

# PeopleSoft®

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Enterprise PeopleTools 8.45  
PeopleBook: PeopleSoft Upgrade  
Assistant

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Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Upgrade Assistant  
SKU PT845UGA-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.

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**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.

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## 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.

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## 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.

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## 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.

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**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.

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#### 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](mailto: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
<b>Bold</b>	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.

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**Note.** Example of a note.

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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.

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**Important!** Example of an important note.

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### Warnings

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

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**Warning!** Example of a warning.

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### 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 A, “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](mailto: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

<b>As of Date</b>	The last date for which a report or process includes data.
<b>Business Unit</b>	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.
<b>Description</b>	Enter up to 30 characters of text.
<b>Effective Date</b>	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 Upgrade Assistant Preface

This preface discusses the PeopleSoft Upgrade Assistant.

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## PeopleSoft Upgrade Assistant

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

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



# CHAPTER 1

## Using PeopleSoft Upgrade Assistant

This chapter provides an overview of PeopleSoft Upgrade Assistant and discusses:

- Installation of PeopleSoft Upgrade Assistant.
- Using the upgrade template.
- Creating and running upgrade jobs.
- Running Application Engine processes.
- Resolving errors.

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### Understanding PeopleSoft Upgrade Assistant

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

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

### Understanding the Upgrade Template View

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

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

### Understanding the Job Status View

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

---

## Common Elements in this Chapter



The New File button corresponds with the File, New menu item. Use it to create a new template.



The Open File button corresponds with the File, Open menu item. Use it to open a new template.



The Save File button corresponds with the File, Save menu item. Use it to save a template.



The Insert Task button corresponds with the Edit, Insert Task menu item. Use it to insert a task into a template.



The Delete Task button corresponds with the Edit, Delete Task menu item. Use it to delete a task from a template.



The Insert Step button corresponds with the Edit, Insert Step menu item. Use it to insert a step into a template.



The Delete Step button corresponds with the Edit, Delete Step menu item. Use it to delete a step from a template.



The Run icon indicates that PeopleSoft Upgrade Assistant runs this step or process. These are known as automated steps.



The Stop icon indicates that PeopleSoft Upgrade Assistant stops on this process.



The Restart icon restarts or continues the step. You would set an automatic step to *restart* if it failed, you've corrected the problem, and now you want to restart the step.



The Processing icon indicates that the process is running.



The Error icon indicates an error.



The Complete icon indicates that the step is finished.



The New File button corresponds with the File, New menu item. Use it to create a new job.



The Open File button corresponds with the File, Open menu item. Use it to open a new job.



The Save File button corresponds with the File, Save menu item. Use it to save a job.



Use the Run button to start processing the steps that are defined to run in the upgrade job.



Use the Cancel button to cancel processing of the steps that are defined to run in the upgrade job.



Use the Expand All button to expand all chapters, tasks, and steps in the upgrade job.



Use the Collapse All button to collapse all chapters, tasks, and steps in the upgrade job.

**New Upgrade Template**

Select this option to create your own upgrade template. After creating your own template, you can insert steps, scripts, and procedures to configure your upgrade.

**Open Upgrade Template**

Select this option to open an existing template.

**Save Upgrade Template**

Select this option to save your upgrade template and the properties and configurations you have designated for the template.

**Save Upgrade Template As?**

Select this option to save your upgrade template as a filename specified by the user and the properties and configurations you have designated for the template.

**Close**

Select this option to close the current template.

**Print**

Select this option to Print the current template.

**Find**

Enables you to search for a chapter, task, or step within the current template by entering a search string.

**Find Next**

Enables you to search for the next occurrence of the target text that you entered.

**Insert Chapter**

Enables you to insert a chapter into an upgrade template. A chapter serves as a section head for multiple tasks.

**Delete Chapter**

Enables you to delete a chapter from an upgrade template.

**Insert Task**

Enables you to insert a task into an upgrade template. A task serves as a section head for one or more steps.

**Delete Task**

Enables you to delete a task from an upgrade template.

**Insert Step**

Enables you to insert a step into an upgrade template.

**Delete Step**

Enables you to delete a step from an upgrade template.

**Step Properties**

Enables you to set step properties for each step in the upgrade. On the Step Properties dialog box, you specify properties that determine the conditions that apply when you run the upgrade process.

**Rename**

Enables you to rename an existing chapter, task, or step in an upgrade template.

**Set Documentation Directory**

Enables you to specify the directory into which your upgrade documentation is saved. The PeopleSoft Upgrade Assistant loads the documentation for viewing during the upgrade process.

**Upgrade Assistant (Option tab)**

Enables you to specify the default log and script editor, HTML browser, and email settings.

**Merge Templates (Option tab)**

Enables you to merge an existing upgrade template with a new upgrade template.

**Database Configuration  
(Option tab)**

Enables you to set the database configuration, specify directories and products, set profiles and run locations, and specify import and export settings.

**Start (Run tab)**

Starts processing of the steps that are defined to run in the Upgrade Job.

**Cancel**

Cancel processing of the steps that are defined to run in the Upgrade Job.

## CHAPTER 2

# Installing PeopleSoft Upgrade Assistant

This chapter discusses how to install PeopleSoft Upgrade Assistant.

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

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## Installing PeopleSoft Upgrade Assistant

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

To install PeopleSoft Upgrade Assistant:

1. From the PS\_HOME/Setup/psua directory, run Setup.exe. The Welcome screen appears.
2. On the Welcome screen, confirm that Modify is selected and click Next.

The PeopleSoft Upgrade Assistant screen appears.

3. Accept the default Destination Folder or specify another Destination Folder.
4. Select Next.

The Start Copying Files screen appears.

5. If you want to review or change any settings, click Back.

When you are satisfied with your settings, click Next to begin copying files. PeopleSoft Upgrade Assistant copies files to the designated directory.

6. Click Finish to complete the Setup process.

## Accessing the PeopleSoft Upgrade Assistant

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

## Uninstalling PeopleSoft Upgrade Assistant

Follow these instructions if you have previously installed the PeopleSoft Upgrade Assistant.

To uninstall the PeopleSoft Upgrade Assistant:

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

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

# CHAPTER 3

## Using the Upgrade Template

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

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

---

### Understanding the Upgrade Template

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

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

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### Understanding Process Types

