PeopleSoft®

# PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: PeopleSoft Process Modeler

**August 2005**

PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: PeopleSoft Process Modeler
SKU E1_TOOLS895TPM-B 0805

# Contents

# About This PeopleBook Preface

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.

**Note.** Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

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

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

## Ordering Printed Documentation

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

- Web
- Telephone
- Email

### Web

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

### Telephone

Contact MMA Partners at 877 588 2525.

### Email

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

### See Also

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

## Additional Resources

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

| Resource | Navigation |
|---|---|
| Application maintenance information | Updates + Fixes |
| Business process diagrams | Support, Documentation, Business Process Maps |
| Interactive Services Repository | Interactive Services Repository |
| Hardware and software requirements | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements |
| Installation guides | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes |
| Integration information | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications |
| Minimum technical requirements (MTRs) (EnterpriseOne only) | Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms |
| PeopleBook documentation updates | Support, Documentation, Documentation Updates |
| PeopleSoft support policy | Support, Support Policy |
| Prerelease notes | Support, Documentation, Documentation Updates, Category, Prerelease Notes |
| Product release roadmap | Support, Roadmaps + Schedules |
| Release notes | Support, Documentation, Documentation Updates, Category, Release Notes |

| Resource | Navigation |
|---|---|
| Release value proposition | Support, Documentation, Documentation Updates, Category, Release Value Proposition |
| Statement of direction | Support, Documentation, Documentation Updates, Category, Statement of Direction |
| Troubleshooting information | Support, Troubleshooting |
| Upgrade documentation | Support, Documentation, Upgrade Documentation and Scripts |

# Typographical Conventions and Visual Cues

This section discusses:

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

## Typographical Conventions

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

| Typographical Convention or Visual Cue | Description |
|---|---|
| **Bold** | Indicates PeopleCode function names, 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. |
| *Italics* | 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.<br><br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*. |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key. |
| `Monospace font` | Indicates a PeopleCode program or other code example. |

| Typographical Convention or Visual Cue | Description |
|---|---|
| “ ” (quotation marks) | Indicate chapter titles in cross-references and words that are used differently from their intended meanings. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( \| ). |
| [ ] (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.<br>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.

# Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

# Common Elements 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.

# PeopleSoft EnterpriseOne Process Modeler Preface

This preface discusses Object Management Workbench companion documentation.

## PeopleSoft EnterpriseOne Process Modeler Companion Documentation

Additional, essential information describing the setup and design of PeopleSoft EnterpriseOne Tools resides in companion documentation. The companion documentation consists of important topics that apply to Process Modeler as well as other PeopleSoft EnterpriseOne Tools. You should be familiar with the contents of these companion PeopleBooks:

- Foundation
- Workflow Tools

### See Also

*PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Foundation*, “Using PeopleSoft Web Applications and Reports”

*PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Workflow Tools*, “Getting Started with PeopleSoft EnterpriseOne Tools Workflow Tools”

# CHAPTER 1

# Getting Started with PeopleSoft EnterpriseOne Tools Process Modeler

This chapter discusses:

- Process Modeler overview
- Process Modeler implementation

## Process Modeler Overview

Process Modeler Client is a tool that enables you to create visual representations of the organization, processes, and workflows. PeopleSoft Process Modeler Client contains objects that represent the tasks and transitions that you can use in a model. By dragging the objects onto a grid, you can create a diagram of a process from beginning to end. At any point during the design, you can right-click an object or transition in the diagram to access the appropriate menu options.

## Process Modeler Implementation

This section provides an overview of the steps that are required to implement Development Tools: Tables and Business Views.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About These PeopleBooks* with information about where to find the most current version of each.

### Process Modeler Implementation Steps

This table lists the steps for the Process Modeler implementation.

| Step | Reference |
|---|---|
| 1. Install Web Client. | *PeopleSoft EnterpriseOne Tools 8.95 Web Client Installation Guide* |
| 2. Set up default project in Object Management Workbench. | *PeopleSoft EnterpriseOne Tools 8.95 System Administration PeopleBook – Object Management Workbench Configuration* |

| Step | Reference |
|---|---|
| 3. Configure Object Management Workbench transfer activity rules and allowed actions. | *PeopleSoft EnterpriseOne Tools 8.95 System Administration PeopleBook – Object Management Workbench Configuration* |
| 4. Set up default location and printers. | *PeopleSoft EnterpriseOne Tools 8.95 Development Tools: Report Printing Administration PeopleBook* |

# CHAPTER 2

# PeopleSoft Process Modeler Client

This chapter provides an overview of PeopleSoft Process Modeler Client, model types, business processes, and scenarios, and discusses how to:

- Set Up PeopleSoft Process Modeler Client to interact with the EnterpriseOne Web Client.
- View PeopleSoft business processes.
- Clone scenarios.
- Change included tasks and flows.

