PeopleSoft®

PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Solution Explorer

August 2005

PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Solution Explorer
SKU E1_TOOLS895TSX-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. 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. 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 Tools Solution Explorer Guide Preface

This preface discusses PeopleSoft EnterpriseOne Tools Solution Explorer.

PeopleSoft EnterpriseOne Tools 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 Solution Explorer as well as other PeopleSoft EnterpriseOne Tools. You should be familiar with the contents of these companion PeopleBooks:

- PeopleSoft EnterpriseOne Tools System Administration
- PeopleSoft EnterpriseOne Tools System Security
- PeopleSoft EnterpriseOne Tools Object Management Workbench

See Also

PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: System Administration, “Getting Started with PeopleSoft EnterpriseOne Tools System Administration”

PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Security Administration, “Getting Started with PeopleSoft EnterpriseOne Tools Security Administration”

PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Object Management Workbench, “Getting Started with PeopleSoft EnterpriseOne Tools Object Management Workbench”

CHAPTER 1

Getting Started with PeopleSoft EnterpriseOne Tools Solution Explorer

This chapter discusses:

- Solution Explorer Overview
- Solution Explorer Implementation

Solution Explorer Overview

Solution Explorer provides you with a convenient method for accessing Windows-based PeopleSoft EnterpriseOne applications, and creating/maintaining PeopleSoft EnterpriseOne task views for Web or Windows.

Solution Explorer is comprised of the following three modes:

- Menu Design Mode

  Use the Menu Design Mode to set up menus, tasks, task views, and task view roles.
- Menu Filtering Mode

  Use the Menu Filter Mode to enable and disable tasks users assigned a certain role can perform.
- Task Launching Mode

  Use the Task Launching Mode to navigate to development and administrative applications in PeopleSoft EnterpriseOne using the Fast Path, or using the menu.

Solution Explorer Implementation

This section provides an overview of the steps that are required to implement Solution Explorer.

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.

Solution Explorer Implementation Steps

This table lists the steps for the Solution Explorer implementation.

Step	Reference
1. Set up task views.	Chapter 2, "Using the Menu Design Mode," Understanding How to Set Up Task Views, page 3
2. Set up tasks.	Chapter 2, "Using the Menu Design Mode," Setting Up Tasks, page 5
3. Set up task view roles.	Chapter 2, "Using the Menu Design Mode," Applying Roles to a Task, page 8

CHAPTER 2

Using the Menu Design Mode

This chapter provides an overview of task views and discusses how to:

- Work with task views.
- Set up tasks.
- Work with tasks.
- Delete tasks.

Understanding the Menu Design Mode

Use the Menu Design Mode to set up menus, tasks, task views, and task view roles in Solution Explorer. Access Menu Design Mode by depressing the Menu Design Mode button located on the toolbar. Whether or not you have access to Menu Design Mode, and the type of access you have, depends on the permissions you have been assigned. You might be able to view Menu Design Mode, you might be able to make changes in Menu Design Mode, or you might not have access to it at all.

Understanding How to Set Up Task Views

Task views are groups of tasks arranged in a hierarchical tree structure. Tasks are the most discrete units in the Solution Explorer. Tasks are organized into hierarchical tree structures inside of task views. PeopleSoft EnterpriseOne provides thousands of tasks, and you can add more of your own. When placed in a single task view, finding a specific task among thousands might be difficult and time-consuming.

Solution Explorer enables you to design many different task views, each displaying only some of the tasks in the system.

Typically, tasks are grouped in a task view because they relate to a common business system, process, or function. Logical selection and grouping of tasks in this way can help users find the functions that they need.

Working with Task Views

This section provides an overview of working with task views and describes how to:

- Create a new task view.
- Change a task view.

- Delete a task view.

Creating a New Task View

Create a new task view when you want to create a new category of tasks that you use to insert tasks and build task relationships. The tasks views that you create, design, and filter in Solution Explorer become part of the PeopleSoft EnterpriseOne Menus in the PeopleSoft EnterpriseOne Web Client.

Access Solution Explorer.