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

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

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

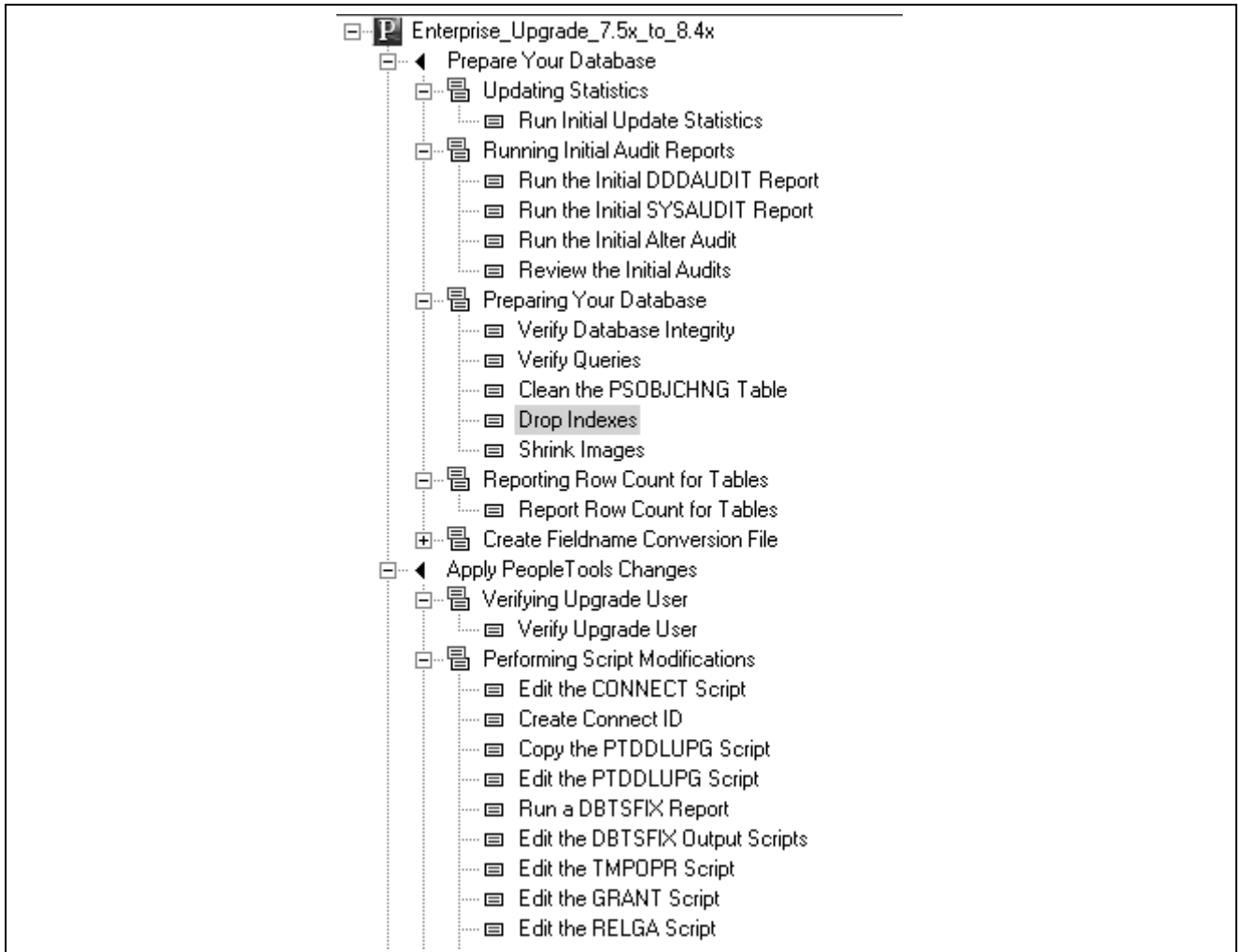
Process Type	Definition
DBTSFIX	Runs the DBTSFIX.sqr for database platforms that utilize tablespaces (DB2, Informix and Oracle). The SQR edits the rel8xx.sql scripts to sync the tablespace information in the scripts with the target database server. PeopleSoft Upgrade Assistant determines your source and target releases and decides which DBTSFIX scripts need to be run for your upgrade.
Load Base Data	Runs scripts conforming to the PTXXXTLS.DMS naming convention that are greater than the target database's current PeopleTools release. PeopleSoft Upgrade Assistant determines your source and target releases and decides which Base Data scripts need to be run for your upgrade.
Manual/Stop	Defines a task you must run manually. PeopleSoft Upgrade Assistant automatically sets the run status to <i>Stop</i> . After you have manually completed the step, you must change the Job Status to <i>Complete</i> .
SQL Command	<p>Runs the SQL command defined in the Parameters value under the Step Properties. PeopleSoft Upgrade Assistant runs the command using the SQL Query tool specified in the Database Configuration dialog box. For most SQL Query Tools, PeopleSoft Upgrade Assistant stops on an error.</p> <p>Following is the list of query tools used for each platform:</p> <ul style="list-style-type: none"> <li>• DB2: <i>DB2CMD.EXE</i></li> <li>• Informix: <i>SQLEDITOR400.EXE</i></li> <li>• Microsoft SQL Server: <i>OSQL.EXE</i></li> <li>• Oracle: <i>SQLPLUS.EXE</i></li> <li>• Sybase: <i>ISQL.EXE</i></li> </ul>
SQL Script	<p>Runs the SQL script defined in the Script/Procedure value under the Step Properties. PeopleSoft Upgrade Assistant runs the script using the SQL Query tools specified on the Database Configuration. For most SQL Query Tools, PeopleSoft Upgrade Assistant stops on an error.</p> <p>Following is the list of query tools used for each platform:</p> <ul style="list-style-type: none"> <li>• DB2: <i>DB2CMD.EXE</i></li> <li>• Informix: <i>SQLEDITOR400.EXE</i></li> <li>• Microsoft SQL Server: <i>OSQL.EXE</i></li> <li>• Oracle: <i>SQLPLUS.EXE</i></li> <li>• Sybase: <i>ISQL.EXE</i></li> </ul>

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

---

## Loading the Upgrade Template

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



Template Tree structure

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

## Loading a Template to the Upgrade Assistant

To load the upgrade template:

1. Start PeopleSoft Upgrade Assistant.
2. Select File, Open Upgrade Template.  
The Open Upgrade Template dialog box appears.
3. Select the directory in which you stored the upgrade template that you downloaded from Customer Connection.
4. Select the template for your product and path.  
PeopleSoft Upgrade Assistant loads the template for your upgrade product.

## Setting the Documentation Directory

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

To set the documentation directory:

1. Select Edit, Set Documentation Directory.

The Documentation Directory dialog box appears.

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

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

---

## (Optional) Editing Templates

This section discusses how to:

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

---

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

---

## Adding Custom Steps

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

To add a step:

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

The Step Properties dialog box appears.

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

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

4. Click OK.
5. Save the template.

## Editing Steps

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

To modify the step properties:

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

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

4. Click OK on the Step Properties dialog box.

The step properties you defined for the current step are displayed in the Task Details section of the Upgrade Assistant Template View.

5. Save the template.

## Deleting Chapters, Tasks, or Steps

To delete a chapter, task, or step:

---

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

---

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

## Renaming Chapters, Tasks, or Steps

To rename a chapter, task, or step:

---

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

---

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

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

---

## (Optional) Creating Templates

This section discusses how to:

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

### Creating Custom Templates

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

To create a custom template:

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

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

### Creating New Chapters

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

To insert a chapter:

1. In the Upgrade Assistant template tree view, highlight the location where you want to add the chapter.  
If this is the first chapter in the template, highlight the top node (template name) at the top of the template tree.
2. On the Upgrade Assistant toolbar, select Edit, Insert Chapter.
3. Enter a unique name for your new chapter.

---

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

---

4. Click OK.

---

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

---

## Creating New Tasks

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

To insert a task:

1. In the Upgrade Assistant template tree view, highlight the location where you want to add the task.  
If you are adding a task to an existing template, put your cursor where you want to insert the task.
2. On the Upgrade Assistant toolbar, select Edit, Insert Task.
3. Enter a unique name for your new task.

---

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

---

4. Click OK.

---

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

---

## Creating New Steps

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

To insert steps:

1. In the Upgrade Assistant template tree view, highlight the task where you want to add the new step.  
If you are adding a step to an existing template, put your cursor where you want to insert the step.
2. From the Upgrade Assistant toolbar, select Edit, Insert Step.
3. Enter a unique name for your new step.

