PeopleSoft

EnterpriseOne 8.93 Product Packaging PeopleBook

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EnterpriseOne 8.93
Product Packaging PeopleBook
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About These EnterpriseOne PeopleBooks Preface

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

This preface discusses:

- EnterpriseOne application prerequisites
- Obtaining documentation updates
- Typographical elements and visual cues
- Comments and suggestions

Note

EnterpriseOne PeopleBooks document only fields that require additional explanation. If a field 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.

EnterpriseOne Application Prerequisites

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

See the *Foundation Guide*.

You might also want to complete at least one EnterpriseOne introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using EnterpriseOne menus and forms. 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 EnterpriseOne applications most effectively.

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 can find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Note

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

See Also

PeopleSoft Customer Connection Website, *http://www.peoplesoft.com/corp/en/login.jsp*

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions
- Visual cues

Typographical Conventions

The following table contains the typographical conventions that are used in EnterpriseOne PeopleBooks:

Typographical Convention or Visual Cue	Description
Italics	Indicates emphasis, topic titles, and titles of PeopleSoft or other book-length publications. Also used in code to indicate variable values.
Key+Key	A plus sign (+) between keys means that you must hold down the first key while you press the second key. For example, Alt+W means hold down the Alt key while you press W.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicates an adjective that is used in a way that might not be readily understood without the quotation marks, for example "as of" date, “as if” currency, "from" date, and "thru" date.
Cross-references	EnterpriseOne PeopleBooks provide cross-references either below the heading “See Also” or preceded by the word See. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

EnterpriseOne PeopleBooks contain the following visual cues:

- Notes
- Cautions

Notes

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

Note

Example of a note.

Cautions

Text that is preceded by *Caution* is crucial and includes information that concerns what you must do for the system to function properly.

Caution

Example of a caution.

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 you can send e-mail comments to *doc@peoplesoft.com*.

While we cannot guarantee an answer to every e-mail message, we will pay careful attention to your comments and suggestions.

Overview

This guide explains how to use the Product Packaging Tools to create a software master image of EnterpriseOne objects.

In this section, you will find relevant definitions for product packaging, a process overview, and prerequisites that are required to use the tools. The remainder of the guide describes how to use the tools to create your own software master, which can be installed onto any enterprise that contains an EnterpriseOne installation at the same release level.

Note

For the complete list of tasks for creating a software master from start to finish, see *Software Master Creation* in the *Product Packaging Guide*.

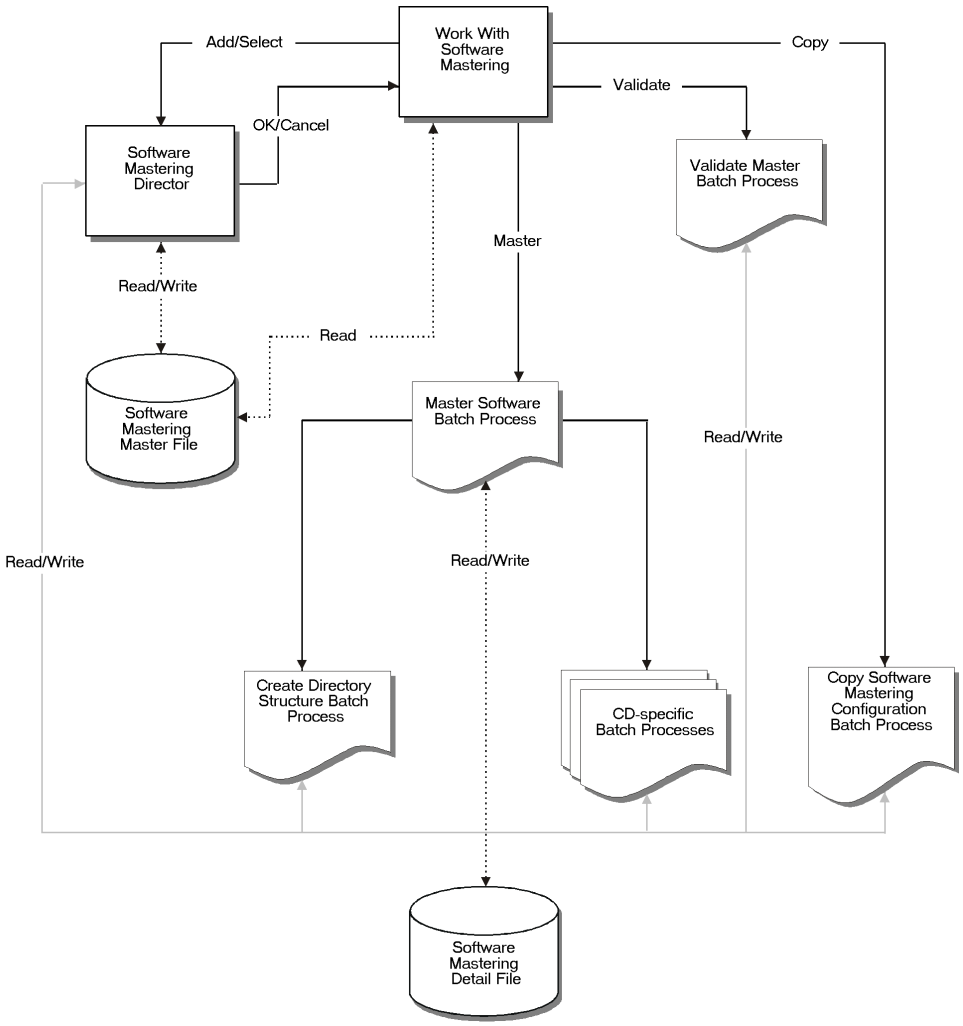
This guide details the different aspects of software masters and the Product Packaging Tools, such as the software master definition, change table configurations, and the final software master.

Product Packaging Definitions

Product Packaging is the ability to master and package a group of EnterpriseOne objects. It provides customers a mechanism to move objects from Central Objects and Control Tables from one location to another. PeopleSoft business partners can use the Product Packaging Tools to develop and market software modules that are based in EnterpriseOne. In addition, customers who modify the software can use the Product Packaging Tools to deliver changes to other locations within their company that are not directly connected to the central enterprise.

The Product Packaging Tools manage the task of mastering the software. In this capacity, the tools oversee the entire mastering process from defining a software master to mastering the CD. The tools start with the definition process, where the user provides as much information as possible up front. After the user enters the critical information, the tools provide a batch process to validate the software mastering information before mastering. Next, the tools provide a batch process to master the software. Finally, the tools provide a batch process to validate the final software master image.

The following graphic details the product packaging flow:



To better understand the overall process, you should be familiar with the following key terms and processes:

Software Mastering Director This director provides EnterpriseOne administrators the ability to build a mastered version of objects or modules. The director handles this functionality through a series of batch processes and manual tasks that build all of the components of a master. The final product is an image of the product, in a tree format, that they can burn onto a CD.

Change Table Configuration Director This director provides administrators the ability to define how to build the software master's change tables.

Distributed Development

Distributed development refers to the ability to perform development using one installation of EnterpriseOne and deploying that development to another installation.

For example, a developer in Paris could create new objects using the Paris installation of EnterpriseOne. An administrator in Paris could then use the Product Packaging Tools to create a CD that includes these new objects. This CD could then be shipped to London, where an administrator updates the London installation of EnterpriseOne, assuming both installations are at the same release level. The Product Packaging Tools described in this guide provide this functionality.

This ability should not be confused with remote development, which is the creation of EnterpriseOne objects by a developer who is completely disconnected from any installation. The developer could connect to an EnterpriseOne installation later and merge those objects.

Prerequisites

This guide is designed for Management Information Systems (MIS) managers and administrators of EnterpriseOne. Success depends upon your understanding of the relevant concepts and procedures. The recommended method for obtaining this information is to attend training courses; information about course offerings, dates, and locations is available at the PeopleSoft web site. At a minimum, read the following guides before you begin:

- EnterpriseOne Foundation Guide
- Configuration Planning and Setup Suite:
  - Configurable Network Computing Implementation Guide
  - System Administration Guide
  - Package Management Guide
  - Server and Workstation Administration Guide

Conventions

The following conventions are used in this guide.

MSDE Database

Currently, the PeopleSoft Supported Local Database is in the Microsoft SQL Server Desktop Engine (MSDE). Throughout this document, whenever *MSDE database* is mentioned, it refers to the PeopleSoft Supported Local Database. The repository for this local database is likely to change in the future.

Fonts

Italic font designates variables used in the guide. For example, if you see the variable *deploymentserver* in a command you must enter, substitute the phrase *deploymentserver* for the actual name of your deployment server. Also, the names of other PeopleSoft guides are in italic font. For example, the *EnterpriseOne Installation Guide*.

`Courier font` designates commands or other information that you must type into the system. For example:

> Type the name of the environment, such as `DVTEMP`.

Software Master Creation

This topic explains the steps involved in creating a software master. Use the checklist for creating a software master to ensure that you complete all of the necessary processes.

Checklist for Creating a Software Master

Use the following checklist to ensure that you complete all of the processes necessary for creating a software master.

	Verify that at least 1 GB of space is available for the TEMP directory of the workstation from which you use the Product Packaging Tools. This memory requirement is the most memory you might need for a software master. The actual size of the master depends on the size of the package you create.
	Complete the tasks in this section.
	Define a software master using the CD Configuration Director: • Provide information about the type of master you want to create, such as its name, release number, and so on. • Choose the package you want built into the master.
	Configure change tables using the Change Table Director: • Provide the target release number for the change tables. • Provide source environment information about the change tables. • Choose the change tables and their versions.
	Validate the software master definition.
	Create the final software master, which automatically validates the master.
	Use the software master to update EnterpriseOne.

Prerequisites for Creating a Software Master

You perform the following tasks to enable the Product Packaging Tools. These tasks are one-time processes. After completing them for the first time, you will not need to perform them again.

Setting Up the System TEMP Directory

This task creates a temporary directory that will be used to store the PeopleSoft Supported Local Database (in MSDE) for mastering the Product Packaging CD.

► **To set up the System TEMP directory**

1. From your Windows desktop, choose Start, then Settings, and then Control Panel.
2. On Windows Control Panel, double-click the System icon.
3. On System Properties, click the Advanced tab.
4. Double-click Environment Variables.
5. Set the TEMP and TMP variables for both the User and System settings so they all access the same directory (for example, c:\TEMP).

Note

Ensure that the windows temp directory on the workstation has at least 1 GB free disk space available (the more space the better). If the temp directory has less than 1 GB of free space, you can create a temp directory on another disk drive with adequate space and set the system environment variables TEMP and TMP to point to the new temp folder. Reboot your system for the change to take effect.

This directory will store the Software Master you create in the following tasks.

Creating Pristine Control Tables

For Control Table changes to be included on an update CD, the Product Packaging tool requires a pristine copy of the Control Tables. If your installation includes the PS810 Pristine Environment, these tables already exist in your EnterpriseOne instance and you can skip the following task. If, however, your installation does not include the pristine environment, you can create a set of pristine Control Tables by copying the Control Table tables from Control Tables Local to a new data source: Control Tables - PS810. You perform this process only once.

► **To create pristine Control Tables**

On the Deployment Server, log on to EnterpriseOne in the DEP810 environment.

From menu GH9011, choose Batch Versions.

1. Type R98403 in the Batch Application field and click Find.
2. On Work With Batch Versions – Available Versions, choose version XJDE0501 (Control Tables For Pristine Database), and choose Processing Options from the Row menu.
3. Click the Environment tab and change the following processing options:
   - Target Environment (option 1)

     Leave this field blank.
   - Target data source (option 2)

     Enter Control Tables - PS810

- Data Load (option 3)

  Enter 2 to copy data to the table.

- Source data source (option 4)

  Enter Control Tables Local.

4. Run the version locally.

   The report copies the F9000, F9001, F9002, F0004, F0004D, F9005, F9005D, F9006, F9006D, F91100, F91100D, F91400, F91410, F91420, F91430, F91500, and F91510 tables from the Control Tables Local data source to Control Tables - PS810.

5. Verify the results of the report and the creation of the tables.
6. Exit the Batch Versions application.
7. From menu GH9011, choose Object Configuration Manager.
8. On Machine Search and Select, choose the machine with the System - 810 data source.
9. For the PS810 environment, add Object Configuration Manager mappings for tables F9000, F9001, F9002, F0004, F0004D, F9005, F9005D, F9006, F9006D, F91100, F91100D, F91400, F91410, F91420, F91430, F91500, and F91510, and assign these new tables to the Control Tables - PS810 data source.
10. Activate the new mappings.
11. Exit Object Configuration Manager.

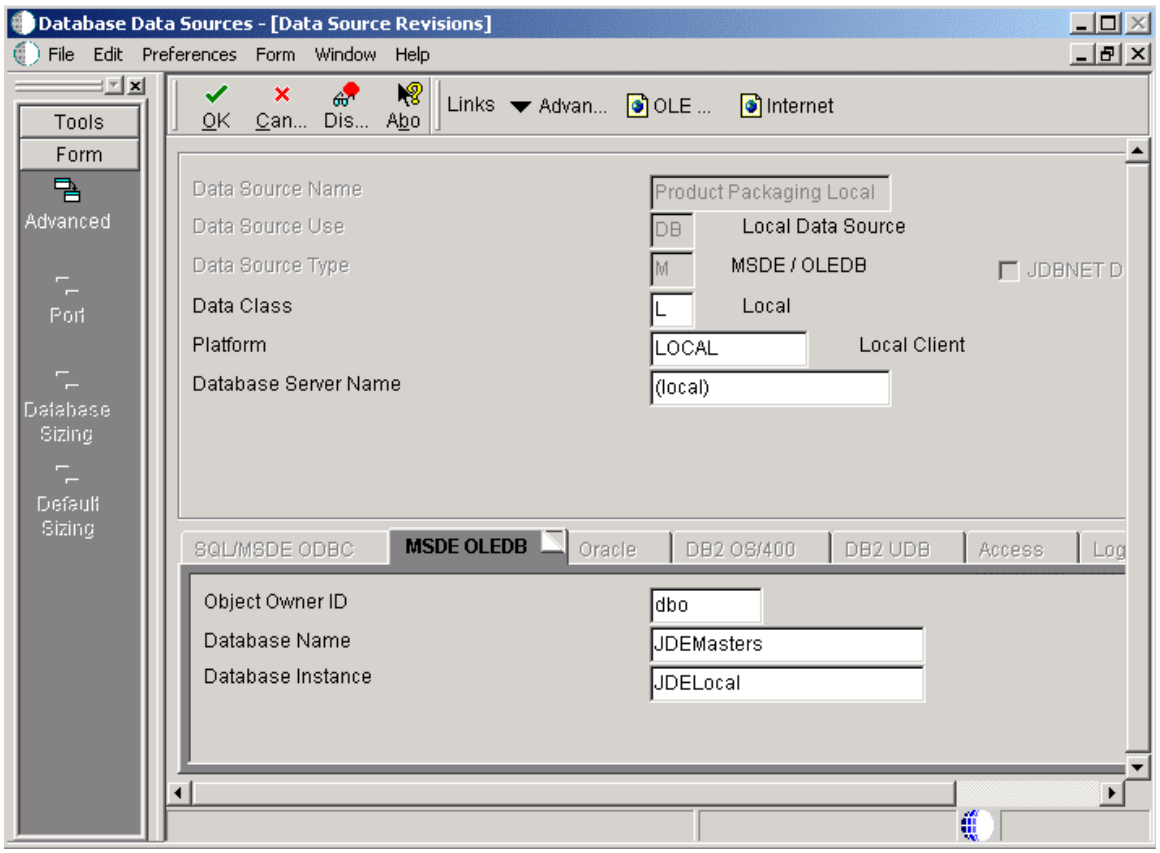
Verifying the Data Source Configuration for Product Packaging

The Product Packaging process creates an MSDE database in the TEMP directory on the workstation on which the Product Package CD image is mastered. This database is used to store data that will be mastered on the CD. To copy tables into this database, you must verify that the Product Packaging Local data source and the Data Dictionary - PS810 data source are properly configured on the Deployment Server.

► **To verify the Product Packaging data source**

From the Deployment Server, log on to EnterpriseOne in the DEP810 environment and type GH9011 in the Fast Path.

1. Double-click Database Data Sources (P986115).
2. On Machine Search & Select, choose the machine with the System - 810 data source.
3. On Work With Data Sources, click Find.
4. Choose the Product Packaging Local data source.



5. On Data Source Revisions, verify that the Product Packaging Local data source is defined with the following values:

   - ODBC Data Source Name

     Product Packaging Local

   - Data Source Type

     M - MSDE/OLEDB

   - Database Name

     JDEMasters

6. Click OK, and exit the Data Source application.

Creating a Data Dictionary in the Pristine Data Source

You need to create a data dictionary in your Pristine data source. This is a one-time process: after creating these tables, you will not need to create them again.

▶ **To create a data dictionary in the Pristine data source**

From the deployment server, log on to the PSFTPLAN environment. Use PSFT as your user name and PSFT as your password.

From the System Administration Tools (GH9011) menu, choose Batch Versions.

1. On Work With Batch Versions - Available Versions, type R98403 into the Batch Application field and click Find.
2. Choose version XJDE0509 and click Copy.
3. On Version Copy, enter a new version name and a new version title, and then click OK.
4. On Work With Batch Versions - Available Versions, choose the version you just created and, from the Row menu, choose Processing Options.
5. Complete the following processing options:
   - Target data source (option 2)

     Type `DATA DICTIONARY – PS810`.

   - Source environment (option 5)

     Type `Data Dictionary Local`

   These processing options set up the batch process to copy the data dictionary tables from PSFTPLAN environment to the new Pristine data dictionary.
6. Set the version you just created to run in the proof mode first.
7. Run this report locally, not on the enterprise server.
8. Verify the results of this report.
9. When satisfied with the proof mode results, run the version you just created in final mode.
10. Run Object Configuration Manager (OCM) from the Fast Path and choose the enterprise server.
11. For the PS810 environment, add OCM mappings for F9200, F9202, F9203, F9207, F9210, F9211, and F9212 that point these tables to Data Dictionary - PS810.
12. Activate the new OCM mappings.

Creating Change Tables

Product packaging requires that a set of tables, called change tables, exist and be mapped to the Control Tables - <environment> data source. A change table is a table that contains the items that have changed between releases or updates. Normally, these tables are generated during the installation process, when you run the environment workbench. If, however, the environment is populated with demo data, these tables will not be generated even though the environment workbench reports that they were created successfully.

Complete the following tasks if you need to create change tables in the mastering environment.

► To create change tables

This task must be completed once to initially build the change tables.

On the Deployment Server, log on to the PSFTPLAN environment.

From menu GH9011, choose Batch Versions.

1. Type `R98403` in the Batch Application field and click Find.
2. Choose version `XJDE0507` (Change Table) and click Copy.
3. On Version Copy, complete the following fields:

   - New Version

     Enter the following name: CREATECT

   - Version Title

     Type a name for the new version.

4. Click OK.
5. On Batch Version Design, click the Processing Options button on the General tab.
6. Edit the following processing options for CREATECT:

   - Target Environment (option 1)

     Type the name of the mastering environment.

   - Target Data Source (option 2)

     Leave this field blank.

   - Data Load (option 3)

     Enter 1 - Load Production to create the table without data.

   - Source data source (option 4)

     Enter Control Tables Local.

7. Click OK.
8. On Batch Version Design, click Run.

9. On Version Prompting, choose Data Selection and click Submit.
10. On Data Selection, verify that the following tables are listed in the right operand for BC OBNM, and add those that are missing:

F960004	F9691100	F9698710	F98800TN
F960005	F9691400	F9698712	F98810DN
F967611	F9691410	F9755	F98810N
F969000	F9691420	F9757	F98811N
F969001	F9691430	F9759	F98830N
F969002	F9691500	F9760	F98840N
F969005	F9691510	F98800DN	F98845N
F969006	F969861	F98800N	

11. Run the version.

    The program creates your change tables in Control Tables - CRP or whichever environment Control Table data source you specified.

See Also

- *Working with a Software Master Definition* in the *Product Packaging Guide* for other features of this form

► To verify the creation of change tables

For each of the change tables, verify that an Object Configuration Manager (OCM) mapping exists and points to the appropriate data source for the mastering environment.

From menu GH9011, choose Object Configuration Manager.

1. On Machine Search and Select, choose the machine with the System - 810 data source.
2. For the mastering environment, verify that each of the following change tables is mapped to the correct data source and that each mapping is activated:

Change Table	Data Source
F960004, F960005, F969000, F969001, F969002, F969005, F969006, F98800DN, F98800N, F98800TN, F98810DN, F98810N, F98811N, F98830N, F98840N, F98845N	Control Tables - <environment>
F969861, F9698710, F9698712	Central Objects - <environment>
F967611, F9691100, F9691400, F9691410, F9691420, F9691430, F9691500, F9691510,	System - 810
F9755, F9757, F9759, F9760	Data Dictionary - 810

3. Exit OCM.
4. Run Universal Table Browser (UTB) to verify that the tables were created in the correct location.

Creating a Software Master

This topic explains how to create a software master from start to finish. Use the checklist cited below to ensure that you complete all of the tasks.

Note

See the *Checklist for Creating a Software Master* in the *Software Master Creation* chapter of the *Product Packaging Guide*.

Defining a Software Master

This task explains how to use the CD Configuration director to define a software master.

Note

If you have already defined a software master and you need to revise the definition, see *Revising a Software Master Definition* in the *Product Packaging Guide*.

A software master definition provides the structure for your finished software master. It establishes what template and packages to use, what build steps to follow, and the directory structure of your final master. The software master definition is only the structure or outline of the master. Once you set up your software master definition, you validate it and then create the actual software master.

Including Custom Data in the Software Definition

The Product Packaging application allows you to include custom data on the software master. Read the following tips for including custom tables and custom media objects on the software image.

Including Custom Tables

If the customer creates a new, customized table that is to be delivered with pristine data, the mastering process should automatically handle this procedure if the following conditions are met:

- The table is included in the update package.
- The table is in the environment of the update package.
- The table is not included in the target environment.
- The table and index change table exist.

After the mastering process is complete, the table should be in the JDEMasters database referenced by the Product Packaging Local data source you set up earlier. In addition, records should exist in the table and index change table for the new custom table.

Including Custom Media Objects

To include custom media objects in the product package, add the following build steps to the ASU template:

1. Add a build step to copy table records from the Media Objects Storage (F00165) table to the JDEMasters database.
2. Add a build step to copy the media object files from the deployment server to the image path directory.