1. In Solution Explorer, select Add New Task View from the Tools menu.
2. In Task View Revisions, complete the following fields and options, and then click OK:
   - Task View

     Enter an internal ID for the task view. The ID must be between two and five digits and cannot contain alphabetic characters. If you start the ID with more than one zero, the system truncates it to a single zero. For example, if you type 005 as an ID, the system changes the ID to 05.
   - Name
   - Description

     The name and the description do not have to be the same.
   - Secured Task View

Changing a Task View

You can modify an existing task view. For example, you might want to change the name of a task view so that it more accurately reflects the category of tasks in that view.

Access Solution Explorer.

1. In Solution Explorer, select Work With Tasks from the Tools menu.

   Alternately, if you want to change the current task view, right-click the top task view node and select Task Revisions from the menu. Skip to step 5.
2. In Work with Tasks, select Task Views from the Form menu.
3. In Work with Task Views, click Find.

   Use the QBE row to refine your search.
4. Select the task view that you want to change, and then click Select.
5. In Task View Revisions, change any of the following fields and options, and then click OK:
   - Name
   - Description

     The name and the description do not have to be the same.
   - Secured Task View

Deleting a Task View

You can delete any task view from the system. Deleting a task view does not delete the tasks within the view from the system, however.

Access Solution Explorer.

1. In Solution Explorer, select Work With Tasks from the Tools menu.
2. In Work with Tasks, select Task Views from the Form menu.
3. In Work with Task Views, click Find.

   Use the QBE row to refine your search.
4. Select a task view, and then click Delete.
5. In Confirm Delete, click OK.

Setting Up Tasks

This section provides an overview of task setup and discusses how to:

- Create tasks.
- Insert existing tasks.
- Apply roles to tasks.
- Change tasks.
- Delete tasks.

Understanding Task Set Up

To design and manage your system, you work with *tasks*, which are units of work that you use to build essential business processes. Tasks can be interactive programs, batch programs, constants, next numbers, and so on. You work with tasks in a Solution Explorer task view, which is a collection of related tasks that are hierarchically grouped in parent-child relationships and illustrated graphically by the task view menu. These task groups usually represent the steps in an essential business process such as Procure to Pay.

PeopleSoft EnterpriseOne provides a large selection of tasks that are already grouped in relationships within different task views. You can modify already existing tasks and their relationships. You can also create new tasks, task relationships, and views.

Within a task view, you insert new or existing tasks and arrange the tasks in logical sequences. You create or revise tasks on an ongoing basis, and then insert them in a task view as necessary to build and enhance your business processes. The processes are fluid; that is, you can drag and drop tasks and task relationships to change the relationships and the order in which you perform tasks.

The system stores each task in a task view in the Task Master table (F9000) and assigns a unique ID to each one. Each task is a reusable object that you can insert into an existing task relationship, or you can use as a basis for creating a new task relationship. After you have inserted a task in a task view, you can move it, revise it, write documentation for it, set up processing options, set up versions, and locate it. You can accomplish any of these functions in a Solution Explorer task view by launching interactive programs or using features and functions that are included in Solution Explorer.

Finding Solution Explorer Task and Task Relationship Changes in Object Management Workbench

When you change tasks or task relationships in Solution Explorer, the change is logged in Object Management Workbench (OMW). If you have added or deleted tasks or task relationships, the information is stored in OMW so that you and others can easily find the tasks and task relationships that have changed. If you changed task properties from within the Work With Tasks program (P9000), the task is logged in OMW.

Note. For your changes to be logged in OMW, your system administrator must have turned on OMW logging in the Security Workbench program (P00950) for your user ID. To determine whether your OMW logging is turned on, double-click the padlock button on the Solution Explorer status bar.

See Also

Chapter 2, "Using the Menu Design Mode," Creating a New Task View, page 4

Chapter 2, "Using the Menu Design Mode," Applying Roles to a Task, page 8

Creating a Task

The tasks in task views are reusable objects that add to the flexibility of the Solution Explorer. Tasks reside in the Task Master table (F9000).

You can create a new task directly in the Solution Explorer by inserting a new task in a task view menu. You define the task using the Task Revisions form. When you create a task, you automatically create a relationship between the new child task and the parent task under which you inserted the new task.

Access Solution Explorer.