## Understanding PeopleSoft Process Modeler Client

PeopleSoft Process Modeler Client works with the EnterpriseOne, Enterprise, and World applications. For each application, you can view corresponding models from a repository you install. It is a tool that enables you to create visual representations of the organization, processes, and workflows. Each step, or task, in the model can contain more specific tasks that relate directly to that particular point in the process. For example, the model might contain the task Enter into Inventory. Within this task, you can list the steps that are necessary to enter an item into inventory.

PeopleSoft Process Modeler Client is fully interactive with EnterpriseOne. You can create and manage models that launch corresponding programs for each task of the model. This enables you to work directly in the program that the model represents. For example, if the model contains a Sales Order Entry task, you can link the task to the Sales Order Entry program (P4210) in EnterpriseOne so that it launches from PeopleSoft Process Modeler Client. You can complete the required tasks in the program, and then return to PeopleSoft Process Modeler Client to review the next task in the model.

## Understanding how PeopleSoft Process Modeler Client Interfaces with EnterpriseOne Menus

EnterpriseOne Menus is a convenient tool for accessing programs in EnterpriseOne. It provides menus from which you select the program that you want to launch. PeopleSoft Process Modeler Client and EnterpriseOne Menus are interactive.

PeopleSoft Process Modeler Client includes several hundred preconfigured models that contain tasks that link to EnterpriseOne. In a PeopleSoft Process Modeler Client model, any task that is linked to a EnterpriseOne program appears in the Task Master table (F9000), which is the EnterpriseOne task database table. Therefore, if you change the properties of one of these tasks using the Properties Context menu option in PeopleSoft Process Modeler Client, you do not need to update the PeopleSoft tables for the change to appear in the EnterpriseOne Menus (the EnterpriseOne interface) the next time that you retrieve the task information from the database. If you add a task to a model and want it to appear in a task view, you must assign the task a relationship (that is, a location in the task view). If the task view to which you assign the task is a role-based task view, you can assign one or more roles. Only those users with corresponding roles can see the task in that role-based task view. However, if you make a change to the PeopleSoft Process Modeler Client task name without using the Properties Context menu option, then the software does not automatically update the Task Master table with the change. To ensure that the PeopleSoft database is updated with the data in PeopleSoft Process Modeler Client, you can use the Synchronize Names features in EnterpriseOne Menus.

Included in the PeopleSoft Process Modeler Client are several hundred preconfigured process models. Each task that is linked to a PeopleSoft program appears in the End-User Tasks task view in the EnterpriseOne Menus. Therefore, if you change the properties of one of these tasks in the PeopleSoft Process Modeler Client, you change how the task functions in the Explorer. If you add a task to a process model and want it to appear in the End-User Tasks task view, you must assign the task a relationship (that is, a location in the task view) and one or more roles. Only those users with corresponding roles can see the new task.

# Setting Up PeopleSoft Process Modeler Client to Interact with the EnterpriseOne Web Client

PeopleSoft Process Modeler Client interacts with both the windows and web versions of EnterpriseOne. For PeopleSoft Process Modeler Client to interact with the web client, you must have EnterpriseOne windows client installed, along with PeopleSoft Process Modeler Client. Additionally, EnterpriseOne web client must be started.

To set up PeopleSoft Process Modeler Client to interact with the EnterpriseOne web client:

1. Open PeopleSoft Process Modeler Client.
2. From the Tools menu, click Preferences, and then click the PeopleSoft tab.
3. In the Server field, type the server on which the web client resides.
4. In the Port field, type the port the web client uses.
5. Close PeopleSoft Process Modeler Client and the EnterpriseOne windows client and restart it to refresh the configurations.

# Understanding Model Types that PeopleSoft Process Modeler Client Supports

You can use PeopleSoft Process Modeler Client to create these types of models.

### Organization Model

An organization model is a hierarchical structure used to define groups of people. These groups of people, who are often referred to as nonsystem actors, include organizations, markets, and roles. You typically use an organization model to define the vertical reporting structure of an organization, such as an organizational chart that illustrates which employees report to which managers in a department. An organization model represents an organization at the highest level, or root, in the hierarchy. More specific groups within the organization are positioned below it. The lower in the hierarchy that a group appears, the more detailed it is.

### Process Model

A process model represents an end-to-end business process in terms of its individual activities and the flow of work among the activities. Because the process crosses organizational boundaries, the process model depicts the organizations or roles that perform the activities and the communication between the activities.

