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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications. This preface discusses:

• PeopleSoft application prerequisites.
• PeopleSoft application fundamentals.
• Documentation updates and printed documentation.
• Additional resources.
• Typographical conventions and visual cues.
• Comments and suggestions.
• Common elements in PeopleBooks.

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

PeopleSoft Application Prerequisites

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

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

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

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

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications. For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.
The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also


Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.
Email
Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

Additional Resources
The following resources are located on the PeopleSoft Customer Connection website:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application maintenance information</td>
<td>Updates + Fixes</td>
</tr>
<tr>
<td>Business process diagrams</td>
<td>Support, Documentation, Business Process Maps</td>
</tr>
<tr>
<td>Interactive Services Repository</td>
<td>Interactive Services Repository</td>
</tr>
<tr>
<td>Hardware and software requirements</td>
<td>Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation &amp; Software, Hardware and Software Requirements</td>
</tr>
<tr>
<td>Installation guides</td>
<td>Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation &amp; Software, Installation Guides and Notes</td>
</tr>
<tr>
<td>Integration information</td>
<td>Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications</td>
</tr>
<tr>
<td>Minimum technical requirements (MTRs) (EnterpriseOne only)</td>
<td>Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms</td>
</tr>
<tr>
<td>PeopleBook documentation updates</td>
<td>Support, Documentation, Documentation Updates</td>
</tr>
<tr>
<td>PeopleSoft support policy</td>
<td>Support, Support Policy</td>
</tr>
<tr>
<td>Prerelease notes</td>
<td>Support, Documentation, Documentation Updates, Category, Prerelease Notes</td>
</tr>
<tr>
<td>Product release roadmap</td>
<td>Support, Roadmaps + Schedules</td>
</tr>
<tr>
<td>Release notes</td>
<td>Support, Documentation, Documentation Updates, Category, Release Notes</td>
</tr>
<tr>
<td>Release value proposition</td>
<td>Support, Documentation, Documentation Updates, Category, Release Value Proposition</td>
</tr>
<tr>
<td>Statement of direction</td>
<td>Support, Documentation, Documentation Updates, Category, Statement of Direction</td>
</tr>
</tbody>
</table>
Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

<table>
<thead>
<tr>
<th>Typographical Convention or Visual Cue</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.</td>
</tr>
<tr>
<td><em>Italics</em></td>
<td>Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter O.</td>
</tr>
<tr>
<td><strong>KEY+KEY</strong></td>
<td>Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.</td>
</tr>
<tr>
<td><strong>Monospace font</strong></td>
<td>Indicates a PeopleCode program or other code example.</td>
</tr>
<tr>
<td>“ ” (quotation marks)</td>
<td>Indicate chapter titles in cross-references and words that are used differently from their intended meanings.</td>
</tr>
</tbody>
</table>
**Typographical Convention or Visual Cue** | **Description**
---|---
... (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{} (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[] (square brackets) | Indicate optional items in PeopleCode syntax.
& (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

**Visual Cues**

PeopleBooks contain the following visual cues.

**Notes**

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

*Note.* Example of a note.

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

*Important!* Example of an important note.

**Warnings**

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

*Warning!* Example of a warning.

**Cross-References**

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

**Country, Region, and Industry Identifiers**

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

Example of a country-specific heading: “(FRA) Hiring an Employee”
Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

**Country Identifiers**

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

**Region Identifiers**

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

- Asia Pacific
- Europe
- Latin America
- North America

**Industry Identifiers**

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

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

**Currency Codes**

Monetary amounts are identified by the ISO currency code.

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**Comments and Suggestions**

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

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

Or send email comments to doc@peoplesoft.com.

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

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**Common Elements Used in PeopleBooks**

**Address Book Number**

Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.
As If Currency Code

Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.

Batch Number

Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).

Batch Date

Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.

Batch Status

Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

- Blank: Batch is unposted and pending approval.
- A: The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.
- D: The batch posted successfully.
- E: The batch is in error. You must correct the batch before it can post.
- P: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E.
- U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant

Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

Business Unit

Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

Category Code

Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

Company

Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code

Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company

Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.
If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

**Document Number**

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

**Document Type**

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

- **P**: Accounts payable documents.
- **R**: Accounts receivable documents.
- **T**: Time and pay documents.
- **I**: Inventory documents.
- **O**: Purchase order documents.
- **S**: Sales order documents.

**Effective Date**

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

**Fiscal Period and Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

**G/L Date (general ledger date)**

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.
Additional Tools and Topics Preface

This preface discusses the Additional Tools and Topics PeopleBook.

PeopleSoft Products

This PeopleBook refers to this PeopleSoft product line: PeopleSoft EnterpriseOne Tools.

PeopleSoft Additional Tools and Topics

This PeopleBook covers Additional Tools and Topics, a member of the PeopleSoft EnterpriseOne Tools suite. It covers these topics:

• Currency
• Cross Reference Facility
• Report Interconnections
• Processing Options
• Transaction Processing
• Record Locking
• Tips of the Day
• Modification Rules
CHAPTER 1

Getting Started with Additional Tools and Topics

This chapter provides an overview of preparing to use Additional Tools and Topics.

Additional Tools and Topics Overview

Use additional tools and topics to maintain and understand various development tools. Additional Tools and topics covers these topics:

- Currency
- Cross Reference Facility
- Report Interconnections
- Processing Options
- Transaction Processing
- Record Locking
- Tips of the Day
- Modification Rules

Additional Tools and Topics Implementation

To use additional tools and topics, these tasks must be completed first:

- You must have a valid PeopleSoft EnterpriseOne user account.
  Depending on how security has been configured, you might need one or more roles assigned to you so that you can access Object Management Workbench (OMW), the PeopleSoft EnterpriseOne databases, and so forth.
- OMW must be configured with transfer activity rules and allowed actions so that application development can occur.
- At a minimum, you must have a default project in OMW to which you have been added in the role of Developer.
CHAPTER 2

Using Currency

This chapter provides an overview of currency and discusses how to work with currency.

Understanding Currency

Enterprises that do business internationally have additional accounting needs and added complexity. This complexity arises from doing business in different currencies and having to follow different reporting and accounting requirements. Some fundamental requirements for an international enterprise include:

- Conversion of foreign currencies to the local currency
- Conversion of the different local currencies into one currency for reporting and comparisons
- Adhering to regulations defined in the countries of operation
- Revaluation of currencies due to fluctuation in exchange rates

Currency Implementation

PeopleSoft EnterpriseOne currency implementation includes the following features:

- Currency retrieval is accomplished through database triggers and table event rules.
- Currency retrieval logic is handled in business functions.
- System Application Programming Interface modules (APIs) assist you in accessing cached tables.

Advantages

PeopleSoft EnterpriseOne enables developers to control currency retrieval. Enabling developers, instead of the system, to control currency, provides greater flexibility and easier maintenance. Some of the advantages in enabling developers to control currency are:

- Additional currency tables do not require changes to system modules. Only new business functions need to be added.
- Business logic is captured in business functions, rather than in a system module that assumes knowledge of business logic.
- Table event rules enable you to attach currency retrieval logic at the table object level.
- Table event rules are triggered by table events instead of application events.
- Any application that uses the table that has currency business functions attached to it receives the same logic, so you do not need to modify each application.
- No hard-coded logic is embedded in the runtime engine.
**Working with Currency**

When identified amounts are written to or retrieved from a database, or when they are used in calculations during processing, proper decimal placement is extremely important. Currency implementation is needed to adjust decimal placement on Math_Numeric currency fields according to a specified currency. Common applications of currency implementation include conversion of currency amounts and revaluation of currency due to fluctuations in exchange rates.

Implementing currency involves the following steps:

- Performing currency setup.
- Creating a business function that contains logic to retrieve currency information. Currency business functions are known as currency triggers.
- Attaching a currency trigger to the *Currency Conversion* event in Table Event Rules (TER).
- Designing the TER functions through Event Rules Design. The system then converts the event rules to C and compiles them into a consolidated DLL through the Object Management Workbench (OMW) Application.
- Modifying applications as necessary.

The EnterpriseOne database middleware then calls the appropriate TER function when the *Currency Conversion* event is triggered.

**Understanding the Build Triggers Option**

The Build Triggers option performs the following steps:

- Converts event rules to C source code.

  This creates the files OBNM.c and OBNM.hxx (where OBNM is the Object Name). The source file will contain one function per TER event.