See Also

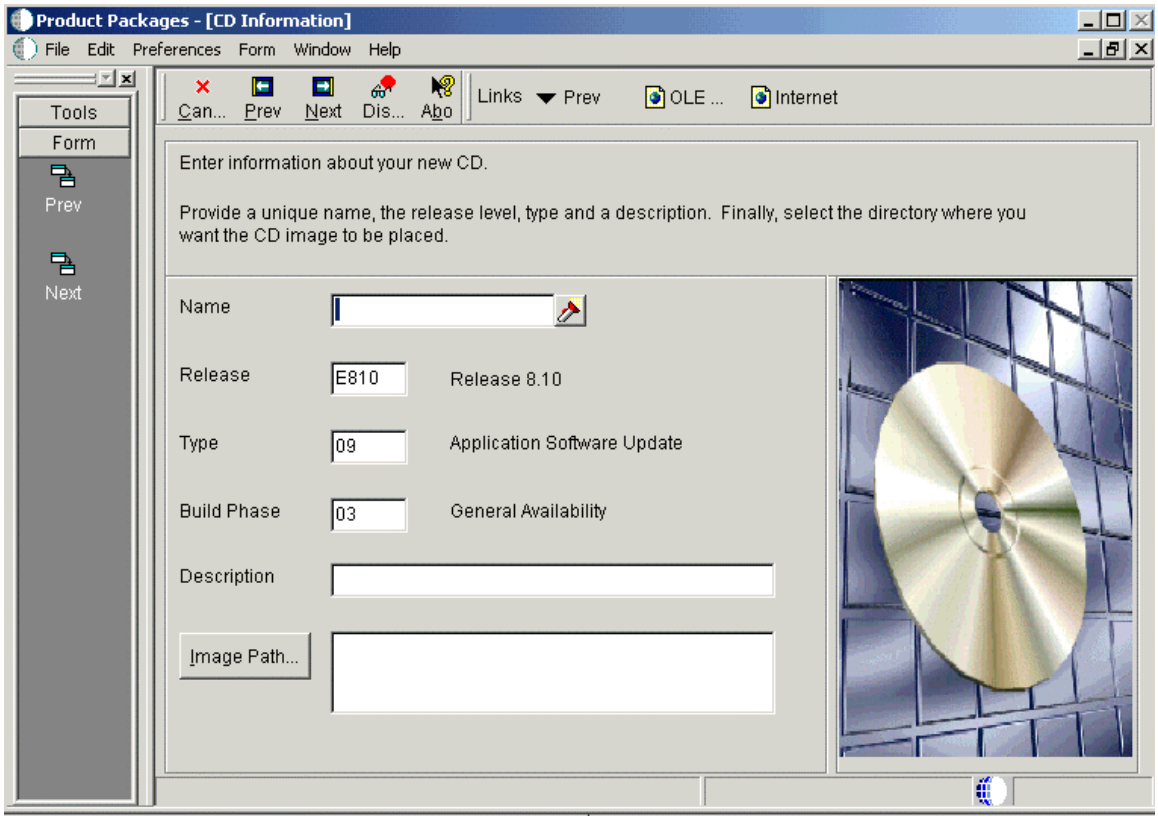
- *Revising a Software Master Template* in the *Product Packaging Guide* for more information about adding build steps

▶ To define a software master

Log on to an EnterpriseOne workstation using the development environment where your modifications exist, such as DV810.

From Product Packaging (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, click Add.
2. On CD Configuration Director, click Next.



3. On CD Information, complete the following fields:

   - Name

     Enter a unique name for the software master definition you are adding, such as `E810 UPDATE`. This name must exactly match the name of the package to be included, and must be in all UPPERCASE letters.

   - Release

     Enter the release for the software master definition, such as `E810`. This is the release currently installed on the client workstation you are using.

   - Type

     Specify the type of CD you want to master. In this case, it is an ASU CD (option 9), which is the default. If you choose an option other than 09, the software displays an error message when you press Next. This field indicates which software template to use when you further define the master. Templates include the build steps and directory structure necessary to create a software master.

     Note

     For information about templates, see *Software Master Templates* in the *Product Packaging Guide*.

   - Build Phase

     Enter the development phase that your software master definition represents, such as an alpha, beta, or general availability.

   - Description

     Optional. Enter a description of the software master definition.

   - Image Path

     Enter the directory path where you want your software master definition to reside on the Product Packaging build machine (for example, `d:\b7\PP`). If the directory does not exist, the software will create it for you when you run the software mastering process. The directory you indicate will be the root directory for the software master you create. It will contain the contents of your master. Once you create the image, the CD can be burned through the CD burner software.

4. Click Next.

   If you chose a template that appears on the list of values when you click the visual assist button from the Type field but the template is not on your enterprise, the CD Template Does Not Exist form appears. You have probably entered the incorrect release number. Click OK to continue adding your software master definition, or click Cancel to stop adding the definition.

If the template you chose via the Type field was set up to include packages, the CD Packages form appears.

5. Choose the update package that includes the objects for the update disk. You can either choose an existing update package or create a new one.

Note

To ensure that the update package is defined correctly, note the following:

- Use only update packages for this process.
- The package name must be the same name as the product package previously defined, and must be all UPPERCASE letters.
- The package should be created from its very beginning.
- The update package must always include specifications, build specifications, build business functions, and compression. If the package is not compressed, then product packaging will not work correctly because Product Packaging only looks for cab files to copy to your image.
- Ensure that the package build is activated and ready for build. For further information, refer to the *Package Management Guide*.

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6. If the package is undefined, the Select Package Build form automatically appears; otherwise, click Select Package.

   You can also add packages by clicking New Package Build or Package Assembly.

7. On Select Package Build, if you need to assemble or define a package or both, choose one of the following from the Form menu:

   - Pkg Assembly
   - Pkg Build

Note

Make sure that you compress any packages that you build.

For procedures to assemble and build packages, see the *Package Management Guide*.

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8. On the Select Package Build form, find and choose a package, and then click Select.
9. On CD Packages, choose the package marker that appears.

   For an ASU CD, only one package is required. For other types of software masters, more than one package might be required.

10. Click Next.

    After you click Next, and if the template you chose was set up to include change table configurations, the Change Table Director form appears.

11. Continue to the next task, which explains how to configure your change tables.

Configuring Change Tables

This task explains how to set up a change table configuration using the Change Table director. Create change table configurations to indicate to the Product Packaging tools the change tables you want included with the software master. When you install the finished software master, the installation process will update the control tables of the enterprise with the change tables you indicate.

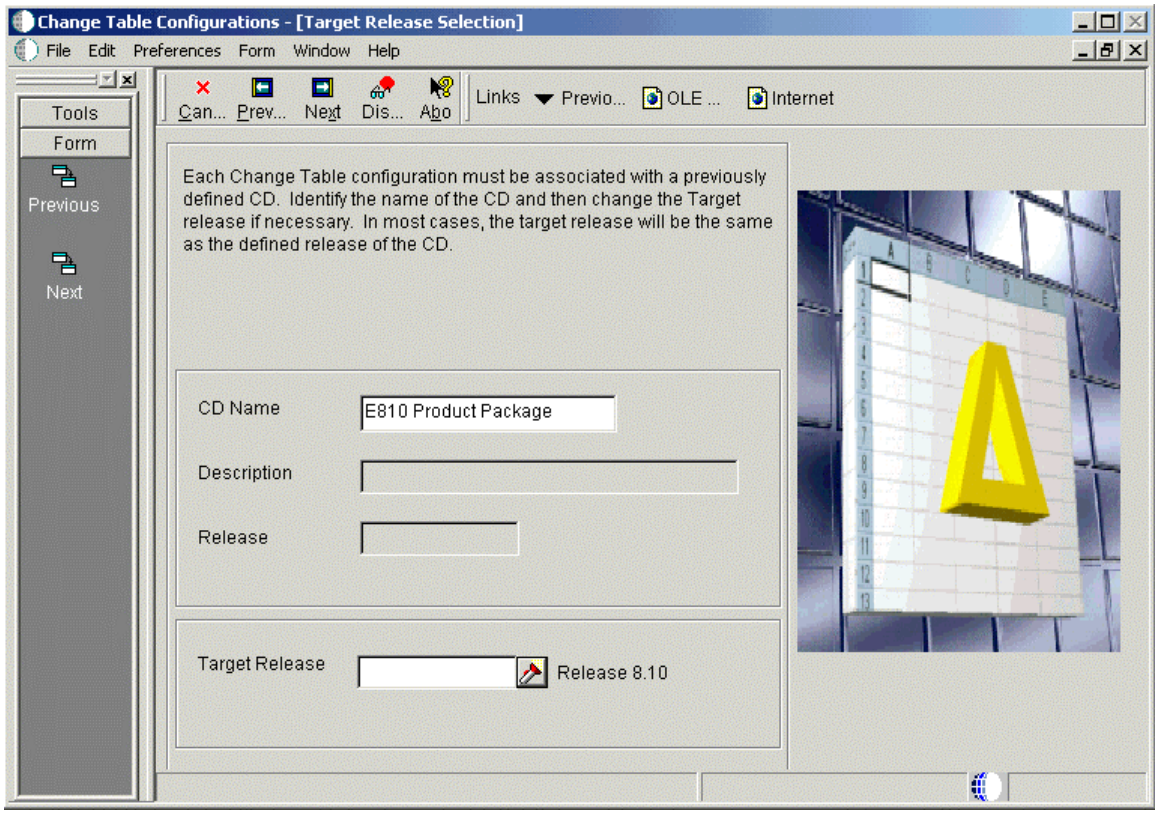
The following example illustrates why change table configurations are needed:

The home office in Denver, USA, makes software changes and wants to update an enterprise that is not networked to the Denver enterprise. The other enterprise, which has its own set of EnterpriseOne software and control tables, is in Paris, France. The Denver enterprise creates a software master that includes the package containing the software changes, as well as the change tables that contain data dictionary and user defined codes changes, which for this example are the only control table changes since the Paris enterprise was last updated. The Denver enterprise writes the software master to a CD and ships it to Paris. When the Paris enterprise installs the software master, the change tables will update the Paris control tables, which will make the tables concurrent with the Denver control tables.

▶ To configure change tables

On the Change Table Director, which appears automatically during the mastering process if required by the template, click Next.

Alternatively, from Product Packaging (GH962), choose Change Table Configurations (P9642) and then click Add. On the Change Table Director, click Next.



1. On the Target Release Selection form, complete the following field:

   - Target Release

     Change the target release to a custom UDC name that you are mastering. This name needs to be unique, such as E810TAX for the 1099 tax update. Choose the release name using the visual-assist button.

     Note

     The software will not function correctly if these tables have the same value for the source and target release. To add the custom UDC, press the visual assist and then click Revisions. This action displays the Work with User Defined Codes form. On User Defined Codes, click Add. Scroll to the bottom of the grid and add the new value in the last line of the grid. Once you have created the UDC, choose the new UDC on the User Defined Code form, and click Select. This action will populate the Target Release field with the new value.

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2. Click Next.
3. On Source Environment Selection, complete the following fields:

   - Source Environment

     Enter the name of the environment that includes the control tables used as the baseline for your changes. The source is typically the pristine environment (PS810). The software builds the change table records by comparing the target environment to this baseline.

   - Source Release

     Verify that the source release matches the release and the cumulative update level, such as E810, of the source environment that you want. The software automatically populates this field based upon the source environment.

4. Click Next.

   The Batch Application Selection form appears. This form lists the available change tables along with the batch application and version that will create the change table.

5. To choose the default change tables that you want with your software master, double-click the gray button to the left of the change table row.

   A check mark appears on the button.

   Choose any or all of the following change tables where you made additions, deletions, or changes. The batch process compares the source and target tables in each selected category and creates a change table that contains all changes.

   - Data Dictionary
   - User Defined Codes

     This batch application should always be chosen because these are always changes to the UDC defining the release.

- Workflow
- Favorites
- Templates and Smart Fields
- Tips of the Day
- Table and Index Changes
- Solution Explorer Change Tables

Note

You can double-click a check mark to remove it.

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6. To choose a different version or to choose multiple versions, choose a change table row and, from the Row menu, choose Version Selection.
7. On Version Selection, choose one or more versions and click Select; or double-click the gray button to the left of a version.

   A check mark appears to the left of the versions you chose.

8. After choosing the versions that you want, click Close.

   The Batch Application Selection form reappears.

   A check mark appears to the left of the change table row you chose. The change tables that you want built for the software master must have check marks next to them or the software will ignore them. If you chose more than one version, the word <MULTIPLE> appears under the Version column for that change table.

9. Either choose another change table row and choose Version Selection from the Row menu, or click Next.

   If you click Next, the Additional Change Table Definitions form appears.

10. On Additional Change Table Definitions, complete one of the following:
    - To define additional change table configurations for a new source and target release combination, choose Continue and click OK. The program displays the Target Release Selection form. Return to the beginning of this task and repeat the steps for a different source and target combination.
    - Choose Quit and click OK. This action stops the change table configuration director and displays the final revisions screen for mastering the defined CD.

      If you choose Quit, the CD Revisions form appears. Use this form to revise your software master definition.

      Note

      If you need to revise the change table configurations you just created, see *Revising a Software Master Definition* and *Revising or Submitting Change Tables* in the *Product Packaging Guide*.

      ---

11. On CD Revisions, click OK.

    Your software master definition is saved, and the CD Revisions form disappears.

12. Continue to the next task, which explains how to validate the definition you just created.

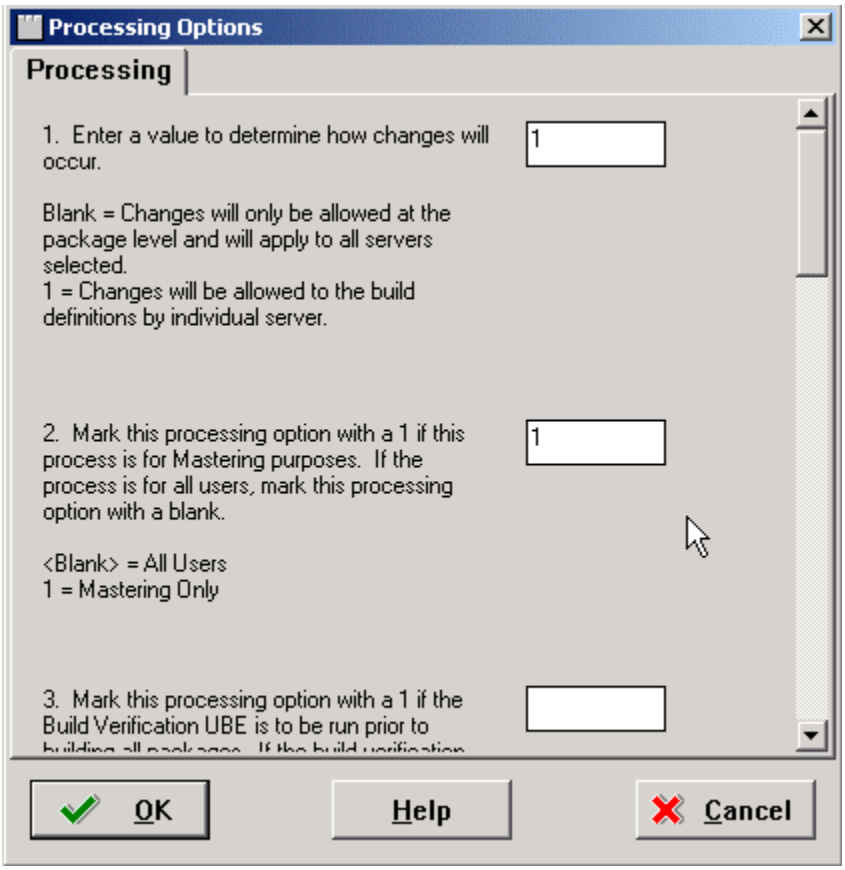
Setting the Package Build Application to the Mastering Mode

To compress an update package, the package build application must be set in mastering mode.

► To set the Package Build Application to the Mastering Mode

On the Deployment server, log on to the DEP810 environment.

From the Package and Deployment Tools menu (GH9083), right-click on Package Build, and choose Prompt For Values.



1. On Processing Options, type 1 in option 2 to set up the mastering mode.
2. Click OK.
3. Exit the package build application.

Validating a Software Master Definition

This task explains how to run the Pre-Mastering CD Validation Report (R9640A) to validate the software master definition that you set up and what to look for in the report to help with your validation. The report runs in final mode. The report lists whether the build step is validated or not. The report will change the status of build steps that do *not* have errors.

► **To validate a software master definition**

From Product Packaging (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, click Find.

   The existing software master definitions appear.

2. Choose the master you want to validate, and then choose Validate from the Row menu.
3. On Report Output Destination, choose to view the report On Screen and click OK.

   The report runs. All steps without errors whose status was In Definition (10) or Defined (20) are promoted to the status of Validated (30), and they will work properly during the software mastering process. Otherwise, the build step will have either a warning or an error message, as follows:

   - Warning messages will not stop the creation of a software master. If a build step has a warning message, you should verify that the build step is as you want it before proceeding. Note that the report will always include a warning stating that the build step is different from the template. This warning is always true because the process uses a custom package build.
   - Error messages will stop the creation of a software master. You must fix any build steps that contain error messages. The message specifies the error.
4. Continue to the next task, which explains how to create the final software master.

Creating a Final Software Master

This task explains how to create the final software master image from a definition that you previously created. You can master a single definition, or choose to master all definitions of a specific EnterpriseOne release.

The report that accomplishes this task is the Master CD (R9640B) report. This report controls the execution of all of the build steps and the UBEs associated with the build steps. This report also changes the status of each build step from 30 - Validated to a new status of 60 - Built or 50 - Failed.

Build Time

With an average workstation, network, and ERP environment, the mastering process should take about an hour. However, the software includes many variables that can affect the time it takes to build a product package CD. These variables are as follows:

- Status and level of debugging
- Number of objects in the update package
- Size of the objects in the update package
- Overall size of the parent package
- Number of change tables to define
- Network speed
- Type of database
- Build machine speed
- Build machine memory
- Number of other processes running on the Enterprise Server, Deployment Server, and Build Machine

Prerequisite

- Ensure that at least 1 GB of space is available for the TEMP directory of the workstation from which you use the Product Packaging Tools. This memory requirement is the most memory you might need for a software master. The actual size of the master depends upon the size of the package you create.

► To create a final software master

From Product Packaging (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, complete one of the following:
   - To create a software master from one specific definition, click Find, choose the definition you want to create, and then click `Master CD` from the Row menu.
   - To create software masters for all definitions of a specific release, click `Master Release` from the Row menu. A form appears in which you enter the release number of the definitions you want to master.

   Either choice runs a batch process (R9640B) that creates your software master based upon the definition you chose. Run the report locally and On Screen. Depending on the build steps to complete, the report launches several other reports, each corresponding to a particular build step.

2. The software mastering process will stop when it encounters a manual build step. To complete the manual build step, choose that build step, and click Execute Step from the View menu. The status of that step is advanced to 60 (Built). Click `Master CD` or `Master Release` to continue the software master process.

Note

For more information about build steps, see *Revising a Software Master Definition* in the *Product Packaging Guide*.

3. The progress of the build can be monitored from the CD Revisions screen. From the View menu, choose `Refresh`.

   As each step is processed and completed, the icon cog will change color and style.

4. The last build step automatically validates your software master and generates a final report (R9840B) This report includes a comprehensive status of the product package build. Review this report for errors.

   If the validation report does not show any errors, you have successfully created a software master. This report validates that the number of directories match between the software master definition and the final software master. It also provides details about the file counts and the total size of the master in megabytes.

   This process automatically creates a self-extracting executable file and a CAB file and places them in the $TEMP/final directory using the name of the software master followed with the .exe and .cab extensions. Use the executable (.exe) file to update EnterpriseOne. Both files include the full software master with all of its directories. If you have a size restriction, such as when downloading from the Internet, you can use the CAB file (which is always smaller than the executable file), but you will need to use a third-party application to uncompress the CAB file.

Confirming the Software Master

After you create the software master image, you should visually check the directory structure and JDEMasters database to verify that the image is complete.

► **To confirm the software master**

In Windows Explorer, open the image path directory.

1. Check that the package directory includes the following files:
   - install manager files
   - planner directory
   - a data cab in the planner directory
   - a directory named the same as your package
   - cab files in your package directory.
2. Verify that the $TEMP\final directory includes the following two files:

   packagename.cab

   packagename.exe

3. Open the JDEMasters database in the $TEMP\master directory, and verify that this database is populated with tables.

Note

If your package includes new custom tables, verify that they are in the JDEMasters database and that they and their associated index change tables have records.

Moving the Software Master to a CD ROM

Once the software master process has been completed and confirmed, the image can be burned onto a CD.

▶ **To move the software master to a CD ROM**

Using a CD burner and CD burner software, copy the *packagename*.cab or *packagename*.exe file from the $TEMP/final directory on to the CD ROM.

Updating EnterpriseOne with the Software Master

This task explains how to update EnterpriseOne using the software master you created. To perform this update, access the Work with Updates (P96470) application from the System Installation Tools (GH961) menu. This process includes setting merge flags, running the self-extracting executable (*packagename*.exe), running software updates, and executing installation workbench.

▶ **To update EnterpriseOne using a software master**

Note

On the deployment server, complete the Customer Preparation tasks described in the *EnterpriseOne Software Update Guide*.

1. Run the *Product_Package*.exe executable file from the CD.

   This process installs the package into the Planner\Package directory on the deployment server, and extracts the *Product_Package_Name*.mdf and *Product_Package_Name*.ldf files into the Planner\Data directory. The process also creates the software master image in the PLANNER directory.

   Note

   You can also use the CAB file to create the software master image on your deployment server, but you need to use a third-party application to uncompress the file.

2. If InstallManager.exe exists on the CD, start the installation by double-clicking it.

   If this file is not on the CD, double-click the PACKAGE_NAME.exe file to self-extract and uncompress the CAB file. Once uncompressed, Install Manager will automatically launch.

3. On Installation Setup Screen, click Next.
4. On Installation Setup Type, verify that the machine has the necessary disk space and that the Install Path is correct, and then click Finish.
5. When the installation is complete, the Install Manager displays the "Installation Complete" window.
6. Click OK.
7. On the Deployment Server, log on to the Planner environment (PSFTPLAN).
8. Type GH9612 in the Fast Path.
9. Choose Application Software Updates (P96470).
10. On Work with Software Updates, click Find.
11. Choose the product package to install, and click Next.
12. On Software Update Environment Selection, choose the pathcode to install the package on to, and click Next.

    If unattended mode is chosen, the Installation Workbench will automatically perform all the workbench tasks to complete the installation. If unattended mode is not chosen, the Installation Workbench tasks must be done manually. If backup is chosen, the process will create an MSDE database (OWBAK_*packagename_pathcode*) and its corresponding files called OWBAK_*packagename_pathcode*.mdf and OWBAK_*packagename_pathcode*.ldf in the Planner\Package*Package_Name**PathCode*.bak\data directory. Only the tables and objects affected by the update will be backed up in the database.

    The Installation Workbench should stop after the Table Conversion workbench is complete.

13. Review the PDFs and the log files created by the table conversions, and then continue with Installation Workbench.
14. When Installation Workbench is complete, Software Updates returns to the Work with Software Updates screen, and the selected software update should have the Completed Normally install status.
15. Click Close to exit Work with Software Updates.
16. Review all PDFs generated on the deployment server by the software update process, and verify that each of report is free of errors.

If a report has errors or does not appear to have run, review the jde.log file to determine the source of the problem. The table below includes descriptions of the Software Update reports.

Report	Version	Description
R98405 – Application	XJDE0001	Table Conversion/Merge Driver for Application Tables: Master UBE for creating and regenerating application tables. This report should have only one record: Table and Index Creation (F984072). The status of the record should be: Completed Normally.
R98407	XJDE0001	Table and Index Creation: Launched by R98405 UBE, which creates or regenerates all tables specified in the table change table. Page one of the report includes source, target, and environment information. Page two includes the overall status of the table creation in green or red text. Subsequent pages list the status of each table and index to be created or regenerated.
R98405 – Control	XJDE0001	Table Conversion/Merge Driver for Control Tables: The master UBE that specifies the control table merge UBEs to launch. It should list the following UBEs: Data Dictionary (R989200P), and User Defined Codes (R9600042). The status on all should be: Completed Normally.
R989200P	XJDE0001	Data Dictionary Merge: Launched by R98405. This UBE merges all data dictionary changes specified in the data dictionary change tables into the existing data dictionary. Page one of the report has source, target, and environment information. Subsequent pages list the status of each data dictionary addition or change. At the end of the individual listings, the overall status of the data dictionary merge is listed in green or red text. The final page has detailed summary information.
R9600042	XJDE0001	User Defined Code Merge: Launched by R98405. This UBE merges all user defined code changes specified in the UDC change tables into the existing UDC tables. Page one of the report lists source, target, and environment information. Subsequent pages list the status of each UDC addition or change. The final page has detailed summary information.