---

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

---

4. Click OK.

PeopleSoft Upgrade Assistant displays the Step Properties dialog box.

5. Define the step properties for the new step.

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

6. Continue creating steps until the template is complete.

---

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

---

---

## (Optional) Merging Templates

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

To merge templates:

1. Select Options, Merge Templates.
2. Enter the path and file name of the existing upgrade template.  
This is the path you selected when you installed the upgrade template.
3. Enter the path and file name of the new upgrade template.
4. You can accept the default Log File Name or specify a different log file name.
5. Click Next.  
PeopleSoft Upgrade Assistant merges the two templates. It then displays the new merged template for you to review.
6. Review the merged templates in the Upgrade Assistant - Merge Templates dialog box.
7. When satisfied, click Finish.

---

## (Optional) Modifying Step Properties

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

---

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

---

Access the Step Properties Dialog box.

<b>Step Description</b>	Displays your current step. Enter a step name for a new step.
<b>Script/Procedure</b>	Enter the script or procedure name associated with this step. A script or procedure name is required for all process types except <i>Manual Stop</i> . For SQL scripts, Data Mover scripts, SQRs, and Application Engine programs, the script or procedure name should be the same name as the script, SQR or AE program to be run. For other step types, the script name is used to name the output log.  For example, if you select <i>SQL Command</i> as the process type, you can enter any name for the script/procedure because the SQL command is included in the Parameters field. The name you enter for the script/procedure is used as the output log for the SQL command.
<b>Type</b>	Select a process type. This selection defines the type for the script or procedure you selected. Types of scripts and procedures are defined earlier in this chapter.  See <a href="#">Chapter 3, “Using the Upgrade Template,” Understanding Process Types, page 7</a> .  Following is a list of the process types and the effects of selecting some of them:  <i>Application Engine</i>  <i>Build Project:</i> When you select <i>Build Project</i> , a Build Options button appears. Click the button to select options based on the instructions in the upgrade documentation for your product and path.

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

*Convert Application Engine*

*Convert FieldNames*

*Convert PeopleCode*

*Convert Workflow*

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

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

*Copy to File*

*Create Project:* If you select *Create Project*, you must set a #Type parameter in the Parameter field.

*Custom Defined Process*

*Data Mover - Bootstrap*

*Data Mover - User*

*DBTSFIX*

*Load Base Data*

*Manual - Stop*

*SQL Command*

*SQL Script*

*SQR Report*

*Upgrade PeopleTools*

## Parameters

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

The additional parameters are:

Parameter	Description
#Project=	Required for steps that refer to a project name; for example, Build Project, Upgrade Compare or Upgrade Copy.
#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: <i>#Directory=#PT_PSHOMEsrc\cbl\base\</i>

Parameter	Description
#P1= through #P5=	Used to pass parameters to SQR reports, for example, DBTSFIX.sqr. In this case, you would pass the necessary value, such as: <i>#P1=#OutputDirectory</i>
#Rename=	Used primarily for the Convert FieldNames step type. It automatically copies the CONVERT-XXXX.INF file from the %PS_HOME%\scripts directory into c:\temp\ and renames the file to CONVERT.INF.
#PTPS_HOME=	Used to specify the %PS_HOME% variable that is defined in the Database Configuration window.
#OutputDirectory=	Used to specify the Output Directory variable that is defined in the Database Configuration window.
#NT=	Used for DB2 Command Center, for Non-Terminated SQL Scripts.
#Type=	Enables you to specify the type of record to insert into the project. Select from the following record types: <i>All Records, Table, View/Query View, Derived, SubRecord, Stored Procedure, Temporary Table, Dynamic View</i>
#RCID=	Enables the user to override the Run Control ID used for Application Engine processes.

### Run Location

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

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

---

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

---

### Database Orientation

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

---

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

---

### Products

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

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

---

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

---

**Platforms**

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

**Language**

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

**Type of Upgrade Step**

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

**Initial Upgrade**

Indicates the initial upgrade part of the upgrade process.

**Move to Production**

Indicates the move to production part of the upgrade process.

**Both**

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

**Language Type**

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

**Installed Language**

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

See [Chapter 5, “Creating and Running the Upgrade Job,” Configuring the Database, page 29.](#)

**Base Language**

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

See [Chapter 5, “Creating and Running the Upgrade Job,” Configuring the Database, page 29.](#)

**Allow for Errors**

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

**Yes**

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

**No**

Select to allow for no errors in the step. If you select this option, PeopleSoft Upgrade Assistant stops the upgrade process if it encounters

an error. You can configure PeopleSoft Upgrade Assistant to notify you, by email, if an error occurs.

See [Chapter 7, “Configuring and Editing Options,” Specifying General and Email Settings, page 37.](#)

---

**Note.** The default setting is *No*.

---

## Run Concurrently

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

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

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

---

**Note.** The default setting is *No*.

---

# CHAPTER 4

## Adding Custom Documentation

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

---

### Understanding Upgrade Documentation

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

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

### How Chapters, Tasks and Steps are Tagged in HTML

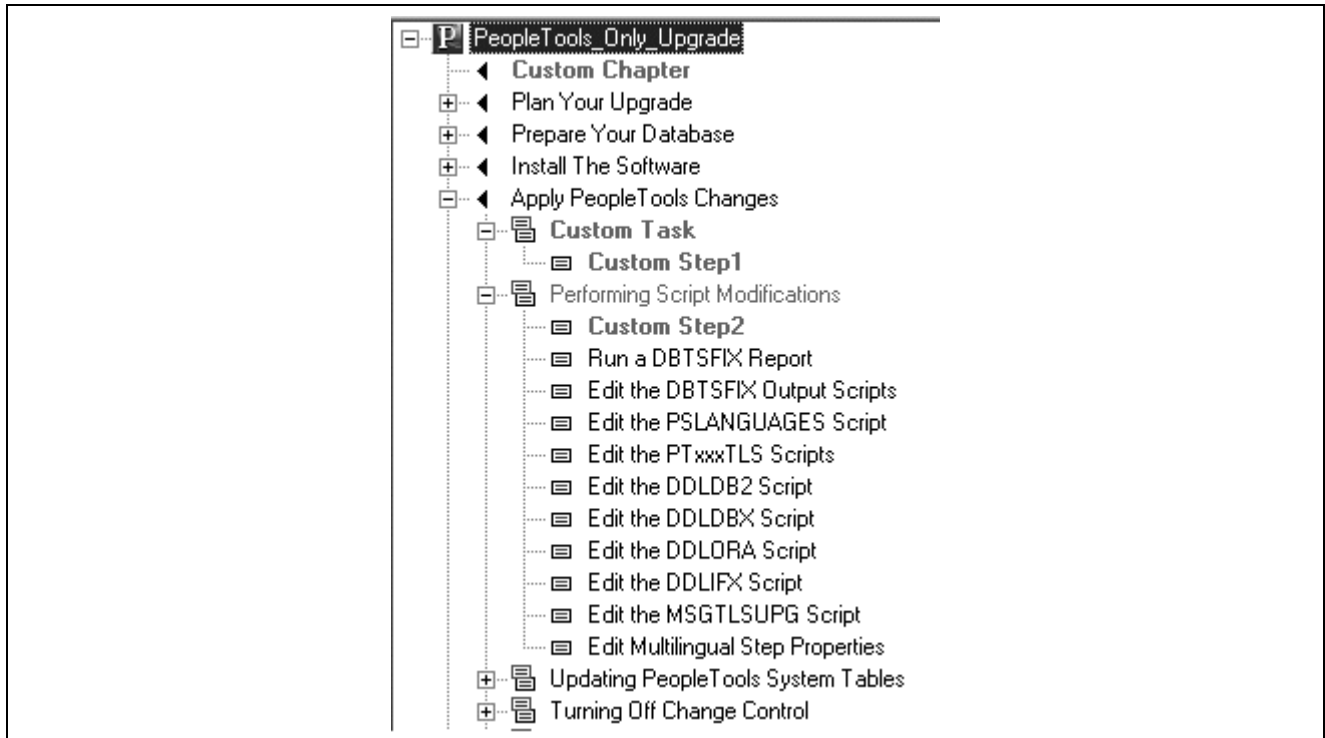
Chapters, tasks, and steps have special tags in HTML code that you will insert (or copy) into your custom documentation. Open any .htm file in an HTML editor to view the HTML code associated with the corresponding chapter. As you scroll through the file, you can see the documentation text associated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