  For example, if you are working with the F0411 table, the Build Triggers option creates a C source member called F0411.c. You can browse through the C code and ensure that all of the parameters are set up correctly. The system generates an error log if an error occurs during the ER-to-C conversion. The error log is called eF0411.log.

- Compiles the new functions and adds them to JDBTRIG.DLL. This is the consolidated DLL that contains TER functions.

**Understanding How Table Event Rules Work with Currency Processing**

The *Currency Conversion* event runs if currency processing is enabled.

Table triggers for currency run after the record is fetched and before the record is added to the database.

The following diagram illustrates the currency conversion process:
Currency conversion process.

<table>
<thead>
<tr>
<th><strong>On FETCH:</strong></th>
<th><strong>On ADD/UPDATE:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Application requests data.</td>
<td>1. Application sends data.</td>
</tr>
<tr>
<td>2. Is currency on?</td>
<td>2. Is currency on?</td>
</tr>
<tr>
<td>3. If yes, run currency trigger.</td>
<td>3. If yes, run currency trigger.</td>
</tr>
<tr>
<td>• Executes the business function</td>
<td>• Performs the business logic</td>
</tr>
<tr>
<td>• Performs the business logic</td>
<td>• Scrubs data accordingly</td>
</tr>
<tr>
<td>• Scrubs data accordingly</td>
<td></td>
</tr>
<tr>
<td>5. Return data to database, and then to application</td>
<td>5. Update database.</td>
</tr>
</tbody>
</table>

When passing Math_Numeric currency fields into a business function, the currency values in the respective data structure must be populated. Math_Numeric work fields that contain currency values also need the proper currency information.

You can copy currency information to controls (work fields or others) in event rules by using the system function Copy Currency Info. You can call the currency triggers from within an application’s event rules or from another business function.

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### Working with Currency Conversion

This section discusses how to:

- Set up currency conversion
- Show currency sensitive controls
- Create a currency conversion trigger.
# Forms Used to Work With Currency Conversion

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Setup</td>
<td>W0000A</td>
<td>EnterpriseOne Menus, Multi-Currency Setup (G1141), Set Multi Currency Option</td>
<td>Set up currency conversion.</td>
</tr>
<tr>
<td>General Accounting Constants</td>
<td>W0000B</td>
<td>System Setup, click General Accounting Constants</td>
<td>Set up currency conversion.</td>
</tr>
<tr>
<td>Form Design Aid</td>
<td>NA</td>
<td>Object Management Workbench, select an interactive application and click the Design button.</td>
<td>Show currency sensitive controls</td>
</tr>
<tr>
<td>Object Management Workbench</td>
<td>W98220A</td>
<td>Type OMW in the Fast Path field of Solution Explorer</td>
<td>Create a currency conversion trigger.</td>
</tr>
</tbody>
</table>

## Setting Up Currency Conversion

If the business uses more than one currency, you must designate the method of currency conversion to use.

Access the General Accounting Constants form.

**Multi-Currency Conversion (Y, N, Z)**

Select a code that specifies whether to use multi-currency accounting, and the method of multi-currency accounting to use:

Codes are:

- **N** Do not use multi-currency accounting. Use if you enter transactions in only one currency for all companies. The multi-currency fields will not appear on forms. The system supplies a value of N if you do not enter a value.
- **Y** Activate multi-currency accounting and use multipliers to convert currency. The system multiplies the foreign amount by the exchange rate to calculate the domestic amount.
- **Z** Activate multi-currency accounting and use divisors to convert currency. The system divides the foreign amount by the exchange rate to calculate the domestic amount.

## Showing Currency-Sensitive Controls

When you design an application, you can decide whether to hide or show currency-sensitive controls at runtime.

Access the Form Design Aid.

To show currency-sensitive controls:

1. On Form Design, double-click the control that you want to appear on the form.
2. Click Control Options.
3. If you want to display currency fields, verify that the No Display if Currency is Off option is turned off.

When the No Display if Currency is Off option is on, currency-sensitive controls do not appear. If the No Display if Currency is Off option is turned off, currency fields are visible.
You must exit the current PeopleSoft EnterpriseOne session and begin a new one to apply currency conversion changes.

**Creating a Currency Conversion Trigger**

If the table that you are using contains currency fields, you must specify how many decimal places exist in each column. When the source or destination fields are currency fields and you have not created a currency trigger, problems might arise if the value is used in a calculation. If you do not create a currency conversion trigger, the system cannot determine where to locate the decimal within a field.

**Access Object Management Workbench**

To create a currency conversion trigger:

1. Check out the table to which you want to attach event rules.
2. Ensure that the table is highlighted, and then click the Design button in the center column.
3. On Table Design, click the Design Tools tab, and then click Start Table Trigger Design Aid.
4. On Event Rules Design, select the Currency Conversion event and attach the currency trigger that you want to use.
5. Click the Business Functions button.
   - The Business Function Search form appears.
   - Use the query by example (QBE) line to search for selected business functions. You can use Category *CUR* or System Code *11* to find existing currency business functions. To read notes that describe the purpose of the business function, its parameters, and program requirements, click the Attachments button.
6. Choose the business function with which you want to work, and then click Select.
7. On Business Functions, attach the table columns to the business function data structure, and then click OK.
6. The available objects that appear are for table column only.
8. On Event Rules Design, click Save, and then click OK.
9. On Table Design, click the Table Operations tab, and then click Generate Table.
10. Choose the data source for the table, and then click OK.
11. On Table Design, click the Design Tools tab, and then click Build Table Triggers.
   - The system creates the table event rule. The newly created or modified table event rule functions are now called from the database Application Program Interfaces (APIs) whenever the corresponding event occurs against the table.
CHAPTER 3

Using Cross Reference Facility

This chapter contains overviews of the cross reference facility, searching for objects, viewing field relationships, and rebuilding cross reference information and discusses how to work with the cross reference facility.

Understanding the Cross Reference Facility

You can use the Cross Reference Facility to determine where and how specific kinds of objects are used. You can also view relationships between objects and their components. For example, you can do the following:

• Identify each instance in which a business function is used.
• View a list of forms within an application.
• Display all fields within a business view.
• Cross-reference all applications in which a specific field is used.

You can rebuild cross-reference relationships when you change an object or a component.

Searching for Objects

You can search for objects by search type and object name.

You can search for data items, interactive applications, batch applications, business functions, business views, data structures, tables, and forms.

Searching for Data Items

You can determine where specific data items are used. You can search for the following:

• Forms that use a data item.
• Universal Batch Engine applications (UBEs) that use a data item.
• UBE event rules that use a data item as a variable.
• Applications that use a data item as a variable.
• Named event rules that use a data item as a variable.
• Functions called by smart field data items.
• Edit rule functions called by a data item.
• Display rule functions called by a data item.
• Search forms used by data items.
• Processing options that use a data item.
• Generic text data structures that use a data item.
• Business function data structures that use a data item.
• All data structures that use a data item.
• Tables that use a data item.
• Indices that use a data item.
• Business views that use a data item.
• Table event rules that use a data item.

**Searching for Interactive Applications**

You can locate a variety of information about interactive applications. You can search for the following:

• Applications that call an application.
• Applications that call a business function.
• Data structures that are used by an application.
• Tables that are used by an application.
• Forms for an application.
• Data items for an application.
• Data items that are used as variables in an application.
• Processing options for an application.
• Business views for an application.

**Searching for Batch Applications**

You can locate information about UBEs and how they are used. You can search for the following:

• UBEs that call a business function.
• Tables that are used by a UBE.
• Data structures that are used by a UBE.
• UBEs that are called by a UBE.
• UBEs that call a UBE.
• Processing options for a UBE.
• Business views for a UBE.
• Data items that are used by a UBE.
• Data items that are used as variables in a UBE.
Searching for Business Functions

You can locate a variety of information about business functions and how they are used. You can search for the following:

- The places in which a business function is used.
- Data structures that are used by a named event rule.
- Business functions that are called by an application.
- Business functions that are called by a UBE.
- Tables that are used by a business function.
- Business functions that are called by a business function.
- Business functions that call a business function.
- Data items that are used as variables in a named event rule.
- Tables that are used by a named event rule.
- Business functions that are called by a named event rule.
- Smart field data items that call a column header function.
- The places in which a function is used.
- Smart field data items that call a value business function.
- Data items that call edit rule functions.
- Data items that call display rule functions.
- Source and header files by string.
- Table event rules that use a business function.

Searching for Business Views

You can locate information about business views and how they are used. You can search for the following:

- Applications that use a business view.
- UBEs that use a business view.
- Forms that use a business view.
- Data items for a business view.
- Tables for a business view.