R9690002	XJDE0001	Solution Explorer Merge: Launched by R98405. This UBE merges all Solution Explorer changes specified in the SE change tables into the existing SE tables. Page one of the report lists source, target, and environment information. Subsequent pages list each addition, change, or deletion in the change tables. The final page has detailed summary information.
R96911002	XJDE0001	Favorites Merge: Launched by R98405. This UBE merges all Favorites changes specified in the Favorites change tables into the existing Favorites tables. Page one of the report lists the source, target, and environment information. Subsequent pages list the status of each Favorites addition or change. The final page has detailed summary information.
R96914002	XJDE0001	Report Director Templates Merge: Launched by R98405. This UBE merges all Favorites changes specified in the Report Director Templates change tables into the existing Report Director Templates tables. Page one of the report lists the source, target, and environment information. Subsequent pages list the status of each addition or change. The final page has detailed summary information.
R96915002	XJDE0001	Tips Merge: Launched by R98405. This UBE merges all Tips changes specified in the Tips change tables into the existing Tips tables. Page one of the report lists the source, target, and environment information. Subsequent pages list the status of each addition or change. The final page has detailed summary information.
R98405 – Spec	XJDE0001	Table Conversion/Merge Driver for specification tables: Master UBE for specification table merge. This report should have only one record: Specification Merge (F98710). The status of this record should be: Completed Normally.
R98700	ZJDE0002	Specification Merge: Launched by R98405. This UBE adds, replaces, and merges all specified object specifications into the selected Central Objects path code. This report is the standard specification merge report. Page one of the report lists the source, target, and environment information. Page two summarizes information about the merge status. The remaining pages include the individual object action and status.

17. On the Deployment Server, log on to the DEP9 environment.
18. Find the package in the Package Assembly (P9601), and build and deploy the update package to a client workstation.
19. Open Object Management Workbench and view the new project with all the updated objects that were included in the Product Package.

Software Master

You can delete a software master after you have created it. You can also revise, copy, proof, validate, and delete a software master definition after you have created it.

See Also

In the *Product Packaging Guide*:

- *Creating a Final Software Master* for information on how to convert your software master definition into the final software master that you can deploy to your enterprise
- *Defining a Software Master* for information on how to create a software master definition

Working with a Software Master

Objects in the software master refer to the following:

- EnterpriseOne objects, such as applications and business functions
- Control and change tables, such as data dictionary items or user defined codes
- Application data, such as the Address Book table

Deleting a Software Master

To delete a software master, perform the following task.

Important

All records associated with the definition, such as the change table configurations and repair director records, will be deleted when you delete the software master.

► To delete a software master definition

From Product Packaging (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, click Find.
2. Choose the master you want to delete, and then click Delete.

   A message box appears asking if you are sure you want to delete the software master definition.

3. Click OK.

Working with a Software Master Definition

Once you have completed the definition of a software master, you can revise any of the information, including the build steps and directory structure. You also can copy the definition information to a new software master definition, delete the definition, and proof and validate it.

Revising a Software Master Definition

You can revise a software master definition that you created. This revision allows you to modify the information you entered into the CD Configuration Director, as well as the build steps and directory structure included with the template that you chose.

Note

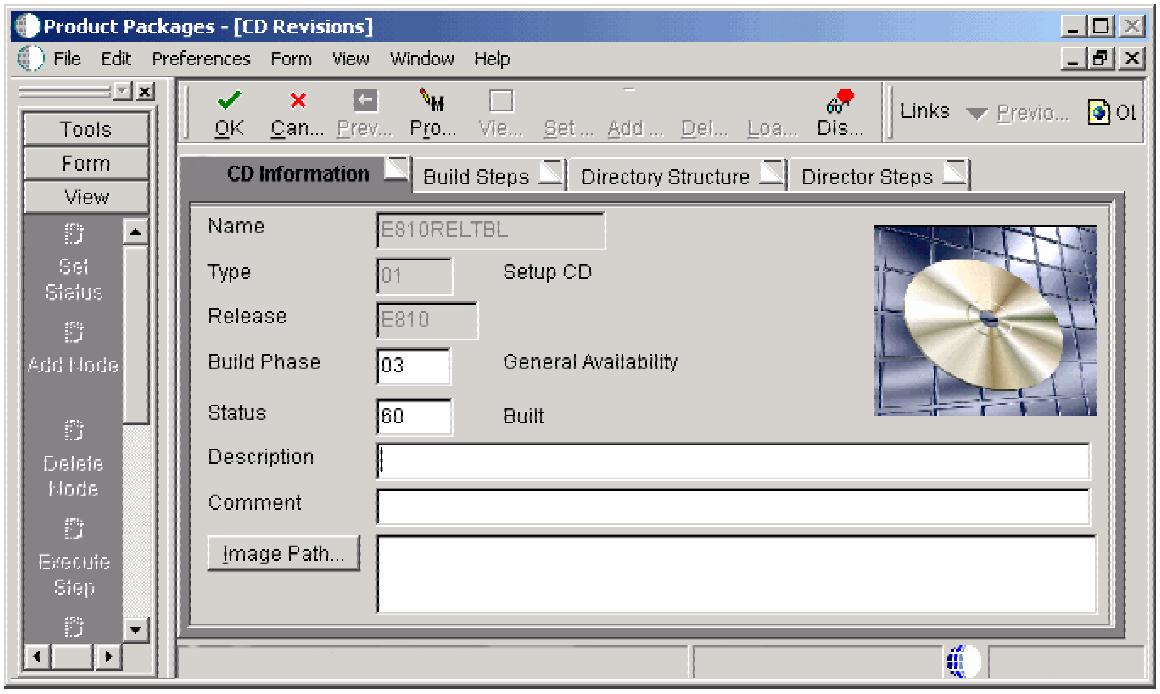
If you need to add a new software master definition, see *Defining a Software Master* in the *Product Packaging Guide*.

▶ To revise a software master definition

From Product Packaging (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, click Find.
2. From the existing software master definitions that appear, choose the one you want to revise, and then click Select.

   The CD Revisions form appears.



3. On the CD Revisions form, choose Refresh to refresh the information shown on any of the tabs.
4. To validate the information shown on any tabs, click Validate. A report runs in proof mode to validate the definition.

Note

To run this report in final mode, see *Validating a Software Master Definition* in the *Product Packaging Guide*.

---

5. Click the CD Information tab and revise the following fields:

   - Status

     Verify the status of the software master definition.

   - Description

     Optional. Enter a description of the software master definition.

   - Comment

     Optional. The mastering process populates this field with status information about the process. You can also enter any additional information about the software master definition, but the software will overwrite that information when a subsequent process completes.

   - Image Path

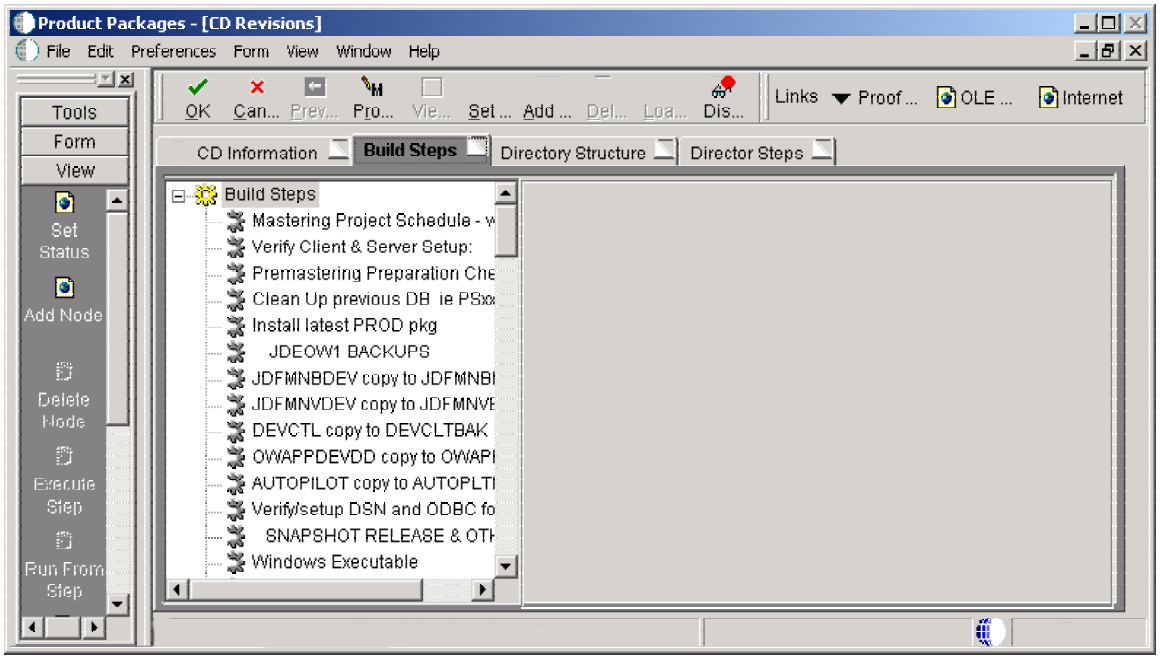
     Verify the directory path where you want your software master to reside on your enterprise. If the directory does not exist, the software will create it for you when you run the software mastering process. The directory you indicate will be the root directory for when you create your final software master.

     Note

     See the *Software Master Creation* section in the *Product Packaging Guide* for information about running the software master process.

     ---

6. Click the Build Steps tab.



7. To revise a build step, choose the step and complete the following fields:

   - Sequence

     Verify the order in which you want the step performed during the creation of the software master definition. You can use the same sequence number for multiple build steps.

   - Type

     Verify which component type you want the build step to perform. For example, you can define steps to create file structures, build a package, or create INF files.

   - Status

     Verify the current status of the build step, which can indicate whether or not to run the particular step during the mastering process. For example, if there are manual steps that you need to perform during the mastering process, you can manually complete the step, change the step's status to 60 (Built) by choosing the step, and then, from the View menu, choose Execute Step.

The icons to the left of each build step illustrate the status of that step:

 The status code is 10, In Definition

 Gray Cog. The status code is 20, Defined.

 The status code is 30, Validated.

 The status code is 40, Processing.

 The status code is 50, Failed.

 Gold Cog. The status code is 60, Built.

The following fields are dynamic and appear depending upon the build step you chose:

- Description

  Enter a description about the build step. The first line of the description appears as the text for the build step. This line of text appears in the tree view on the left side of the form. You may want to enter a short descriptive name in the first line of the Description field, such as Check Mastering Items, and then press the Enter key before typing in a more robust description for the step.

- Target Folder

  The software may populate this field based upon the build step's definition in the software master template. To change this field, click the Target Folder button and use the Select CD Directory form to choose the target folder for this build step.

- Executable

  The software may populate this field based upon the build step's definition in the software master template. To change this field, click the Executable button and use the Select a Windows Executable form to choose an executable for this build step.

- Value/Parameter

  Verify the value or parameter. To change this information, click the Value/Parameter button, and then enter a value or parameter appropriate to the step you chose. This field is dynamic. The button name is either Value or Parameter, based upon the step that you chose. The form that appears when you click the button also depends upon which step you chose. For example, the Package Build step calls the Select Package Build form, from which you can choose a package; and the Build Change Tables step calls the Work With Change Table Definitions form, from which you can modify the change table configuration.

8. To add a step, click Add.

   The software creates a new step labeled Undefined and places it at the end of the steps.

9. Choose the Undefined step and complete the following fields:

   - Sequence
   - Type
   - Status
   - Description
   - Value

10. To run one or more steps, choose the build step you want to run, and from the View menu either choose Execute Step to run just that step or choose Run From Step to run that step plus any steps that follow it.

    This option runs the step and updates its status to 60 (Built). You might use this option for manual build steps. Manual steps are those that you need to perform yourself, such as an additional mastering step that is not part of the Product Packaging Tools. After you complete the manual step, use the Execute Step option to update the step to a status of 60 so that you can proceed to the next step in the process.

11. To add an attachment to a build step, choose the step and from the View menu, and then click Attachments.

    The Media Objects form appears.

    Note

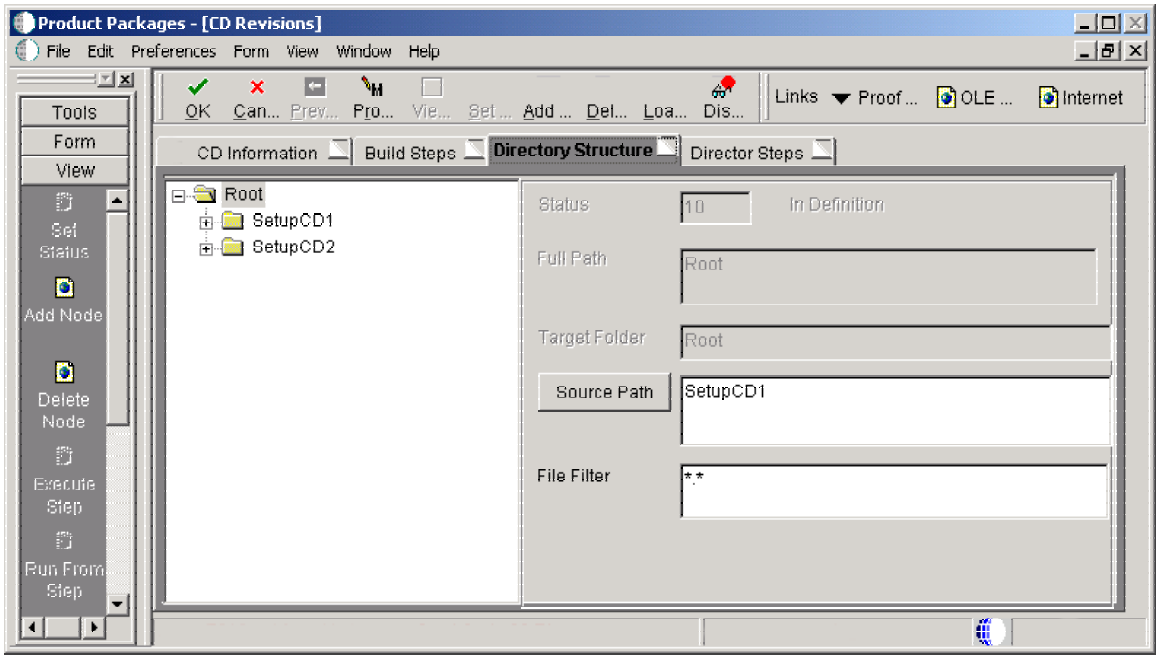
    See *Media Objects and Imaging* in the *System Administration Guide* for information about attaching media objects.

    After attaching a media object, a paper clip appears in the upper-right corner of the Build Step tab for that build step.

12. To renumber your build steps, from the Form menu, click Renumber.

    The software renumbers your build steps, updating the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, and so on). The software keeps the build steps in the same sequence that you or the software master template established.

13. To delete a step, choose the step, and click Delete.
14. Click the Directory Structure tab.



15. To revise a directory, choose the directory and complete the following fields:

    - Status

      Verify the status of the directory.

    - Target Folder

      The software populates this field based upon the directory's definition in the software master template. Do not change the directory name that was defined in the template.

    - Source Path

      Verify the directory path of the source that will populate the component. This is the source path name of the data that you want to retrieve for the master and that you placed into the target folder. You can specify this path using either a relative or absolute path. See "Appendix A" for information about relative and absolute paths.

    - File Filter

      Verify the file filter (*.* is the default). The file filter allows you to filter any data files you retrieve from the source directory. For example, you can use *.* to retrieve all files in the source directory.

16. To add a subdirectory, click a directory for which you want to add a subdirectory and click Add. You can choose any directory, including Root.

    The software creates a new directory labeled Undefined and places it at the bottom of the structure.

17. Choose the Undefined directory and complete the following fields:

    - Status
    - Target Folder

      The software populates this field for new directories with Undefined. Change this field to represent the new directory's name.

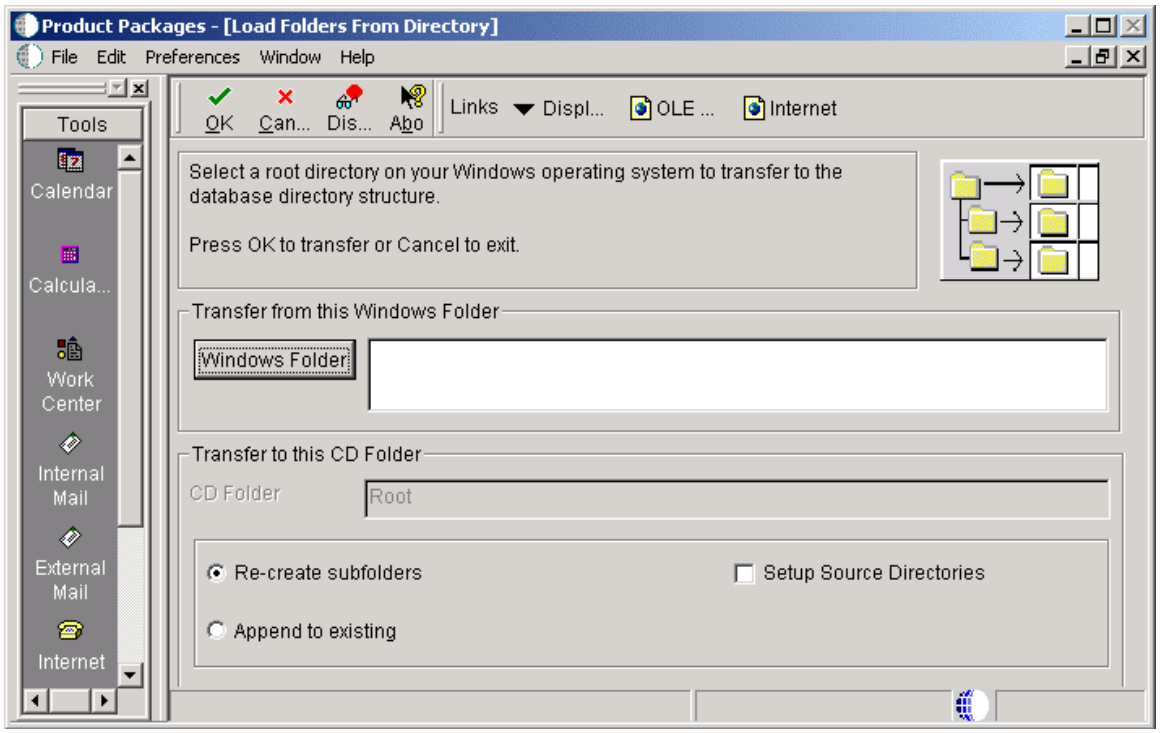
    - Source Path
    - File Filter

18. To load a subdirectory from an enterprise network directory, click on the directory that will be the root of the subdirectory that you want to load, which must already exist on your enterprise.

    This feature copies any enterprise directory structure into the software master definition. Complete the following:

19. Click Load.

    The Load Folders From Directory form appears.



20. Click Windows Folder.

    The Select Directory form appears.

21. Find and choose a directory you want to load into your software master, and then click OK.

22. On the Load Folders From Directory form, choose one of the following:

    - Re-create subfolders

      This option replaces (deletes) the existing subdirectories and replaces them with the subdirectories you want to load into the software master.

    - Append to existing

      This option appends to the existing subdirectories the subdirectories you want to load into the software master.

23. If needed, click the Setup Source Directories checkbox. When creating the software master, having this checked will automatically create the structure of the source directories and it will also copy all files within the source directories to the software master.

    If you do not check Setup Source Directories, the software will create the source directory structure within the software master and the directories will be empty.

24. Click OK.
25. To delete a directory and all its subdirectories, choose the directory, and then click Delete.
26. When finished revising the software master definition, click OK.

Copying a Software Master Definition

You can copy a software master definition that you already created, which allows you to copy the information that you entered into the CD Configuration Director, the build steps, and the directory structure.

► **To copy a software master definition**

From Product Packaging (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, click Find.
2. From the software master definitions that appear, choose the master you want to copy, and then click Copy.
3. On Copy CD Configuration, complete the following fields and click OK:

    - Name

      Enter a unique name for the software master definition you are copying, such as E810 Update.

    - Description

      Optional. Enter a description of the software master definition.

    - Release

      Enter the EnterpriseOne release for the copy of the software master definition, such as E810.

- Type

  In most cases, you will not need to change the default value. If you need to, however, you can change the type of your software master when making a copy. For example, you can change the type from a Setup CD to an ASU CD. This change does not change build steps or the directory structure. When you validate your software master, you will receive warning messages that your master does not match the default settings of the ASU CD template. This is because your master is actually based on the Setup CD template. You will not be prevented from creating your software master.

- Build Phase

  Enter the phase of development that your software master definition represents, such as alpha, beta, or general availability.

- Image Path

  Enter the directory path where you want your software master to reside on your enterprise. If the directory does not exist, the software will create it for you when you run the software mastering process. The directory you indicate will be the root directory for the software master that you create.

Note

See *Software Master Creation* in the *Product Packaging Guide* for information about running the software master process.

Proofing a Software Master Definition

You are able to proof software master definitions. To do so, you create a report, which details each build step in the definition and shows the sequence of steps and processes that each step will run when creating the actual master.

Proofing a software master definition does not change any part of the status of a software master.

► **To proof a software master definition**

From Product Packaging (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, click Find.
2. From the software master definitions that appear, complete one of the following:
   - To proof one software master definition, choose the definition you want to create, and then choose Proof CD from the View menu.
   - To proof all software master definitions for a specific release, choose Proof Release from the View menu. On the form that appears, enter the release number of the definitions you want to proof.

   For whichever proof method you chose, the Report Output Destination form appears.

3. Specify whether to send the report to a printer or to view an online version of the report using Acrobat Reader, and click OK.

   A batch process runs a report that shows each build step in sequence and what processes, if any, each step runs when creating the actual master.

Validating a Software Master Definition

You run a report to validate the software master definition that you created. The report runs in final mode, and it changes the status of the build steps that do not have errors.

► **To validate a software master definition**

From Product Packaging (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, click Find.
2. From the software master definitions that appear, choose the master you want to validate, and then click Validate.
3. On Report Output Destination, specify whether to send the report to a printer or to view an online version of the report using Acrobat Reader, and then click OK.

   The report runs. All steps without errors whose status was In Definition or Defined are promoted to the status of Validated. The report lists each build step that will run when you create your master. The report lists whether the build step is validated or not. If it is validated, the build step will work properly when creating the software master. Otherwise, the build step will have either a warning or error message, as follows:

   - Warning messages will not stop the creation of a software master. The message specifies what the warning is. If a build step has a warning message, you should verify that the build step is as you want it to be before proceeding.
   - Error messages will stop the creation of a software master. You must fix any build steps that contain error messages. The message specifies the error.

Deleting a Software Master Definition

You can delete a software master definition. All records associated with the definition, such as the change table configurations, are also deleted.

► **To delete a software master definition**

From Product Packaging (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, click Find.
2. From the software master definitions that appear, choose the master you want to delete, and then click Delete.

   A message box appears asking if you are sure you want to delete the software master definition.

3. Click OK.

Software Master Templates

The Product Packaging tool uses software master templates. These templates provide default information when creating a new software master. For example, to distribute objects to a disconnected enterprise, you would choose to build a master based on the ASU (Application Software Update) CD template. The Mastering Director would use the ASU CD template to determine which director steps, build steps, and directory structure to use when creating the software master. You can customize the default information provided by the templates.

You use build steps to build a template. Build steps are the processes used to create a software master. You also can add, revise, copy, and delete software master templates.

See Also

- *Defining a Software Master* in the *Product Packaging Guide* for information about the Mastering Director and how to indicate the template you want to use when creating your software master

Details of All Build Step Processes

A template can offer all of the following software mastering build step processes. Not all of these processes will appear on every template.

Undefined

Type = 00

Performed Automatically = Not Applicable

This build step is the default process when adding a new build step to a software master or template. Once you add this build step, you need to define it for the master or template.

Create CD File Structure

Type = 01

Performed Automatically = Yes

This build step creates the physical directory structure at the image-path location that you specified when creating the software master definition.