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

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

## Adding Custom Documentation to the Template

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



Example of adding custom documentation

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

### Adding Custom Step Documentation

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

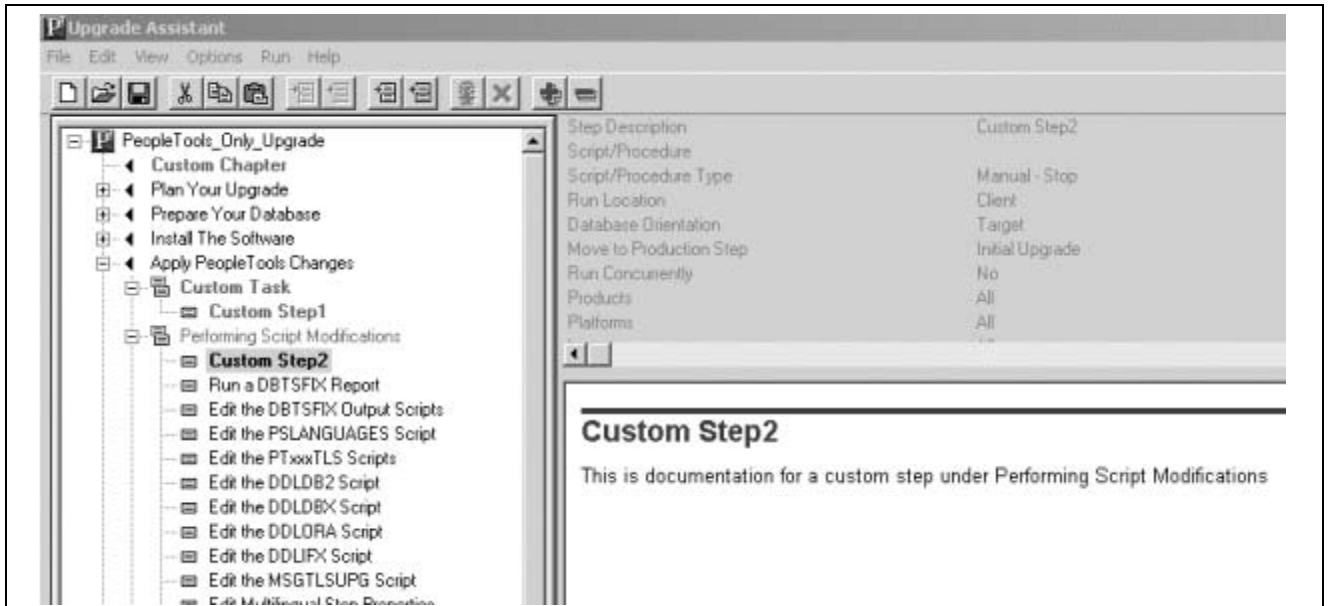
1. Open your template and add the custom items (chapter, step, task) where it's appropriate for your system. Save the template.
2. Open the .htm file for the chapter to which you want to add custom documentation.
3. Search the file for the step name that follows the new Custom Step. You will insert custom documentation above this step since the new custom step was added above this step.

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

4. Add two lines—one to tag the step name and the other for its associated text. It's easiest to copy the existing text and customize as appropriate. Note that the space has been removed from the step name for the `<a name=>` tag and the `<H4>` is used for a step. `<a name="CustomStep2"></a><H4>Custom Step2</H4> <P>This is documentation for a custom step under Performing Script Modifications. </P>`
5. Save the .htm file.