Searching for Data Structures

You can locate a variety of information about data structures and how they are used. You can search for the following:

- Applications that use a data structure.
- Business functions that use a data structure.
- UBEs that use a data structure.
- Data items for a processing option.
• Data items for generic text data structures.
• Data items for a business function data structure.
• Data items for all data structures.
• Table event rules that use a data structure.

**Searching for Tables**

You can locate a variety of information about tables and how they are used. You can search for the following:

• Business functions that use a table.
• Applications that use a table.
• UBEs that use a table.
• Named event rules that use a table.
• Forms that use a table.
• Data items for a table.
• Indices for a table.
• Business views that use a table.
• Data items that are used by table event rules.
• Business functions that are used by table event rules.
• Data structures that are used by table event rules.
• Tables that are used by table event rules.

**Searching for Forms**

You can locate a variety of information about forms and how they are used. You can search for the following:

• Forms that are called by an application.
• Tables for a form.
• Data items for a form.
• Business views for a form.
• Data items that use a search form.

**Searching for Event Rules**

You can search where a particular control is used in an application’s Event Rules.

---

### Viewing Field Relationships

The Field Relationships form is meaningful only for the following cross-reference search types:
<table>
<thead>
<tr>
<th>Search Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DA</td>
<td>Data items that are used by an application</td>
</tr>
<tr>
<td>FA</td>
<td>Forms for an application</td>
</tr>
<tr>
<td>FI</td>
<td>Forms that use a data item</td>
</tr>
<tr>
<td>SA</td>
<td>Data structure for an application</td>
</tr>
</tbody>
</table>

In these instances, the Field Relationships form displays the control type for a field, such as one of the following:

- \( BC \) for a business view column
- \( FI \) for a form interconnect
- \( GC \) for a grid control
- \( FC \) for a form control

---

**Rebuilding Cross Reference Information**

When developers modify objects, cross-reference information might become out-of-date with objects in the system. Because the cross-reference files are not automatically rebuilt when objects are modified, you must do so at the time of inquiry. You can also regularly schedule cross-reference builds to ensure that the cross-reference information is updated regularly.

The Cross Reference application contains multiple forms. Each form contain a grid of cross reference records. Each row contains a date column (the far right column) that indicates on which date the cross reference record was built. Use this date to verify if cross reference records are out of date. If information is out-of-date, use the Rebuild option from any of the cross-reference forms.

Cross-reference builds use relational database tables, not local specifications.

---

**Working with the Cross Reference Facility**

This section discusses how to:

- Search for objects.
- Search for event rules.
- View field relationships.
- Rebuild cross reference information.
**Forms Used to Work with the Cross Reference Facility**

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>ER Search</td>
<td>W980011A</td>
<td>On Cross Reference form, select Event Rules from the Form menu</td>
<td>Search for event rules.</td>
</tr>
<tr>
<td>Field Relationships</td>
<td>W980011B</td>
<td>On Cross Reference form, select Field Relationships from the Form menu</td>
<td>View field relationships.</td>
</tr>
</tbody>
</table>

**Searching for Objects**

Access the Cross Reference form.

To search for objects:

Click one of the following tabs:

- Data Items
- Interactive Applications
- Batch Applications (also called UBEs)
- Business Functions
- Business Views
- Data Structures
- Tables
- Forms

You can also search for Event Rules and Field Relationships.

**Searching for Event Rules**

Access the ER Search form.

**Object Name**

Enter the name of the application whose Event Rules are searched. For example, if you are searching for how Search Type is used in the address book application event rules, you would enter P01012 in this field.

**Form Name**

Enter the name of the form whose Event Rules are searched. For example, if you are searching for how Search Type is used in the Work With Address Book form, you would enter W01012B in this field.

**Data Field Name**

Enter the name of the data item that you’re searching for. For example, if you are searching for how Search Type is used in the Work With Address Book form, you would enter the data dictionary item name for Search Type which is AT1 here.
## Viewing Field Relationships

Access the Field Relationships form.

<table>
<thead>
<tr>
<th><strong>Object</strong></th>
<th>Enter the name of the application whose field relationships are searched.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Form Name</strong></td>
<td>Enter the name of the form.</td>
</tr>
<tr>
<td><strong>Field</strong></td>
<td>Enter the data dictionary item name.</td>
</tr>
<tr>
<td><strong>Control</strong></td>
<td>Select types of objects that you are search for:</td>
</tr>
<tr>
<td></td>
<td>• <em>BC</em> - Business View Field</td>
</tr>
<tr>
<td></td>
<td>• <em>PO</em> - Processing Option</td>
</tr>
<tr>
<td></td>
<td>• <em>FI</em> - Form Interconnect</td>
</tr>
<tr>
<td></td>
<td>• <em>VAR</em> - Variable</td>
</tr>
<tr>
<td></td>
<td>• <em>FC</em> - Form Control</td>
</tr>
<tr>
<td></td>
<td>• <em>FCW</em> - Form Control Work Field</td>
</tr>
<tr>
<td></td>
<td>• <em>GC</em> - Grid Column</td>
</tr>
<tr>
<td></td>
<td>• <em>GCW</em> - Grid Column Work Field</td>
</tr>
</tbody>
</table>

## Rebuilding Cross Reference Information

Access the Cross Reference form.

To rebuild cross reference information:

1. Select Rebuild Relationships from the Form menu.
2. Select the objects that you want to rebuild.

---

**Note.** The rebuild process can take several minutes.
CHAPTER 4

Creating Report Interconnections

This chapter provides an overview of report interconnections and discusses how to create a report interconnection.

Understanding Report Interconnections

Use report interconnections to launch a batch application or report. The current event rules might continue processing or wait for the completion of the report, based upon whether asynchronous processing is enabled. If you use a synchronous report interconnect, the initiating process waits until the report has completed before it continues running. If you use asynchronous processing, the initiating process starts another process and continues to run. The two processes run separately.

Creating a Report Interconnection

Access Event Rules Design.

To create a report interconnection:

2. Click the Report Interconnection button.
3. On Work with Applications, select the report to which you are connecting.
   Work with Versions displays versions for the selected report.
4. Choose the appropriate version of the report to which you want to connect.
5. In the Available Objects column, select the object that you want to pass. Click the > button to move it to the Data Structure-Value Column.
6. Indicate the direction of data flow between Value and Data Items.
   As you click the direction arrow, it toggles through the following four options:
   • Data flows from the source to the target
   • Data flows from the target to the source
   • Data flows from the source to the target when the target is launched; Upon exiting the target, data flows back to the source
   • No data flow
7. To run the report as a separate process, click the Asynchronously option.
8. To include the report interconnect for transaction processing, click the Include in Transaction option.
9. Click one of the following buttons to add notes:
   - Structure Notes
   - Parameter Notes

10. After the data structure is defined, click OK.
    Event Rules Design displays the Report Interconnection with the Call (UBE <name> Version <name>) statement.
CHAPTER 5

Using Processing Options

This chapter provides overviews of processing options, processing options templates, defining a processing options data structure (template), and attaching a processing options template and discusses how to work with processing options.

Understanding Processing Options

Processing options are a set of start up values that are provided to an interactive or batch application when it is launched. You can use processing options to change the way in which an application or a report appears or behaves. You can attach different processing option values to different versions of the same application, which enables you to change the behavior of an application without creating a new application. In addition, you can use processing options to do the following:

• Control the path that a user can use to navigate through a system.
• Set up default values.
• Customize an application for different companies or different users.
• Control the format of forms and reports.
• Control page breaks and totaling for reports.
• Specify the default version of a related application or batch process.

Understanding Processing Options Templates

A processing options template is a special kind of Data Structure. It contains one or more data dictionary items. It can also contain one or more tab pages that can be used to categorize data items.

Each tab page has a descriptive title.

You can add data items on processing option templates. Each data item contains a descriptive label and an edit field.

You can also add comments on a tab page. A comment is a text string that is displayed on the processing option dialog. It helps user understands the data items.

At runtime, a processing option dialog displays a set of tabs. Each tab represents a category of processing options. When you click the tab header, the tab body displays the set of processing options for that category.
The following steps describe how to create and implement processing options:

1. Create processing options template.
2. Attach this template to an application and create event rules so that the application uses these values.
3. Create versions of the application. Save different processing option values to different versions. Specify the default version.
4. Specify how the processing options are handled at application launch time. You can set up the menu to do one of the following:
   - The processing options dialog appears. The user can select to supply values to processing options.
   - A version list appears. The user can select a version to launch.
   - The system runs a particular version with the processing option values saved for that version.