Package Build

Type = 02

Performed Automatically = Yes

This build step builds the assigned package based upon the package assembly and build definitions.

Manual Build Step

Type = 03

Performed Automatically = No, see the specific template definition for complete information about the performance of this build step.

This build step allows the administrator to instruct the user on how to perform a process that has not yet been automated. You should verify the mastering steps and options of this step before beginning your master.

Note

The software mastering batch process stops when it encounters this build step. Once you complete this build step, change its status to Succeeded (status code 60), and restart the software mastering batch process.

Pre-Build Package

Type = 04

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

Pre-Build Pristine

Type = 05

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

Build Cross-Reference

Type = 06

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

Build Data Dictionary

Type = 07

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

Build In-House Package Database

Type = 08

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

Build Planner Database

Type = 09

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

Build Pristine Database

Type = 10

Performed Automatically = Partial, see the specific template definition for complete information about the performance of this build step.

This build step creates the pristine data tables in the final pristine database that corresponds to the given set of modules.

Build Store & Forward Database

Type = 11

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

Build Standalone Database

Type = 12

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

Build Change Tables

Type = 13

Performed Automatically = Yes

This build step builds the change tables based on the change table configuration that was set up as part of the software master definition.

Master Central Objects

Type = 14

Performed Automatically = No

For PeopleSoft Internal Use Only.

Compress

Type = 15

Performed Automatically = Partial, see the specific template definition for complete information about the performance of this build step.

This build step compresses the final pristine JDE Masters database into the data.cab file in the final image path.

Create INF

Type = 16

Performed Automatically = Yes

DO NOT modify this file manually. This build step updates the deployment.inf file that the installation applications use during the update installation.

Copy CD Directory Files

Type = 17

Performed Automatically = Yes

This build step copies the built package to the target image path. This step also copies any additional files defined in the software master directory structure to the target image path.

Note

If you have already built the package and do not want the mastering process to build the package again, set the status of the Package Build step to 60. When you create your software master, the process will skip the package build and, when it runs this Copy CD Directory Files step, will copy the package.

Virus Check

Type = 18

Performed Automatically = Partial

For PeopleSoft Internal Use Only.

Windows Executable

Type = 19

Performed Automatically = Partial, see the specific template definition for complete information about the performance of this build step.

This build step allows you to specify a Microsoft Windows executable or batch file as part of the mastering process.

Data Cleanup

Type = 20

Performed Automatically = No

For PeopleSoft Internal Use Only.

Build Package Database

Type = 21

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

Batch Process

Type = 22

Performed Automatically = Yes

This build step allows you to define a batch process to run as part of the software master definition.

ASU CD Template

The ASU CD is the main template used with the Product Packaging Tools. This template is the basis for delivering objects to distributed enterprises. The following table shows the build steps and their sequence for an ASU CD:

Sequence Number	Build Step (Type)
10	Check Mastering Items (03 - Manual Build Step)
20	Cleanup Temporary Files (22 - Batch Process)
30	Cleanup Temp Master (22 - Batch Process)
40	Create CD File Structure (01 – Create the CD File Structure)
50	Build (02 – Package Build)
60	Create Database (22 – Batch Process)
70	Build Change Tables (13 – Build Change Tables)
80	Create/Load ASU Change Tables (22 - Batch Process)
90	Create/Load ASU Control Tables (22 - Batch Process)
100	Create/Load ASU Misc Tables (22 - Batch Process)
110	Create/Load New and Regen Tables (22 - Batch Process)
120	Create/Load ASU OL & VL Tables (22 - Batch Process)
130	ASU v/s Package Validation (22 - Batch Process)

140	Compact Database (22 - Batch Process)
150	Detach Database (22 - Batch Process)
160	Copy Database (22 - Batch Process)
170	Rename MSDE database files (22 - Batch Process)
180	Compress/Copy Database (15 - Compress)
190	Copy Package and Feature INFs (22 - Batch Process)
200	Copy CD Directory Files
210	Create INF
220	Create self-extracting executable
230	Validate the mastered CD

Additional Build Step Information for the ASU CD Template

The following table provides additional information pertaining to a particular build step within the ASU CD template:

Sequence Number	Build Step (Type) with Additional Information
10	Check Mastering Items (03 – Manual Build Step) Verify the mastering steps and options of the step before beginning your master. Must be executed manually before the Master CD.
20	Cleanup Temporary Files (22 - Batch Process) Launches the R9640L batch process using versions XJDE0001 through XJDE0005. This process deletes the previous software master from the build machine. This step deletes the contents of the $TEMP\data directory. It also drops the JDEMasters database, if present, by launching UBE R9640MK.
30	Cleanup Temp Master (22 - Batch Process) Launches the R9640L batch process, version XJDE0001 to delete the contents of $TEMP\Master folder.

40	Create CD File Structure (01 – Create CD Structure) Creates the CD file structure on the Image path.
50	Build (02 – Package Build) Builds the defined update package. Can be set to Built status if the package has run through the Package Build application.
60	Create Database (22 - Batch Process) Launches the R9640MF batch process using version XJDE0001. This process creates an empty MSDE database called JDEMasters in the following directory: `$TEMP/master`.
70	Build Change Tables (13 – Build Change Tables) Builds the change tables based on the configuration that was set up during the director phase.
80	Create/Load ASU Change Tables (22 - Batch Process) Launches the R9670 batch process using version XJDE0003. This process creates change tables in the JDEMasters database, populating the tables from the Change Table data source.
90	Create/Load ASU Control Tables (22 - Batch Process) Launches the R9670 batch process using version XJDE0001. This process creates control tables in the JDEMasters database, populating the tables from the Control Table data source.
100	Create/Load ASU Misc Tables (22 - Batch Process) Launches the R9670 batch process using version XJDE0002. This process creates miscellaneous tables in the JDEMasters database, populating the tables based on the selections you made for the objects in your ASU package, your change tables, and the software master definition.

110	Create/Load New & Regen Tables (22 - Batch Process) Launches the R96700 batch process using version XJDE0001. This process creates tables in the JDEMasters database that are marked as new or regenerate in the table change table or the table conversion scheduler.
120	Create/Load ASU OL & VL tables (22 - Batch Process) Launches the R9600400C batch process using version XJDE0001. This process copies to the JDEMasters database the Object Librarian, Versions List, package assembly information for your master. Verify that the data source, which you can set in the processing options of this version, is set correctly.
130	ASU v/s Package Validation (22 - Batch Process) Launches the R9671 batch process using version XJDE0001. This process cross validates, ensuring that objects, tables, and specifications in the ASU package definition match with the object change table, table change table, index change table, and table conversion scheduler in the software master.
140	Compact Database (22 - Batch Process) Launches the R9640MG batch process using version XJDE0001, which runs the MSDE compaction tool to compact JDEMasters MSDE Database.
150	Detach Database (22 - Batch Process) Launches the R9640ML batch process using version XJDE0001, which detaches the JDEMasters MSDE Database.
160	Copy Database (22 - Batch Process) Launches the R9640E batch process using version XJDE0002. This process copies the ASU database from $TEMP\master\JDEMasters.*df to $TEMP\data\JDEMasters.*df.
170	Rename MSDE Database files (22 - Batch Process) Launches the R9640H batch process using version XJDE0006 and XJDE007. This process renames the JDEMasters.*df files to packagename.*df files, where *packagename* is the name of the package associated with the database.

180	Compress/Copy Database (22 - Batch Process) Launches R9640E using version XJDE0003. This process compresses the ASU database (packagename.*df) files and copies them from the $TEMP/data directory to the final software master image path as Data.cab.
190	Copy Package and Feature INFs (22 - Batch Process) Launches the R9600400E batch process using version XJDE0001. This process copies deployment features INFs, the package INFs, and the feature INFs from the deployment server to $TEMP directories.
200	Copy CD Directory Files (17 – Copy CD Directory Files) Copies additionally specified items into the Image path. For example, all install programs are copied to the root of the Image Path.
210	Create INF (16 – Create INF) Creates the deployment INF file into the image path directory.
220	Create self-extracting exe (22 - Batch Process) Launches the R9640J batch process using version XJDE0001. This process takes the entire software master image and creates a CAB file and a self-extracting executable file in the $TEMP/final directory. You can use either of these files to deliver the software master. Uncompress the CAB file or run the executable file on the deployment server, then use the Application Software Update Guide to update EnterpriseOne with the software master.
230	Validate the Mastered CD (22 - Batch Process) Launches R9640D version XJDE0001, which performs post-mastering validation on the master that has been created. Refer to the report output for details.

Custom CD

The Custom CD is for general use; this CD type has no template. An EnterpriseOne administrator uses this CD type primarily to create backups of source code, documents, and so forth, while still using the Product Packaging Tools. This CD type allows you to enter a directory structure that contains all of the files that you want loaded on to a custom CD image. Once completed, the administrator can move that image to a CD burner to create the actual CD.

Working with Software Master Templates

You can add, revise, copy, proof, and delete software master templates. Once you add a template, you can use the Mastering Director to create a software master definition using that template.

Note

See *Defining a Software Master* in the *Product Packaging Guide* for information about how to create a software master.

Adding a Software Master Template

This task explains how to add a software master template.

Note

If you have already set up the template and need to revise it, see *Revising a Software Master Template* in the *Product Packaging Guide*.

► To add a software master template

From the Advanced Operations menu (GH9622), choose Mastering Templates (P9640).

1. On Work With CD Templates, click Add.
2. On the Template Director form, click Next.
3. On the Template Information form, complete the following fields:

   - Name

     This is a read-only field. The software populates this field with the information you enter into the following fields. For example, if you enter release E810 with an 11 type and a 02 build phase, the name of the template will be E810-11-02. The software will not allow you to add a template with the same name as an already existing template.

   - Release

     Enter the release for the software master template, such as E810.

- Type

  Enter which type of CD you want the template to define, such as an ASU CD.

- Build Phase

  Enter which phase of development your software master template represents, such as alpha, beta, or general availability.

- Description

  Optional. Enter a description of the software master template.

4. Click Next.
5. On the CD Revisions form, set up the build steps and directory structure for the template.

Note

See *Revising a Software Master Template* in the *Product Packaging Guide* for instructions about setting up the build steps.

Revising a Software Master Template

You can revise a software master template.

Note

If you need to add a new template, see *Adding a Software Master Template* in the *Product Packaging Guide*.

► **To revise a software master template**

From the Advanced Operations menu (GH9622), choose Mastering Templates (P9640).

1. On Work With CD Templates, click Find.
2. From the existing templates that appear, choose the template you want to revise, and then click Select.

   The CD Revisions form appears.

3. To refresh the information shown on any tabs of the CD Revisions form, choose Refresh from the View menu.
4. To validate, in proof mode only, the information shown on any tabs, click Validate.

   A report runs that validates the definition.

5. Click the CD Information tab and, if needed, revise the following fields:

    - Status

      Enter the status of the template, which should be 10 In Definition.

    - Description

      Optional. Enter a description of the software master template.

    - Comment

      Optional. The mastering process populates this field with status information about the process. You can also enter any additional information about the software master template, but the software will overwrite that information when a subsequent process completes as you define and create your software master.

6. Click the Build Steps tab and, if needed, choose a step and revise the following fields:

    - Sequence

      Enter the order in which you want the step performed during the creation of the software master definition. You can use the same sequence number for multiple build steps.

    - Type

      Enter which component type you want the build step to perform. For example, you can define steps to create file structures, build a package, or create INF files.

      Enter the starting status of the build step, which should be 10 In Definition. The Product Packaging process changes this field during the subsequent stages of defining and creating a software master.

    - Status

      The following fields are dynamic and appear depending upon the build step you chose:

    - Description

      Enter a description about the build step. The first line of the description appears as the text for the build step. This line of text appears in the tree view on the left side of the form. You might want to enter a short descriptive name in the first line of the Description field, such as Check Mastering Items, and then press the Enter key before typing a more robust description for the step.

    - Target Folder

      Click the Target Folder button. Use the Select CD Directory form to choose the target folder for the build step you chose.

        - Executable

          Click the Executable button. Use the Select a Windows Executable form to choose an executable for this build step.

- Value/Parameter

  Click the Value/Parameter button, and then enter a value or parameter appropriate to the step you chose. This field is dynamic. The button name is either Value or Parameter, based on the build step. The form that appears when you click the button also depends on which step you chose. For example, the Package Build step calls the Select Package Build form from which you can choose a package; and the Build Change Tables step calls the Work With Change Table Definitions form from which you can modify the change table configuration.

7. If you need to add a step, click Add.

   The software creates a new step labeled Undefined and places it at the bottom of the steps.

8. Choose the Undefined step and complete the following fields:

   - Sequence
   - Type
   - Status
   - Description
   - Value

9. To add an attachment to a build step, choose the step and then choose Attachments from the View menu.

   The Media Objects form appears.

Note

See *Media Objects and Imaging* in the *System Administration Guide* for information about attaching media objects.

   After attaching a media object, a paper clip appears in the upper-right corner of the Build Step tab for that build step.

10. To renumber your build steps, click Renumber from the Form menu.

    The software renumbers your build steps, which updates the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, and so on). The software maintains the same build step sequence that you established.

11. To delete a step, choose the step and then click Delete.
12. Click the Directory Structure tab and, if necessary, revise each directory by choosing a directory and verifying the following fields:

    - Status

      Enter the status of the directory, which should be `10 In Definition`.

    - Target Folder

      Enter the Target Folder path for the directory you chose.

- Source Path

  Enter the directory path of the source that will populate the component. This is the source of the data that you want to retrieve for the master and placed into the target folder (directory). You can specify this path using either a relative or absolute path.

- File Filter

  Enter the file filter (*.* is the default value) to filter data files that you retrieve from the source directory. For example, you can use *.* to retrieve all files in the source directory.

13. To add a subdirectory, choose a directory for which you want to add a subdirectory, and then click Add. You can choose any directory, including Root.

    The software creates a new directory labeled Undefined and places it below the directory that you chose.

14. Choose the Undefined directory and complete the following fields:

    - Status
    - Target Folder
    - Source Path
    - File Filter

15. To load a subdirectory from an enterprise network directory, click the directory that will be the root of the subdirectory that you want to load. This directory must already exist on your enterprise.
16. Click Load.

    The Load Folders From Directory form appears.

17. Click Windows Folder.

    The Select Directory form appears.

18. Find and choose a directory you want to load into your template, and then click OK.
19. On the Load Folders From Directory form, choose one of the following:

    - Re-create subfolders

      This option replaces (deletes) the existing subdirectories and replaces them with the subdirectories you want to load into the template.

    - Append to existing

      This option appends to the existing subdirectories the subdirectories you want to load into the software template.

20. If needed, click the Setup Source Directories option.

    When creating the software master, turning this option on will automatically create the structure of the source directories and will copy all files within the source directories to the software master.

    If you do not check Setup Source Directories, the software will create the source directory structure within the software master and the directories will be empty.

21. Click OK.
22. When finished revising the template, click OK.

Copying a Software Master Template

Copying a software master template allows you to copy information from the template. This information includes the build steps and the directory structure.

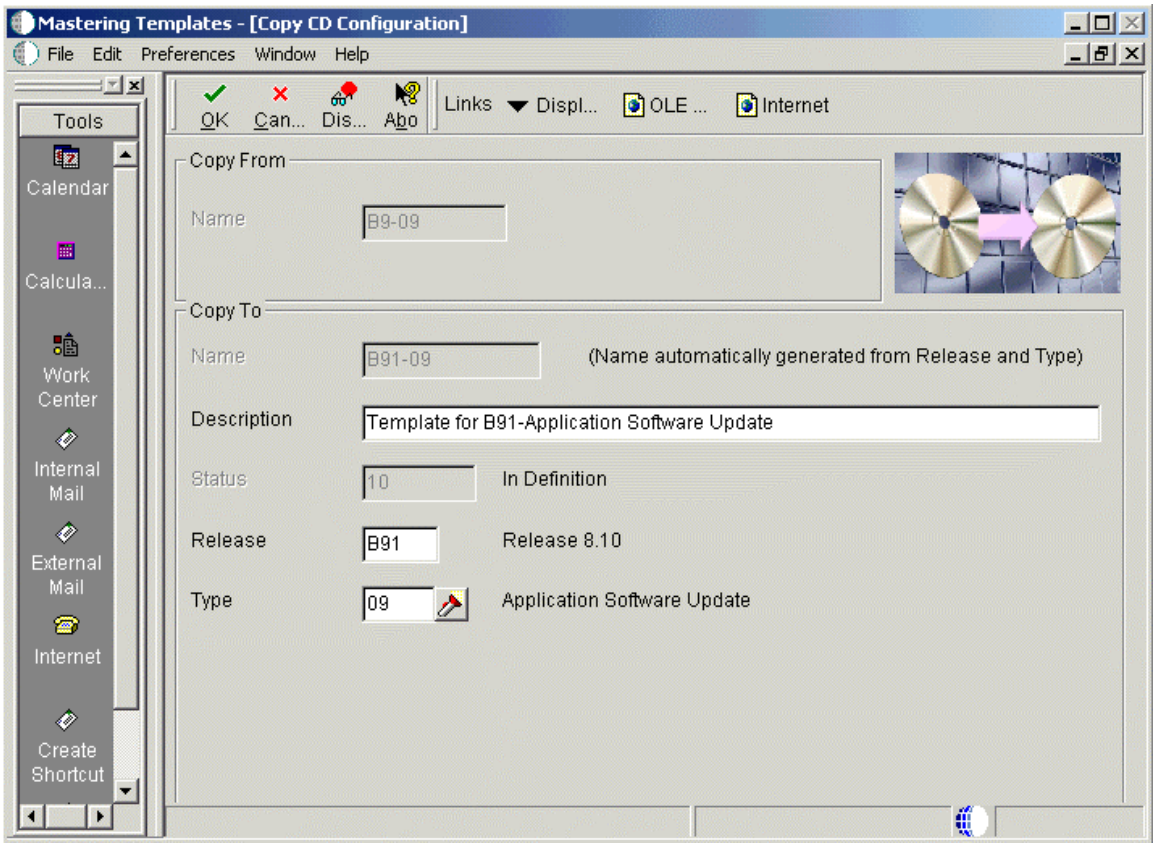
Note

If you need to add a new software master template and cannot copy and revise an existing one, see *Adding a Software Master Template* in the *Product Packaging Guide*.

► **To copy a software master template**

From the Advanced Operations menu (GH9622), choose Mastering Templates (P9640).

1. On Work With CD Templates, click Find.
2. From the existing templates that appear, choose the template you want to copy, and then click Copy.



3. On the Copy CD Configuration form, complete the following Copy To fields and then click OK:

- Description

  Optional. Enter a description of the software master definition.

- Release

  Enter the release for the template, such as E810.

- Type

  Enter which type of template you want to use when setting up your software master, such as the ASU CD template.

- Build Phase

  Enter which phase of development your template represents, such as alpha, beta, or general availability.

Proofing a Software Master Template

To proof software master templates, you create a report that details each build step in the definition, shows the sequence of the steps, and shows which processes, if any, each step will run when creating the actual master. Proofing a software master template does not change the status of a build step.

► To proof a software master template

From the Advanced Operations menu (GH9622), choose Mastering Templates (P9640).

1. On Work With CD Templates, click Find.
2. From the exisitng templates that appear, complete one of the following:
   - To proof one software master template, choose the template you want to create, and then choose Proof CD from the View menu.
   - To proof all software master templates for a specific release, choose Proof Release from the View menu. A form appears in which you enter the release number of the templates you want to proof.
3. On the Report Output Destination form, specify whether to send the report to a printer or to view an online version of the report using Acrobat Reader, and then click OK.

   A batch process runs a report that shows each build step in sequence and what processes, if any, each step would run when creating the actual master.

Deleting a Software Master Template

You can delete a software master template.

► To delete a software master template

From the Advanced Operations menu (GH9622), choose Mastering Templates (P9640).

1. On Work With CD Templates, click Find.
2. From the existing templates that appear, choose the template you want to delete, and then click Delete.

   A message box appears asking if you are sure you want to delete the software master template.

3. Click OK.

Change Table Configuration

After you have created the configuration of a change table, you can revise, copy, or delete it.

See Also

- *Configuring Change Tables* in the *Product Packaging Guide* for information on how to create a change table configuration

► To revise or submit change tables

From the Product Packaging menu (GH962), choose Change Table Configurations (P9642).

1. On Work With Change Table Definitions, complete the following field, and then click Find:

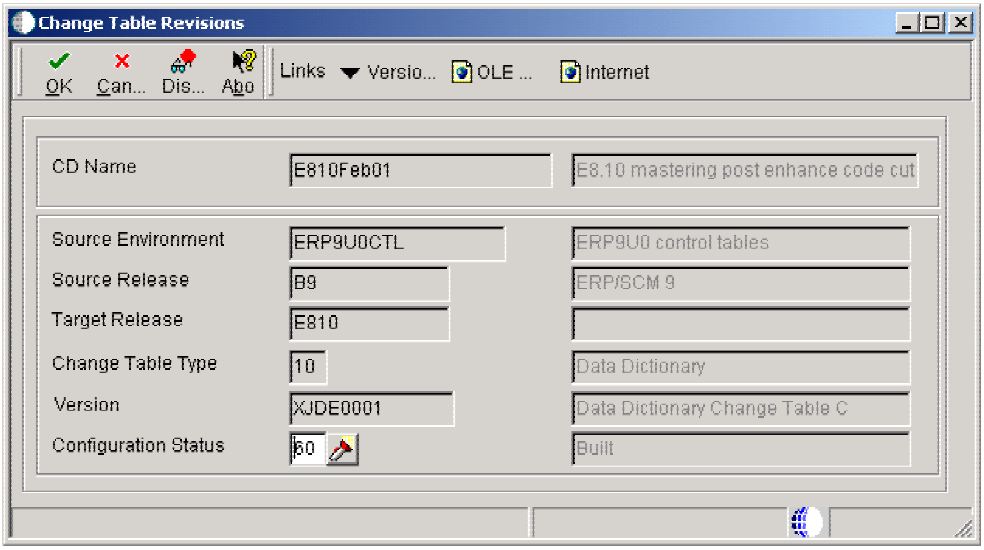
   - CD Name

     Enter the name of the software master for which you want to view change table configurations.

   Existing change table configurations appear with the following:

   - A check mark appears to the left of each table configuration row that either completed its build successfully or is ready to be built.
   - A circle with a line through it appears to the left of any table configuration that failed its build or is not at a valid status for the configuration to be submitted.

2. If you need to rerun a particular change table batch process and the change table row does not have a check mark to the left of it, correct any issue that might exist, choose the change table row, and click Select.



3. On the Change Table Revisions form, complete the following field and click OK:

   - Configuration Status

     Change to or verify that the status is 30 (Validated), which allows this change table to be built and submitted to the software master.

4. To submit change tables, complete one of the following:

   - To submit an individual change table row, choose the row and then choose Submit from the Row menu.
   - To submit multiple change table rows, choose the rows using the Control or Shift keys with your mouse, and then choose Submit from the Row menu.
   - To submit all of the change table rows, choose Submit from the Form menu.

   The software builds the change tables you chose and includes them with the software master. If you revised existing change tables, they will replace themselves in the software master. If you added change tables, they will be appended to the software master.

Revising or Submitting Change Tables

If you need to revise or add change tables, you can build and submit change table configurations to a software master after you have created the software master. Ignore this task if you have not yet created your software master. If the template you chose for your software master required change tables, the software master will build the change tables you specified during the setup of your software master definition.

Copying a Change Table Configuration

You copy change table configurations from one master definition to another master definition. This process copies all change table configurations associated with the master from which you are copying.

