled. Verify that these values are specified and the Environment Management Hub is up and running.

2. Accept the default download directory that you set up in PeopleSoft Change Assistant options, or select a different directory for your download.
3. Click Next to display a screen where you enter the update IDs.

You may enter multiple update IDs by separating them with spaces, commas, or returns.

Note. To avoid mistakes, it is recommended that you copy and paste the desired update ID values from the spreadsheet created during the update discovery process.

4. Click Next to display a screen where you enter your user name and password to access PeopleSoft Customer Connection.
5. When the Confirm Selections screen appears, review the list of update IDs that you want to download before clicking Next.
6. When you are prompted to launch the Apply Change Package upon the completion of the download process, you may elect to accept or decline.
7. Click Close when the download is complete.

Applying Updates

The Apply Change Packages process enables you to apply one or more change packages to the target environment.

Using the Change Log

In order for PeopleSoft Customer Connection to identify the prerequisites and post-requisites for the update, PeopleSoft Change Assistant must upload a reliable and valid change log to PeopleSoft Customer Connection. The change log keeps track of all the change packages that you have previously applied.

Using the Environment Management Hub, PeopleSoft Change Assistant evaluates the change log status of the available environments to determine the reliability of the change log data. For environments that don't have reliable change log data, you need to apply the change packages individually and manually in order to identify the prerequisites.

If you want to view the change log to determine if it is reliable, you need to access the PeopleSoft application in your browser.

See [Chapter 3, “Using PeopleSoft Change Assistant for Updates,” Viewing and Editing the Change Log, page 23.](#)

Reliability of Change Log

Only those application releases in which *all* of their application updates were delivered in change packages are considered to have reliable change log data. Application updates that you applied that were not delivered as change packages are probably not included in your change log. Therefore it's possible that your change log does not match your actual maintenance history. In these cases, you should apply change packages individually—select only one change package in the Update Wizard. Then, you can verify whether the list of missing pre-requisites reported by PeopleSoft Change Assistant accurately reflects your maintenance history.

If your target environment is at an application release level that is not considered to have reliable change log data, PeopleSoft Change Assistant may falsely report that a prerequisite is missing from this environment. If this is the case, *do not* add the supposed missing update to your current apply list, as this would reinstall the update (not recommended).

Therefore, if your target environment may have unreliable change log data, review the list of missing prerequisites found by PeopleSoft Change Assistant and if any of these updates are known to have been previously applied to your target environment, manually enter these updates to your change log first so that PeopleSoft Change Assistant can accurately determine that these prerequisites have been satisfied. If you need to add entries to your change log, you will have to restart the apply change packages process.

If you want to view the change log to determine if it is reliable, you need to access the PeopleSoft application in the browser.

Applying Change Packages

To apply change packages to the target environment:

1. Select Apply Change Packages.
2. Select a product line release of the target environment and click *Next* to display the Select target environment(s) screen.
3. Select the target environment.
4. Click Next to display the Environment Preparation screen where you can read the preparation instructions for your environment.
5. After you've read the instructions, select the check box, then click Next to display a screen where you can enter the database username and password and access ID and password for the selected environment.
6. Select the file servers that are used in conjunction with the environment you selected.
7. Click Next to display a screen where you can modify the default apply directory that you set up in PeopleSoft Change Assistant options.
8. Click Next to display a screen where you can select change packages to install.
You can use the Select All button to select all the available change packages listed on the screen.
9. Click Next after you've selected your change packages.

At this time, PeopleSoft Change Assistant examines all the selected change packages to determine if any of them have previously been applied.

Note. If an *Unable to read change package* error appears because of an unsupported change package version number, then you must install the latest release of PeopleSoft Change Assistant.

10. If the change package has already been installed, you will be prompted to select one of the following options:
 - Do not reapply the change package.
 - Review each change package individually, with option to apply.

If you choose to review each change package individually, you will be prompted either not to reapply the change package or to reapply the change package (not recommended).
11. Select the options, then click Next.

If none of the translated languages included in a change package applies to the languages installed in the target environment, you will be prompted to select one of the following options:

- Remove these change packages from my installation list.
- Review each of these change packages individually, with option to apply.

If you elect to review each change package individually, you will be prompted either not to apply the change package or to apply the change package (not recommended).

12. After you've made your selection, PeopleSoft Change Assistant searches for post-requisites. If there are post-requisites that are not listed in the apply list, you will be prompted to select one of the following options:

- Apply these additional change packages.

The additional change packages are added to the list of selected change packages.