## Viewing the Added Documentation

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



Viewing Custom Step documentation

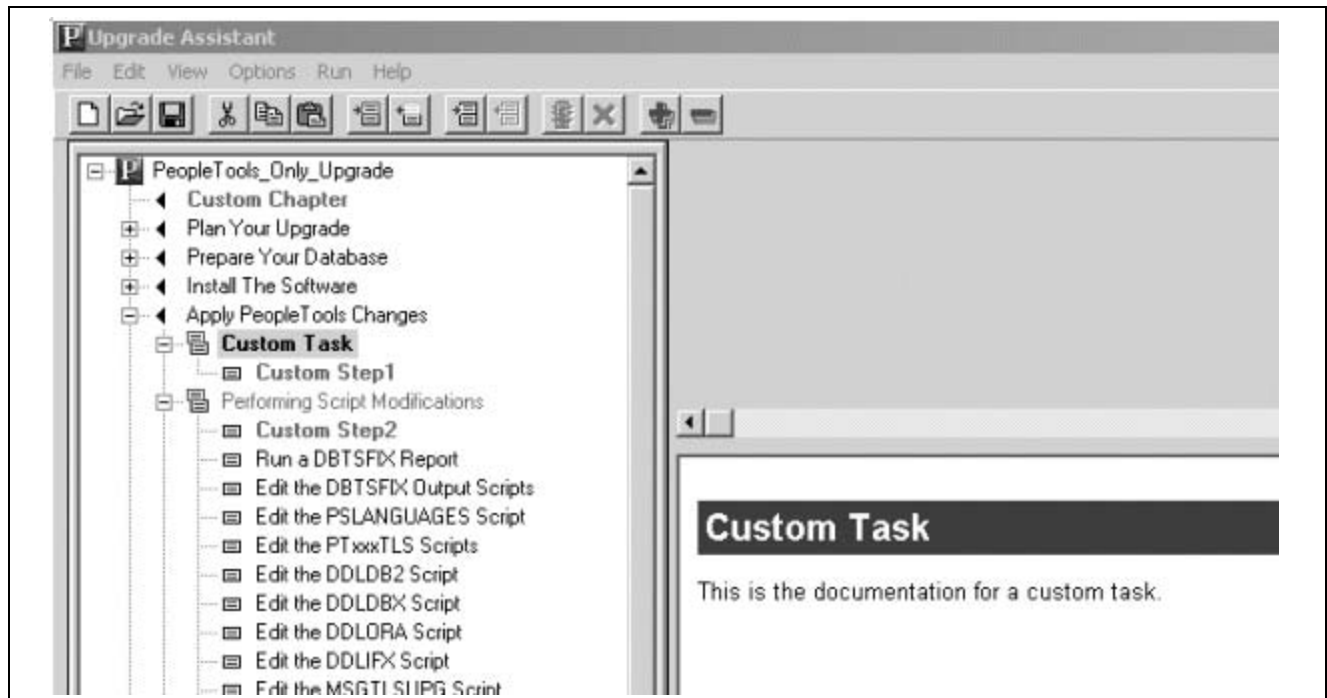
## Adding Custom Task Documentation

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

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

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

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



Viewing Custom Task documentation

## Adding Custom Chapter Documentation

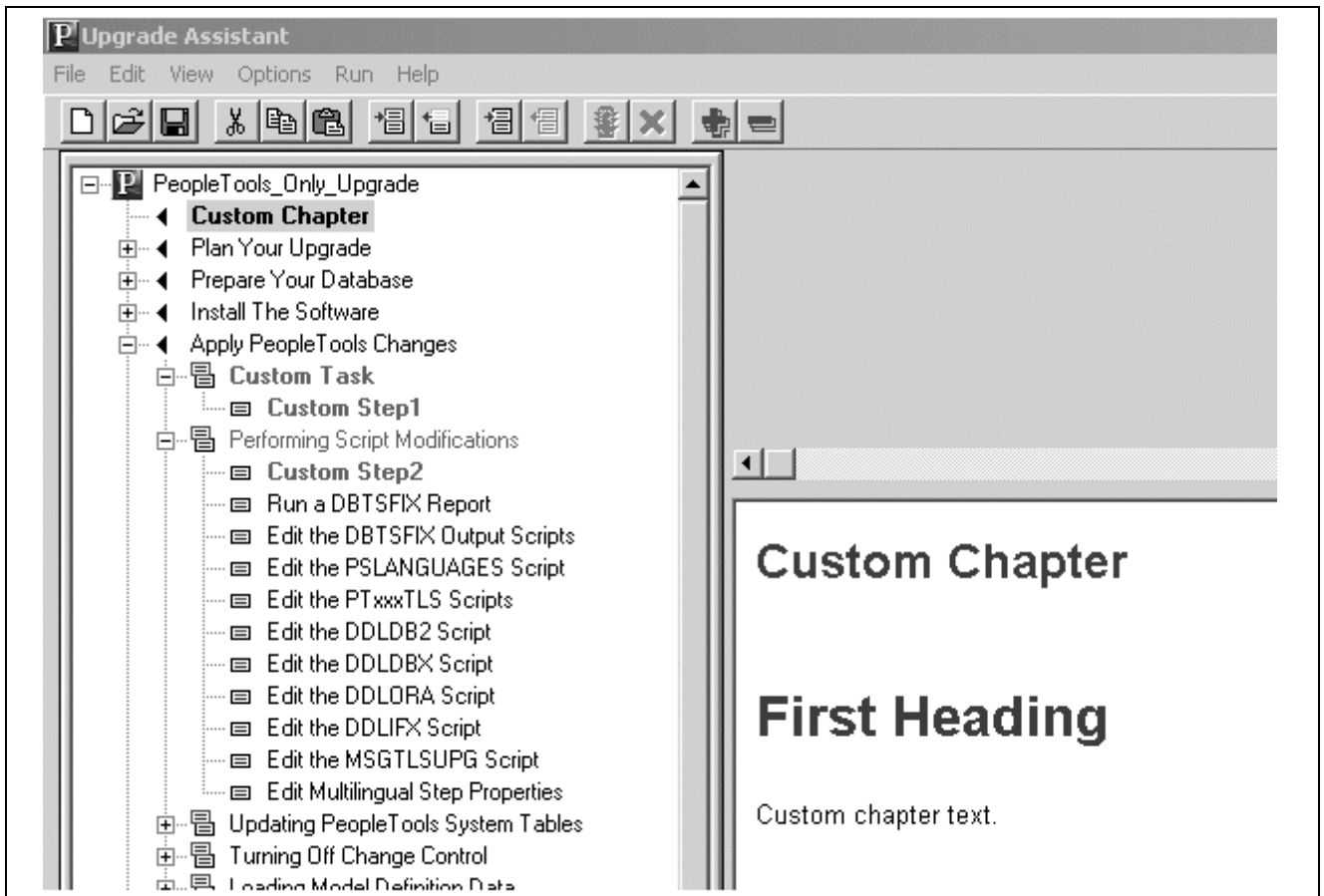
This section describes how to add documentation for a custom chapter.

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

```
<html>
<head>
<META http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
<SCRIPT LANGUAGE="JavaScript" SRC="commonvars.js"></SCRIPT>
<SCRIPT LANGUAGE="JavaScript" SRC="booklist.js"></SCRIPT>
<LINK REL="StyleSheet" HREF="content.css">
<title>Custom Chapter</title>
</head>
<BODY onLoad="CheckPrint()" onFocus="AfterPrint()">

<P><A NAME="topofpage"></A> <a name="CustomChapter"></a><H1>Custom Chapter
</H1> <a name="FirstHeading"></a><H2>First Heading</H2>
</body>
</html>
```
- Save the .htm file.

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



Viewing Custom Chapter documentation

## Adding Custom Tables or Graphics

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

### Tables

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

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

```

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

```

## Graphics

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

For example, in PeopleSoft Upgrade Assistant, select Run the Initial Alter Audit step, located in the Prepare Your Database chapter, under Running Initial Audit Reports task. Scroll down to step 12 in the documentation window to find the graphic icon. To view the HTML code associated with this step, open ch02.htm in an HTML editor. Search for ch02\_0002.jpg (or any .jpg file).

The following HTML code appears for this task:

```

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

```

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

## See Also

a general HTML reference guide.

## CHAPTER 5

# Creating and Running the Upgrade Job

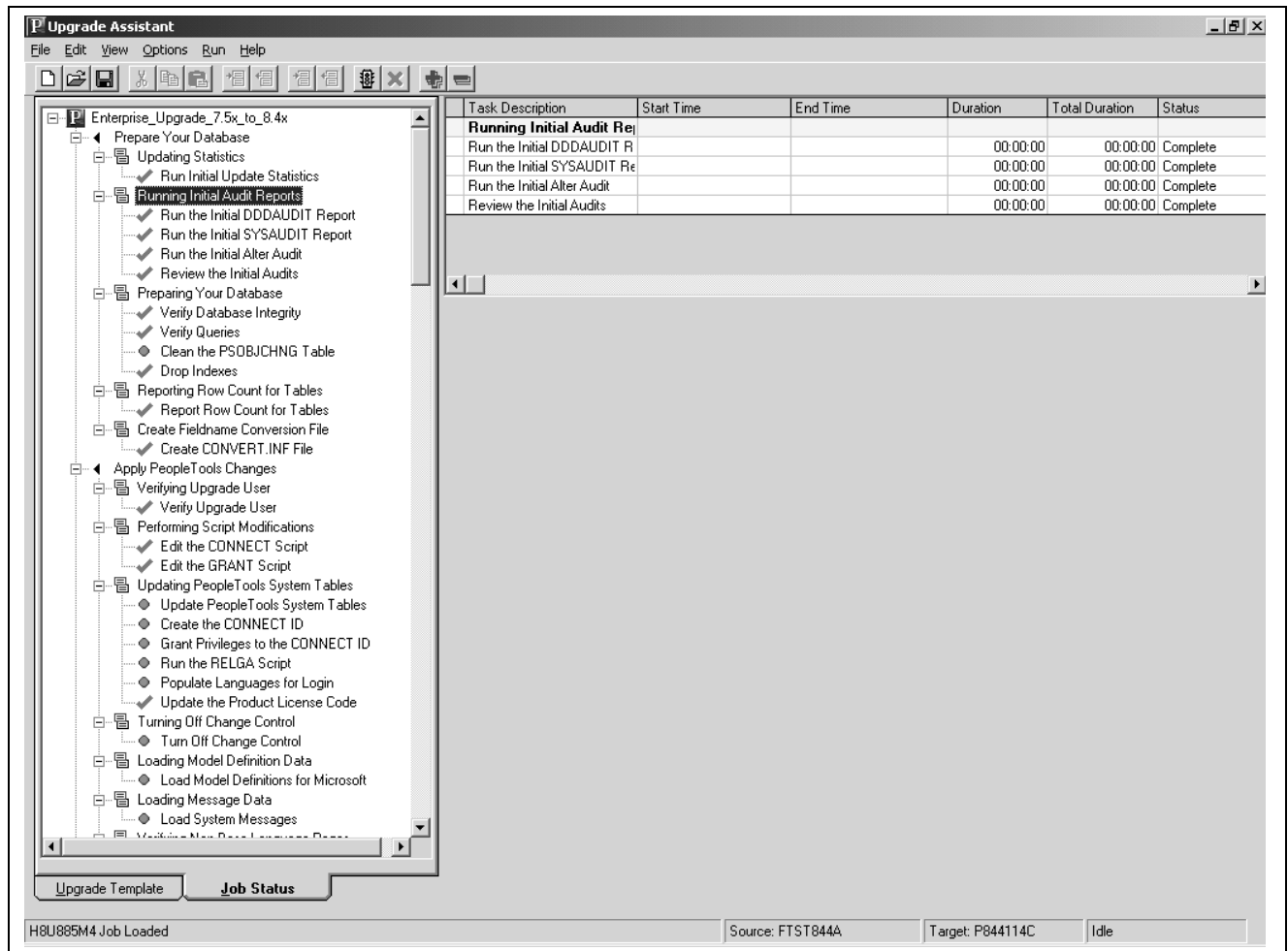
This chapter discusses how to:

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

---

## Creating a New Job

The following screen shows the job status view.



Job Status view

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

To create the upgrade job:

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

The Create New Job File dialog box appears.

4. Enter a name for your upgrade job, for example, the name of your target database.
5. Click Save.

The Database Configuration dialog box appears.

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

See [Chapter 5, “Creating and Running the Upgrade Job,” Configuring the Database, page 29.](#)

7. When configuration is complete, click OK.

---

## Configuring the Database

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

This section discusses how to:

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

### Entering Source and Target Database Information

Click the Database tab.

#### Database Type

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

---

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

---

#### SQL Query Executable

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

---

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

---

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

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

#### Unicode and Non-Unicode

These radio buttons are enabled for all platforms except DB2 UDB for OS/390.

#### Target Base Language

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

The target base language is the language associated with the LANGUAGE\_CD in PS\_OPTIONS on the target database.

**Database Server Name** Database server names can be up to 256 characters.

## Entering User ID and Access ID Information

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

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

## Specifying Directories

Click the Directories tab.

**PS\_HOME Directory** Enter or browse to your PS\_HOME directory. PS\_HOME contains files, in subdirectories, that are run in the upgrade process. For example, PS\_HOME contains the files of the release you are going *to*.

**Upgrade Script Staging Directory** Enter or browse to your staging directory. The path to the staging directory cannot contain any spaces. This directory should be a local directory and should NOT point to a pre-existing directory within your PS\_HOME.

**Upgrade Output Directory** Enter or browse to your output directory. The path to the output directory cannot contain any spaces. This directory should be a local directory and should NOT point to a pre-existing directory within your PS\_HOME.

## Selecting Products

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

## Selecting Languages

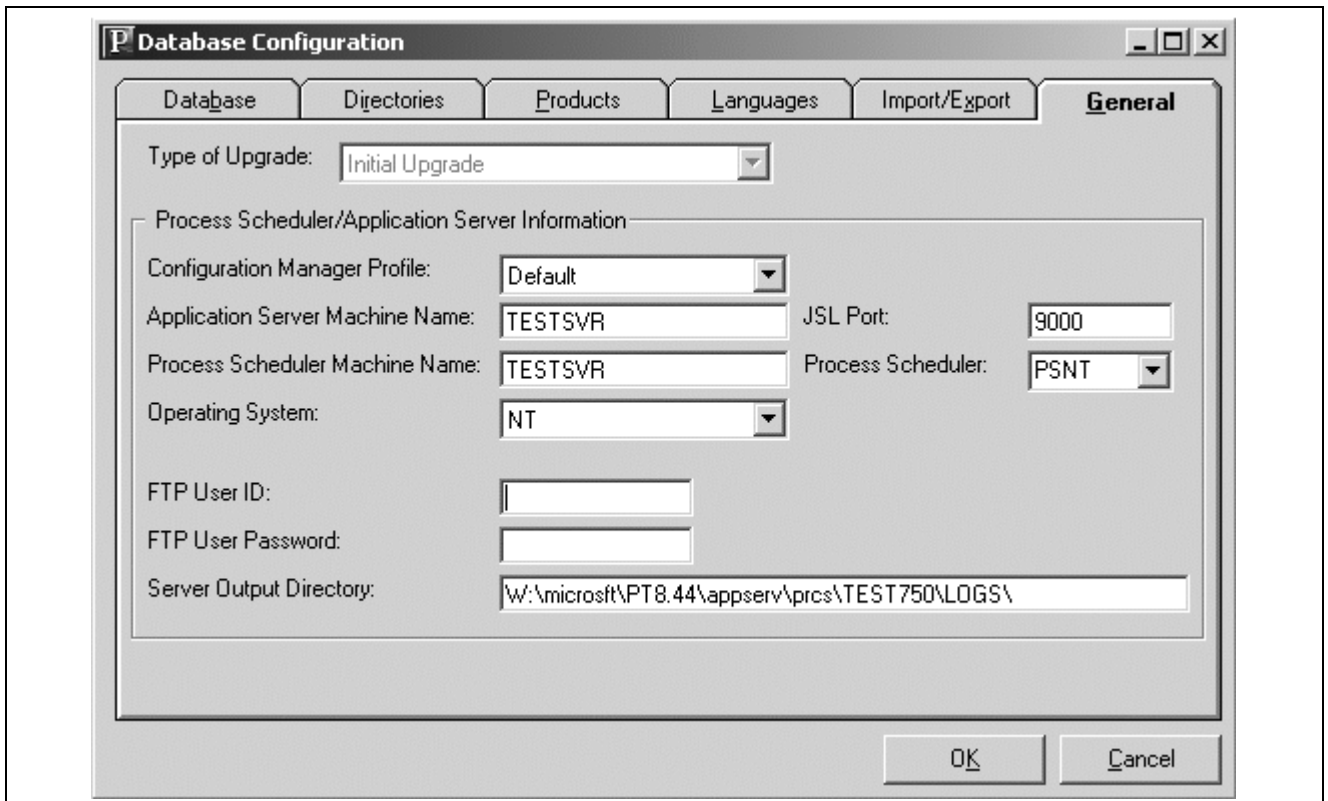
Click the Languages tab. Select all languages that are installed on the database. You must select at least one language.

## Importing and Exporting Database Configuration

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

## Entering General Settings

Click the General tab.



Database Configuration - General tab

**Type of Upgrade**

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

**Configuration Manager Profile**

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

**Entering Server Information**

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

**See Also**

*Enterprise PeopleTools 8.45 PeopleBook: System and Server Administration*, “Setting Application Server Domain Parameters,” PSAPPSRV Options

---

## Opening a Previously Saved Job

To open a previously saved job:

1. Open the desired template in the PeopleSoft Upgrade Assistant.
2. Select the Job Status tab.

3. Select File, Open Upgrade Job.

The Upgrade Assistant Signon dialog box appears.