► To copy a change table configuration

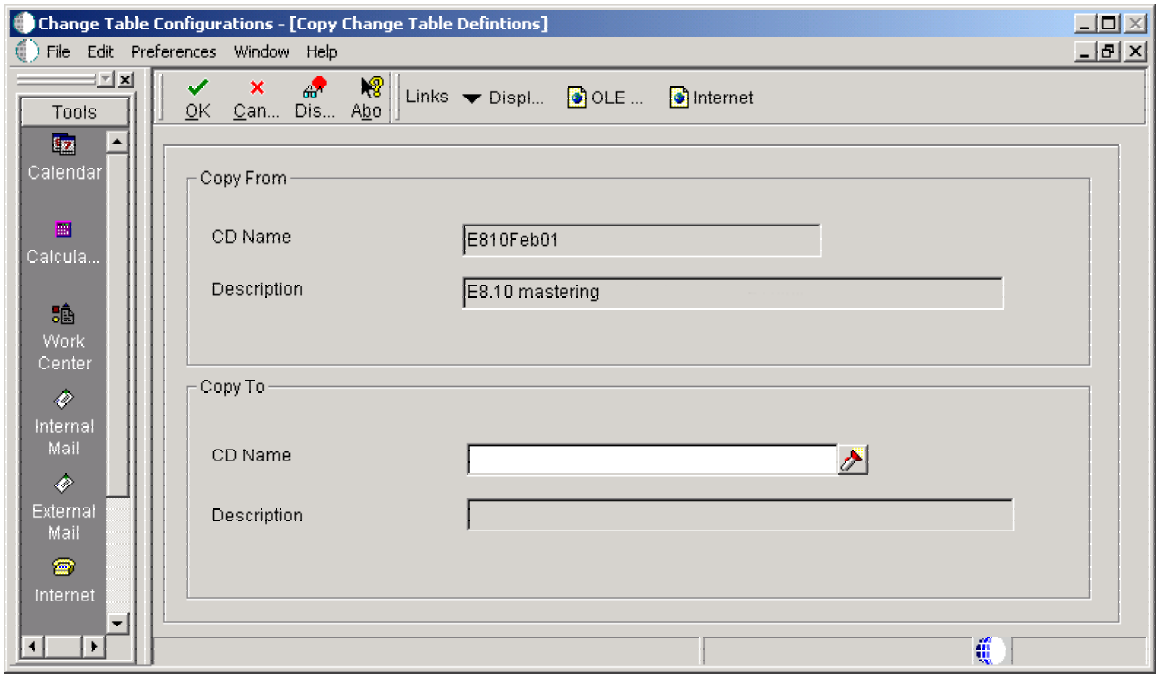
From the Product Packaging menu (GH962), choose Change Table Configurations (P9642).

1. On Work With Change Table Definitions, complete the following field:

   - CD Name

     Enter the name of the software master from which you want to copy its change table configurations.

2. Click Find.
3. From the existing change table configurations that appear, choose a change table row and click Copy.



4. On Copy Change Table Definitions, complete the following field, and then click OK:

   - CD Name

     Enter the name of the software master definition to which you want to copy the change table configurations. The master you are copying to must already exist.

Deleting a Change Table Configuration

You can delete change table configurations that you have added to your software master definition.

▶ To delete a change table configuration

From the Product Packaging menu (GH962), choose Change Table Configurations (P9642).

1. On Work With Change Table Definitions, complete the following field, and then click Find:

   - CD Name

2. From the existing change table configurations that appear, choose a change table row and click Delete.

Data Cleanup

Use the data cleanup application to create procedures and templates to clean up your software master data. The data cleanup application can delete obsolete data, standardize existing data, and provide integrity, summary, and error reports about the data. You can clean up the following:

- Data dictionary tables and specifications
- AutoPilot tables
- User defined codes and types
- Menu tables
- Object Librarian tables
- Central Objects tables

Working with Data Cleanup Procedures

The Product Packaging Tools includes an application that allows you to add, revise, copy, and delete a set of data cleanup steps. You define how you want these steps to clean up your software master data.

Adding a Data Cleanup Procedure

You can add a data cleanup procedure. This function allows you to add procedure information and the steps necessary to clean up data.

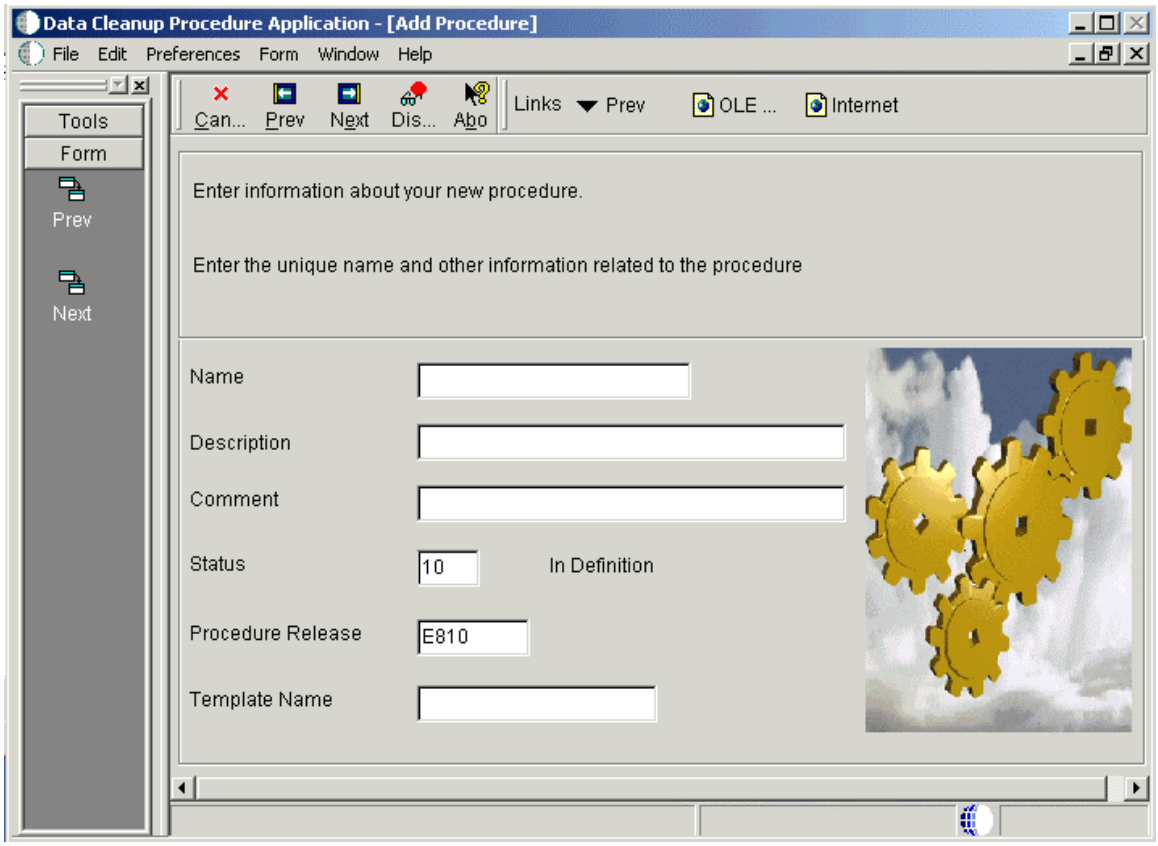
Note

Even though this Product Packaging Tools function is primarily for creating data cleanup procedures, you can use it to create any type of procedure to run a batch process or Microsoft Windows executable.

► **To add a data cleanup procedure**

From the Product Packaging menu (GH962), choose Data Cleanup Procedure Templates (P9646).

1. On Work With Procedure, click Add.
2. On the Procedure Definition Director, click Next.



3. On Add Procedure, complete the following fields:

   - Name

     Enter a unique name, such as Object Librarian Cleanup, for the data cleanup procedure you are adding.

   - Description

     Optional. Enter a description of the data cleanup procedure.

   - Comment

     Optional. Enter a comment about the data cleanup procedure.

   - Status

     Verify the status of the data cleanup procedure. Set the status to 30 (Validated) before you execute the procedure.

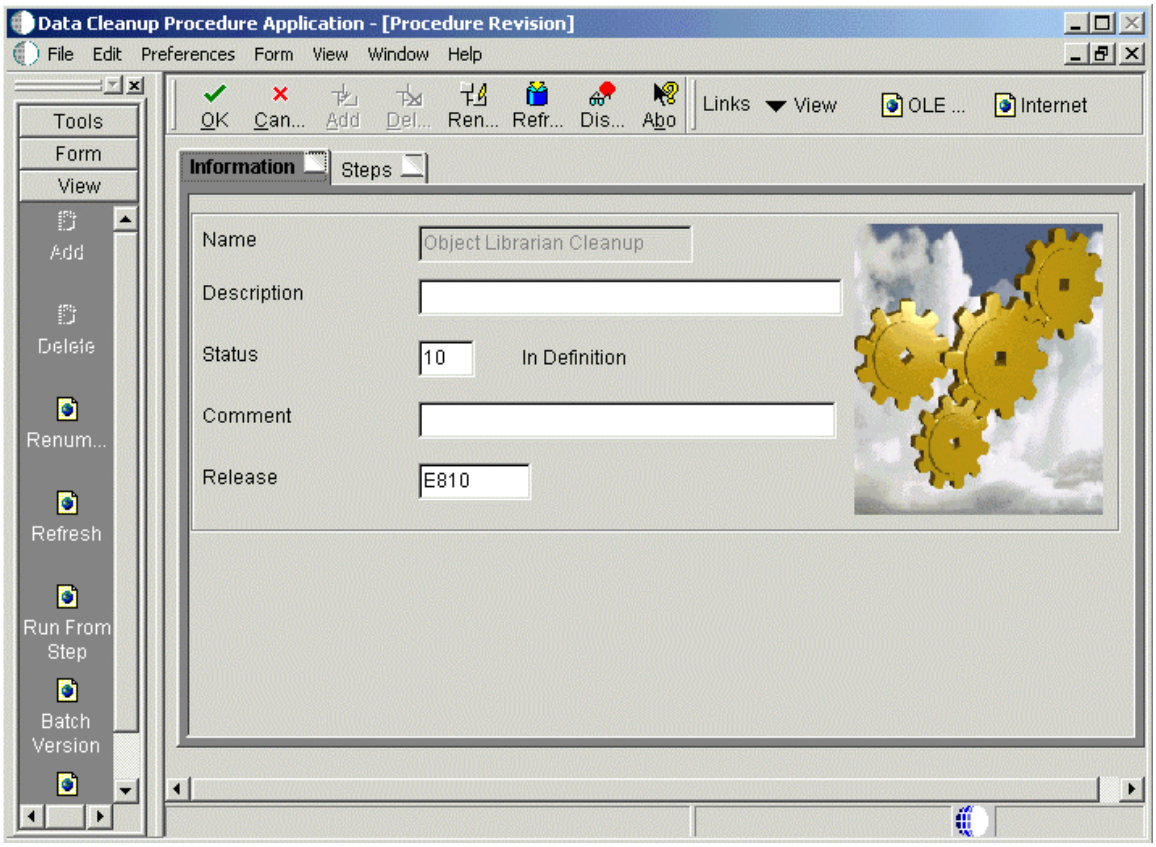
   - Procedure Release

     Enter the release that pertains to the data cleanup procedure, such as E810. This value is the release currently installed on the client workstation you are using.

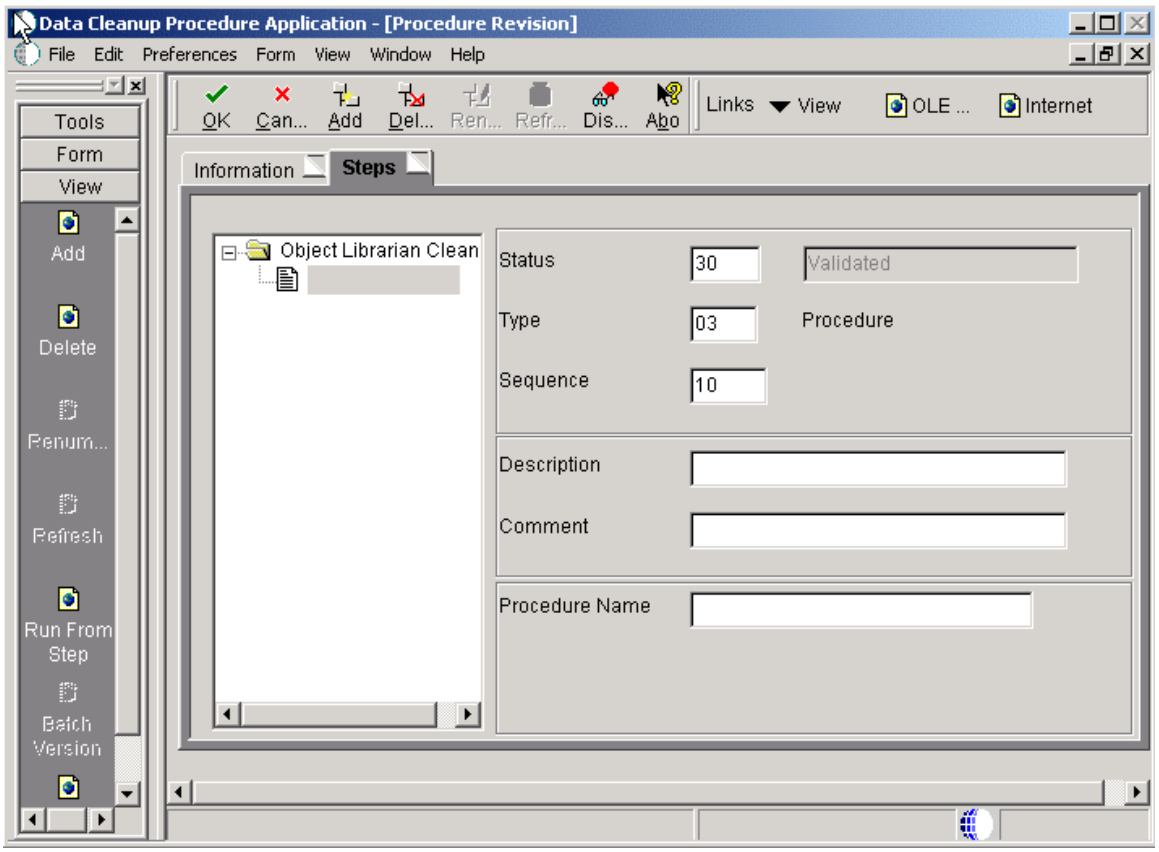
   - Template Name

     Optional. Enter the name of the data cleanup template that you want to work from for the procedure you are adding.

4. Click Next.



5. On the Procedure Revision form, choose Refresh from the View menu to refresh the information shown on either the Information tab or the Steps tab of the Procedure Revision form.
6. Click the Information tab, and complete the following fields:
   - Description
   - Status
   - Comment
   - Release
7. Click the Steps tab.



8. To add a step, click Add.

   The software creates a new step labeled Undefined and places it at the end of the highlighted procedure displayed in the tree. If you add a step to a sub-procedure, the Undefined step appears at the end of that sub-procedure. A form appears asking you to verify your add to the sub-procedure.

9. Choose the Undefined step and complete the following fields:

   - Status

     Enter the status of the data cleanup build step. Set the status to 30 (Validated) before you execute the step.

   - Type

     Enter which type of build step you want to add. For example, you can add steps that are batch processes, a Microsoft Windows executable program, or another data cleanup procedure.

   - Sequence

     The software automatically displays a sequence number based upon where you add the build step. You can change this sequence number to move the build step up or down in the procedure. You can use the same sequence number for multiple build steps.

- Description

  Optional. Enter a description of the data cleanup build step.

- Comment

  Optional. Enter a comment about the data cleanup build step.

10. Complete the following fields, which appear if you are adding a batch process:

    - Object Name

      Enter the name of a batch process. For example, enter R9647R to have the step execute the Object Librarian - Object Relationship Cleanup report.

    - Version

      Enter the name of the report version for the batch process you entered; for example, XJDE0002, Final Mode version.

11. Complete the following fields, which appear if you are adding a Microsoft Windows executable program:

    - Executable

      Enter the name of a Microsoft Windows-compatible executable program. For example, the `xcopy.exe` program.

    - Parameters

      Enter the parameters for the executable program. You can enter command-line switches, directories, and files. For example, for the `xcopy.exe` program, you could enter a copy-from parameter of `c:\temp\*.*` and you can enter a command-line switch of `\s`.

12. Complete the following field, which appears if you are adding a data cleanup procedure:

    - Procedure Name

      Enter the name of an existing data cleanup procedure. The data cleanup procedure that you enter must already exist. If the procedure appears on the visual-assist form, then it exists.

13. When you tab out of the last field or choose a step in the tree structure on the left side of the form, the data cleanup application saves your step.
14. When you are finished adding steps, click OK.

Revising a Data Cleanup Procedure

You can revise the information and steps within a data cleanup procedure that you already created. Be aware that if you revise a data cleanup procedure, those revisions are reflected wherever that procedure is used, such as when the revised procedure is nested within another procedure.

Note

To add a new data cleanup procedure, see *Adding a Data Cleanup Procedure* in the *Product Packaging Guide*.

► To revise a data cleanup procedure

From the Product Packaging menu (GH962), choose Data Cleanup Procedure Application (P9646).

1. On Work With Procedure, click Find.
2. From the existing data cleanup procedures that appear, choose the procedure you want to revise, and then click Select.
3. On the Procedure Revision form, choose Refresh from the View menu to refresh the information shown on either the Information tab or the Steps tab of the Procedure Revision form.
4. Click the Information tab, and revise the following fields:
   - Description

     Optional. Enter a description of the data cleanup procedure.

   - Status

     Verify the status of the data cleanup procedure. Set the status to 30 (Validated) before you execute the procedure.

   - Comment

     Optional. Enter a comment about the data cleanup procedure.

   - Release

     Verify the ERP release that pertains to the data cleanup procedure, such as E810. This value is the release currently installed on the client workstation you are using.
5. Click the Steps tab.

6. To revise a build step, choose the step, and complete the following fields:

   - Status

     Verify the status of the data cleanup build step. Set the status to 30 (Validated) before you execute the step.

   - Type

     Verify which component type you want the build step to perform. For example, you can define steps as a batch process, a Microsoft Windows executable, or another data cleanup procedure.

   - Sequence

     Verify the order in which you want the step performed during the execution of the procedure. You can use the same sequence number for multiple build steps.

   - Description

     Optional. Enter a description of the data cleanup build step.

   - Comment

     Optional. Enter a comment about the data cleanup build step.

   The following fields appear if you are revising a batch process:

   - Object Name

     Verify the name of the batch process.

   - Version

     Verify the name of the report version for the batch process.

   The following fields appear if you are revising a Microsoft Windows executable program:

   - Executable

     Verify the Microsoft Windows executable program.

   - Parameters

     Verify the parameters of the executable.

   The following field appears if you are revising a data cleanup procedure:

   - Procedure Name

     Verify the name of the data cleanup procedure.

7. To renumber your build steps, from the View menu, click Renumber.

   The software renumbers your build steps and updates the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, and so on). The software keeps the build steps in the same sequence that you or the data cleanup template established.

8. To delete a step, choose the step and click Delete.
9. When you are finished revising the data cleanup procedure, click OK.

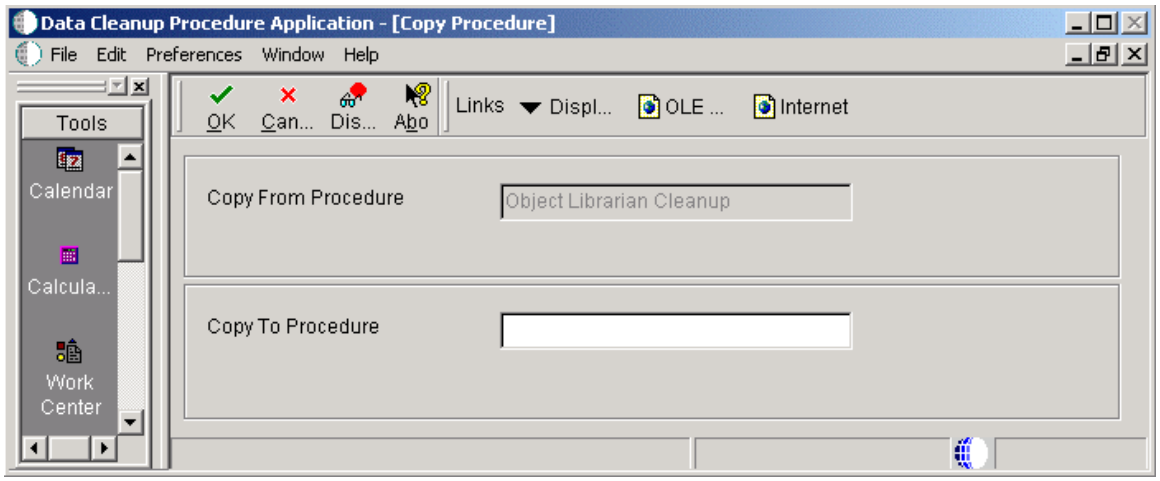
Copying a Data Cleanup Procedure

You can copy a data cleanup procedure that you already created.

► **To copy a data cleanup procedure**

From the Product Packaging menu (GH962), choose Data Cleanup Procedure Application (P9646).

1. On Work With Procedure, click Find.
2. From the existing data cleanup procedures that appear, choose the procedure you want to copy, and then click Copy.



3. On the Copy Procedure form, complete the following fields and click OK:
   - Copy From Procedure

     Enter the name of an existing data cleanup procedure.
   - Copy To Procedure

     Enter the name that you want to call the new data cleanup procedure.

Executing a Data Cleanup Procedure and Build Step

You can execute a data cleanup procedure and build step from the data cleanup application.

Note

While the following task explains how to execute procedures from the data cleanup application, you can also use the software master build steps to define a step that executes your data cleanup. See *Creating a Software Master* in the *Product Packaging Guide* for information about adding build steps to the software master definition.

► **To execute a data cleanup procedure and build step**

From the Product Packaging menu (GH962), choose Data Cleanup Procedure Application (P9646).

1. On Work With Procedure, click Find.

   Existing data cleanup procedures appear.

2. To execute the entire procedure, complete one of the following:

   - On the Work With Procedures form, choose the procedure and, from the Row menu, choose Execute.
   - On the Procedure Revision form, choose the main data cleanup procedure and, from the View menu, choose Execute Step.
   - On the Procedure Revisions form, from the Form menu, choose Run Main Procedure.

   These options execute the entire procedure. If it executes successfully, the software updates the procedure and the build step statuses to 60 (Built).

3. To execute individual build steps, on the Work With Procedures form, choose a procedure and then click Select.
4. On the Procedure Revision form, click the Steps tab.
5. Choose the build step that you want to execute and, from the View menu, choose Execute Step to process only that step.

   This option executes the step. If the step executes successfully, the software updates the step status to 60 (Built). If you execute a data cleanup procedure step, all of its subordinate steps also execute, including any sub-procedures.

Deleting a Data Cleanup Procedure

When you delete a data cleanup procedure, the application deletes all records associated with the procedure, including its location as a subprocedure under other data cleanup procedures.

► **To delete a data cleanup procedure**

From the Product Packaging menu (GH962), choose Data Cleanup Procedure Application (P9646).

1. On Work With Procedure, click Find.

   Existing data cleanup procedures appear.

2. Choose the procedure you want to delete, and then click Delete.

   A message box appears to verify that you want to delete the procedure.

3. Click OK.

Working with Data Cleanup Templates

Data cleanup templates are optional for use in data cleanup. You can use them as a guide to building your own data cleanup procedures. As with procedures, you can add, revise, copy, and delete templates.

See Also

- *Working with Data Cleanup Procedures* in the *Product Packaging Guide* for information about procedures

Adding a Data Cleanup Template

Adding a data cleanup template allows you to add template information and the steps you want for cleaning up data.

► To add a data cleanup template

From the Advanced Operations menu (GH9622), choose Data Cleanup Procedure Templates (P9646).