Note. This option is enabled only if the additional change packages are already present in your apply directory.

- Remove the change packages that require post-requisites from my installation list.

13. Click Next.

PeopleSoft Change Assistant searches for any missing prerequisites required by the selected change packages, and you will be prompted to make the same selections as in the previous step.

Note. If your target environment is at an application release level that is not considered to have reliable change log data, PeopleSoft Change Assistant may falsely report that a prerequisite is missing from this environment. If this is the case, it is very important that you *not* elect to add the supposed missing update to your current apply list, because this would reinstall the update, which is not recommended. Therefore, if your target environment is considered to have unreliable change log data, it is very important that you review the list of missing prerequisites found by PeopleSoft Change Assistant. If any of these updates are known to have been previously applied to your target environment, you must first manually enter these updates to your change log so that PeopleSoft Change Assistant can accurately determine that these prerequisites have been satisfied. If you need to add entries to your change log, you will have to restart the Apply Change Packages process.

14. After you have selected your option, click Next.

If one or more of the change packages you are applying includes the Build and Alter template steps, you will be prompted to select one of the following methods to apply the database changes.

- Automatically: This enables build scripts to be run as an automated template step.
- Manually: This enables the build script to be run as a manual template step.

15. If one of your selected changes packages will be executing a script that includes embedded question syntax that is supported by PeopleSoft Change Assistant, you will be prompted to enter a runtime value for the script variables.

16. Click Next to display a screen where you confirm your selections—target environment and change packages to apply and number of manual steps, if any, for each change package.

17. Click Next to begin the apply process.

Automatically Deploying Files

PeopleSoft Change Assistant can automatically deploy files in a change package to different servers within an environment. If the job that is running while applying the change package includes a Deploy Files chapter and contains tasks and steps, that indicates that PeopleSoft Change Assistant deploy the files to the agents that are running in the environment.

While PeopleSoft Change Assistant runs individual deploy file steps within the job, it will query the hub for the location to deploy the file. The query is based on the PeopleSoft server, operating system, and database platform. If the query returned from the hub matches what was defined for the file reference in the change package, PeopleSoft Change Assistant attempts to deploy the file to the agent running on the host machine.

When the file is deployed, the step's log file lists the host name and the type of server that match the file reference and the target path on the remote host.

If the Environment Management agent is not running at the time when PeopleSoft Change Assistant is trying to deploy the file, a warning message appears stating the inability to deploy the file. Other types of problems that may occur, such as lack of disk storage space, will result in step failure.

Applying Updates

If there is current apply job set, the Resume Running Jobs dialog box appears automatically when you start PeopleSoft Change Assistant, run a job, or apply change packages (start a new apply).

- Selecting Cancel will:
 - Remove all jobs associated with the current apply job set that have not been run.
 - If a job definition is open in PeopleSoft Change Assistant and it does not belong in the current apply job set, the job definition remains open.
 - If a template definition is open in the PeopleSoft Change Assistant, regardless of whether or not it's used in the current job set, it will remain open.
- Selecting No keeps the current apply job set and its associated jobs as they are, so that you can resume this apply job set later.

Viewing and Editing the Change Log

Occasionally, you may want to fix a problem on your own without applying the PeopleSoft delivered update. For example, the fix may be very simple and may affect a customized object. In this case, you should manually add a User Applied update entry to your change log so that the PeopleSoft Change Assistant will be aware that a fix equivalent to the PeopleSoft update has been applied. In addition, in very rare circumstances where you have determined that a required update is unnecessary in your environment, you can enter an Override Requisite update entry to your change log. That is, you want to override an update. You should override an update only if you are certain that it will not result in any harmful effects in the future when other updates may rely on this update's changes.

Pages Used to View and Modify the Change Log Table

Page Name	Object Name	Navigation	Usage
Updates – View All	MAINLOGVIEW	PeopleTools, Utilities, Administration, Updates – View All	Use this page to view all the information of the update, including its history.
Add Update Entry	MAINTLOGADD_SEC	PeopleTools, Utilities, Administration, Updates – View All Click the Add Update Entry link.	Use this page to add an entry to the change log.

Viewing the Change Log

Access the Update – View All page.