4. Enter the user ID and password that you specified for the target database on the Database Configuration - Database tab.
5. Click OK.

---

## Running the Job

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

### See Also

[Chapter 6, “Running Application Engine Processes on the Server,” page 33](#)

## CHAPTER 6

# Running Application Engine Processes on the Server

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

This chapter discusses how to:

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

---

## Configuring Process Scheduler and Application Server

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

### See Also

*Enterprise PeopleTools 8.45 PeopleBook: System and Server Administration*, “Setting Application Server Domain Parameters”

*Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler*

---

## Configuring the Portal

You must configure the portal to update user security.

See the PeopleTools 8.45 Installation Guide for your platform, "Setting Up the PeopleSoft Internet Architecture."

---

## Building the PROCESSREQUEST Component Interface

To configure the PROCESSREQUEST component interface:

1. Launch the PeopleSoft Application Designer.
2. Select File, Open.
3. For Definition, select Component Interface.
4. Click Open to display a list of component interfaces.
5. Select PROCESSREQUEST and click Open again.
6. Select Build, PeopleSoft APIs.  
The PeopleSoft API Bindings dialog box appears.
7. Select the Build check box in the COM Type Library group box.
8. In the Target Directory field, enter the directory in which you want the COM type library to be created: typically <PS\_HOME>\bin\client\winX86. It must be a local directory.
9. In the COM Server DLL Location field, enter the server location to specify where the PeopleSoft API Adapter (psapiadapter.dll) is located: <PS\_HOME>\bin\client\winX86.
10. (Optional) Select the AutoRegister check box to execute the registry file immediately upon building the API. This causes your client machine registry to be immediately updated without having to register it manually.
11. (Optional) Select the Clean-up Registry check box to clean up the registry if you've applied previous versions of Peoplesoft\_Peoplesoft.reg.  
This is needed so that the older registry settings don't remain and conflict with settings made by the latest version.

---

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

---

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

## Setting System Variables

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

### Setting Up Windows 2000 Workstations

To set system variables for Windows 2000 workstations:

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

### Setting Up NT Workstations

To set system variables for Windows NT workstations:

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

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

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

---

## Editing Component Interface Security

You must edit security permissions to run the PROCESSREQUEST object.

To set up component interface security:

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

The Permission List component appears.

4. Access the component interfaces page and select the PROCESSREQUEST component interface.
5. Click Edit.

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

6. Set the access permission for each method.

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

7. Click OK when finished.
8. Click Save.

---

## Editing Step Properties

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

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

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

### See Also

[Chapter 3, “Using the Upgrade Template,” Editing Steps, page 13](#)



# CHAPTER 7

## Configuring and Editing Options

This chapter discusses how to:

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

---

### Editing Your Database Configuration

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

To edit your database configuration:

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

PeopleSoft Upgrade Assistant displays the Database Configuration dialog box.

5. Modify your selected options.

---

**Note.** You cannot change the database type; you must create a new job if the database type is incorrect.

---

6. When you are finished modifying your database configuration options, click OK.  
The Upgrade Template reappears in Job Status view.
7. Save your template.

#### See Also

[Chapter 5, “Creating and Running the Upgrade Job,” Configuring the Database, page 29](#)

---

### Specifying General and Email Settings

This section discusses how to:

- Specify general settings.
- Specify email settings.

## Specifying General Settings

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

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

<b>Log and Script Editor</b>	Enter or browse to the executable for the editor, including the path name.
<b>HTML Browser</b>	Enter or browse to the executable for the HTML browser, including the path name (for example, C:\Apps\Internet Explorer\iexplore.exe).
<b>Add Upgrade Job Comments to Documentation</b>	Select to add comments to documentation that is viewed through the upgrade assistant or the filtered documentation produced by the upgrade assistant. Add your comments through the Edit Job Properties dialog box.

## Specifying Email Settings

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

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

Access Upgrade Assistant - Email Settings tab.

<b>Send Email Notifications</b>	Select the check box if you want PeopleSoft Upgrade Assistant to notify you of any errors encountered during the upgrade process.
<b>SMTP Mail Server</b>	If you are not sure what your SMTP mail server is, contact your system administrator.
<b>To Address</b>	Enter the address to which you want the email sent.
<b>From Address</b>	Enter the address from which you want the email sent.

# CHAPTER 8

## Resolving Error Messages

This chapter discusses how to:

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

---

### Resolving PeopleTools Upgrade Messages

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

Message	Recommended Action
Unable to login into the Target Database	<p>Check the following items:</p> <ul style="list-style-type: none"><li>• Confirm that the target database configuration information is correct.</li><li>• Confirm that the upgrade assistant staging and output directories (found under the Database Configuration, Directories tab) does not contain spaces in the directory name: for example:  Not Valid: C:\Program Files\PeopleSoft\Upgrade Assistant\staging\ (There is a space between <i>Upgrade</i> and <i>Assistant</i>) Valid: C:\PT844\staging\  </li><li>• Check the &lt;UA Output Directory&gt;\TOOLSREL.log file for error messages.</li><li>• Verify that you specified the correct query tool in the database configuration.  <u>See Chapter 5, “Creating and Running the Upgrade Job,” Configuring the Database, page 29.</u></li><li>• Verify that you can connect to the target database manually through PeopleTools and the query tool.</li></ul>

Message	Recommended Action
Unable to login into the Source Database	<p>If your Upgrade Template <i>does not</i> contain the task titled “Organize Your PeopleTools Upgrade,” review the following:</p> <ul style="list-style-type: none"> <li>• Confirm that the Source Database Configuration information is correct.</li> <li>• Check the &lt;UA Output Directory&gt;\TOOLSREL.log file for error messages.</li> <li>• Verify that you specified the correct query tool in the database configuration.</li> </ul> <p>See <a href="#">Chapter 5, “Creating and Running the Upgrade Job,” Configuring the Database, page 29.</a></p> <ul style="list-style-type: none"> <li>• Verify that you can connect to the target database manually through PeopleTools and the query tool.</li> </ul>
Target and Source Databases at the same release. No scripts to execute.	The Upgrade Assistant ran the TOOLSREL.sql query against both the Source and Target databases and determined that both are at the same release. Once the Source and Target releases have been determined, the database configuration is stamped with the releases. Also, once the database configuration is stamped, the database configuration cannot be changed. The only way to continue is to create a new job.
Run-Time error '53' File not found: PSAPI.DLL	Perform a Find/Search on the local drive (C: drive) for PSAPI.DLL. PSAPI.DLL is part of the NT operating system. If any other version of PSAPI.DLL is found, in addition to the version located in the C:\WINNT\SYSTEM32 directory, rename it and try again.
Cannot locate log file: c:\temp\UA\75to840out \DBTSFIX_DBTSFIX800	Confirm that SQR parameters were set correctly.

## Resolving Messages from Application Engine Processes

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

### Server Process Messages

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

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

### Client Process Messages

Message	Recommended Action
Run the Upgrade Assistant <i>Run</i> function but nothing happens.	Confirm that <code>C:\WINNT\SYSTEM32\PSAPI.DLL</code> exists.