1. On Work With Procedure, click Add.
2. On the Template Definition Director form, click Next.
3. On the Add Template form, complete the following fields:

   - Name

     Enter a unique name, such as Object Librarian Cleanup, for the data cleanup template you are adding.

   - Description

     Optional. Enter a description of the data cleanup template.

   - Comment

     Optional. Enter a comment about the data cleanup template.

   - Status

     Enter a status of 10 (In Definition).

   - Procedure Release

     Enter the ERP release that pertains to the data cleanup template, such as E810. This value is the release currently installed on the client workstation you are using.

   - Template Name

     Enter the name of another data cleanup template that you want to work from for the template you are adding.

4. Click Next.
5. On the Template Revision form, to refresh the information shown on either tab of the Template Revision form, choose Refresh from the View menu.
6. Click the Information tab, and complete the following fields:
   - Description
   - Status
   - Comment
   - Release
7. Click the Steps tab.
8. To add a step, click Add

   The software creates a new step labeled Undefined and places it at the end of the highlighted procedure displayed in the tree. If you add a step to a sub-procedure, the Undefined step appears at the end of that sub-procedure. A form appears asking you to verify your add to the sub-procedure; the add changes that procedure, whether it is a sub-procedure or not, wherever it appears.

9. Choose the Undefined step and complete the following fields:
   - Status

     Enter the status of the data cleanup build step. Set the status to 10 (In Definition).

   - Type

     Enter which type of build step you want to add. For example, you can add steps that are batch processes, a Microsoft Windows executable program, or another data cleanup procedure or template.

   - Sequence

     The software automatically displays a sequence number based upon where you add the build step. You can change this sequence number to move the build step up or down in the template. You can use the same sequence number for multiple build steps.

   - Description

     Optional. Enter a description of the data cleanup build step.

   - Comment

     Optional. Enter a comment about the data cleanup build step.

10. Complete the following fields, which appear if you are adding a batch process:
    - Object Name

      Enter an name of a batch process. For example, enter R9647R to have the step execute the Object Librarian - Object Relationship Cleanup report.

- Version

  Enter the name of the report version for the batch process you entered. For example, XJDE0002, the Final Mode version.

11. Complete the following fields, which appear if you are adding a Microsoft Windows executable program:

    - Executable

      Enter the name of a Microsoft Windows-compatible executable program. For example, the `xcopy.exe` program.

    - Parameters

      Enter the parameters for the executable program. You can enter command-line switches, directories, and files. For example, for the `xcopy.exe` program, you could enter a copy-from parameter of `c:\temp\*.*` and you can enter a command-line switch of `\s`.

12. Complete the following field, which appears if you are adding a data cleanup procedure:

    - Procedure Name

      Enter the name of an existing data cleanup procedure. The data cleanup procedure that you enter must already exist. If the procedure appears on the visual-assist form, then it exists.

13. When you tab from the last field or choose a step in the tree structure on the left side of the form, the data cleanup application saves your step.
14. When you are finished adding steps, click OK.

Revising a Data Cleanup Template

You can revise a data cleanup template that you already created in order to revise the information and steps you created within the template.

Note

If you need to add a new data cleanup template, see *Adding a Data Cleanup Template* in the *Product Packaging Guide*.

► To revise a data cleanup template

From the Advanced Operations menu (GH9622), choose Data Cleanup Procedure Templates (P9646).

1. On Work With Procedure, click Find.

   Existing data cleanup templates appear.

2. Choose the template you want to revise, and then click Select.

3. On the Procedure Revision form, to refresh the information shown on either tab of the Template Revisions form, choose Refresh from the View menu.
4. Click the Information tab, and revise the following fields:
    - Description

      Optional. Enter a description of the data cleanup template.

    - Status

      Verify the status of the data cleanup template. Set the status to 10 (In Definition) before you execute the template.

    - Comment

      Optional. Enter a comment about the data cleanup template.

    - Release

      Verify the release that pertains to the data cleanup template, such as E810. This value is the release currently installed on the client workstation you are using.
5. Click the Steps tab.
6. To revise a build step, choose the step, and complete the following fields:
    - Status

      Verify the status of the data cleanup build step. Set the status to 30 (validate) before you execute the step.

    - Type

      Verify which component type you want the build step to perform. For example, you can define steps as a batch process, a Microsoft Windows executable, or another data cleanup template.

    - Sequence

      Verify the order in which you want the step performed during the execution of the procedure. You can use the same sequence number for multiple build steps.

    - Description

      Optional. Enter a description of the data cleanup build step.

    - Comment

      Optional. Enter a comment about the data cleanup build step.

    The following fields appear if you are revising a batch process:

    - Object Name

      Verify the name of the batch process.

    - Version

      Verify the name of the report version for the batch process.

The following fields appear if you are revising a Microsoft Windows executable program:

- Executable

  Verify the Microsoft Windows executable program.

- Parameters

  Verify the parameters of the executable.

The following field appears if you are revising a data cleanup procedure:

- Procedure Name

  Verify the name of the data cleanup procedure.

7. To renumber your build steps, from the View menu, click Renumber.

   The software renumbers your build steps and updates the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, and so on). The software keeps the build steps in the same sequence that you established.

8. To delete a step, choose the step, and then click Delete.
9. When you are finished revising the data cleanup template, click OK.

Copying a Data Cleanup Template

You can copy a data cleanup template that you already created.

► **To copy a data cleanup template**

From the Advanced Operations menu (GH9622), choose Data Cleanup Procedure Templates (P9646).

1. On Work With Procedure, click Find.

   Existing data cleanup templates appear.

2. Choose the template you want to copy, and then click Copy.
3. On the Copy Procedure form, complete the following fields and click OK:

   - Copy From Procedure

     Enter the name of an existing data cleanup template.

   - Copy To Procedure

     Enter the name for the new data cleanup template.

Deleting a Data Cleanup Procedure Template

You can delete a data cleanup procedure template. The application deletes all records associated with the procedure template, including its location as a subprocedure under other data cleanup procedures.

► **To delete a data cleanup procedure template**

From the Advanced Operations menu (GH9622), choose Data Cleanup Procedure Templates (P9646).

1. On Work With Procedure, click Find.

   Existing data cleanup procedure templates appear.

2. Choose the master you want to delete, and then click Delete.

   A message box appears to verify that you want to delete the template.

3. Click OK.

Relative and Absolute Paths

An absolute path name begins with the root directory and details the entire path, such as `Z:\DepServer\CD Templates\Partial Update`. A relative path name begins with a token, such as `$DEP`. The token represents at least the root directory and possible contiguous directory paths. For example, `$DEP` might represent `Z:\DepServer`. This relative path might appear within an applicable field as `$DEP\CD Templates\Partial Update`. The following list shows the relative path tokens you can use:

- `$DEP`

  Represents the root directory where EnterpriseOne is installed on your deployment server.

- `$IMAGE`

  Represents the image path of your software master.

- `$CLIENT`

  Represents the root directory where EnterpriseOne is installed on the workstation you are currently using.

- `$TEMP`

  Represents the Microsoft Windows temporary directory of the workstation you are currently using.

You do not need to define the tokens. The Product Packaging Tool automatically resolves the token values based on your installation and other information available to it.

Using Relative Path Tokens

You use relative path token within a field.

► **To use relative path tokens**

From a field that allows relative paths, enter a token followed by the remainder of the path needed for that field.

For example:

```
$DEP\CD Templates\Partial Update
```

Converting Relative and Absolute Paths

The software allows you to convert relative path tokens and absolute path names for those fields that accept them within the Product Packaging Tools. If any fields use a token, you can convert the token into an absolute path or you can convert the absolute path into a token. For example, you can convert any instance of `$DEP` into `Z:\DepServer` or you can convert `Z:\DepServer` into `$DEP`.

► To convert relative and absolute paths

From the Product Packaging menu (GH962), choose Product Packages (P9640).

1. On Work With Software Mastering, click Find.

   Existing software masters appear.

2. Choose the master for which you want to convert relative and absolute paths, and then choose Convert Paths from the Row menu.
3. On Report Output Destination, choose to send the report to a printer or to your screen, and then click OK.

   The software converts the absolute and relative paths for any fields within the Product Packaging Tools to which this applies.

Troubleshooting: Failure During the Check Mastering Items Step

Problem

When mastering the CD, the process fails during the Check Mastering Items step.

Solution

This step is a manual build; it must be executed manually. Highlight the step and choose Execute Step from the View exit menu. Once that is executed, click Master CD and then proceed.

Troubleshooting: Failure to Build the Feature INF File

Problem

The product packaging mastering process fails at the build step Copy Package and Feature INFs - report R9600400E. Because features are a part of the Package Build process, update packages do not build feature INF files.

Solution

If Features are included in the chosen update package, be sure that the Feature INF files were created previously.

Note

See *Understanding Feature INF Files* and other related topics in the *Package Management Guide* for instructions to complete this task.

Troubleshooting: JDEMasters Database Not Populated

Problem

The build process completes without error but no tables exist in the JDEMasters database in the $TEMP\master directory. This error occurs when the Product Packaging Local data source is not set up correctly in the database data sources.

Solution

Reconfigure the database data source for Product Packaging Local, and then repeat the build process.

Troubleshooting: Failure to Copy Change Tables

Problem

No change tables (for instance, F960004 and F960005) exist in the JDEMasters database, and the jde.log file lists several errors reporting that it cannot find these tables in the Control Tables. This problem indicates that the change tables do not exist in the mastering environment.

Solution

Verify that the tables exist and are set up correctly in the mastering environment.

Troubleshooting: Failure to Copy Custom Tables

Problem

Custom tables were not copied to the JDEMasters database, even though these tables were included in the update package and exist in the environment that the package is built from. This problem is an indication that the source environment specified in the change table configurator is not set up correctly or that the table exists in that environment.

Solution

Verify that the specified environment is valid, has tables associated with the environment, and that the custom table cannot be found in that environment.

Troubleshooting: Unable to Find Product Package after Installation

Problem

After running the install manager to install the Software Master on the new system, the product package is not listed in the Software Updates application. This error occurs because the package name does not match the product package name.

Solution

Re-master the Software Master and ensure that the update package name is the same as the product package name. Also, make sure that you have the latest Planner update installed.

Troubleshooting: Error Backing Up Tables in the Software Update Application

Problem

In the Software Updates application, after choosing the path code and backup, the error message Create Table Failed displays and the application stops processing.

The jde.log file reports the following error:

JDB9900245 - Failed to find F98611 OWBAK_PRODPACKUD_PY810 in cache

JDB3100011 - Failed to get location of table F983051 for environment PSFTPLAN

JDB2100004 - Failed to open table

Solution

The Software Update application creates a new data source called OWBAK_*PACKAGE_NAME_PATHCODE* that points to a backup database called Planner\Package*PACKAGE_NAME**PATHCODE*.bak\data\OWBAK_*packagename_pathcode*.mdf and OWBAK_*packagename_pathcode*.ldf. Do the following to troubleshoot the problem:

1. Ensure that the latest Planner update is installed before you install the product package.
2. Open the Database Data Sources application P986115 and verify that the data source OWBAK_*PACKAGE_NAME_PATHCODE* is created, where *PACKAGE_NAME* is the product package name in all UPPERCASE letters, and *PATHCODE* is the chosen path code from the Software Updates application. If the data source exists but is not in all UPPERCASE letters, manually delete that data source item and create a new data source item as follows:

Data Source Name:	OWBAK_*PACKAGE_NAME_PATHCODE*
Data Source Type:	A – Access
DLL Name:	JDBODBC.DLL
Database Name:	OWBAK_*PACKAGE_NAME_PATHCODE*
Server Name:	LOCAL
Platform:	LOCAL

3. Verify that the ODBC data source is created and is pointing to a valid location and database.
4. Exit EnterpriseOne, log on again, and try the process again.

Troubleshooting: Problems with Object Librarian Records

Problem

A potential problem exists for objects that belong to a project in the original system that was created with a SAR that contains an alpha character. This problem would be evident when trying to enter that project after installation on the destination system.

Solution

After the package is installed on the destination deployment server, open the created Product Packaging Local JDEMasters database and modify the F9861 table. In the SIMSAR column, make sure that no records have alpha characters for values. Change all alpha characters to 0.

EnterpriseOne PeopleBooks Glossary

“as of” processing	A process that is run at a specific point in time to summarize item transactions.
52 period accounting	A method of accounting that uses each week as a separate accounting period.
account site	In the invoice process, the address to which invoices are mailed. Invoices can go to a different location or account site from the statement.
active window	The window that contains the document or display that will be affected by current cursor movements, commands, and data entry in environments that are capable of displaying multiple on-screen windows.
ActiveX	A technology and set of programming tools developed by Microsoft Corporation that enable software components written in different languages to interact with each another in a network environment or on a web page. The technology, based on object linking and embedding, enables Java applet-style functionality for Web browsers as well as other applications (Java is limited to Web browsers at this time). The ActiveX equivalent of a Java applet is an ActiveX control. These controls bring computational, communications, and data manipulation power to programs that can “contain” them—for example, certain Web browsers, Microsoft Office programs, and anything developed with Visual Basic or Visual C++.
activity	In Advanced Cost Accounting, an aggregation of actions performed within an organization that is used in activity-based costing.
activity driver	A measure of the frequency and intensity of the demands that are placed on activities by cost objects. An activity driver is used to assign costs to cost objects. It represents a line item on the bill of activities for a product or customer. An example is the number of part numbers, which is used to measure the consumption of material-related activities by each product, material type, or component. The number of customer orders measures the consumption of order-entry activities by each customer. Sometimes an activity driver is used as an indicator of the output of an activity, such as the number of purchase orders that are prepared by the purchasing activity. See also cost object.
activity rule	The criteria by which an object progresses from a given point to the next in a flow.
actual cost	Actual costing uses predetermined cost components, but the costs are accumulated at the time that they occur throughout the production process.
adapter	A component that connects two devices or systems, physically or electronically, and enables them to work together.
add mode	The condition of a form where a user can enter data into it.
advanced interactive executive	An open IBM operating system that is based on UNIX.
agent	A program that searches through archives or other repositories of information on a topic that is specified by the user.

aging	A classification of accounts by the time elapsed since the billing date or due date. Aging is divided into schedules or accounting periods, such as 0-30 days, 31-60 days, and so on.
aging schedule	A schedule that is used to determine whether a payment is delinquent and the number of days which the payment is delinquent.
allegato IVA clienti	In Italy, the term for the A/R Annual VAT report.
allegato IVA fornitori	In Italy, the term for the A/P Annual VAT report.
application layer	The seventh layer of the Open Systems Interconnection Reference Model, which defines standards for interaction at the user or application program level.
application programming interface (API)	A set of routines that is used by an application program to direct the performance of procedures by the computer's operating system.
AS/400 Common	A data source that resides on an AS/400 and holds data that is common to the co-existent library, allowing PeopleSoft EnterpriseOne to share information with PeopleSoft World.
assembly inclusion rule	A logic statement that specifies the conditions for using a part, adjusting the price or cost, performing a calculation, or using a routing operation for configured items.
audit trail	The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records and usually concludes with a report.
automatic return	A feature that allows a user to move to the next entry line in a detail area or to the first cell in the next row in several applications.
availability	The expression of the inventory amount that can be used for sales orders or manufacturing orders.
available inventory	The quantity of product that can be promised for sale or transfer at a particular time, considering current on-hand quantities, replenishments in process, and anticipated demand.
back office	The set of enterprise software applications that supports the internal business functions of a company.
backhaul	The return trip of a vehicle after delivering a load to a specified destination. The vehicle can be empty or the backhaul can produce less revenue than the original trip. For example, the state of Florida is considered a backhaul for many other states—that is, many trucking companies ship products into the state of Florida, but most of them cannot fill a load coming out of Florida or they charge less. Hence, trucks coming out of Florida are either empty or produce less revenue than the original trip.
balance forward	The cumulative total of inventory transactions that is used in the Running Balance program. The system does not store this total. You must run this program each time that you want to review the cumulative inventory transactions total.
balance forward receipt application method	A receipt application method in which the receipt is applied to the oldest or newest invoices in chronological order according to the net due date.

bank tape (lock box) processing	The receipt of payments directly from a customer's bank via customer tapes for automatic receipt application.
base location	[In package management] The topmost location that is displayed when a user launches the Machine Identification application.
basket discount	A reduction in price that applies to a group or "basket" of products within a sales order.
basket repricing	A rule that specifies how to calculate and display discounts for a group of products on a sales order. The system can calculate and display the discount as a separate sales order detail line, or it can discount the price of each item on a line-by-line basis within the sales order.
batch job	A job submitted to a system and processed as a single unit with no user interaction.
batch override	An instruction that causes a batch process to produce output other than what it normally would produce for the current execution only.
batch process	A type of process that runs to completion without user intervention after it has been started.
batch program	A program that executes without interacting with the user.
batch version	A version of a report or application that includes a set of user-defined specifications, which control how a batch process runs.
batch/lot tracking	The act of identifying where a component from a specific lot is used in the production of goods.
batch/mix	A manufacturing process that primarily schedules short production runs of products.
batch-of-one processing	A transaction method that allows a client application to perform work on a client workstation, and then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect, store-and-forward.
binary large object (BLOB)	A collection of binary data stored as a single entity in a [file].
binder clip	See paper clip.
black products	Products that are derived from the low or heavy end of the distillation process—for example, diesel oils and fuel oils. See also white products.
blend note	Document that authorizes a blending activity, and describes both the ingredients for the blend and the blending steps that occur.
blend off	Reworking off-specification material by introducing a small percentage back into another run of the same product.
blind execution	The mode of execution of a program that does not require the user to review or change the processing options set for the program, and does not require user intervention after the program has been launched.

boleto	In Brazil, the document requesting payment by a supplier or a bank on behalf of a supplier.
bolla doganale	VAT-Only Vouchers for Customs. In Italy, a document issued by the customs authority to charge VAT and duties on extra-EU purchasing.
bookmark	A shortcut to a location in a document or a specific place in an application or application suite.
bordero & cheque	In Brazil, bank payment reports.
broker	A program that acts as an intermediary between clients and servers to coordinate and manage requests.
BTL91	In the Netherlands, the ABN/AMRO electronic banking file format that enables batches with foreign automatic payment instructions to be delivered.
budgeted volume	A statement of planned volumes (capacity utilization) upon which budgets for the period have been set.
bunkering	A rate per ton or a sum of money that is charged for placing fuel on board; can also mean the operation itself.
business function	An encapsulated set of business rules and logic that can normally be re-used by multiple applications. Business functions can execute a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the APIs that allow them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	Encapsulated, reusable business logic that is created by using through event rules rather than C programming. Contrast with embedded event rule. See also event rule.
business object library	[In interoperability] The repository that stores EnterpriseOne business objects, which consist of Java or CORBA objects.
business unit	A financial entity that is used to track the costs, revenue, or both, of an organization. A business unit can also be defined as a branch/plant in which distribution and manufacturing activities occur. Additionally, in manufacturing setup, work centers and production lines must be defined as business units; but these business unit types do not have profit/loss capability.
business view	Used by EnterpriseOne applications to access data from database tables. A business view is a means for selecting specific columns from one or more tables with data that will be used in an application or report. It does not select specific rows and does not contain any physical data. It is strictly a view through which data can be handled.
business view design aid (BDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing business views. The tool uses a graphical user interface.

buy-back crude	In foreign producing oil countries, that portion of the host government's share of "participation crude" which it permits the company holding a concession to "buy back."
CAB	In Italy, the bank branch code or branch ID. A five-digit number that identifies any agency of a specific bank company in Italy.
cadastro de pessoas físicas	Cadastro de pessoas físicas. In Brazil, the federal tax ID for a person.
category code	A code that identifies a collection of objects sharing at least one common attribute.
central object	A software component that resides on a central server.
central objects merge	A process that blends a customer's modifications with the objects in a current release with objects in a new release.
central server	A computer that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers.
certificate input	See direct input.
certificate of analysis (COA)	A document that is a record of all of the testing which has been performed against an item, lot, or both, plus the test results for that item and lot.
change management	[In software development] A process that aids in controlling and tracking the evolution of software components.
change order	In PeopleSoft, an addendum to the original purchase order that reflects changes in quantities, dates, or specifications in subcontract-based purchasing. A change order is typically accompanied by a formal notification.
chargeback	A receipt application method that generates an invoice for a disputed amount or for the difference of an unpaid receipt.
chart	EnterpriseOne term for tables of information that appear on forms in the software. See forms.
check-in location	The directory structure location for the package and its set of replicated objects. This location is usually \\deploymentserver\release\path_code\ package\packagename. The subdirectories under this path are where the central C components (source, include, object, library, and DLL file) for business functions are stored.
checksum value	A computed value that depends on the contents of a block of data, and that is transmitted or stored with the data to detect whether errors have occurred in the transmission or storage.
class	[In object-oriented programming] A category of objects that share the same characteristics.
clean cargo	Term that refers to cargoes of gasoline and other refined products. See also dirty cargo.
client access	The ability to access data on a server from a client machine.
client machine	Any machine that is connected to a network and that exchanges data with a server.

client workstation	A network computer that runs user application software and is able to request data from a server.
ClieOp03	In the Netherlands, the euro-compliant uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
ClieOp2	In the Netherlands, the uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
cluster	Two or more computers that are grouped together in such a way that they behave like a single computer.
co-existence	A condition where two or more applications or application suites access one or more of the same database tables within the same enterprise.
cold test	The temperature at which oil becomes solid. Generally considered to be 5 degrees F lower than the pour point.
commitment	The number of items that are reserved to fill demand.
common object request broker architecture	An object request broker standard that is endorsed by the Object Management Group.
compa-ratio	An employee's salary divided by the midpoint amount for the employee's pay grade.
component changeout	See component swap.
component object model (COM)	A specification developed by Microsoft for building software components that can be assembled into programs or add functionality to existing programs running on Microsoft Windows platforms. COM components can be written in a variety of languages, although most are written in C++, and can be unplugged from a program at runtime without having to recompile the program.
component swap	In Equipment/Plant Management, the substitution of an operable component for one that requires maintenance. Typically, you swap components to minimize equipment downtime while servicing one of the components. A component swap can also mean the substitution of one parent or component item for another in its associated bill of material.
conference room pilot environment	An EnterpriseOne environment that is used as a staging environment for production data, which includes constants and masters tables such as company constants, fiscal date patterns, and item master. Use this environment along with the test environment to verify that your configuration works before you release changes to end-users.
configurable network computing (CNC)	An application architecture that allows interactive and batch applications that are composed of a single code base to run across a TCP/IP network of multiple server platforms and SQL databases. The applications consist of re-usable business functions and associated data that can be configured across the network dynamically. The overall objective for businesses is to provide a future-proof environment that enables them to change organizational structures, business processes, and technologies independently of each other.

configurable processing engine	Handles all "batch" processes, including reporting, Electronic Data Exchange (EDIt) transactions, and data duplication and transformation (for data warehousing). This ability does not mean that it exists only on the server; it can be configured to run on desktop machines (Windows 95 and NT Workstation) as well.
configuration management	A rules-based method of ordering assemble-to-order or make-to-order products in which characteristics of the product are defined as part of the Sales Order Entry process. Characteristics are edited by using Boolean logic, and then translated into the components and routing steps that are required to produce the product. The resulting configuration is also priced and costed, based on the defined characteristics.
configured item segment	A characteristic of a configured item that is defined during sales order entry. For example, a customer might specify a type of computer hard drive by stating the number of megabytes of the hard drive, rather than a part number.
consuming location	The point in the manufacturing routing where a component or subassembly is used in the production process. In kanban processing, the location where the kanban container materials are used in the manufacturing process and the kanban is checked out for replenishment.
contra/clearing account	A G/L account used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations.
contribution to profit	Selling price of an item minus its variable costs.
control table	A table that controls the program flow or plays a major part in program control.
control table workbench	During the Installation Workbench process, Control Table Workbench runs the batch applications for the planned merges that update the data dictionary, user defined codes, menus, and user overrides tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
cost assignment	Allocating resources to activities or cost objects.
cost component	An element of an item's cost—for example, material, labor, or overhead.
cost object	Any customer, product, service, contract, project, or other work unit for which you need a separate cost measurement.
cost rollup	A simulated scenario in which work center rates, material costs, and labor costs are used to determine the total cost of an item.
costing elements	The individual classes of added value or conversion costs. These elements are typically materials, such as raw and packaging; labor and machine costs; and overhead, such as fixed and variable. Each corporation defines the necessary detail of product costs by defining and tracking cost categories and subcategories.