Updates - View All

Show All Updates Show PS Updates Only

Updates					
Update ID	Imported Date Time	Description	Log Type	User that Created Update	User that Applied Update
120715	07/01/03 6:13:49.000000PM	Composite PeopleTools Maintena		PT8	QADMIN
126292	07/01/03 6:13:49.000000PM	Composite PeopleTools Maintena		PT8	QADMIN
136730	09/12/03 4:10:51.000000PM	Composite PeopleTools Project	IDE Project Copy	PT8	PT8
136730	09/26/03 5:14:23.000000PM	Composite PeopleTools Project	IDE Project Copy	PT8	PT8
136730	10/07/03 6:10:52.000000PM	Composite PeopleTools Project	IDE Project Copy	PTUPG	PTUPG
136730	10/10/03 4:16:43.000000PM	Composite PeopleTools Project	IDE Project Copy	PTUPG	PTUPG
139098	09/23/03 7:13:24.000000PM	Increm Proj for PT844_113A	IDE Project Copy	PT8	QADMIN
139098	09/26/03 5:14:23.000000PM	Composite PeopleTools Project		PT8	PT8
139098	10/07/03 6:10:52.000000PM	Composite PeopleTools Project	Non-Primary Update	PTUPG	PTUPG
139098	10/10/03 4:16:43.000000PM	Composite PeopleTools Project	Non-Primary Update	PTUPG	PTUPG

[Add Update Entry](#)

Updates – View All page

Show All Updates	Select this option to view all the updates in the system.
Show PS Updates Only	Select this option to view only the PeopleSoft updates.
Update ID	Identifies a change package.
Imported Date Time	Shows the date and time the update was installed.
Description	Provides specific description of the update.
Log Type	Valid options are <i>Non-primary Update</i> , <i>IDE Project Copy</i> , <i>User Applied</i> , and <i>Override Requisite</i> .
User that Created Update	Identifies the person who created the update.
User that Applied Update	Identifies the person who applied the update.

Adding an Entry to the Change Log

Access the Add Update Entry page.

Add Update Entry

*Update ID

*Update ID Type

*Description

*Log Type

Release Label

Release Date/Time

Product Line

*Imported Date Time

*User that Created Update

*User that Applied Update

Comment

Add Update Entry page

Update ID Type

Valid options are *Others* and *PS Update*.

Note. Use the Other type when adding entries for non-PeopleSoft update IDs; for example, updates or customizations being tracked in your own internal issues tracking system.

Log Type

Valid options are *Override Requisite* and *User Applied*.

CHAPTER 4

Using the Templates

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

- Use the PeopleSoft Change Assistant templates.
- Export the PeopleSoft Change Assistant templates.
- Edit templates.
- Modify step properties.

Understanding the Update Template

When applying a change package, PeopleSoft Change Assistant uses the update template embedded in the PeopleSoft provided change package. You can use the update template to automate the majority of the job steps. The primary difference between a template and a job is that a template is a composite of the update process, whereas a job is a set of filtered steps for a given target environment within a template.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer, “Using Change Packager,” Creating a Change Package

Using the PeopleSoft Change Assistant Templates

PeopleSoft delivers update templates for each update in PeopleSoft change packages. When you apply updates by using the Apply Change Packages option, PeopleSoft Change Assistant automatically loads the template into the PeopleSoft Change Assistant internal storage system. You can add additional chapters, tasks, and steps to the template.

Note. Any changes that you make to the imported template won't affect the original template that you downloaded from PeopleSoft Customer Connection. If you want to overwrite the original template with your changes, save the template and select File, Export to export it to the directory from which you downloaded it. You can also use the export function to make this modified template available to others.

Exporting Templates

In order for others to use the template that you create or modify, you need to export it from PeopleSoft Change Assistant. If you want to overwrite an existing template file, enter the name of the original template.

To export a template:

1. Open the template in PeopleSoft Change Assistant by selecting File, Open Template.
2. Select File, Export Template.

The Export Template dialog box appears.

3. Navigate to the folder in which you want to save the template.
4. Enter the name of the template.

Note. If you want to overwrite the original template that you downloaded from PeopleSoft Customer Connection, enter the original name of the template.

5. Click Save.

Editing Templates

You may want to add steps, modify existing steps, or delete existing steps from the templates. To edit a template, you must be in the Template mode (Options, Change Assistant Options, General tab, Advanced Options button, Template).

Note. Under normal circumstances, you don't need to modify the template delivered by PeopleSoft. However, if you choose to edit a template, take special care.

Creating New Chapters in Templates

You can add a chapter to an existing update template. A chapter is a section heading for a group of tasks.

To insert a chapter:

1. Highlight the location where you want to add the chapter.

If you want to add a chapter above the existing first chapter in the template, highlight the top node (template name) at the top of the template tree. Otherwise, put your cursor on the chapter below which you want to insert the new chapter.