At runtime, depending on how you set up the application, one of the following events occurs:

Processing option template is created through Processing Option Design Aid. When working with processing option design aid (PODA), all processing option template information is stored in Processing Option Text (POTEXT) Table Access Management (TAM) specifications until you check it in. When you check in the processing option template, it is moved from POTEXT TAM to the F98306 table. Data values for processing options are stored in the F983051 table. For batch versions, the Versions List table has an identifier that points to specifications for overrides (report overrides, data sequencing, data selection, or override location).

Each version of an application can be associated with a list of processing option values.

---

**Defining a Processing Options Data Structure (Template)**

You can create a processing options data structure (template) that lists the values for data items that are passed to the application at runtime. Any changes that you make to the template reside on the workstation until you check in the template. This ensures that current users of the existing template are not immediately affected by the changes. After you check in the changes, the next Just-In-Time-Install (JITI) replicates the changes to the other users.

**Prerequisite**

Create a processing options data structure.


**PeopleSoft EnterpriseOne Processing Option Naming Standards**

You should follow PeopleSoft EnterpriseOne naming standards whenever possible unless you have a strong business case for doing otherwise. Following the naming standards ensures a consistent approach to programming.
**Processing Option Data Structure**

The name of a data structure can be a maximum of 10 characters-only 9 if you begin the name with a T and is formatted as `Txxxxxyyyy`:

Where:

- **T** = Processing option data structure
- **xxxxxyyyy** = The program number for the application or report

For example, the processing option data structure name for the P0101 application is T0101.

**Tab Title**

Use the following guidelines when you define a tab title for a processing option:

- Avoid abbreviations.
- For future processing options, indicate that they are currently unavailable by entering the word `FUTURE`. If the entire tab is unavailable, enter `FUTURE` behind the extended description for the tab. If a single processing option is unavailable, place `FUTURE` behind the data item description.
- Ensure that each tab exists only one time and that it is not divided into multiple tabs. For example, use `Process` instead of `Process 1, Process 2`.
- Include the application name, such as P4310, in the text when referencing versions that are to be used. The Version tab should always begin with the comment block Enter the version to be used for each program. If left blank, ZJDE0001 will be used.
- Use application-specific tabs sparingly and only when no other categories are appropriate. To allow for increased length of text when the text is translated, the name of an application-specific tab should be no longer than 10 characters in English.
- Use one of the eight standard tab titles. Along with the extended description and processing options for each, they are as follows:
  - **Display**: Options that determine whether specific fields appear or which format of a form appears on entry.
  - **Defaults**: Options that assign default values to specific fields.
  - **Edits**: Options that indicate whether the system performs data validation for specific fields.
  - **Process**: Options that control the process flow of the application.
  - **Currency**: Options that are specific to currency.
  - **Categories**: Options that assign default category codes.
  - **Print**: Options that control the output of a report.
  - **Versions**: Options that specify which versions the system runs of applications that are called from this application.

**Comment**

When you enter a comment for a processing option, use the following guidelines:

**Note.** When several processing options are grouped together, you can select to number the processing options or the comments. Choose whatever works best for the situation.
Using Processing Options

Chapter 5

• Number every option on a tab. Use sequential numbering, starting at 1, for each tab.
• Use nouns, such as Customer Master, to describe the processing option. The action required is defined in the glossary for that processing option.
• Add the word "Required" to the end of the processing option if a processing option is required.
• Use a comment block when multiple processing options refer to the same topic. The comment block is a title for the logical group of processing options.

Data Item

When choosing a data item for a processing option, use the following guidelines:
• When necessary, change the name of the data item to be descriptive.
• When renaming the data item element, the field element should comply with the naming standards for event rule variables, with the alias appended, such as szCategoryCode3_CT03.
• Use a relevant data item when the data dictionary glossary applies. The user can display the glossary from the processing options. Do not use generic work fields, such as EV01.

Language Considerations for Processing Options

You can change a processing option template to incorporate language features.

When you add a new processing option template for an application that is language-enabled, complete the following tasks:
1. Create the application.
2. Create the processing option template for the base language.
3. Add the language text.

Attaching a Processing Options Template

You must attach a processing options template (data structure) to an application to enable processing options at runtime. A processing options template has the following characteristics:
• It exists as a separate object.
• It can be attached to multiple applications.

When you attach a processing options template, if any of the processing options are designed to process on a certain event, you must attach event rule logic to enable those processing options.

Working with Processing Options

This section discusses how to:
• Define a processing options data structure (template).
• Change a template for text translation.
• Attach a processing options template.

### Forms Used to Work with Processing Options

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object Management Workbench</td>
<td>W98220A</td>
<td>Type OMW in the Fast Path field of Solution Explorer.</td>
<td>View and select objects in projects.</td>
</tr>
<tr>
<td>Work With PO Text Translations</td>
<td>W98306A</td>
<td>System Administration Tools (GH9011), Processing Options Text Translation.</td>
<td>Change a template for text translation.</td>
</tr>
</tbody>
</table>

### Defining a Processing Options Data Structure (Template)

Access the Object Management Workbench form.

To define a processing options data structure (template):

1. Check out the processing options data structure with which you want to work.
2. Ensure that the data structure is highlighted, and then click the Design button in the center column.
3. On Processing Option Design, click the Design Tools tab, and then click Start the Processing Option Design Aid.
   
   The Processing Options Design tool launches. The area on the left of the form displays how the processing option will look to the user.
4. Locate the data items that you need for the processing options with the Data Dictionary Browser.
5. Use one of the following methods to select the data items that you want to add to the processing options:
   - Double-click the item in the Data Dictionary Browser. The item appears in the left side of the form under the tab.
   - Drag the item from the Data Dictionary Browser to the position where you want it in the structure members.
6. Click an item to edit it.
   - You can use the hatching around the control to reposition it.
   - You can select text, and then delete or overwrite it.
   
   Processing Options Design automatically adjusts the size and position of data items to fit the width of the tab.
7. Click the text button (A) to add comments.
8. Choose an object in the area on the left side of the form, and select Properties from the View menu.
   
   If you are on a data item, you can view its properties and change the item name if necessary. The item name should be unique.
   
   You can click the Help Override Data Item tab to add an alternate data dictionary name from which to get the help.
9. Right-click the processing option, and then select Properties from the menu.
10. On PSFT DataItem Properties, click the Help Override Data Item tab, and then complete the Data Item Help Override Name field.
Note. When you name Help Override Data Items, you should use the naming guidelines as defined in the Development Guidelines for Application Design.

11. Click OK.

12. To view tab properties, click the tab and select Properties from the View menu.
   You can also right-click a tab and select Current Tab Properties from the menu that appears.
   If you are on a tab item, you can enter a short and long name for the tab.
   Use the Help File Name field to add the name of the help file for the tab.

13. To add a new tab, select New Tab from the File menu.
   You can also right-click an existing tab and select New Tab from the menu that appears.

Changing a Template for Text Translation

Access the Work With PO Text Translations form.

To change a template for text translation:
1. Complete the following fields and click Find:
   • Template Name
   • To Language
   Work with PO Text Translations displays processing option text for the processing option template and language that you specify.
2. Choose a row with the text type that you want to change and click Select.
   Text types include tabs, items, and comments.
3. On PO Text Translation, enter the new text.

Attaching a Processing Options Template

Access the Form Design Aid.

To attach a processing options template:

1. On Form Design Aid, from the file menu, select Application Properties.
2. On the Application tab, click on the .. button under the Processing Options Template.
3. On Select Processing Option Template, select the processing option template that you want to use and click OK.

Important! If you disconnect that template from the application or connect a different template to the application, the application might not run properly.

To change the processing option template, first remove all existing versions of the application. Then, examine all event rules within the application to ensure that references to the old processing option items are removed. Then attach the new processing option template.
CHAPTER 6

Transaction Processing

This chapter provides an overview of transaction processing and discusses how to work with transaction processing.

Understanding Transaction Processing

A transaction is a logical unit of work (comprised of one or more SQL statements) performed on the database to complete a common task and maintain data consistency. Transaction statements are closely related and perform interdependent actions. Each statement performs part of the task, but all of them are required for the complete task.

Transaction processing ensures that related data is added to or deleted from the database simultaneously, thus preserving data integrity in your application. In transaction processing, data is not written to the database until a commit command is issued. When this happens, data is permanently written to the database.