### Workflow Process Models for EnterpriseOne

A workflow process model represents a workflow in which employees perform a series of tasks until a final outcome is reached. A workflow commonly involves several different groups of people, each playing a different role in the workflow process. For example, a workflow process might represent the steps taken to approve someone for a credit card. Some steps might involve these groups: phone representatives, group supervisors, and managers. After a phone representative verifies that caller's logistical information, she moves the request to her supervisor. While the request is with the supervisor, the phone representative can no longer access the request. If the supervisor approves the request and move it to her manager, neither she nor the phone representative can access the request.

Workflow models are not stored in the PeopleSoft Process Modeler Client repository. Instead, they are stored in the Process Task Associations table (F98830) in the EnterpriseOne database. Because workflow models are stored in a different repository, they do not appear in the Repository View or Model View panes in PeopleSoft Process Modeler Client. You can access a workflow model by navigating to the task with which it is associated.

See *PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Workflow Tools*, "Creating a Workflow Process," Working with Transitions and Transition Conditions.

## Understanding Business Processes

A business process model represents a business process in terms of its individual activities, and the flow of work among the activities. Because the process crosses organizational boundaries, the process model depicts the organizations or roles that perform the activities and the communication between the activities.

Business processes usually do not follow the same path each time that they are performed. To examine alternatives, you can create process scenarios that you use to compare different paths through a process. A scenario is all or a portion of a process model that defines a particular way in which the business executes the process.

PeopleSoft Process Modeler repositories provide hundreds of predefined business processes and scenarios that represent suggested solutions for specific business process needs. You can select from these scenarios, modify them, or create new ones.

# Understanding Scenarios

Scenarios are variations of a business process model. In the base model, all of the tasks are considered to be active. In a scenario, you can disable or add extra tasks. Active (recruited) tasks appear in color in the scenario, while disabled (not recruited) tasks might appear in gray or might be hidden, based on how the scenario is configured.

This activation applies only to the current business process. If you have multiple business process views available and you switch to a different view, you must activate the Scenario toolbar again to make it available in the view.

To select a scenario of the current business process, select it from the drop-down list on the Scenario toolbar. After you select a scenario, it becomes the default parent process in each subprocess that you define for it.

---

**Note.** To properly link a scenario of a subprocess to its parent scenario, both the parent and child scenarios must have the same name. For example, you might have a base process named Enter Work Order that includes a number of subprocesses, including one called Create Work Order Header. If you create a scenario of the parent called Enter Work Order v1, and then went to the Create Work Order Header subprocess and created a scenario of that subprocess, you must name that scenario Enter Work Order, as well.

---

PeopleSoft software provides a placeholder for a scenario and recommends that you create the own scenarios using existing base models as a reference. You can also use the cloning feature to create multiple scenarios. After cloning a scenario, you can modify the clone without affecting the base scenario. The most common reasons for modifying a scenario are as follows:

- To change the tasks or flow that are included in the scenario.
- To change the names of the tasks that apply to a specific scenario.
- To change the program version that is assigned to a task in a specific scenario.

  See Chapter 3, “Working with Modeler Tasks,” Understanding Modeler and EnterpriseOne Menus Tasks, page 9.

## Viewing PeopleSoft Business Processes

Access PeopleSoft Process Modeler Client and ensure that the PeopleSoft Business Process Models repository is open.

To view PeopleSoft business processes:

1. Expand the repository in the Repository View window, and then double-click one of the notebooks that appears underneath the repository.

   You might need to provide a user ID and password, depending on how the repository is configured.
2. Expand the Process Modeler folder in the Inventory Control pane.
3. Double-click the PeopleSoft Business Process Models object.

   The Business Process Model appears in the main window of the Modeler.
4. Access more discrete process models by completing one of these tasks:

   Right click object and then click Process Modeler (existing models)

   Click the down-arrow button on a task and click PeopleSoft Process Modeler.

---

**Note.** If you do not see any down arrow buttons, right click on the object, and click Process Modeler (existing models).

---

Double click a model located in the Model Inventory pane.

The system opens a new view each time you access a new file. Each view has its own tab at the bottom of the form. Click their tabs to alternate between views. To close a view, click a tab and then click the bottommost close button (the X) in the upper right corner of the form. Do not click the uppermost close button, or you will exit the PeopleSoft Process Modeler Client.

## Cloning a Scenario

Access PeopleSoft Process Modeler Client and open the scenario that you want to clone.

To clone a scenario:

1. Open the scenario that you want to clone.
2. Click Maintain on the Scenario toolbar.
3. On Scenario Maintenance, click the scenario you want to clone, and then click Clone.