credit memo	A negative amount that is used to correct a customer's statement when he or she is overcharged.
credit notice	The physical document that is used to communicate the circumstances and value of a credit order.
credit order	A credit order is used to reflect products or equipment that is received or returned so that it can be viewed as a sales order with negative amounts. Credit orders usually add the product back into inventory. This process is linked with delivery confirmation.
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
crude oil assay	A procedure for determining the distillation curve and quality characteristics of a crude oil.
cumulative update	A version of software that includes fixes and enhancements that have been made since the last release or update.
currency relationships	When converting amounts from one currency to another, the currency relationship defines the from currency and the to currency in PeopleSoft software. For example, to convert amounts from German marks to the euro, you first define a currency relationship between those two currencies.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. It can be used, for example, when many currencies must be restated into a single currency for consolidated reporting.
current cost	The cost that is associated with an item at the time a parts list and routing are attached to a work order or rate schedule. Current cost is based on the latest bill of material and routing for the item.
customer pricing rules	In Procurement, the inventory pricing rules that are assigned to a supplier. In Sales, inventory pricing rules that are assigned to a customer.
D.A.S. 2 Reporting (DAS 2 or DADS 1)	In France, the name of the official form on which a business must declare fees and other forms of remuneration that were paid during the fiscal year.
data dictionary	A dynamic repository that is used for storing and managing a specific set of data item definitions and specifications.
data source workbench	During the Installation Workbench process, Data Source Workbench copies all of the data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System - release number data source. It also updates the Data Source Plan detail record to reflect completion.
data structure	A description of the format of records in a database such as the number of fields, valid data types, and so on.
data types	Supplemental information that is attached to a company or business unit. Narrative type contains free-form text. Code type contains dates, amounts, and so on.

datagram	A self-contained packet of information that is forwarded by routers, based on their address and the routing table information.
date pattern	A period of time that is set for each period in standard and 52-period accounting and forecasting.
DCE	See distributed computing environment.
DEB	See déclaration d'echange de biens.
debit memo	In Accounts Payable, a voucher that is entered with a negative amount. Enter this type of voucher when a supplier sends you a credit so that you can apply the amount to open vouchers when you issue payment to the supplier.
debit memo	A form that is issued by a customer, requesting an adjustment of the amount, which is owed to the supplier.
debit statement	A list of debit balances.
de-blend	When blend off does not result in a product that is acceptable to customers. The further processing of product to adjust specific physical and chemical properties to within specification ranges. See also blend off.
déclaration d'echange de biens (DEB)	The French term that is used for the Intrastat report.
delayed billing	The invoicing process is delayed until the end of a designated period.
delta load	A batch process that is used to compare and update records between specified environments.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail	The specific information that makes up a record or transaction. Contrast with summary.
detail information	Information that primarily relates to individual lines in a sales or purchase order.
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate, store-and-forward.
direct input	The system calculates the net units when you enter gross volume, temperature, and gravity or density. This data is generally entered during product receiving from the certificate that is prepared by an independent inspector.
direct ship orders	A purchase order that is issued to a third-party supplier who designates the destination as the customer. A direct ship sales order is also created for the customer. Direct ship orders occur when a product is not available from a company-owned or company-operated source, so the system creates an order to ship the product from a third-party source directly to the customer. Sometimes referred to as a drop ship or third-party supply.
direct usage	Consumption of resources that are attributable to specific production runs because the resources were directly issued to the schedule/order.

director	An EnterpriseOne user interface that guides a user interactively through an EnterpriseOne process.
dirty cargo	Term that refers to crude oil cargoes or other non-refined petroleum cargoes. See also clean cargo.
dispatch planning	Efficient planning and scheduling of product deliveries. Considerations include: Dispatch groups Scheduled delivery date Scheduled delivery time Preferred delivery date Preferred delivery time Average delivery time for that geographical location Available resources Special equipment requirements at the product's source or destination.
displacement days	The number of days that are calculated from today's date by which you group vouchers for payment. For example, if today's date is March 10 and you specify three displacement days, the system includes vouchers with a due date through March 13 in the payment group. Contrast with pay-through date.
display sequence	A number that the system uses to re-order a group of records on the form.
distributed computing environment (DCE)	A set of integrated software services that allows software which is running on multiple computers to perform seamless and transparently to the end-users. DCE provides security, directory, time, remote procedure calls, and files across computers running on a network.
distributed data processing	Processing in which some of the functions are performed across two or more linked facilities or systems.
distributed database management system (DDBMS)	A system for distributing a database and its control system across many geographically dispersed machines.
do not translate (DNT)	A type of data source that must exist on the AS/400 because of BLOB restrictions.
double-byte character set (DBCS)	A method of representing some characters by using one byte and other characters by using two bytes. Double-byte character sets are necessary to represent some characters in the Japanese, Korean, and Chinese languages.
downgrade profile	A statement of the hierarchy of allowable downgrades. Includes substitutions of items, and meeting tighter specifications for those products with wider or overlapping specification ranges.
DTA	Datenträgeraustausch. A Swiss payment format that is required by Telekurs (Payserv).
dual pricing	To provide prices for goods and services in two currencies. During the euro transition period, dual pricing between the euro and Economic and Monetary Union (EMU) member currencies is encouraged.

dynamic link library (DLL)	A set of program modules that are designed to be invoked from executable files when the executable files are run, without having to be linked to the executable files. They typically contain commonly used functions.
dynamic partitioning	The ability to dynamically distribute logic or data to multiple tiers in a client/server architecture.
economy of scale	A phenomenon whereby larger volumes of production reduce unit cost by distributing fixed costs over a larger quantity. Variable costs are constant; but fixed costs per unit are reduced, thereby reducing total unit cost.
edit mode	A processing mode or condition where the user can alter the information in a form.
edit rule	A method that is used for formatting user entries, validating user entries, or both, against a predefined rule or set of rules.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field that is based on a processing option value, or calling a business function. Contrast with business function event rule. See also event rule.
employee work center	A central location for sending and receiving all EnterpriseOne messages (system and user-generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages. With respect to workflow, the Message Center is MAPI compliant and supports drag-and-drop work reassignment, escalation, forward and reply, and workflow monitoring. All messages from the message center can be viewed through EnterpriseOne messages or Microsoft Exchange.
Emulator	An item of software or firmware that allows one device to imitate the functioning of another.
encapsulation	The ability to confine access to and manipulation of data within an object to the procedures that contribute to the definition of that object.
engineering change order (ECO)	A work order document that is used to implement and track changes to items and resulting assemblies. The document can include changes in design, quantity of items required, and the assembly or production process.
enhanced analysis database	A database containing a subset of operational data. The data on the enhanced analysis database performs calculations and provides summary data to speed generation of reports and query response times. This solution is appropriate when external data must be added to source data, or when historical data is necessary for trend analysis or regulatory reporting. See also duplicated database, enterprise data warehouse.
enterprise server	A computer containing programs that collectively serve the needs of an enterprise rather than a single user, department, or specialized application.
EnterpriseOne object	A re-usable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects. See also object.

EnterpriseOne process	Allows EnterpriseOne clients and servers to handle processing requests and execute transactions. A client runs one process, and servers can have multiple instances of a process. EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes do not have to wait if the server is particularly busy.
EnterpriseOne web development computer	A standard EnterpriseOne Windows developer computer with the additional components installed: Sun's JDK 1.1. JFC (0.5.1). Generator Package with Generator.Java and JDECOM.dll. R2 with interpretive and application controls/form.
environment workbench	During the Installation Workbench process, Environment Workbench copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System release number data source. It also updates the Environment Plan detail record to reflect completion.
equivalent fuel	A barrel of equivalent fuel supplies six million BTUs of heat. Fuel gas quantities are usually calculated as equivalent fuel barrels in economic calculations for refinery operations.
escalation monitor	A batch process that monitors pending requests or activities, and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.
ESR	Einzahlungsschein mit Referenznummer. A pay slip with a reference number.
event rule	[In EnterpriseOne] A logic statement that instructs the system to perform one or more operations that are based on an activity that can occur in a specific application, such as entering a form or exiting a field.
exit bar	[In EnterpriseOne] The tall pane with icons in the left portion of many EnterpriseOne program windows.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Sometimes referred to as a business unit.
fast path	[In EnterpriseOne] A command prompt that allows the user to move quickly among menus and applications by using specific commands.
file handle	A temporary reference (typically a number) that is assigned to a file which has been opened by the operating system and is used throughout the session to access the file.
file server	A computer that stores files to be accessed by other computers on the network.
find/browse	A type of form used to: Search, view, and select multiple records in a detail area. Delete records. Exit to another form. Serve as an entry point for most applications.

firm planned order (FPO)	A work order that has reached a user defined status. When this status is entered in the processing options for the various manufacturing programs, messages for those orders are not exploded to the components.
fiscal date pattern	A representation of the beginning date for the fiscal year and the ending date for each period in that year.
fix/inspect	A type of form used to view, add, or modify existing records. A fix/inspect form has no detail area.
fixed quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a fixed quantity relationship to its parent, the amount of the component does not change when the software calculates parts list requirements for different work order quantities. Contrast with variable quantity.
flexible account numbers	The format of account numbers for journal entries. The format that you set up must be the three segments: Business unit. Object. Subsidiary.
form design aid (FDA)	The EnterpriseOne GUI development tool for building interactive applications and forms.
form exit	[In EnterpriseOne] An option that is available as a button on the Form Exit bar or as a selection in the Form menu. It allows users to open an interconnected form.
form interconnection	Allows one form to access and pass data to another form. Form interconnections can be attached to any event; however, they are normally used when a button is clicked.
form type	The following form types are available in EnterpriseOne: Find/browse. Fix/inspect. Header detail. Headerless detail. Message. Parent/child. Search/select.
form-to-form call	A request by a form for data or functionality from one of the connected forms.
framework	[In object-oriented systems] A set of object classes that provide a collection of related functions for a user or piece of software.
frozen cost	The cost of an item, operation, or process after the frozen update program is run; used by the Manufacturing Accounting system.
frozen update program	A program that freezes the current simulated costs, thereby finalizing them for use by the Manufacturing Accounting system.

globally unique identifier (GUI)	A 16-byte code in the Component Object Model that identifies an interface to an object across all computers and networks.
handle	[In programming] A pointer that contains the address of another pointer, which, in turn, contains the address of the desired object.
hard commitment	The number of items that are reserved for a sales order, work order, or both, from a specific location, lot, or both.
hard error	An error that cannot be corrected by a given error detection and correction system.
header	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
header information	Information that pertains to the entire order.
hover help	A help function that provides contextual information or instructions when a cursor moves over a particular part of the interface element for a predefined amount of time.
ICMS	Imposto sobre circulação de mercadoria e servicos. In Brazil, a state tax that is applied to the movement of merchandise and some services.
ICMS Substituto	Imposto sobre circulacao de mercadoria e servicos substituto. In Brazil, the ICMS tax that is charged on interstate transactions, or on special products and clients.
ICMS Substituto-Markup	See imposto sobre circulação de mercadoria e servicos substituto-markup.
imposto de renda (IR)	Brazilian income tax.
imposto sobre produtos industrializados	In Brazil, a federal tax that applies to manufactured goods (domestic and imported).
imposto sobre services (ISS)	In Brazil, tax on services.
inbound document	A document that is received from a trading partner using Electronic Data Interface (EDI). This document is also referred to as an inbound transaction.
indented tracing	Tracking all lot numbers of intermediates and ingredients that are consumed in the manufacture of a given lot of product, down through all levels of the bill of material, recipe, or formula.
indexed allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a fixed percentage.
indirect measurement	Determining the quantity on-hand by: Measuring the storage vessels and calculating the content's balance quantity. or Theoretically calculating consumption of ingredients and deducting them from the on-hand balance.

indirect usage	Determining what should have been used by multiplying receipt quantity of the parent times the quantity per statement in the formula, recipe, or bill of material. This transaction typically affects both consumption on schedule as well as issue from on-hand balances.
in-process rework	Recycling a semi processed product that does not meet acceptable standards. Further processing takes the product out of a given operation and sends it back to the beginning of that operation or a previous operation (for example, unreacted materials). Rework that is detected prior to receipt of finished goods and corrected during the same schedule run.
INPS withholding tax	Instituto Nazionale di Previdenza Sociale withholding tax. In Italy, a 12% social security withholding tax that is imposed on payments to certain types of contractors. This tax is paid directly to the Italian social security office.
inscrição estadual	ICMS tax ID. In Brazil, the state tax ID.
inscrição municipal	ISS tax ID. In Brazil, the municipal tax ID.
integrated toolset	Unique to EnterpriseOne is an industrial-strength toolset that is embedded in the already comprehensive business applications. This toolset is the same toolset that is used by PeopleSoft to build EnterpriseOne interactive and batch applications. Much more than a development environment, however, the EnterpriseOne integrated toolset handles reporting and other batch processes, change management, and basic data warehousing facilities.
integrity test	A process that is used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interbranch sales order	A sales order that is used for transactions between branch/plants other than the selling branch/plant.
Interoperability	The ability of different computer systems, networks, operating systems, and applications to work together and share information.
inventory pricing rule	A discount method that is used for purchases from suppliers and sales to customers. The method is based on effectivity dates, up-to quantities, and a factor by which you can mark up or discount the price or cost.
inventory turn	The number of times that the inventory cycles, or turns over, during the year. A frequently used method to compute inventory turnover is to divide the annual costs of sales by the average inventory level.
invoice	An itemized list of goods that are shipped or services that are rendered, stating quantities, prices, fees, shipping charges, and so on. Companies often have their invoices mailed to a different address than where they ship products. In such cases, the bill-to address differs from the ship-to address.
IP	See imposto sobre produtos industrializados.
IR	See imposto de renda.
IServer Service	Developed by PeopleSoft, this Internet server service resides on the Web server and is used to speed up delivery of the Java class files from the database to the client.

ISS	See imposto sobre servicos.
jargon	An alternate data dictionary item description that EnterpriseOne or PeopleSoft World displays, based on the product code of the current object.
java application server	A component-based server that resides in the middle-tier of a server-centric architecture and provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that allows heterogeneous servers to access each other's data.
jde.ini	A PeopleSoft file (or member for AS/400) that provides the runtime settings that are required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine that is running EnterpriseOne, including workstations and servers.
JDE.LOG	The main diagnostic log file of EnterpriseOne. Always located in the root directory on the primary drive. Contains status and error messages from the startup and operation of EnterpriseOne.
JDEBASE Database Middleware	PeopleSoft proprietary database middleware package that provides two primary benefits: 1. Platform-independent APIs for multidatabase access. These APIs are used in two ways: a. By the interactive and batch engines to dynamically generate platform-specific SQL, depending on the data source request. b. As open APIs for advanced C business function writing. These APIs are then used by the engines to dynamically generate platform-specific SQL. 2. Client-to-server and server-to-server database access. To accomplish this access, EnterpriseOne is integrated with a variety of third-party database drivers, such as Client Access 400 and open database connectivity (ODBC).
JDECallObject	An application programming interface that is used by business functions to invoke other business functions.
JDEIPC	Communications programming tools that are used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.
JDENET	PeopleSoft proprietary middleware software. JDENET is a messaging software package.
JDENET communications middleware	PeopleSoft proprietary communications middleware package for EnterpriseOne. It is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all EnterpriseOne supported platforms.
just in time installation (JITI)	EnterpriseOne's method of dynamically replicating objects from the central object location to a workstation.
just in time replication (JITR)	EnterpriseOne's method of replicating data to individual workstations. EnterpriseOne replicates new records (inserts) only at the time that the user needs the data. Changes, deletes, and updates must be replicated using Pull Replication.

Kagami	In Japan, summarized invoices that are created monthly (in most cases) to reduce the number of payment transactions.
latitude	The X coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
laytime (or layhours)	The amount of time that is allotted to a tanker at berth to complete loading or discharging cargo. This time is usually expressed in running hours, and is fixed by prior agreement between the vessel owner and the company that is chartering the vessel. Laytime is stipulated in the charter, which states exactly the total of number of hours that are granted at both loading and unloading ports, and indicates whether such time is reversible. A statement of "Seventy-Two Hours, Reversible" means that a total of 72 hours is granted overall at both ports, and any time saved at one port can be applied as a credit at the other port. For example, if the vessel uses only 32 hours instead of 36 hours to load cargo, it can apply an additional four hours to the 36 hours allotted at the discharge port. Such considerations are important for purposes of computing demurrage.
leading zeros	A series of zeros that certain facilities in PeopleSoft systems place in front of a value that is entered. This situation normally occurs when you enter a value that is smaller than the specified length of the field. For example, if you enter 4567 in a field that accommodates eight numbers, the facility places four zeros in front of the four numbers that you enter. The result appears as 00004567.
ledger type	A code that designates a ledger which is used by the system for a particular purpose. For example, all transactions are recorded in the AA (actual amounts) ledger type in their domestic currency. The same transactions can also be stored in the CA (foreign currency) ledger type.
level break	The position in a report or text where a group of similar types of information ends and another one begins.
libro IVA	Monthly VAT report. In Italy, the term for the report that contains the detail of invoices and vouchers that were registered during each month.
line of business	A description of the nature of a company's work; also a tool to control the relationship with that customer, including product pricing.
linked service type	A service type that is associated with a primary service type. Linked service types can be cancelled, and the maintenance tasks are performed when the primary service type to which they are linked comes due. You can specify whether the system generates work orders for linked service types, as well as the status that the system assigns to work orders that have already been generated. Sometimes referred to as associated service types. See also primary service type and service type.
livro razao	In Brazil, a general ledger report.
load balancing	The act of distributing the number of processes proportionally to all servers in a group to maximize overall performance.
location workbench	During the Installation Workbench process, Location Workbench copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.

log files	Files that track operations for a process or application. Reviewing log files is helpful for troubleshooting problems. The file extension for log files is .LOG.
logic data source	Any code that provides data during runtime.
logical compartment	One of two ways that is identified in the transportation constants to display compartments on vehicles. Logical display numbers the compartments sequentially. For example, if two vehicles are on a trip and each vehicle has three compartments, the logical display is 1,2,3,4,5,6.
logical file	A set of keys or indices that is used for direct access or ordered access to the records in a physical file. Several logical files can have different accesses to a physical.
logical shelf	A logical, not physical, location for inventory that is used to track inventory transactions in loan/borrow, or exchange agreements with other companies. See also logical warehouse.
logical warehouse	Not a physical warehouse containing actual inventory, but a means for storing and tracking information for inventory transactions in loan/borrow, or exchange agreements with other companies.
longitude	The Y coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
LSV	Lastschriftverfahren. A Swiss auto debit format that is required by Telekurs (Payserv).
mail merge	A mass-mail facility that takes names, addresses, and (sometimes) pertinent facts about recipients and merges the information into a form letter or a similarly basic document.
mailmerge workbench	[In EnterpriseOne] An application that merges Microsoft Word 6.0 (or higher) word-processing documents with EnterpriseOne records to automatically print business documents.
main fuels	Usually refers to bulk fuel products, but sometimes includes packaged products.
maintenance loop	See maintenance route.
maintenance route	A method of performing PMs for multiple pieces of equipment from a single preventive maintenance work order. A maintenance route includes pieces of equipment that share one or more identical maintenance tasks which can be performed at the same time for each piece of equipment. Sometimes referred to as maintenance loop.
maintenance work order	In PeopleSoft EnterpriseOne systems, a term that is used to distinguish work orders created for the performance of equipment and plant maintenance from other work orders, such as manufacturing work orders, utility work orders, and engineering change orders.

manufacturing and distribution planning	Planning that includes resource and capacity planning, and material planning operations. Resource and capacity planning allows you to prepare a feasible production schedule that reflects your demand forecasts and production capability. Material Planning Operations provides a short-range plan to cover material requirements that are needed to make a product.
mapping	A set of instructions that describes how one data structure passes data to another.
master business function	An interactive master file that serves as a central location for adding, changing, and updating information in a database.
master business function	A central system location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. Master business functions ensure uniform processing according to guidelines that you establish.
master table	A database table that is used to store data and information that is permanent and necessary to the system's operation. Master tables might contain data such as paid tax amounts, supplier names, addresses, employee information, and job information.
matching document	A document that is associated with an original document to complete or change a transaction. For example, a receipt is the matching document of an invoice.
media object	An electronic or digital representation of an object.
media storage objects	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
memory violation	An error that occurs as the result of a memory leak.
menu selection	An option on a menu that initiates a software function directly.
message center	A central location for sending and receiving all EnterpriseOne messages (system- and user-generated), regardless of the originating application or user.
messaging application programming interface (MAPI)	An architecture that defines the components of a messaging system and how they behave. It also defines the interface between the messaging system and the components.
metal content	A series of properties of a blended product that help to determine its suitability for a prescribed purpose.
metals management	The process of maintaining information about the location and status of durable product containers such as liquid petroleum gas (LPG) cylinders.
mobile inventory	Inventory that is transferred from a depot to a barge or truck for milk-run deliveries.
modal	A restrictive or limiting interaction that is created by a given condition of operation. Modal often describes a secondary window that restricts a user's interaction with other windows. A secondary window can be modal with respect to its primary window or to the entire system. A modal dialog box must be closed by the user before the application continues.

model work order	For scheduled preventive maintenance or for a condition-based alert, a model work order functions as a template for the creation of other work orders. You can assign model work orders to service types and condition-based alerts. When the service type comes due or the alert is generated, the system automatically generates a work order that is based on information from the model work order.
modeless	Not restricting or limiting interaction. Modeless often describes a secondary window that does not restrict a user's interaction with other windows. A modeless dialog box stays on the screen and is available for use at any time, but also permits other user activities.
multiple stocking locations	Authorized storage locations for the same item number at locations, in addition to the primary stocking location.
multitier architecture	A client/server architecture that allows multiple levels of processing. A tier defines the number of computers that can be used to complete some defined task.
named event rules (NER)	Also called business function event rules. Encapsulated, re-usable business logic that is created by using event rules, rather than C programming.
national language support (NLS)	Mechanisms that are provided to facilitate internationalization of both system and application user interfaces.
natureza da operação	Transaction nature. In Brazil, a code that classifies the type of commercial transaction to conform to the fiscal legislation.
negative pay item	An entry in an account that indicates a prepayment. For example, you might prepay a supplier before goods are sent or prepay an employee's forecasted expenses for a business trip. The system stores these pending entries, assigning them a minus quantity as debit amounts in a designated expense account. After the prepaid goods are received or the employee submits an expense report, entering the actual voucher clears all of the negative pay items by processing them as regular pay items. Note that a negative pay item can also result from entering a debit memo (A/P) or a credit memo (A/R).
net added cost	The cost to manufacture an item at the current level in the bill of material. Thus, for manufactured parts, the net added cost includes labor, outside operations, and cost extras applicable to this level in the bill of material, but not materials (lower-level items). For purchased parts, the net added cost also includes the cost of materials.
next status	The next step in the payment process for payment control groups. The next status can be either WRT (write) or UPD (update).
node	A termination point for two or more communications links. A node can serve as the control location for forwarding data among the elements of a network or multiple networks, as well as performing other networking and, in some cases, local processing.
non-inventory items	See non-stock items.
non-list price	A price for bulk products that is determined by its own algorithms, such as a rolling average or commodity price plus.
non-prime product	A manufactured product with revenue potential that is less than the product planned for, or scheduled to be produced.