For example, if a transaction comprises database operations to update two database tables, either all updates are made to both tables, or no updates are made to either table. This condition guarantees that the data remains in a consistent state and the integrity of the data is maintained.

You see a consistent view of the database during a transaction. You do not see changes from other users during a transaction.

Transaction processing ensures that transaction are:

• Atomic
  Either all database changes for an entire transaction are completed or none of the changes are completed.

• Consistent
  Database changes transform from one consistent database state to another.

• Isolated
  Transaction from concurrent applications do not interfere with each other. The updates from a transaction are not visible to other transactions that execute concurrently until the transaction commits.

• Durable
  Complete database operations are permanently written to the database.

Commits and Rollbacks

The scope of a transaction is defined by the beginning and end of the transaction. The end of a transaction occurs when the transaction is committed or rolled back. If a transaction is started but not committed or rolled back, the system will roll back the transaction when user exists the system.
Transaction processing uses commits to control database operations. Commits are commands to the database. EnterpriseOne Transactions can be automatically or manually committed. An EnterpriseOne auto commit transaction writes database changes permanently immediately when the changes occur. An EnterpriseOne manual commit transaction will buffer database changes when they occur, and only write database changes permanently when the transaction is committed.

**Commit**

A commit is an explicit command to the database to permanently store the results of operations performed by a statement. This event successfully ends a transaction.

**Rollback**

A rollback is an explicit command to the database to cancel the results of operations performed by a statement. This event indicates that a transaction ended unsuccessfully.

Any failure to insert, update, or delete within a transaction boundary causes all record activity within that transaction to roll back. If no failures have occurred at the end of the transaction, a commit is done, and the records become available to other processes.

In the case of a catastrophic failure (such as due to network problems), the Database Management System (DBMS) performs an automatic rollback. Likewise, if the user clicks Cancel on a form, a rollback command can be issued through a system function.

**Transaction Processing**

A PeopleSoft EnterpriseOne software transaction is a logical unit of work (comprised of one or more SQL statements) performed on any number of databases. A single-statement transaction consists of one statement; a multiple-statement transaction consists of more than one statement.

You can construct a transaction within a PeopleSoft EnterpriseOne application to group multiple database operations. The application can then request the DBMS to buffer the database operations until the application executes a specific command to perform the updates requested within the transaction. Database operations that are not part of a transaction update the database immediately.

If an application has transaction processing turned on, you cannot see the updated records until an update has been committed. Only processes within that transaction can access records in the transaction until the transaction is complete.

Transaction processing is supported to both interactive applications and batch applications (also called reports). Using Form Design Aid, you can enable transactions for EnterpriseOne forms. You can also design the database operations that are included in a transaction. Using Report Design Aid, you can enable transactions and design transaction operations for EnterpriseOne batch applications. Not all EnterpriseOne applications enable transaction processing. Decide carefully whether transaction processing should be enabled.

If transaction processing is turned on for database operations for tables that reside in DB2, then those tables must be journaled. Journaled can decrease performance because of the additional processing required. Contact your DB2 administrator, if you have problems with the process.

General messages and errors for transaction processing are written in jde.log, jdedebug.log or jas logs.

**Data Interdependence**

Data interdependence refers to the situation where data in multiple tables are dependent on each other. For example, a voucher has records in both the F0411 and the F0911 tables. Because data interdependence exists between these two tables, the transaction is incomplete when data is written in one table but not the other.
**Transaction Boundaries**

A transaction boundary encompasses all of the database operations that comprise a transaction. In interactive applications, a transaction boundary might include only the database operations on a single form. When a transaction includes data operations from another form, the transaction boundary must be extended to include that form.

**Interactive Application Transaction Processing Scenarios**

The typical flow for a transaction is:

1. An application starts and calls the runtime engine.
2. The runtime engine initializes the transaction.
3. The runtime engine opens a view.
4. The runtime engine performs database operations.
5. The runtime engine commits database operations.

To include two connected forms in the same transaction boundary, you must activate transaction processing for the parent form and designate *Include in parent* on interconnect to the second form. You do not need to activate transaction processing for the second form because your choice on the interconnect form overrides your choice on the called form.

This table outlines the relationship between two forms and the transaction boundaries that exist in each scenario. Transactions can be started in one form and extended to more forms through form interconnects and business function calls. In the example below, the OK button on Form 1 invokes Form 2. You can change the transaction boundaries by specifying TP On or TP Off. The table explains what happens when you define your transaction boundary in various ways.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Forms</th>
<th>TP On</th>
<th>TP Off</th>
<th>“Include in Parent” flag On for Form Interconnect, BSFN,, Table I/O</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Form 1 Form 2</td>
<td>X</td>
<td>X</td>
<td></td>
<td>All forms use Auto Commit.</td>
</tr>
<tr>
<td>B</td>
<td>Form 1 Form 2</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>Because neither form uses Manual Commit, the Include in Parent flag on Form Interconnect Properties is ignored. All forms use Auto Commit</td>
</tr>
<tr>
<td>C</td>
<td>Form 1 Form 2</td>
<td>X</td>
<td>O</td>
<td>X</td>
<td>Form 1 (parent) uses Manual Commit mode, and Form 2 (child) uses Auto Commit. Because the Include in Parent flag is Off, the transaction boundary does not extend to include Form 2 (child).</td>
</tr>
</tbody>
</table>
### Table: Transaction Processing Scenarios

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Forms</th>
<th>TP On</th>
<th>TP Off</th>
<th>“Include in Parent” flag On for Form Interconnect, BSFN., Table I/O</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>Form 1 Form 2</td>
<td>X O</td>
<td>X X</td>
<td>X</td>
<td>Even though the transaction processing flag is Off for Form 2 (child), the Include in Parent flag is On. The transaction boundary extends to include Form 2 (child)</td>
</tr>
<tr>
<td>E</td>
<td>Form 1 Form 2</td>
<td>O X</td>
<td>O X</td>
<td></td>
<td>Because the Include in Parent flag is Off, Form 1 (parent) and Form 2 (child) operate as independent entities. Form 1 operates in Auto Commit mode and Form 2 operates in Manual Commit mode.</td>
</tr>
<tr>
<td>F</td>
<td>Form 1 Form 2</td>
<td>O X</td>
<td>X O</td>
<td>X</td>
<td>An atypical case. Because transaction processing is Off on Form 1 (parent), the transaction boundary does not extend to the child, even though the Include in Parent flag is On for Form 2 (child) Form 2 (child) is in Manual Commit mode and the interconnect flag is ignored.</td>
</tr>
<tr>
<td>G</td>
<td>Form 1 Form 2</td>
<td>X X</td>
<td></td>
<td></td>
<td>Transaction processing is On for both forms. Because in Include in Parent flag is Off, each form is a transaction boundary and a commit is issued for each.</td>
</tr>
<tr>
<td>H</td>
<td>Form 1 Form 2</td>
<td>X X</td>
<td></td>
<td>X</td>
<td>Transaction processing is On for both forms. However, because the Include in Parent flag is On, one transaction will incorporate both forms. The transaction boundary encompasses both forms. Form 2 is a child of Form 1.</td>
</tr>
</tbody>
</table>
Transaction Processing and Business Functions

An application or batch process establishes the primary transaction boundary. If an application calls a business function in Event Rules, the database operations in the business function are grouped within the boundaries of their parent application.

Master business functions should not define their own boundaries.

If your application calls several business functions, and you need to include the business functions in the transaction boundary, you must enable transaction processing for the application. Should a failure occur and you need to roll back database operations for the business function, you must designate Include in Transaction on the business function call.

Note. When you use business functions within a transaction, you must be careful not to cause a deadlock. If two functions modify the same table, you might cause a deadlock if you include one function in the transaction but not the other. On the other hand, if a business function that selects records for information also updates or inserts data in other tables, you might want to split the business function.

Transaction Processing in Remote Business Functions

In a transaction-enabled application, if a server business function has modified a record, and a client business function outside the transaction attempts to access the record, the client function is locked out until the server business function has committed the data. Until the data is committed, the client application cannot access database changes performed by server-side business functions. If a server business function fails to commit or a user cancels a transaction on a server business function, the transaction for the business function rolls back.

Transaction Processing System Functions

Several transaction processing system functions are available. You might need to use these system functions for transaction processing.