   The system adds a new scenario with the same name as the one you are cloning, and places an asterisk (*) at the end of the name.
4. Ensure the new scenario is highlighted, and then click Modify.
5. On Scenario Detail, complete these fields:
   - Name
   - Desc
6. Select one of these options:
   - Hide non-members

     Select this option to prevent not recruited tasks from being displayed in the scenario.
   - Ghost non-members

     Select this option to display not recruited tasks in gray in the scenario.
7. Click OK.
8. On Scenario Maintenance, click OK.

## Changing Included Tasks and Flows

Access PeopleSoft Process Modeler Client.

To change included tasks and flow:

1. From the drop-down field located above the PeopleSoft Process Modeler Client work area, select the scenario you want to open.
2. Open the scenario you want to change.
3. Use the standard Modeler tools to add tasks and change the flow among the tasks.
4. To change the recruitment status of a task, click Recruitment on the Scenario toolbar.

   The Scenario Recruitment dialog box appears.

5. Click tasks to toggle their status between recruited and not recruited, and then click OK on Scenario Recruitment.

# CHAPTER 3

# Working with Modeler Tasks

This chapter provides overviews of tasks and repositories, and discusses how to:

- Work with tasks.
- Synchronize task names and statuses.
- Check models out of the repository.

## Understanding Modeler and EnterpriseOne Menus Tasks

You can add EnterpriseOne Menus task functionality to any PeopleSoft Process Modeler Client task. Additionally, you can define and modify EnterpriseOne scenarios for each Modeler task.

After creating a Modeler task, you then create an EnterpriseOne Menus task to associate with it. You create EnterpriseOne Menus tasks while you are in the PeopleSoft Process Modeler Client. Once the EnterpriseOne Menus task is associated with the Modeler task, you can interact with the Modeler task in many of the same ways you can with tasks in EnterpriseOne Menus task views. For example, you can prompt for values or versions, or execute the application of the task if it is a software task.

## Understanding Repository Information

The PeopleSoft Process Modeler Client repository contains all organization and process models. You can store models on the local repository or on a server-based repository. You can check out models from the server-based repository each time you edit them, and then check them back in when you are finished. While a model is checked out to you, other users will receive a notification when they try to check out the same model. You will also receive a notification about changes other users have made to the model. For example, you and another user have the same model checked out and you are both working on the same task. The other user checks in the model before you do. When you check in the model, PeopleSoft Process Modeler Client will notify you that changes were already made to the task and will ask you if you want to override them. However, suppose you and another user have the same model checked out but you are working on different tasks. The other user checks in the model before you. When you check in the model, PeopleSoft Process Modeler Client will retain the changes the first user made while adding the changes to the model as well.

The check in/check out functionality ensures that the changes you make are not overwritten by someone working on the same model by providing notifications to users trying to check out a model that is already checked out to someone else.

Workflow models are not stored in the PeopleSoft Process Modeler Client repository. Instead, they are stored in the Process Task Associations table (F98830) in the EnterpriseOne database. Because workflow models are stored in a different repository, they do not display in the Repository View or Model View panes in PeopleSoft Process Modeler Client. You can access a workflow model by double-clicking the task with which it is associated.

PeopleSoft Process Modeler Client enables you to retrieve models from any repository to which you have access.

# Working with EnterpriseOne Tasks

This section discusses how to:

- Access the Interoperability menu.
- Assign properties to a task.
- Modify task properties.
- Launch an associated EntepriseOne task.
- Link to an EnterpriseOne task.
- Execute a link.
- Set processing options for a task.
- Select a version of a task to execute.
- Override a Task in a Scenario

## Accessing the Interoperability Menu

All task association in the PeopleSoft Process Modeler Client is performed through the interoperability menu. To perform any of the tasks in this section, you must first complete these steps to display the interoperability menu.

To access the interoperability menu:

1. In PeopleSoft Process Modeler Client, open a process model or create a new one.
2. Right-click the Modeler task you want to work with, and then select PeopleSoft.

## Assigning Properties to a Task

You can associate an EnterpriseOne task with a Modeler task. Then, you can launch the EnterpriseOne task from the Modeler task by right-clicking the task and then choosing PeopleSoft, then Properties from the interoperability menu.

To assign properties to a task:

1. Right-click the Modeler task to which you want to assign properties.
2. Select PeopleSoft, and then select Properties.

   The system confirms that you want to create a task.
3. Click Yes.

4. On Task Revisions, create an EnterpriseOne task to associate with the Modeler task.

   ---
   **Note.** Keep in mind that the system does not automatically assign roles or task view relationships, so you must assign them yourself, as described in the referenced task.