2. Select Edit, Insert Chapter on the PeopleSoft Change Assistant toolbar.
3. Enter a unique name for your new chapter.

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

4. Click OK.

Creating New Tasks in Templates

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

To insert a task:

1. Highlight the chapter or task below which you want to insert the new task.
2. Select Edit, Insert Task on the PeopleSoft Change Assistant toolbar.

3. Enter a unique name for your new task.

Note. Each task within a chapter must have a unique name.

4. Click OK.

Adding Steps to Templates

PeopleSoft delivers update templates with all of the steps included to perform the update. While performing the update, you may need to add steps (for example, you may add steps for dropping and adding indexes or running a backup of the target database).

To add a step:

1. Highlight the task or step below which you want to insert the new step.
2. Select Edit, Insert Step on the PeopleSoft Change Assistant toolbar.
3. Enter a unique name for your new step.

Note. Each step within a task must have a unique name.

4. Click OK.

PeopleSoft Change Assistant displays the Step Properties dialog box.

5. Enter the step properties for the new step.
6. Continue creating steps until the template is complete.
7. Save the template.

Editing Steps in Templates

PeopleSoft delivers update templates with default settings to perform updates. You can modify the default settings by changing the step properties. Setting these properties determines the conditions that apply when you run the update process.

To modify the step properties, highlight the step for which you want to modify the step properties, then select Edit, Step Properties.

Note. Depending on whether you are in Job mode or Template mode, some of the fields may be disabled. Also, the step status grid only appears when you are in Job mode.

1. Verify that the step description corresponds to the step you selected.
2. Modify the step properties.
3. Click OK on the Step Properties dialog box to display the PeopleSoft Change Assistant dialog box.
4. Save the template.

The step properties that you defined for the current step are displayed in the Task Details section of the dialog box.

Deleting Chapters, Tasks, or Steps from Templates

To delete a chapter, task, or step:

1. Access PeopleSoft Change Assistant and select Template view from the Advanced Options screen.
2. Select File, Open Template to select your template.
3. Highlight the chapter, task, or step that you want to delete.

Warning! If you delete a chapter, PeopleSoft Change Assistant deletes all the tasks and steps within the chapter. If you delete a task, PeopleSoft Change Assistant deletes all the steps within the task.

4. Select from the following:
 - a. If you want to delete a chapter, select Edit, Delete Chapter.
 - b. If you want to delete a task, select Edit, Delete Task.
 - c. If you want to delete a step, select Edit, Delete Step.
5. PeopleSoft Change Assistant deletes the chapter, task, or step and updates the template.
6. Save the template.

Modifying Step Properties

Step properties are set by default in PeopleSoft-delivered templates. However, you may want to modify or edit step properties in your own templates or for steps that you add to PeopleSoft-delivered templates.

Note. Under normal circumstances, it is recommended that you not modify or edit the step properties in your delivered template.

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

Step Description	This field displays your current step.
Script/Procedure	This field is required for all step types except manual stop.
Type	Select a step type. This selection defines the type of action to be performed by the step. Step types are listed in the following table:

Type	Definition
Application Engine	Runs the Application Engine process indicated by the Script/Procedure value under Step Properties.
Build Project	Builds the project specified in the step properties parameter as #Project= (for example, #Project=ALLTABS). The project is built through the PeopleTools command line.
Copy from file	Copies a project from a file. This is used in conjunction with the Copy To File. It uses the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS).

Type	Definition
Copy to file	Copies a project to a file. This is used in conjunction with the Copy From File option. It uses the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS).
Create project	This type enables you to select the type of records to insert into a project.
Data Mover-Bootstrap	Runs Data Mover scripts as the access ID specified in the credentials panel in the Apply Wizard (bootstrap mode).
Data Mover-User	Runs Data Mover scripts as the user ID specified in the credentials panel in the Apply Wizard (non-bootstrap mode).
Deploy file	Deploys files in change packages to different servers.
Execute process	Enables you to include custom processes, such as batch files, that you can run in PeopleSoft Change Assistant. You need to start this process with cmd /c for the process to run; for example: Cmd /c c:\backup.bat
Manual/Stop	Defined as a step you must run manually. PeopleSoft Change Assistant automatically sets the run status to Stop. After you have manually completed the step, you must change the Job Status to Complete.
SQL Command	Runs the SQL command defined in the Parameters value under the Step Properties. PeopleSoft Change Assistant runs the command using the SQL Query tool specified in the Database Configuration dialog box. For most SQL Query Tools, PeopleSoft Upgrade Assistant stops on an error.
SQL Script	Runs the SQL script defined in the Script/Procedure value under the Step Properties. PeopleSoft Change Assistant runs the script using the SQL Query tools specified on the Database Configuration. For most SQL Query Tools, PeopleSoft Change Assistant stops on an error.
SQR Report	Runs SQRs using the pssqr command line. If parameters are included in the Parameters section of the step properties, PeopleSoft Change Assistant will obtain the SQR settings from Configuration Manager for the Profile selected in the Job Database Configuration.