For example, assume a scenario with two forms, Form A and Form B, with transaction processing enabled for Form A. Furthermore, assume that Form A calls Form B with the Include in Parent option on the Post OK Button is Clicked event. Because Form B inherits the transaction boundaries for Form A, if a user cancels an event on Form B, this occurs:

- The entries for Form B are not written.
- Control is returned to Form A.
- The entries for Form A are written and committed.

In this scenario, you can prevent commitment of the entries for Form A by using the Rollback Transaction system function.

You can use the following system functions to define transaction boundaries in a batch process:

- Begin Transaction to define where the transaction begins.
- Commit Transaction to commits a transaction.
- Rollback Transaction to rollback a transaction.

Transaction Processing Availability

For interactive applications, transaction processing is available for these form types:

- Fix/Inspect
Transaction processing is only available during OK processing for the following events:

- OK Button Clicked
- OK Post Button Clicked
- Add Record to DB – Before
- Add Record to DB – After
- Update Record to DB – Before
- Update Record to DB – After
- Add Grid Rec to DB – Before
- Add Grid Rec to DB – After
- All Grid Recs Added to DB
- Update Grid Rec to DB – Before
- Update Grid Rec to DB – After
- All Grid Recs Updated to DB
- Delete Grid Rec from DB – Before
- Delete Grid Rec from DB – After
- All Grid Recs Deleted from DB

Actions that occur outside of these events are not within the transaction boundary.

**Note.** Transaction processing is also available for reports and batch applications. You can use the transaction processing system functions to define transaction boundary. You can also extend transaction boundaries through business function calls and table I/O calls.

---

**Working with Transaction Processing**

This section discusses how to:

- Define transaction processing for a form.
- Extend a transaction boundary
- Define transaction processing for a report.
- Set the jde.ini for Lock Manager.
Forms Used to Work with Transaction Processing in Interactive Applications

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Design Aid</td>
<td>NA</td>
<td>On Solution Explorer, type OMW in the Fast Path field. On Object Management Workbench, select an interactive application and click the Design Tools button. On the Interactive Applications Design form, select the Design Tools tab, and then click Start Form Design Aid button.</td>
<td>Create and modify interactive applications.</td>
</tr>
</tbody>
</table>

Defining Transaction Processing for a Form

To define transaction processing for a form, you must specify the Transaction option on Form Properties in Form Design. This requirement means that all data for the form is committed to the database at the same time.

If a transaction includes a single form, then this is the only action that is required because the form itself is the transaction boundary. However, if the transaction included data from another form, then you must extend the boundary to the applicable form through a form interconnection.

Note. You can also extend transaction boundaries using business functions or table I/O.

To define transaction processing for a form:

Access Form Design.

1. Double click the form for which you want to access Form Properties.
2. Click the Transaction Properties style option.

Extending a Transaction Boundary

You can extend the transaction boundary from one form to another form by setting up a parent/child relationship between the forms. To extend the boundary enable the Transaction Processing flag through a from interconnection in Event Rules Design.

In Form Design, define form properties so that each form within the transaction boundary includes transaction processing.

Extending a Transaction Boundary between Forms

If a parent form uses manual commit, the form to which you connect it must also use manual commit.

Access Form Design Aid.

To extend the transaction boundary between forms:

1. Select the parent form with which you are working.
2. From the Form menu, select Menu, Toolbar Exits.
3. Choose the OK row and click the Event Rules button.
4. From Event Rules Design, select the Button Clicked event, and click the Form Interconnect button.
5. On Work with Applications, select the application that you want to use.
6. On Work with Forms, select that form that you want to include in the transaction boundary.
7. On Work with Versions, select the version of the application that you want to use.
8. On Form Interconnect, click the Include in Transaction Transaction Processing option, and click OK.

**Extending a Transaction Boundary by Using Business Functions**

You can include a business function in a transaction boundary. If the parent form uses automatic commit, the business function to which you extend the transaction boundary also uses automatic commit. Any business function that is not marked as Include in Transaction uses auto-commit. Business functions that process asynchronously can also be included in a transaction.

Access the Form Design Aid.

To extend a transaction boundary by using business functions:

1. Select the parent form with which you are working.
2. From the Form menu, select Menu, Toolbar Exits.
3. Select the OK row and click the Event Rules button.
4. From Event Rules Design, select the Button Clicked event, and click the Business Functions button.
5. From Business Function Search, select the business function that you want to include in the transaction boundary.

Business Function marked for both Asynchronous and Include in Transaction are included in the Transaction Boundary.

**Extending a Transaction Boundary by Using Table I/O**

Transaction processing is available only for the Open Table operation in Table I/O. The opening of a table determines whether interaction with the table will be manual commit (part of a transaction) or automatic commit. Any Open Table operation not marked as Include in Transaction uses automatic commit.

Access the Form Design Aid.

To extend a transaction boundary by using table I/O:

1. Select the parent form with which you are working.
2. From the Form menu, select Menu, Toolbar Exits.
3. Select the OK row and click the Event Rules button.
4. From Event Rules Design, select the Button Clicked event, and click the Table I/O button.
5. On Insert Table I/O Operation, select the Open option under Advanced Operations, and then click Next.
6. On Data Source, click Advanced Options.
7. On Advanced Options, select the Include in Transaction option, and then click OK.
8. On Data Source, click Finish.

The Open operation appears in your event rules.
Defining Transaction Processing for a Report

In addition to interactive transaction processing, PeopleSoft EnterpriseOne software also provides transaction processing for reports and batch processes. To enable transaction processing for a batch process, click the Advanced tab for report properties and select Transaction Processing. Then use the Transaction Processing system functions to define the beginning and ending boundaries of the transactions. You can also extend your transaction boundaries to include business functions and table I/O.

Setting the jde.ini for Lock Manager

You must modify the enterprise server and workstation jde.ini files to enable transaction processing. For each PeopleSoft EnterpriseOne workstation, you must enable transaction processing by changing setting in the workstation jde.ini file in the [LOCK MANAGER] section. You should make these changes in the deployment server to the resident jde.ini file that is delivered to workstations through package deployment, and then deploy a package with the changed jde.ini file.

These tasks describe how to enter the settings for [LOCK MANAGER]

Entering [LOCK MANAGER] Settings for the Server

To enter [LOCK MANAGER] settings for the server:
1. Access the jde.ini file on the enterprise server.
2. Using an ASCII editor, view the jde.ini file to ensure the accuracy of the settings.

```
[LOCK MANAGER]
Server=server name
AvailableService=available server service
RequestedService=client service request
```

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server</td>
<td>This setting specifies the name of the lock manager server to be used to process records. For example, a server might be intelInta. If the client is used as a server, such as in cases where batch applications are running on the workstation, this setting must match the same entry in the [LOCK MANAGER] section of the jde.ini file on the workstation.</td>
</tr>
<tr>
<td>AvailableService</td>
<td>This setting indicates the available service of the server. Values are:</td>
</tr>
<tr>
<td></td>
<td>• TS: Time stamp service is available</td>
</tr>
<tr>
<td></td>
<td>• NONE: No service is available.</td>
</tr>
<tr>
<td></td>
<td>This setting applies only to servers.</td>
</tr>
<tr>
<td>RequestedService</td>
<td>This setting indicates the type of service that the client requests from the server. Values are:</td>
</tr>
<tr>
<td></td>
<td>• TS: Time stamp service is requested</td>
</tr>
<tr>
<td></td>
<td>• NONE: No service is requested.</td>
</tr>
</tbody>
</table>
Note. Enable transaction processing on the server before you enable it on the workstation. If you try to set up the workstation jde.ini file before you set up the server jde.ini, you could be requesting a service on the server that is not yet available, which generates an error.

**Entering [LOCK MANAGER] Settings for the Workstation**

To enter [LOCK MANAGER] settings for the workstation:

1. Access the jde.ini file on the workstation.
2. Using an ASCII editor, view the jde.ini file to ensure the accuracy of the settings.

```
[LOCK MANAGER]
Server=server name
RequestedService=client service request
```

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server</td>
<td>This setting specifies the name of the lock manager server to be used to process records. For example, a server might be <code>intelnta</code>. If the client is used as a server, such as in cases where batch applications are running on the workstation, this setting must match the same entry in the [LOCK MANAGER] section of the jde.ini file on the workstation.</td>
</tr>
<tr>
<td>RequestedService</td>
<td>This setting indicates the type of service that the client requests from the server. Values are:</td>
</tr>
<tr>
<td></td>
<td>• TS: Time stamp service is requested</td>
</tr>
<tr>
<td></td>
<td>• NONE: No service is requested</td>
</tr>
</tbody>
</table>
This chapter provides overviews of record locking, optimistic locking, and pessimistic locking.