   ---

5. Click OK.

## Modifying Task Properties

After you have associated an EnterpriseOne task with a Modeler task, you can change the properties of the task from the Modeler.

To modify task properties:

1. Right-click a Modeler task with the associated EnterpriseOne task that you want to modify.
2. Select PeopleSoft, and then select Properties.
3. On Task Revisions, change the properties that you want, and then click OK.

## Launching an Associated Task

After you have associated an EnterpriseOne task with a Modeler task, you can launch the action defined by the associated task from the Modeler.

To launch an associated task:

1. Right-click a Modeler task with the associated EnterpriseOne task that you want to launch.
2. Select PeopleSoft, and then select Run.

   The system launches the associated task.

## Linking to an EnterpriseOne Task

Just as you can with EnterpriseOne tasks, you can create a link from a Modeler task to an EnterpriseOne task.

To link to an EnterpriseOne task:

1. Right-click a Modeler task with the associated EnterpriseOne task to which you want to add a link.

   You can also create a link when you first create a new EnterpriseOne task.
2. Select PeopleSoft, and then select Properties.
3. On Task Revisions, from the Form menu, select Link To.
4. On the Link To form, click the Find Relationship button.
5. On the Find Relationship form, complete the Task View field, and then click Find:
   - Task View

     Click the visual assist to bring up the Task View Search & Select form.
   - Parent Task ID

     Enter the parent of the task you want to set as the link target. Click the visual assist to bring up the Task Search & Select form.

     The Find Relationship form lists all of the child tasks of the parent you searched on.

6. Select the task you want to set as the link target, and then click Select.

   The link target is the task that will appear in the second window when you invoke the link. The system uses the information you provided to complete the required fields in the Link To form.
7. Click OK.
8. On Task Relationship Revisions, click OK.

## Executing a Link

After you have created a link from a Modeler task to an EnterpriseOne task, you can execute the link.

To execute a link:

1. Right-click the Modeler task with the link that you want to execute.
2. Select PeopleSoft, and then select Run.

   The system switches to the EnterpriseOne Menus and displays the linked task in a second window.

## Setting Processing Options for a Task

After you have associated an EnterpriseOne task with a Modeler task, you can set its processing options, when applicable, from the Modeler.

To set processing options for a task:

1. Right-click the Modeler task with an associated EnterpriseOne task for which you want to set processing options.
2. Select PeopleSoft, and then select Prompt for Values.
3. On Processing Options, set the processing options values as desired, and then click OK.

## Choosing a Version of a Task to Execute

After you have associated an EnterpriseOne task with a Modeler task, you can select which version of its associated application to execute.

To select a version of a task to execute:

1. Right-click the Modeler task with an associated EnterpriseOne task that you want to select a version to execute.
2. Select PeopleSoft, and then select Prompt for Version.
3. On Work with Versions, select the version you want to execute, and then click Select.

## Overriding a Task in a Scenario

In some instances, you might want to maintain a task's place in a scenario but alter some aspect of it, such as its name or the version of the program that it opens. For example, you might have two offices that use identical processes to enter a new employee record, but they use different versions of the form for entering basic compensation information. You can use the same process model for both offices, and then create a scenario with a task override to launch a different form for the second office.

To override a task in a scenario:

1. From the drop-down field located above the PeopleSoft Process Modeler Client work area, select the scenario you want to open.
2. Double-click the task that you want to override.
3. On Task, click the EnterpriseOne tab.
4. Click Override.
5. Perform one of these tasks:
   - Select a task from Select Override Task.

     Override tasks are available only if the base business process model has multiple scenarios in which overrides already exist for the current task.
   - Enter a name in Create New Override Task, and then click Add.
6. Click OK.
7. Right-click the task, and then select PeopleSoft and select Properties.

   If you created a new task, the system confirms its creation.
8. On Task Revisions, create or modify an EnterpriseOne task to associate with the Modeler task.

   **Note.** The system does not automatically assign roles or task view relationships, so you must assign them when you create a task.
9. Click OK.

# Synchronizing EnterpriseOne Task Names and Statuses

This section provides an overview of synchronization and describes how to:

- Synchronize task names.
- Synchronize task statuses between PeopleSoft Process Modeler Client and EnterpriseOne.

## Synchronizing Task Names

When you use the Synchronize Names feature, Solution Explorer retrieves from PeopleSoft Process Modeler Client a list of the task IDs and task names that are associated with PeopleSoft tasks. Solution Explorer updates the F9000 table in the PeopleSoft database so that Solution Explorer displays the updated task names the next time task information is retrieved from the database. Information is retrieved from the database when you log in to EnterpriseOne or when you change task views.