Note. If you select *Create Project* from the Type drop-down list box, you must set a #Type parameter and a #Project parameter. For a list of parameters, see the next topic. When you select *Build Project* from the Type drop-down list box, a Build options button appears. You select options based on the instructions in the update documentation for your product and path.

Parameters

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

The additional parameters are:

Parameter	Description
#Project=	Used primarily for functions that require a project name; for example, Build Project.
#Directory=	Used when you need to run a script that is not located in the <PS_HOME>\scripts directory, for example, STOREPT. In this case, you could enter: #Directory=#PTPS_HOME\src\cbl\base\
#P1= through #P5=	Used to pass parameters to SQR reports, for example, TEST.sqr. In this case, you would pass the necessary value, such as: #P1=#OutputDirectory
#PTPS_HOME=	Used to specify the <PS_HOME> variable that is defined on the Directory tab of the Change Assistant options (Options, Change Assistant, Directories tab).
#OutputDirectory=	Used to specify the Output Directory variable that is defined in the Options, Change Assistant, Directories screen.
#NT=	Used for DB2 Command Center, for Non-Terminated SQL Scripts.
#Type=	Enables you to specify the type of record to insert into the project. Choose from the following record types: All Records Table View/Query View Derived SubRecord Stored Procedure Temporary Table Dynamic View
#RCID=	Enables the user to override the run control ID used for Application Engine processes.

Products

Click the Products icon and PeopleSoft Change Assistant displays the Select Products dialog box. This dialog box enables you to select the product line (for example, FIN/SCM) and the industry (for example, Commercial) from the drop-down list boxes and the products your step should be run against, from the checklist (for example Asset Management).

Note. This feature is used primarily for data conversion processes. You must select at least one product.

Note. Run Location and Database Configuration are not used at this time.

After you select a product line, industry, and one or more products, PeopleSoft Change Assistant displays your selection on the Step Properties dialog box.

Platforms Click the Platforms icon on the Step Properties dialog box, and PeopleSoft Change Assistant enables you to select the platforms you want to run against this update step. You must select at least one platform.

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

Language Click the Languages icon on the Step Properties dialog box, and PeopleSoft Change Assistant enables you to select the languages you want this update step to run against. You must select at least one language.

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

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

Note. Type of Update Step , Language Type, Allow for Errors, and Run Concurrently options are not used at this time.

APPENDIX A

Migrating Change Packages or Maintenance Updates

This appendix describes the procedure used to migrate change packages or maintenance updates to your environment.

Note. This process is required for every change package delivered by PeopleSoft. For example, Financials 8.8 Maintenance Pack 1 is delivered in 5 change packages—therefore, financial customers would need to create 5 modified change packages for each of the delivered change packages. PeopleSoft does not support the addition or removal of files in any delivered change package.

Migrating Change Packages or Maintenance Updates

1. Using PeopleSoft Change Assistant, apply a change package or maintenance update to the demo database.
2. Run the project compare operation of installed updates to the development or copy of production.
3. Review each customized object and decide whether or not you want to allow the object to be copied into your development database.
4. Copy project from the demo database to the development or copy of production database.
5. Select the objects in the project that require re-customization, and reapply customizations.
6. Select the Upgrade checkbox for each object that required re-customization.
7. Copy project to file.
You can specify any location; for example, `c:\peoplesoft\modified\project`.
8. Extract the files from the delivered change package.
9. Update the project files (.xml and .ini) in the extracted project directory with the exported custom project. For example, copy PRJ151828.XML and PRJ151828.INI from `c:\peoplesoft\modified\projects\PRJ151828` to `c:\peoplesoft\extracted\upd151828\PRJ151828`.
10. Examine the files changes in the maintenance pack with customized files. Typically, these files exist in the `updXXXXXX_batch` directory.
11. Update file changes where necessary.
12. Open the modified project in PeopleSoft Application Designer and repackage the change package by selecting Tools, Finalize Change Package.
When you are prompted for the directory, enter the high-level extracted directory. For example, `c:\peoplesoft\extracted\upd151828`.
13. Apply the modified maintenance updates to the test or production database or both.
When you are prompted to enter the apply directory, enter the directory that contains the modified change package. For example, `c:\peoplesoft\extracted\upd151828`.