# APPENDIX A

## 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

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## 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	Maldive 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

<b>absence entitlement</b>	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.
<b>absence take</b>	This element defines the conditions that must be met before a payee is entitled to take paid time off.
<b>accounting class</b>	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.
<b>accounting date</b>	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.
<b>accounting split</b>	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
<b>accumulator</b>	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.
<b>action reason</b>	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.
<b>action template</b>	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.
<b>activity</b>	<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>

<b>agreement</b>	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.
<b>allocation rule</b>	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.
<b>alternate account</b>	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.
<b>AR specialist</b>	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
<b>arbitration plan</b>	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
<b>assessment rule</b>	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.
<b>asset class</b>	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
<b>attribute/value pair</b>	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
<b>authentication server</b>	A server that is set up to verify users of the system.
<b>base time period</b>	In PeopleSoft Business Planning, the lowest level time period in a calendar.
<b>benchmark job</b>	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
<b>book</b>	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
<b>branch</b>	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
<b>budgetary account only</b>	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."
<b>budget check</b>	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
<b>budget control</b>	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.
<b>budget period</b>	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.
<b>business event</b>	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).
<b>business unit</b>	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
<b>buyer</b>	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.
<b>catalog item</b>	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.
<b>catalog map</b>	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
<b>catalog partner</b>	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
<b>categorization</b>	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
<b>channel</b>	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
<b>ChartField</b>	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.
<b>ChartField balancing</b>	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
<b>ChartField combination edit</b>	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
<b>ChartKey</b>	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.
<b>checkbook</b>	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.
<b>Class ChartField</b>	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> .
<b>clone</b>	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.
<b>collection</b>	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.

<b>collection rule</b>	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.
<b>compensation object</b>	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.
<b>compensation structure</b>	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
<b>condition</b>	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.
<b>configuration parameter catalog</b>	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.
<b>configuration plan</b>	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.
<b>content reference</b>	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.
<b>context</b>	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.
<b>control table</b>	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.
<b>cost profile</b>	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.
<b>cost row</b>	A cost transaction and amount for a set of ChartFields.
<b>current learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
<b>data acquisition</b>	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).
<b>data elements</b>	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.
<b>dataset</b>	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.

<b>delivery method</b>	<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>
<b>delivery method type</b>	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.
<b>directory information tree</b>	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
<b>document sequencing</b>	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.
<b>dynamic detail tree</b>	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.
<b>edit table</b>	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.
<b>effective date</b>	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.
<b>EIM ledger</b>	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.
<b>elimination set</b>	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
<b>entry event</b>	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.
<b>equitization</b>	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.
<b>event</b>	<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>
<b>event propagation process</b>	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.
<b>exception</b>	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
<b>exclusive pricing</b>	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.
<b>fact</b>	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.
<b>forecast item</b>	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.
<b>fund</b>	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.
<b>generic process type</b>	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.
<b>group</b>	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.
<b>incentive object</b>	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.
<b>incentive rule</b>	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.
<b>incur</b>	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
<b>item</b>	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.
<b>KPI</b>	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.

<b>LDIF file</b>	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
<b>learner group</b>	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.
<b>learning components</b>	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.
<b>learning environment</b>	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.
<b>learning history</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
<b>ledger mapping</b>	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.
<b>library section</b>	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.
<b>linked section</b>	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.
<b>linked variable</b>	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.
<b>load</b>	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.
<b>local functionality</b>	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.
<b>location</b>	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.
<b>logistical task</b>	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.

<b>market template</b>	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.
<b>match group</b>	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.
<b>MCF server</b>	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.
<b>merchandising activity</b>	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.
<b>meta-SQL</b>	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.
<b>metastring</b>	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
<b>multibook</b>	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).
<b>multicurrency</b>	The ability to process transactions in a currency other than the business unit's base currency.
<b>national allowance</b>	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.
<b>node-oriented tree</b>	A tree that is based on a detail structure, but the detail values are not used.
<b>pagelet</b>	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.
<b>participant</b>	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
<b>participant object</b>	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
<b>partner</b>	A company that supplies products or services that are resold or purchased by the enterprise.
<b>pay cycle</b>	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
<b>pending item</b>	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.

<b>PeopleCode</b>	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.
<b>PeopleCode event</b>	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
<b>PeopleSoft Internet Architecture</b>	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.
<b>performance measurement</b>	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.
<b>period context</b>	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.
<b>plan</b>	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.
<b>plan context</b>	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.
<b>plan template</b>	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.
<b>planned learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
<b>planning instance</b>	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
<b>portal registry</b>	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.
<b>price list</b>	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.
<b>price rule</b>	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.

<b>price rule condition</b>	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.
<b>price rule key</b>	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.
<b>process category</b>	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
<b>process group</b>	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.
<b>process definition</b>	Process definitions define each run request.
<b>process instance</b>	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.
<b>process job</b>	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.
<b>process request</b>	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.
<b>process run control</b>	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.
<b>product category</b>	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.
<b>programs</b>	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.
<b>progress log</b>	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.
<b>project transaction</b>	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
<b>promotion</b>	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
<b>publishing</b>	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
<b>record group</b>	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.
<b>record input VAT flag</b>	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.

<b>record output VAT flag</b>	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
<b>reference data</b>	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
<b>reference object</b>	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).
<b>reference transaction</b>	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.
<b>regional sourcing</b>	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.
<b>relationship object</b>	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
<b>remote data source data</b>	Data that is extracted from a separate database and migrated into the local database.
<b>REN server</b>	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
<b>requester</b>	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
<b>role</b>	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.
<b>role user</b>	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.
<b>roll up</b>	In a tree, to roll up is to total sums based on the information hierarchy.
<b>run control</b>	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.
<b>run control ID</b>	A unique ID to associate each user with his or her own run control table entries.

<b>run-level context</b>	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.
<b>search query</b>	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.
<b>section</b>	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.
<b>security event</b>	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
<b>serial genealogy</b>	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
<b>serial in production</b>	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
<b>session</b>	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.
<b>session template</b>	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.
<b>setup relationship</b>	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
<b>share driver expression</b>	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.
<b>single signon</b>	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.
<b>source transaction</b>	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.
<b>SpeedChart</b>	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.
<b>SpeedType</b>	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
<b>staging</b>	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

<b>statutory account</b>	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
<b>step</b>	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
<b>storage level</b>	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.
<b>subcustomer qualifier</b>	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
<b>Summary ChartField</b>	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).
<b>summary ledger</b>	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.
<b>summary time period</b>	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.
<b>summary tree</b>	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.
<b>syndicate</b>	To distribute a production version of the enterprise catalog to partners.
<b>system function</b>	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
<b>TableSet</b>	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.
<b>TableSet sharing</b>	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.
<b>target currency</b>	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
<b>template</b>	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.
<b>territory</b>	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
<b>TimeSpan</b>	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.
<b>trace usage</b>	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.
<b>transaction allocation</b>	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.
<b>transaction state</b>	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.
<b>Translate table</b>	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.
<b>tree</b>	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.
<b>unclaimed transaction</b>	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.
<b>universal navigation header</b>	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.
<b>user interaction object</b>	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).
<b>variable</b>	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.
<b>VAT exception</b>	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.
<b>VAT exempt</b>	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.
<b>VAT exoneration</b>	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.
<b>VAT suspension</b>	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
<b>warehouse</b>	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

<b>work order</b>	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.
<b>worksheet</b>	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.
<b>worklist</b>	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.
<b>XML schema</b>	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
<b>yield by operation</b>	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
<b>zero-rated VAT</b>	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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