To synchronize task names, select PeopleSoft Process Modeler Client from the Tools menu, and then select Synchronize Names.

## Synchronizing Task Statuses between PeopleSoft Process Modeler Client and EnterpriseOne

When you synchronize task statuses, Solution Explorer retrieves from PeopleSoft Process Modeler Client task IDs and task statuses that are associated with tasks in EnterpriseOne. Synchronizing tasks updates the active or inactive option of the task in the Task Master table (F9000). The active or inactive option of a task determines whether a task is visible in any task view. When a task is set to inactive, it does not appear in any task view. When a task is set to active, it appears in any task view in which a task relationship has been defined for it and it has not been filtered out by a mechanism such as Menu Design. In a role-based task view, the tasks that you see in Solution Explorer depend upon the role that you are assigned and the role or roles that are assigned to the tasks.

To synchronize a task status, select PeopleSoft Process Modeler Client from the Tools menu, and then select Synchronize Tasks.

# Checking Models Out of the Repository

This section provides an overview of checking models in and out of the repository and discusses how to check models out of the repository.

## Checking Models Out of the Repository

To edit a model, you must check it out of the repository. When a model is checked out to you, no other user can access the model. This measure ensures that someone working on the same model does not overwrite the changes. You save the changes by checking the model back into the repository.

To check out models from a repository:

1. From the Repository menu, select Check Out, and then select the repository from which you want to check out.
2. On Check Out Wizard - Step 1, select one of these options:
   - From the currently open notebook.

     Select this option if you want to check out a model that resides in the notebook you currently have open.
   - From a ProVision objects (.pvw) file.

     Select this option if you want to check out a model that resides in an existing .pvw file. If you select this object, type the pathname or browse to the .pvw file you want to use.
   - From a connected ProVision Repository.

     Select this option if you want to check out a model that resides in a different repository than the one with which you are currently connected. If you select this option, select the repository from the Repository drop-down field.
3. Click Next.
4. On Check Out Wizard - Step 2 of 5, complete these options:
   - All models in the notebook.

     Select this option you want to check out all of the models in the notebook you chose in step 2.

- These models.

  Select this option if you want to check out models from the list that appears on screen. If you select this option, select the models you want to check out.
- Include nested models in selection.
- Include model scenarios in selection.
- Check out objects as read-only.

5. Click Next.

   If you chose to check out a model that can be viewed under more that one context, a screen displays asking you if you want to view the model under a specific context. If you select Yes and then click Next, a wizard launches. You must select:

   - The model that contains the context you want to view.
   - The instance you want to use as the context.
6. On Check Out Wizard - Step 3 of 5, complete these fields and options:
   - Type an optional description of the object, if you desire to do so.
   - Check the object out under the name.

     Type the computer name, if you desire to.
   - Check the objects out anonymously.
7. Click Next.
8. On Check Out Wizard - Step 4 of 5, select the appropriate options listed below:
   - To the currently open notebook.

     Select this option if you want the models you checked out to reside in the notebook currently open.
   - To a ProVision objects (.pvw) file.

     Select this option if you want the models you checked out to reside in the notebook currently open.
   - To a connected ProVision repository.
   - Select this option if you want the models you checked out to reside in a repository. If you select this option, then you must select a repository in the Repository drop-down menu.
   - Create Notebook.

     Select this option if you want the models you checked out to reside in a newly created notebook. If you select this option, type in the name you want to call the notebook you are creating.
9. Click Next.
10. On Check Out Wizard - Step 5 of 5, click Finish.

    PeopleSoft Process Modeler Client checks out the model to you.

# CHAPTER 4

# Managing Disk Space and Backups

This chapter provides an overview of disk space and backups and discusses how to work with backups.

## Understanding Disk Space and Backups

While working in a repository, you should back up the work often. By default, PeopleSoft Process Modeler Client automatically saves a new backup each time that you close the repository. PeopleSoft Process Modeler Client saves the five latest backups; this *rolling backup* method is useful for working repositories. Static repositories, such as the EnterpriseOne Business Process Model repository, do not require multiple backups. Because each backup requires an equal amount of disk space, you should change the number of backups of static directories that the system saves. PeopleSoft Process Modeler Client enables you to set the number of backups for each repository in the application.

## Working with Backups

This section provides an overview of the backups and discusses how to:

- Change the number of rolling backups.
- Manage Backups.

### Changing the Number of Rolling Backups

Use this procedure to change the number of rolling backups that the system saves for a specific repository. You can also disable the automatic backup option.

To change the number of rolling backups:

1. From the Repository menu, select Detail.
2. On Repository Details, click the Options tab.
3. Enter the number of automatic backups that you want to retain.