1. From Menu Design mode, right-click a folder and clickInsert New Task from the menu.

   The Task Revisions application displays.
2. In Task Revisions, complete the Task Name field.
3. Select the Common tab, and then complete the following fields:
   - Product Code
   - Jargon
   - Country Code

     Leave this field blank if you want this task to be available for all users, regardless of their country codes. Otherwise, enter the country code that must be assigned to users before they can access this task.
4. Select the Executable tab, and then select one of the following task type options:
   - Interactive

     Select this option for a task that launches an interactive PeopleSoft EnterpriseOne program.
   - Batch

     Turn on this option for a task that launches a PeopleSoft EnterpriseOne batch program.
   - URL

     Turn on this option for a task that launches a web-based executable.

- Folder

  Turn on this option for a task to be used as an activity or nonsoftware placeholder in a task view. This task does not execute a function, but might have accompanying documentation that describes the activity.

- User Defined Code

  Turn on this option for a task that launches a program that enables a user to modify UDC tables.

- EnterpriseOne Workflow

  Turn on this option for a task that displays workflow processes.

5. If you turned on the Interactive option, complete the following fields:

   - Application

     Enter the object name of the program.

   - Version

     Complete this field only if you want to launch a specific version of a program. Click the Visual Assist to search for a version.

   - Form

     This is an optional field. To open a specific form in the program, enter the form ID. Click the Visual Assist to search for a form.

   - Option Code
   - Form Mode
   - Application Type

6. If you turned on the Batch option, complete the following steps:

   - Application
   - Version

     This is an optional field. To launch a specific version of a batch program, enter the version.

7. Select one of the following options:

   - No Processing Options

     Turn on this option to execute the batch program without processing options.

   - Blind Execution

     Turn on this option to execute the batch program without displaying its processing options.

   - Prompt for Version

     Select this option if you want to prompt the user to select which version of the batch program to run at execution.

   - Prompt for Values

     Select this option if you want to prompt the user to enter processing option values at execution.

   - Data Selection

     Select this option if you want to prompt the user to enter data selection at execution.

   - Data Selection and Values

     Select this option if you want to prompt the user to enter data selection and processing option values at execution.

8. If you turned on the URL option, complete the URL fields.
9. If you turned on the User Defined Code option, complete the following fields:
   - Product Code
   - User Defined Codes
10. To apply roles to the task, select Roles from the Form menu.
11. In Task Where Used, select the role that you want to apply to the task, and then select Change Status from the Row menu.

    A check mark appears to indicate that the role is applied to the task. To remove a check mark, select Change Status from the Row menu again. To apply all roles to the task, select Enable All from the Form menu.
12. Click Close.
13. In Task Revisions, click OK.

Inserting an Existing Task

When you insert a task and thereby create a task relationship, the system stores the parent-child relationship that you create in the Task Relationships table (F9001). The system also stores the task view into which you inserted the task.

Because tasks are reusable objects, you can insert the same task into multiple task views.

Access a task view in Solution Explorer.

1. In a task view of Solution Explorer, select a task that will be the parent of the task that you want to insert.
2. Right-click the parent task, and then select Insert Existing Task from the menu.

   The Task Relationship Revisions form appears. The form displays the parent task ID and all tasks that are children of the parent task that you selected.
3. In Task Relationship Revisions, click a new line, and complete the following required fields:
   - Child Task ID
   - Presentation Sequence

     If you want the task that you are inserting to appear in a position other than last in the presentation sequence, change the number.
4. Complete any of the optional fields.

Applying Roles to a Task

You apply roles to tasks so that the tasks will be filtered properly in role-based task views. You can apply one or more roles to each task.

When a user launches a role-based task view, the system applies his or her login role to the view. If the system administrator has applied other roles to that user, he or she can view the task view by any of those roles to see a different set of tasks.

For example, a user might have two roles, General Accounting Clerk (the user's sign on role) and Accounts Payable Clerk. When the user launches a role-based task view, the system displays only those tasks to which the General Account Clerk role has been applied, such as Autoreconcile Void Payments, Autoreconcile Void Receipts, and Refresh Reconciliations File. The user can apply the Accounts Payable Clerk role to the task view, and the system displays only those tasks to which the Accounts Payable Clerk role has been applied, such as Speed Status Change, Create Payment Groups, and Work with Payments.

Users can switch roles only if they sign on to Solution Explorer with the *ALL role. If a user signs on with the *ALL role and then accesses a role-based task view, then the user can view all tasks that are visible to any of the roles assigned to the *ALL role.