The modified change package already includes customizations from the development database and modified files from the development environment. Therefore, now PeopleSoft Change Assistant can be used to migrate both the delivered and the customized objects in the customer's environment without additional manual interventions.

APPENDIX B

Data Sent to PeopleSoft Customer Connection

This appendix describes the environment summary data collected by the Environment Management Hub and sent to PeopleSoft Customer Connection through PeopleSoft Change Assistant. The data is sent in an XML file.

Data Included in Summary File

The following specific environment information is included in the XML file:

Specific Environment Data	DATETIME (Date and Time)
	GUID (Globally Unique ID)
	LONGNAME
	MAINTLOG_VALID
	SHORTNAME
	SYSTEMTYPE
	TIMEZONE
Application Data	LICENSE_CODE
	LICENSE_GROUP
	RELEASELABEL (Release Label)
	TOOLSREL (Tools Release)
	UNICODE_ENABLED
	LANGUAGES SIZE
	LANGUAGE_CD NAME (Language Code Name)
Server Data	HOSTS SIZE (number of hosts in the current environment)
	HOST NAME
	OS (Operating System)
	RELEASELABEL (Release Label)
	SIZE (number of servers)
	SERVER NAME
	TOOLSREL (Tools Release)

Finding Applied Updates

The following change log information shows all the applied updates in the environment:

- MAINTENANCE_LOG SIZE
- UPDATE FIXOPRID (update fix operator ID)
- MAINTLOGTYPE (change log type)
- UPDATE_ID

APPENDIX C

Viewing a PeopleSoft Change Assistant Template

The PeopleSoft Change Assistant template comprises four sections: template tree, step details, documentation, and activity. A template is a blueprint of a job and can be found in a change package that you download from PeopleSoft Customer Connection.

Common Elements in This Section

Open Template	Opens a template from the PeopleSoft Change Assistant storage (internal database).
Save Template	Saves your template into the PeopleSoft Change Assistant storage (internal database).
Save Template As	Saves your template as a new template name that you specify.
Close	Closes the current template.
Import Template	Imports an existing template into PeopleSoft Change Assistant.

Note. Any modifications to the current template will not affect the original template that you imported. If you want others to obtain a copy of your modified template, you need to export it out of PeopleSoft Change Assistant.

Delete Template	Removes the template from PeopleSoft Change Assistant. When you delete a template, you also delete all the jobs associated with the template.
Export Template	Exports a copy of the template out of PeopleSoft Change Assistant so others can use it.
Delete Job	Removes a job associated with the current template.
Exit	Exits PeopleSoft Change Assistant.
Change Assistant	(Options menu) Enables you to specify general options, advanced options, the download and apply directory for the updates, the staging directory, and the output directory.
Web Services	(Options menu) Enables you to configure the URLs to access PeopleSoft Customer Connection and related servers.
Environment Management Hub	(Options menu) Enables you to view and edit the URL to the Environment Management Hub.

Upload Environment	(Tools menu) Uploads environment data from Environment Management Hub to PeopleSoft so that PeopleSoft Customer Connection can use the information to determine what patches and fixes are applicable for your updates.
Go to Customer Connection	(Tools menu) Accesses the PeopleSoft Customer Connection update search page.
Download Change Package	(Tools menu) Downloads the change packages into PeopleSoft Change Assistant based on the update IDs that you specify. You can obtain a list of update IDs by downloading a Microsoft Excel file from PeopleSoft Customer Connection.
Apply Change Packages	(Tools menu) Launches the process to apply change packages that you downloaded from PeopleSoft Customer Connection.

Viewing the Template Tree

The template tree section displays the chapter, tasks, and steps for your selected update product and uses the following structure:

- Chapters are section dividers that display the tasks within the chapter.
- Tasks are section levels that contain one or more steps.
- Steps are the actual update steps that you select to set up and run your update job.

Note. When you run your update job, you assign properties at the step level, not the task level.

APPENDIX D

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

“About This PeopleBook,” Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijani Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Franc
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldives Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa'anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	<p>In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.</p> <p>In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.</p>
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	<p>A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source 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.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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