   You can enter any number of automatic backups. The default value is 5. Remember that each backup takes the same amount of disk space and, unless you are managing a working repository, the file size of each subsequent backup will increase over time. This growth occurs because of the way in which the underlying database is set up.

   To manage the growth of backup files, periodically select the Compact database option.
4. If you do not want the system to perform automatic backups, select the Automatically back up this repository whenever it is closed option.

## Managing Backups

In addition to using the automatic backup feature in PeopleSoft Process Modeler Client, you can create backups manually. After backups exist, you can restore data from them. You can rename backups to better manage them, and you can delete backups that you no longer need.

You can create a manual backup, rename a backup, restore a backup, or delete a backup. To do so, select Detail from the Repository menu, click the Backups tab, and perform the appropriate actions.

# Glossary of PeopleSoft Terms

| | |
|---|---|
| **activity** | A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar. |
| **activity rule** | The criteria by which an object progresses from one given point to the next in a flow. |
| **add mode** | A condition of a form that enables users to input data. |
| **Advanced Planning Agent (APAg)** | A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML. |
| **application server** | A server in a local area network that contains applications shared by network clients. |
| **as if processing** | A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction. |
| **alternate currency** | A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.<br><br>In PeopleSoft EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued. |
| **as of processing** | A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date. |
| **back-to-back process** | A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process. |
| **batch processing** | A process of transferring records from a third-party system to PeopleSoft EnterpriseOne.<br><br>In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne. |
| **batch server** | A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications. |
| **batch-of-one immediate** | A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks.<br><br>See also direct connect and store-and-forward. |
| **business function** | A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through |

| | |
|---|---|
| | event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability. |
| **business function event rule** | See named event rule (NER). |
| **business view** | A means for selecting specific columns from one or more PeopleSoft EnterpriseOne tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data. |
| **central objects merge** | A process that blends a customer's modifications to the objects in a current release with objects in a new release. |
| **central server** | A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical PeopleSoft EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server. |
| **charts** | Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software. |
| **connector** | Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors. |
| **contra/clearing account** | A general ledger account in PeopleSoft EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in PeopleSoft EnterpriseOne General Accounting. |
| **Control Table Workbench** | An application that, during the installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables. |
| **control tables merge** | A process that blends a customer's modifications to the control tables with the data that accompanies a new release. |
| **cost assignment** | The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects. |
| **cost component** | In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead). |
| **cross segment edit** | A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced. |
| **currency restatement** | The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting. |
| **database server** | A server in a local area network that maintains a database and performs searches for client computers. |
| **Data Source Workbench** | An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System-release number data source. It also updates the Data Source Plan detail record to reflect completion. |

| | |
|---|---|
| **date pattern** | A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting. |
| **denominated-in currency** | The company currency in which financial reports are based. |
| **deployment server** | A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations. |
| **detail information** | Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines). |
| **direct connect** | A transaction method in which a client application communicates interactively and directly with a server application.<br>See also batch-of-one immediate and store-and-forward. |
| **Do Not Translate (DNT)** | A type of data source that must exist on the iSeries because of BLOB restrictions. |
| **dual pricing** | The process of providing prices for goods and services in two currencies. |
| **edit code** | A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information. |
| **edit mode** | A condition of a form that enables users to change data. |
| **edit rule** | A method used for formatting and validating user entries against a predefined rule or set of rules. |
| **Electronic Data Interchange (EDI)** | An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems. |
| **embedded event rule** | An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule. |
| **Employee Work Center** | A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages. |
| **enterprise server** | A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World. |
| **EnterpriseOne object** | A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects. |
| **EnterpriseOne process** | A software process that enables PeopleSoft EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. PeopleSoft EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy. |
| **Environment Workbench** | An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System-release number data source. It also updates the Environment Plan detail record to reflect completion. |
| **escalation monitor** | A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time. |

| | |
|---|---|
| **event rule** | A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field. |
| **facility** | An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a *business unit*. |
| **fast path** | A command prompt that enables the user to move quickly among menus and applications by using specific commands. |
| **file server** | A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network user request files and make changes to these files. |
| **final mode** | The report processing mode of a processing mode of a program that updates or creates data records. |
| **FTP server** | A server that responds to requests for files via file transfer protocol. |
| **header information** | Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows. |
| **interface table** | See Z table. |
| **integration server** | A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems. |
| **integrity test** | A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies. |
| **interoperability model** | A method for third-party systems to connect to or access PeopleSoft EnterpriseOne. |
| **in-your-face-error** | In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form. |
| **IServer service** | Developed by PeopleSoft, this internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client. |
| **jargon** | An alternative data dictionary item description that PeopleSoft EnterpriseOne or People World displays based on the product code of the current object. |
| **Java application server** | A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence. |
| **JDBNET** | A database driver that enables heterogeneous servers to access each other's data. |
| **JDEBASE Database Middleware** | A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access. |
| **JDECallObject** | An API used by business functions to invoke other business functions. |
| **jde.ini** | A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers. |
| **JDEIPC** | Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes. |