Record Locking

PeopleSoft EnterpriseOne does not implement any record-locking techniques. It relies on the native locking strategy of the vendor database management system.

In specific situations, the vendor database does not automatically lock as needed. In these situations, you can instruct PeopleSoft EnterpriseOne to control record locking. For example, you can mandate record locking on the Next Numbers table to ensure the integrity of the Next Numbers feature.

You can lock PeopleSoft EnterpriseOne records using one of the following methods:

- **Optimistic locking**
  
  Use optimistic locking (sometimes referred to as record change detection) to prevent a user from updating a record if it has changed between the time the user inquired on the record and the time user updates the record.

- **Pessimistic locking**

  Use pessimistic locking to prevent attempts to update the same record at the same time by different applications or users. The record is locked before it is updated.

Optimistic Locking

You can set optimistic locking in the workstation jde.ini file. This type of database locking prevents a user from updating a record that changed since the user has inquired about it. If the record has changed, the user must select the record again and then make the change. This feature is available for business functions, table I/O, and Named Event Rules.

For example, assume that two users are working in the Address Book application. The following table illustrates the optimistic locking process:

<table>
<thead>
<tr>
<th>Time</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00</td>
<td>User A selects Address Book record 1001 to inspect it.</td>
</tr>
</tbody>
</table>
| 10:05 | User B selects Address Book record 1001 to inspect it.  
       | Both users now have Address Book record 1001 open.  |
When the system detects that a record change has occurred, it displays a message indicating that the record has been changed since it was retrieved.

## Pessimistic Locking

Pessimistic locking is sometimes referred to as record locking. You can use pessimistic locking to prevent multiple users or applications from updating the same record at the same time. For example, suppose a user enters a transaction that uses Next Numbers. When the user clicks OK, the Next Numbers feature selects the appropriate Next Numbers record, verifies that this number is not already in the transaction file, and then updates the Next Numbers record by incrementing the number. If another process tries to access the same Next Numbers record before the first process has successfully updated the record, the Next Numbers function waits until the record is unlocked and then completes the second process.

Pessimistic locking in PeopleSoft EnterpriseOne is implemented by calling published JDEBase APIs. When you use pessimistic locking, you should consider the time required to select and update a record because the record is locked until the update is complete. Transaction processing uses a special set of locking APIs. A locked record might or might not be part of a transaction. Record locking APIs are independent of the transaction and its boundaries. They always lock, regardless of whether you are in manual or auto commit mode.

Records that are updated using pessimistic locking APIs (such as JDB_FetchForUpdate or JDB_UpdateCurrent) within a transaction boundary are locked from the time the record is selected for update until the commit or rollback occurs. Records within the transaction boundary that are updated without using pessimistic locking APIs are locked from the time of the update until the commit or rollback occurs. This is also true if you use a business function to define and activate transaction processing.

### Using Pessimistic Locking Within a Transaction Boundary

You might need to use pessimistic locking in conjunction with transaction processing. For example, if you want the system to lock records between the read operation and the update, you must use pessimistic locking.

### Business Functions and Pessimistic Locking

You might want to use pessimistic locking in a business function if the business function updates a table. The table being updated should have a high potential for record contention with another user or job. Remember that you should lock records for as short a time as possible. Ensure that the select or fetch for an update occurs as closely to the update as possible.
Adding Tips of the Day

This chapter provides an overview of Tips of the Day and discusses how to work with Tips of the Day.

Understanding Tips of the Day

Many PeopleSoft EnterpriseOne applications provide tips of the day, which are sets of short informational text that appear each time you launch an application or accesses a form. You can change these tip sets or create your own. Tips of the day appear sequentially, so you can browse through the tips. When you close the tip form, the system records where in the tip sequence you are and displays the next tip when you launch the object again.

Prerequisite

Create a data dictionary item with glossary text for each tip of the day.

Working with Tips of the Day

In PeopleSoft EnterpriseOne, tips of the day are the glossary texts of data dictionary items. You create one data dictionary item for each tip. Since you can translate data dictionary glossaries, tips of the day can appear in different languages.

You can associate tips with an application, a form, or an application version. The tips appear in the order that you specify, and you can override a user’s option to clear the tip of the day feature for the tip set.

After you have associated tips with an object, you can rearrange the tip order, add new tips, or delete existing ones from the tip set.

Forms Used to Work with Tips of the Day

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work With Tips of the Day</td>
<td>W91500B</td>
<td>System Administration Tools (GH9011), Tip of the Day</td>
<td>View and select a tip of the day.</td>
</tr>
<tr>
<td>Tips of the Day Revisions</td>
<td>W91500C</td>
<td>Work With Tips of the Day, click Add</td>
<td>Add a tip of the day to an object.</td>
</tr>
</tbody>
</table>
## Adding Tips of the Day to an Object

You can add tips to an application, form, or application version that does not already have tips associated with it. To add tips to an existing tip set, double-click one of the existing tips on the Work With Tips of the Day form to access the Tips of the Day Revisions form.


<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft EnterpriseOne Tool</td>
<td>Enter the system application to which you are attaching the tip set.</td>
</tr>
<tr>
<td>Form Name</td>
<td>Enter the unique name that identifies a form.</td>
</tr>
<tr>
<td>Version</td>
<td>Select a version of the application or report. You use versions to group and save a set of processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must select a version.</td>
</tr>
<tr>
<td>Force tip to all users</td>
<td>Select an option that ends the user’s ability to disable Tip of the Day. The option applies to the current tip set only.</td>
</tr>
<tr>
<td>Tip Sequence</td>
<td>Select the order in which the tips in the tip set appear.</td>
</tr>
<tr>
<td>Data Item</td>
<td>Select the alias of the data dictionary item.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>absence entitlement</td>
<td>This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.</td>
</tr>
<tr>
<td>absence take</td>
<td>This element defines the conditions that must be met before a payee is entitled to take paid time off.</td>
</tr>
<tr>
<td>academic career</td>
<td>In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).</td>
</tr>
<tr>
<td>academic institution</td>
<td>In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.</td>
</tr>
<tr>
<td>academic organization</td>
<td>In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.</td>
</tr>
<tr>
<td>academic plan</td>
<td>In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.</td>
</tr>
<tr>
<td>academic program</td>
<td>In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.</td>
</tr>
<tr>
<td>accounting class</td>
<td>In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.</td>
</tr>
<tr>
<td>accounting date</td>
<td>The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.</td>
</tr>
<tr>
<td>accounting split</td>
<td>The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.</td>
</tr>
<tr>
<td>accumulator</td>
<td>You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.</td>
</tr>
<tr>
<td>action reason</td>
<td>The reason an employee’s job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,</td>
</tr>
</tbody>
</table>
PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

**action template**
In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

**activity**
In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

**address usage**
In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

**adjustment calendar**
In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student’s account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

**administrative function**
In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person’s checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

**admit type**
In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

**agreement**
In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

**allocation rule**
In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

**alternate account**
A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

**analysis database**
In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on
courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

**AR specialist**
Abbreviation for *receivables specialist*. In PeopleSoft Receivables, an individual who tracks and resolves deductions and disputed items.

**arbitration plan**
In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

**assessment rule**
In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer’s account or of individual items to determine whether to generate a follow-up action.

**asset class**
An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

**attribute/value pair**
In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

**audience**
In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of ’65 and Undergraduate Arts & Sciences.

**authentication server**
A server that is set up to verify users of the system.

**base time period**
In PeopleSoft Business Planning, the lowest level time period in a calendar.

**benchmark job**
In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

**billing career**
In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

**bio bit or bio brief**
In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

**book**
In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

**branch**
A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

**budgetary account only**
An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called “system-maintained account.”

**budget check**
In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

**budget control**
In commitment control, budget control ensures that commitments and expenditures don’t exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document’s cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

**budget period**
The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event  In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business unit  A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer  In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus  In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

catalog item  In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map  In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner  In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization  Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category  In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel  In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField  A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing  You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit  The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey  One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook  In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code  In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
**class**

In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course*.

**Class ChartField**

A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification*.

**clearance**

In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

**clone**

In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

**cohort**

In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

**collection**

To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is a set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

**collection rule**

In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

**comm key**

See *communication key*.

**communication key**

In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

**compensation object**

In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure’s hierarchical representation.