non-stock items	Items that the system does not account for as part of the inventory. For example, office supplies, or packaging materials can be non-stock items.
nota fiscal	In Brazil, a legal document that must accompany all commercial transactions.
nota fiscal fatura	In Brazil, a nota fiscal and invoice information.
notula	In Italy, the process whereby a business does not recognize value added tax until the payment of a voucher.
object configuration manager (OCM)	EnterpriseOne's object request broker and the control center for the runtime environment. It keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, the Object Configuration Manager directs access to it by using defaults and overrides for a given environment and user.
object embedding	When an object is embedded in another document, an association is maintained between the object and the application that created it; however, any changes made to the object are also only kept in the compound document. See also object linking.
object librarian	A repository of all versions, applications, and business functions that are re-usable in building applications.
object linking	When an object is linked to another document, a reference is created with the file in which the object is stored, as well as with the application that created it. When the object is modified, either from the compound document or directly through the file in which it is saved, the change is reflected in that application as well as anywhere it has been linked. See also object embedding.
object linking and embedding (OLE)	A technology for transferring and sharing information among applications by allowing the integration of objects from diverse applications, such as graphics, charts, spreadsheets, text, or an audio clip from a sound program. OLE is a compound document standard that was developed by Microsoft Corporation. It enables you to create objects with one application, and then link or embed them in a second application. Embedded objects retain their original format and links to the application that created them. See also object embedding, object linking.
object management workbench (OMW)	The change management system that is used for EnterpriseOne development.
object-based technology (OBT)	A technology that supports some of the main principles of object-oriented technology: Classes. Polymorphism.I Inheritance. Encapsulation.

object-oriented technology (OOT)	Brings software development past procedural programming into a world of re-usable programming that simplifies development of applications. Object orientation is based on the following principles: Classes. Polymorphism.I Inheritance. Encapsulation.
offsetting account	An account that reduces the amount of another account to provide a net balance. For example, a credit of 200 to a cash account might have an offsetting entry of 200 to an A/P Trade (liability) account.
open database connectivity (ODBC)	Defines a standard interface for different technologies to process data between applications and different data sources. The ODBC interface comprises set of function calls, methods of connectivity, and representation of data types that define access to data sources.
open systems interconnection (OSI)	The OSI model was developed by the International Standards Organization (ISO) in the early 1980s. It defines protocols and standards for the interconnection of computers and network equipment.
order detail line	A part of an order that contains transaction information about a service or item being purchased or sold, such as quantity, cost, price, and so on.
order hold	A flag that stops the processing of an order because it has exceeded the credit or budget limit, or has another problem.
order-based pricing	Pricing strategy that grants reductions in price to a customer. It is based upon the contents and relative size (volume or value) of the order as a whole.
outbound document	A document that is sent to a trading partner using EDI. This term is also referred to as an outbound transaction.
outturn	The quantity of oil that is actually received into a buyer's storage tanks when a vessel is unloaded. For various reasons (vaporization, clingage to vessel tank walls, and so on), the amount of a product pumped into shore tankage at unloading is often less than the quantity originally loaded onto the vessel, as certified by the Bill of Lading. Under a delivered or CIF outturn transaction, the buyer pays only for the barrels actually "turned out" by the vessel into storage. When a buyer is paying CIF Bill of Lading figures, a loss of 0.5% of total cargo volume is considered normal. Losses in excess of 0.5%, however, are either chargeable to the seller or are covered by specialized insurance that covers partial, as well as total, loss of the cargo.
overhead	In the distillation process, that portion of the charge that leaves the top of the distillation column as vapor. This definition is strictly as it relates to ECS.
override conversion method	A method of calculating exchange rates that is set up between two specific currencies. For those specific currencies, this method overrides the conversion method in General Accounting Constants and does not allow inverse rates to be used when calculating currency amounts.

package / package build	A collection of software that is grouped into a single entity for modular installation. EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where the installation program can find them on the deployment server. It is a point-in-time "snapshot" of the central objects on the deployment server.
package location	The directory structure location for the package and its set of replicated objects. This location is usually \\deployment server\release\path_code\package\ package name. The replicated objects for the package are placed in the subdirectories under this path. This location is also where the package is built or stored.
package workbench	During the Installation Workbench process, Package Workbench transfers the package information tables from the Planner data source to the System - release number data source. It also updates the Package Plan detail record to reflect completion.
packaged products	Products that, by their nature, must be delivered to the customer in containers which are suitable for discrete consumption or resale.
pane/panel	A resizable subarea of a window that contains options, components, or other related information.
paper clip	An icon that is used to indicate that a media object is attached to a form or record.
parent/child form	A type of form that presents parent/child relationships in an application on one form: The left portion of the form presents a tree view that displays a visual representation of a parent/child relationship. The right portion of the form displays a detail area in browse mode. The detail area displays the records for the child item in the tree. The parent/child form supports drag and drop functionality.
parent/child relationship	See parent/component relationship.
parent/component relationship	1. In Capital Asset Management, the hierarchical relationship of a parent piece of equipment to its components. For example, a manufacturing line could be a parent and the machinery on the line could be components of the line. In addition, each piece of machinery could be a parent of still more components. 2. In Product Data Management, a hierarchical relationship of the components and subassemblies of a parent item to that parent item. For example, an automobile is a parent item; its components and subassemblies include: engine, frame, seats, and windows. Sometimes referred to as parent/child relationship.
partita IVA	In Italy, a company fiscal identification number.
pass-through	A process where data is accepted from a source and forwarded directly to a target without the system or application performing any data conversion, validation, and so on.
pay on consumption	The method of postponing financial liability for component materials until you issue that material to its consuming work order or rate schedule.

payment group	A system-generated group of payments with similar information, such as a bank account. The system processes all of the payments in a payment group at the same time.
PeopleSoft database	See JDEBASE Database Middleware.
performance tuning	The adjustments that are made for a more efficient, reliable, and fast program.
persistent object	An object that continues to exist and retains its data beyond the duration of the process that creates it.
pervasive device	A type of intelligent and portable device that provides a user with the ability to receive and gather information anytime, from anywhere.
planning family	A means of grouping end items that have similarity of design or manufacture.
plug-in	A small program that plugs into a larger application to provide added functionality or enhance the main application.
polymorphism	A principle of object-oriented technology in which a single mnemonic name can be used to perform similar operations on software objects of different types.
portal	A Web site or service that is a starting point and frequent gateway to a broad array of on-line resources and services.
Postfinance	A subsidiary of the Swiss postal service. Postfinance provides some banking services.
potency	Identifies the percent of an item in a given solution. For example, you can use an 80% potent solution in a work order that calls for 100% potent solution, but you would use 25% more, in terms of quantity, to meet the requirement (100 / 80 = 1.25).
preference profile	The ability to define default values for specified fields for a user defined hierarchy of items, item groups, customers, and customer groups. In Quality Management setup, this method links test and specification testing criteria to specific items, item groups, customers, or customer groups.
preflush	A work order inventory technique in which you deduct (relieve) materials from inventory when the parts list is attached to the work order or rate schedule.
preventive maintenance cycle	The sequence of events that make up a preventive maintenance task, from its definition to its completion. Because most preventive maintenance tasks are commonly performed at scheduled intervals, parts of the preventive maintenance cycle repeat, based on those intervals.
preventive maintenance schedule	The combination of service types that apply to a specific piece of equipment, as well as the intervals at which each service type is scheduled to be performed.
primary service type	A service type to which you can link related service types. For example, for a particular piece of equipment, you might set up a primary service type for a 1000-hour inspection and a linked service type for a 500-hour inspection. The 1000-hour inspection includes all of the tasks performed at 500 hours. When a primary service type is scheduled to be performed, the system schedules the linked service type. See also linked service type.

pristine environment	An EnterpriseOne environment that is used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so you can compare pristine objects that you modify.
processing option	A data structure that allows users to supply parameters that regulate the execution of a batch program or report.
product data management (PDM)	In PeopleSoft EnterpriseOne software, the system that enables a business to organize and maintain information about each item which it manufactures. Features of this system, such as bills of material, work centers, and routings, define the relationships among parents and components, and how they can be combined to manufacture an item. PDM also provides data for other manufacturing systems including Manufacturing Accounting, Shop Floor Management, and Manufacturing and Distribution Planning.
product line	A group of products with similarity in manufacturing procedures, marketing characteristics, or specifications that allow them to be aggregated for planning; marketing; and, occasionally, costing.
product/process definition	A combination of bill of material (recipe, formula, or both) and routing (process list). Organized into tasks with a statement of required consumed resources and produced resources.
production environment	An EnterpriseOne environment in which users operate EnterpriseOne software.
program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or diskettes.
project	[In EnterpriseOne] A virtual container for objects being developed in Object Management Workbench.
projected cost	The target expenditure in added value for material, labor, and so on, during manufacture. See also standard cost.
promotion path	The designated path for advancing objects or projects in a workflow.
protocollo	See registration number.
PST	Provincial sales tax. A tax that is assessed by individual provinces in Canada.
published table	Also called a “Master” table, this is the central copy to be replicated to other machines and resides on the “publisher” machine. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers that use EnterpriseOne’s data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the Data Replication Pending Change Notification table (F98DRPCN).

query by example (QBE)	Located at the top of a detail area, this area is used to search for data to display in the detail area.
rate scheduling	A method of scheduling product or manufacturing families, or both. Also a technique to determine run times and quantities of each item within the family to produce enough of each individual product to satisfy demand until the family can be scheduled again.
rate type	For currency exchange transactions, the rate type distinguishes different types of exchange rates. For example, you can use both period average and period-end rates, distinguishing them by rate type.
real-time	Pertaining to information processing that returns a result so rapidly that the interaction appears to be instantaneous.
receipt routing	A series of steps that is used to track and move items within the receipt process. The steps might include in-transit, dock, staging area, inspection, and stock.
referential integrity	Ensures that a parent record cannot be deleted from the database when a child record for exists.
regenerable	Source code for EnterpriseOne business functions can be regenerated from specifications (business function names). Regeneration occurs whenever an application is recompiled, either for a new platform or when new functionality is added.
register types and classes	In Italian VAT Summary Reporting, the classification of VAT transactions.
relationship	Links tables together and facilitates joining business views for use in an application or report. Relationships that are created are based on indexes.
rélevé d'identité bancaire (RIB)	In France, the term that indicates the bank transit code, account number, and check digit that are used to validate the bank transit code and account number. The bank transit code consists of the bank code and agency code. The account number is alphanumeric and can be as many as 11 characters. PeopleSoft supplies a validation routine to ensure RIB key correctness.
remessa	In Brazil, the remit process for A/R.
render	To include external data in displayed content through a linking mechanism.
repasse	In Brazil, a discount of the ICMS tax for interstate transactions. It is the adjustment between the interstate and the intrastate ICMS tax rates.
replenishment point	The location on or near the production line where additional components or subassemblies are to be delivered.
replication server	A server that is responsible for replicating central objects to client machines.
report design aid (RDA)	The EnterpriseOne GUI tool for operating, modifying, and copying report batch applications.
repost	In Sales, the process of clearing all commitments from locations and restoring commitments, based on quantities from the Sales Order Detail table (F4211).
resident	Pertaining to computer programs or data while they remain on a particular storage device.

retorno	In Brazil, the receipt process for A/R.
RIB	See rélevé d'identité bancaire.
ricevute bancarie (RiBa)	In Italy, the term for accounts receivable drafts.
riepilogo IVA	Summary VAT monthly report. In Italy, the term for the report that shows the total amount of VAT credit and debit.
ritenuta d'acconto	In Italy, the term for standard withholding tax.
rollback	[In database management] A feature or command that undoes changes in database transactions of one or more records.
rollup	See cost rollup.
row exit	[In EnterpriseOne] An application shortcut, available as a button on the Row Exit bar or as a menu selection, that allows users to open a form that is related to the highlighted grid record.
runtime	The period of time when a program or process is running.
SAD	The German name for a Swiss payment format that is accepted by Postfinance.
SAR	See software action request.
scalability	The ability of software, architecture, hardware, or a network to support software as it grows in size or resource requirements.
scripts	A collection of SQL statements that perform a specific task.
scrub	To remove unnecessary or unwanted characters from a string.
search/select	A type of form that is used to search for a value and return it to the calling field.
selection	Found on PeopleSoft menus, selections represent functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
serialize	To convert a software object into a stream of bytes to store on a disk or transfer across a network.
server map	The server view of the object configuration mapping.
server workbench	During the Installation Workbench process, Server Workbench copies the server configuration files from the Planner data source to the System release number data source. It also updates the Server Plan detail record to reflect completion.
service interval	The frequency at which a service type is to be performed. Service intervals can be based on dates, periods, or statistical units that are user defined. Examples of statistical units are hours, miles, and fuel consumption.
service type	An individual preventive maintenance task or procedure, such as an inspection, lubrication, or overhaul. Service types can apply to a specific piece of equipment or to a class of equipment. You can specify that service types come due based on a predetermined service interval, or whenever the task that is represented by the service type becomes necessary.

servlet	A [small] program that extends the functionality of a Web server by generating dynamic content and interacting with Web clients by using a request-response paradigm.
share path	The network node under which one or more servers or objects reside.
shop floor management	A system that uses data from multiple system codes to help develop, execute, and manage work orders and rate schedules in the enterprise.
silent mode	A method for installing or running a program that does not require any user intervention.
silent post	A type of post that occurs in the background without the knowledge of the user.
simulated cost	After a cost rollup, the cost of an item, operation, or process according to the current cost scenario. This cost can be finalized by running the frozen update program. You can create simulated costs for a number of cost methods—for example, standard, future, and simulated current costs. See also cost rollup.
single-byte character set (SBCS)	An encoding scheme in which each alphabetic character is represented by one byte. Most Western languages, such as English, can be represented by using a single-byte character set.
single-level tracking	Finding all immediate parents where a specific lot has been used (consumed).
single-voyage (spot) charter	An agreement for a single voyage between two ports. The payment is made on the basis of tons of product delivered. The owner of the vessel is responsible for all expenses.
slimer	A script that changes data in a table directly without going through a regular database interface.
smart field	A data dictionary item with an attached business function for use in the Report Design Aid application.
SOC	The Italian term for a Swiss payment format that is accepted by Postfinance.
soft commitment	The number of items that is reserved for sales orders or work orders in the primary units of measure.
soft error	An error from which an operating system or program is able to recover.
software action request (SAR)	An entry in the AS/400 database that is used for requesting modifications to PeopleSoft software.
SOG	The French term for a Swiss payment format that is accepted by Postfinance.
source directory	The path code to the business function source files belonging to the shared library that is created on the enterprise server.
special period/year	The date that determines the source balances for an allocation.

specification merge	The Specification merge is comprised of three merges: Object Librarian merge (via the Object Management Workbench). Versions List merge. Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification table merge workbench	During the Installation Workbench process, Specification Table Merge Workbench runs the batch applications that update the specification tables.
specifications	A complete description of an EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
spot charter	See single-voyage charter.
spot rates	An exchange rate that is entered at the transaction level. Spot rates are not used on transactions between two EMU member currencies because exchange rates are irrevocably fixed to the euro.
stamp tax	In Japan, a tax that is imposed on drafts payable, receipts over 30000 Japanese yen, and all contracts. The party that issues any of the above documents is responsible for this tax.
standalone	Operating or capable of operating independently of certain other components of a computer system.
standard cost	The expected, or target cost of an item, operation, or process. Standard costs represent only one cost method in the Product Costing system. You can also calculate, for example, future costs or current costs. However, the Manufacturing Accounting system uses only standard frozen costs.
standard costing	A costing method that uses cost units that are determined before production. For management control purposes, the system compares standard costs to actual costs and computes variances.
subprocess	A process that is triggered by and is part of a larger process, and that generally consists of activities.
subscriber table	The Subscriber table (F98DRSUB), which is stored on the Publisher Server with the Data Replication Publisher table (F98DRPUB), that identifies all of the subscriber machines for each published table.
summary	The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many systems offer forms and reports that summarize information which is stored in certain tables. Contrast with detail.
super backflush	To create backflush transactions for material, labor, or both, against a work order at predefined pay points in the routing. By doing so, you can relieve inventory and account for labor amounts at strategic points throughout the manufacturing process.
supersession	Specification that a new product is replacing an active product on a specified effective date.

supplemental data	Additional types of data for customers and suppliers. You can enter supplemental data for information such as notes, comments, plans, or other information that you want in a customer or supplier record. The system maintains this data in generic databases, separate from the standard master tables (Customer Master, Supplier Master, and Address Book Master).
supplying location	The location from which inventory is transferred once quantities of the item on the production line have been depleted. In kanban processing, the supplying location is the inventory location from which materials are transferred to the consuming location when the containers are replenished.
system code	A numeric or alphanumeric designation that identifies a specific system in EnterpriseOne software.
system function	[In EnterpriseOne] A named set of pre-packaged, re-usable instructions that can be called from event rules.
table access management (TAM)	The EnterpriseOne component that handles the storage and retrieval of user defined data. TAM stores information such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
table conversion workbench	During the Installation Workbench process, Table Conversion Workbench runs the table conversions that change the technical and application tables to the format for the new release of EnterpriseOne. It also updates the Table Conversions and Controls detail records to reflect completion.
table design aid (TDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing database tables.
table event rules	Use table event rules to attach database triggers (or programs) that automatically run whenever an action occurs against the table. An action against a table is referred to as an event. When you create an EnterpriseOne database trigger, you must first determine which event will activate the trigger. Then, use Event Rules Design to create the trigger. Although EnterpriseOne allows event rules to be attached to application events, this functionality is application-specific. Table event rules provide embedded logic at the table level.
table handle	A pointer into a table that indicates a particular row.
table space	[In relational database management systems] An abstract collection of containers in which database objects are stored.
task	[In Solution Explorer and EnterpriseOne Menu] A user defined object that can initiate an activity, process, or procedure.
task view	A group of tasks in Solution Explorer or EnterpriseOne Menu that are arranged in a tree structure.
termo de abertura	In Brazil, opening terms for the transaction journal.
termo de encerramento	In Brazil, closing terms for the transaction journal.
three-tier processing	The task of entering, reviewing, approving, and posting batches of transactions.

three-way voucher match	The process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records, the purchase order, and the invoice to create vouchers.
threshold percentage	In Capital Asset Management, the percentage of a service interval that you define as the trigger for maintenance to be scheduled. For example, you might set up a service type to be scheduled every 100 hours with a threshold percentage of 90 percent. When the equipment accumulates 90 hours, the system schedules the maintenance.
throughput agreement	A service agreement in which a business partner agrees to store and manage product for another business partner for a specified time period. The second partner actually owns the stock that is stored in the first partner's depot, although the first partner monitors the stock level; suggests replenishments; and unloads, stores, and delivers product to the partner or its customers. The first partner charges a fee for storing and managing the product.
throughput reconciliation	Reconcile confirmed sales figures in a given period with the measured throughput, based on the meter readings. This process is designed to catch discrepancies that are due to transactions not being entered, theft, faulty meters, or some combination of these factors. This reconciliation is the first stage. See also operational reconciliation.
token	[In Object Management Workbench] A flag that is associated with each object which indicates whether you can check out the object.
tolerance range	The amount by which the taxes that you enter manually can vary from the tax that is calculated by the system.
TP monitor	Transaction Processing monitor. A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and can include programs that validate data and format terminal screens.
tracing	The act of researching a lot by going backward, to discover its origin.
tracking	The act of researching a lot by going forward, to discover where it is used.
transaction set	An electronic business transaction (EDI Standard document) composed of segments.
transclude	To include the external data in the displayed content through a linking mechanism.
transfer order	An order that is used to ship inventory between branch/plants within your company and to maintain an accurate on-hand inventory amount. An interbranch transfer order creates a purchase order for the shipping location and a sales order for the receiving location.
translation adjustment account	An optional G/L account used in currency balance restatement to record the total adjustments at a company level.
translator software	The software that converts data from an application table format to an EDI Standard Format, and from EDI Standard Format to application table format. The data is exchanged in an EDI Standard, such as ANSI ASC X12, EDIFACT, UCS, or WINS.

tree structure	A type of graphical user interface that displays objects in a hierarchy.
trigger	Allows you to attach default processing to a data item in the data dictionary. When that data item is used on an application or report, the trigger is invoked by an event which is associated with the data item. EnterpriseOne also has three visual assist triggers: Calculator. Calendar. Search form.
two-way voucher match	The process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
universal batch engine (UBE)	[In EnterpriseOne] A type of application that runs a noninteractive process.
unnormalized	Data that is a random collection of data elements with repeating record groups scattered throughout. Also see Normalized.
user overrides merge	The User Overrides merge adds new user override records into a customer's user override table.
user-defined code (UDC)	A value that a user has assigned as being a valid entry for a given or specific field.
utility	A small program that provides an addition to the capabilities which are provided by an operating system.
variable numerator allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a variable.
variable quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a variable quantity relationship to its parent, the amount of the component changes when the software calculates parts list requirements for different work order quantities. Contrast with fixed quantity.
variance	1. In Product Costing and Manufacturing Accounting, the difference between the frozen standard cost, the current cost, the planned cost, and the actual cost. For example, the difference between the frozen standard cost and the current cost is an engineering variance. Frozen standard costs come from the Cost Components table, and the current costs are calculated by using the current bill of material, routing, and overhead rates. 2. In Capital Asset Management, the difference between revenue that is generated by a piece of equipment and costs that are incurred by the equipment.
versions list merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release as well as their processing options data.
VESR	Verfahren Einzahlungsschein mit Referenznummer. The processing of an ESR pay slip with reference line through accounts receivable and accounts payable.
visual assist	Forms that can be invoked from a control to assist the user in determining what data belongs in the control.

voucher logging	The process of entering vouchers without distributing amounts to specific G/L accounts. The system initially distributes the total amount of each voucher to a G/L suspense account, where it is held until you redistribute it to the correct G/L account.
wareki date format	In Japan, a calendar format, such as Showa or Heisei. When a new emperor begins to reign, the government chooses the title of the date format and the year starts over at one. For instance, January 1, 1998, is equal to Heisei 10, January 1st.
wash down	A minor cleanup between similar product runs. Sometimes used in reference to the sanitation process of a food plant.
wchar_t	An internal type of a wide character. Used for writing portable programs for international markets.
web server	A server that sends information as requested by a browser and uses the TCP/IP set of protocols.
work order life cycle	In Capital Asset Management, the sequence of events through which a work order must pass to accurately communicate the progress of the maintenance tasks that it represents.
workfile	A system-generated file that is used for temporary data processing.
workflow	According to the Workflow Management Coalition, worlflow means “the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.”
workgroup server	A network server usually containing subsets of data that are replicated from a master network server.
WorldSoftware architecture	The broad spectrum of application design and programming technology that PeopleSoft uses to achieve uniformity, consistency, and complete integration throughout its software.
write payment	A step in processing payments. Writing payments includes printing checks, drafts, and creating a bank tape table.
write-off	A method for getting rid of inconsequential differences between amounts. For example, you can apply a receipt to an invoice and write off the difference. You can write off both overpayments and underpayments.
Z file	For store and forward (network disconnected) user, EnterpriseOne store-and-forward applications perform edits on static data and other critical information that must be valid to process an order. After the initial edits are complete, EnterpriseOne stores the transactions in work tables on the workstation. These work table are called Z files. When a network connection is established, Z files are uploaded to the enterprise server; and the transactions are edited again by a master business function. The master business function then updates the records in your transaction files.
z-process	A process that converts inbound data from an external system into an EnterpriseOne software table or converts outbound data into an interface table for an external system to access.

zusammenfassende melding	In Germany, the term for the EU Sales Listing.

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