| | |
|---|---|
| **jde.log** | The main diagnostic log file of PeopleSoft EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of PeopleSoft EnterpriseOne. |
| **JDENET** | PeopleSoft proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all PeopleSoft EnterpriseOne supported platforms. |
| **Location Workbench** | An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source. |
| **logic server** | A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when PeopleSoft EnterpriseOne and World software runs. |
| **MailMerge Workbench** | An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment. |
| **master business function (MBF)** | An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases. |
| **master table** | See published table. |
| **matching document** | A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher. |
| **media storage object** | Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx. |
| **message center** | A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user. |
| **messaging adapter** | An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues. |
| **messaging server** | A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions. |
| **named event rule (NER)** | Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work. |
| ***nota fiscal*** | In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations. |
| ***nota fiscal factura*** | In Brazil, a nota fiscal with invoice information.<br>See also *nota fiscal.* |

| | |
|---|---|
| **Object Configuration Manager (OCM)** | In PeopleSoft EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user. |
| **Object Librarian** | A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another. |
| **Object Librarian merge** | A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release. |
| **Open Data Access (ODA)** | An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation. |
| **Output Stream Access (OSA)** | An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing. |
| **package** | EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snap shot of the central objects on the deployment server. |
| **package build** | A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.<br><br>Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.” |
| **package location** | The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored. |
| **Package Workbench** | An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the System-release number data source. It also updates the Package Plan detail record to reflect completion. |
| **PeopleSoft Database** | See JDEBASE Database Middleware. |
| **planning family** | A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate. |
| **preference profile** | The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups. |
| **print server** | The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself. |
| **pristine environment** | A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify. |

**processing option**

A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.

**production environment**

A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.

**production-grade file server**

A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.

**program temporary fix (PTF)**

A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.

**project**

In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

**promotion path**

The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.

**proxy server**

A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.

**published table**

Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

**publisher**

The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

**pull replication**

One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.

**QBE**

An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

**real-time event**

A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.

**refresh**

A function used to modify PeopleSoft EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.

**replication server**

A server that is responsible for replicating central objects to client machines.

**quote order**

In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order.

**selection**

Found on PeopleSoft menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.

**Server Workbench**

An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the System-release number data source. It also updates the Server Plan detail record to reflect completion.

**spot rate**

An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.

**Specification merge**

A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.

**specification**

A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.

**Specification Table Merge Workbench**

An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.

**store-and-forward**

The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.

**subscriber table**

Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.

**supplemental data**

Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs.

For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across PeopleSoft EnterpriseOne systems.

**table access management (TAM)**

The PeopleSoft EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.

**Table Conversion Workbench**

An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.

**table conversion**

An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.

**table event rules**

Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.

**terminal server**

A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

**three-tier processing** The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.

**three-way voucher match** In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.

**transaction processing (TP) monitor** A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.

**transaction set** An electronic business transaction (electronic data interchange standard document) made up of segments.

**trigger** One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.

**triggering event** A specific workflow event that requires special action or has defined consequences or resulting actions.

**two-way voucher match** In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.

**User Overrides merge** Adds new user override records into a customer's user override table.

**variance** In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.

**Version List merge** The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.

**visual assist** Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.

**vocabulary override** An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.

**wchar_t** An internal type of a wide character. It is used for writing portable programs for international markets.

**web application server** A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.

**web server** A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.

**Windows terminal server** A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

| | |
|---|---|
| **workbench** | A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of PeopleSoft EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench. |
| **work day calendar** | In EnterpriseOne Manufacturing Management, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar. |
| **workflow** | The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules. |
| **workgroup server** | A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing. |
| **XAPI events** | A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response. |
| **XML CallObject** | An interoperability capability that enables you to call business functions. |
| **XML Dispatch** | An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses. |
| **XML List** | An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks. |
| **XML Service** | An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system. |
| **XML Transaction** | An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality. |
| **XML Transaction Service (XTS)** | Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format. |
| **Z event** | A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur. |
| **Z table** | A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Z tables also can be used to retrieve PeopleSoft EnterpriseOne data. Z tables are also known as interface tables. |
| **Z transaction** | Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database. |

# Index