**compensation structure**

In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

**condition**

In PeopleSoft Receivables, occurs when there is a change of status for a customer’s account, such as reaching a credit limit or exceeding a user-defined balance due.

**configuration parameter catalog**

Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

**configuration plan**

In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents
In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

content reference
Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context
In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table
Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile
A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row
A cost transaction and amount for a set of ChartFields.

course
In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also class.

course share set
In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning
In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner’s in-progress learning activities and programs.

data acquisition
In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements
Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset
A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user’s roles.

delivery method
In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides
default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type
In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree
In PeopleSoft Directory Interface, the representation of a directory’s hierarchical structure.

division
In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also population and cohort.

document sequencing
A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree
A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table
A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date
A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don’t delete values; you enter a new value with a current effective date.

EIM ledger
Abbreviation for Enterprise Incentive Management ledger. In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set
In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event
In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization
In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit
In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event

A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process

In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception

In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing

In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact

In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term

In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item

A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund

In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap

In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type

In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table

In PeopleSoft Enterprise Campus Solutions, a table or so-called donor pyramid describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit

Abbreviation for general ledger business unit. A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also business unit.

GL entry template

Abbreviation for general ledger entry template. In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled.
by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

**GL Interface process**
Abbreviation for *General Ledger Interface process*. In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

**group**
In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

**incentive object**
In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

**incentive rule**
In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

**incur**
In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

**initiative**
In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

**inquiry access**
In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access*.

**institution**
In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

**item**
In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

**item shuffle**
In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
joint communication

In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword

In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI

An abbreviation for key performance indicator. A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file


learner group

In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components

In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment

In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history

In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner’s completed learning activities and programs.

ledger mapping

You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as rates) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section

In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section

In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable

In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS

Abbreviation for learning management system. In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load

In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality

In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location

Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a 1—is the address you use most often and may be different from the main address.

logistical task

In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template

In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change

In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also 3C engine.

match group

In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server

Abbreviation for PeopleSoft MultiChannel Framework server: Comprises the universal queue server and the MCF log server. Both processes are started when MCF Servers is selected in an application server domain configuration.

merchandising activity

In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL

Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring

Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook

In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency

The ability to process transactions in a currency other than the business unit’s base currency.
national allowance  In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need  In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called need analysis.

node-oriented tree  A tree that is based on a detail structure, but the detail values are not used.

pagelet  Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant  In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object  Each participant object may be related to one or more compensation objects. See also compensation object.

partner  A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle  In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle  In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item  In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode  PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event  An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture  The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement  In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context  In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest  A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio
In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual’s name, address, telephone number, and other personal information.

plan
In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context
In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template
In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning
In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner’s planned learning activities and programs.

planning instance
In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population
In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also division and cohort.

portal registry
In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list
In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product’s lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule
In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition
In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key
In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number
In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student’s primary career and program. The system also uses the
number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

**primary name type**
In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

**process category**
In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

**process group**
In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

**process definition**
Process definitions define each run request.

**process instance**
A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

**process job**
You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

**process request**
A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

**process run control**
A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

**product category**
In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

**programs**
In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

**progress log**
In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

**project transaction**
In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

**promotion**
In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

**prospects**
In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

**publishing**
In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components
In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group
A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

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

record output VAT flag
Abbreviation for record output value-added tax flag. See record input VAT flag.

rename
The name of a record that is used to determine the associated field to match a value or set of values.

recognition
In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction’s budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for real-time event notification server in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator
In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user
A PeopleSoft Workflow user. A person’s role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context
In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query
You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match
In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address
In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section
In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event
In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy
In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production
In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact
In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator
In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
**session**

In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution’s financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

**session template**

In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

**setup relationship**

In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

**share driver expression**

In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

**single signon**

With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

**source key process**

In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

**source transaction**

In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

**speed key**

See communication key.

**SpeedChart**

A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

**SpeedType**

A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

**staging**

A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

**standard letter code**

In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

**statutory account**

Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
| **step** | In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run. |
| **storage level** | In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels. |
| **subcustomer qualifier** | A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles. |
| **Summary ChartField** | You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters). |
| **summary ledger** | An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting. |
| **summary time period** | In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total. |
| **summary tree** | A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the basis tree). A summary tree structure specifies the details on which the summary trees are to be built. |
| **syndicate** | To distribute a production version of the enterprise catalog to partners. |
| **system function** | In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger. |
| **TableSet** | A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same. |
| **TableSet sharing** | Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier. |
| **target currency** | The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes. |
| **tax authority** | In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact. |
| **template** | A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template. |
| **territory** | In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants. |
| **3C engine** | Abbreviation for *Communications, Checklists, and Comments engine*. In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists,
and comments. You define events and triggers to engage the engine, which runs
the mass change and processes the 3C records (for individuals or organizations)
immediately and automatically from within business processes.

3C group
Abbreviation for Communications, Checklists, and Comments group. In PeopleSoft
Enterprise Campus Solutions, a method of assigning or restricting access privileges. A
3C group enables you to group specific communication categories, checklist codes,
and comment categories. You can then assign the group inquiry-only access or update
access, as appropriate.

TimeSpan
A relative period, such as year-to-date or current period, that can be used in various
PeopleSoft General Ledger functions and reports when a rolling time frame, rather
than a specific date, is required. TimeSpans can also be used with flexible formulas in
PeopleSoft Projects.

trace usage
In PeopleSoft Manufacturing, enables the control of which components will be traced
during the manufacturing process. Serial- and lot-controlled components can be
traced. This is maintained in the Item Master record.

transaction allocation
In PeopleSoft Enterprise Incentive Management, the process of identifying the owner
of a transaction. When a raw transaction from a batch is allocated to a plan context,
the transaction is duplicated in the PeopleSoft Enterprise Incentive Management
transaction tables.

transaction state
In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive
rule to a transaction. Transaction states enable sections to process only transactions
that are at a specific stage in system processing. After being successfully processed,
transactions may be promoted to the next transaction state and “picked up” by a
different section for further processing.

Translate table
A system edit table that stores codes and translate values for the miscellaneous fields in
the database that do not warrant individual edit tables of their own.

tree
The graphical hierarchy in PeopleSoft systems that displays the relationship between
all accounting units (for example, corporate divisions, projects, reporting groups,
account numbers) and determines roll-up hierarchies.

tuition lock
In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation
process that enables you to specify a point in a term after which students are charged a
minimum (or locked) fee amount. Students are charged the locked fee amount even if
they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction
In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed
by a node or participant after the allocation process has completed, usually due to
missing or incomplete data. Unclaimed transactions may be manually assigned to the
appropriate node or participant by a compensation administrator.

universal navigation header
Every PeopleSoft portal includes the universal navigation header, intended to appear at
the top of every page as long as the user is signed on to the portal. In addition to
providing access to the standard navigation buttons (like Home, Favorites, and signoff)
the universal navigation header can also display a welcome message for each user.

update access
In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the
user to edit and update data.

See also inquiry access.

user interaction object
In PeopleSoft Sales Incentive Management, used to define the reporting components
and reports that a participant can access in his or her context. All Sales Incentive
Management user interface objects and reports are registered as user interaction
objects. User interaction objects can be linked to a compensation structure node
through a compensation relationship object (individually or as groups).
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<td>variable</td>
<td>In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.</td>
</tr>
<tr>
<td>VAT exception</td>
<td>Abbreviation for value-added tax exception. A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.</td>
</tr>
<tr>
<td>VAT exempt</td>
<td>Abbreviation for value-added tax exempt. Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.</td>
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<tr>
<td>VAT exoneration</td>
<td>Abbreviation for value-added tax exoneration. An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.</td>
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<tr>
<td>VAT suspension</td>
<td>Abbreviation for value-added tax suspension. An organization that has been granted a temporary exemption from paying VAT.</td>
</tr>
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<td>warehouse</td>
<td>A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.</td>
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<tr>
<td>work order</td>
<td>In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.</td>
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<tr>
<td>worker</td>
<td>A person who is part of the workforce; an employee or a contingent worker.</td>
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<td>workset</td>
<td>A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.</td>
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<tr>
<td>worksheet</td>
<td>A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.</td>
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<tr>
<td>worklist</td>
<td>The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.</td>
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<td>XML schema</td>
<td>An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.</td>
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<td>yield by operation</td>
<td>In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.</td>
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<td>zero-rated VAT</td>
<td>Abbreviation for zero-rated value-added tax. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.</td>
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