For example, the *ALL role contains Role1 and Role2, but not Role3. When a user accesses a role-based task view, Solution Explorer displays all of the tasks that are available in Role1 or Role2. Tasks that are only available to Role 3 do not appear.

To apply roles to a task:

1. Select the task to which you want to apply roles.
2. Right-click the task, and then select Task Revisions.
3. In Task Revisions, select Roles from the Form menu.
4. In Task Where Used, click Find.
5. Select the parent of the task to which you want to apply roles, and then click Select.
6. In Role Definition, select the role to which you want to apply to the task, and then select Change Status from the Row menu.

   A check mark appears to indicate that a role is applied to the task. To remove a check mark, select Change Status from the Row menu again. To apply all roles to the task, select Enable All from the Form menu.
7. Click Close.
8. In Task Revisions, click OK.

Changing a Task

When you change a task using this process, you affect all instances of the task in all task views where it resides.

Access a task view Solution Explorer.

1. In Menu Design Mode, select the task that you want to change.
2. Right-click the task, and then select Task Revisions from the popup menu.
3. In Task Revisions, complete any changes that you want to make to the task, and then click OK.

Deleting Tasks

You can delete an instance of a task from a task view menu. However, performing this action does not delete the task itself; it merely eliminates the task from the task view. To delete a task from the system entirely, you must use the Work With Tasks program (P9000) to locate the task and then delete it from the Task Master table (F9000). You can delete a task from a task view. Doing so deletes the task only from the task view; it still exists in the Task Master table (F9000) and in any other relationship in which it has been inserted. Furthermore, you can still insert it into other task menus.

Deleting an Instance of a Task

Access a task view in Solution Explorer.

1. In Solution Explorer, open the task view that contains the task relationship that you want to delete.
2. Right-click the task that you want to delete, and then select Delete Relationship from the menu.
3. In Delete Relationship, click OK.

Deleting a Task from the Task Master Table (F9000)

To delete a task from the system completely, you must delete it from the Task Master table. Before you can do so, however, you must first delete all of the relationships for the task. This is equivalent to deleting the task in each task view menu in which it appears.

Access Solution Explorer.

1. In Solution Explorer, select Work With Tasksfrom the Tools menu.
2. Click Find.

   Use the QBE row to refine your search.
3. Select the task that you want to delete, and then select Where Used from the Row menu.
4. In Task where Used, search for the parent of the current task by clicking Find.

   The task might have more than one parent. If so, all of the parents appear.
5. Select the parent of the task that you want to delete, and then click Delete.
6. In Task Relationship Revisions, select the task that you want to delete, and then click Delete.
7. In Confirm Delete, click OK.
8. Click OK.
9. Repeat steps 5-8 for each parent of the task in the list.
10. In Task where Used, click Close.
11. In Work With Tasks, select the task that you want to delete, and then click Delete.
12. In Confirm Delete, click OK.

Clearing Cache

When you create menus in Solution Explorer, they are saved to the same database from which the web client retrieves them. The web client stores them in a cache directory and then displays them in the PeopleSoft EnterpriseOne Menu. To display new menus, you must clear the cache directory. You clear the cache directory through Server Administration Workbench (SAW).

Access Server Administration Workbench.

1. Access and sign in SAW for JAS Servers.
2. From the Views menu, click Config.
3. Click Clear PeopleSoft EnterpriseOne Menu Cache.
4. Open the web client.
5. Click the Menu Refreshbutton located on the PeopleSoft EnterpriseOne Menu title bar.

CHAPTER 3

Using the Menu Filtering Mode

This chapter provides an overview of menu filtering and discusses how to:

- Filter menus.
- Define task view roles.
- Change roles.

Understanding Menu Filtering

Menu Filtering is the process that you use to selectively enable or disable tasks by role in a task view.

Access Solution Explorer.

1. In Solution Explorer, depress the Menu Filtering button.
2. Select the task view that you want to refine

   The system changes the task view menu display to indicate enabled and disabled tasks. Enabled tasks are indicated by a green check mark; disabled tasks are indicated by a red X
3. Expand the task tree in the task view to find a task that you want to enable or disable, and then select a task.
4. Click either the Enable or Disable button on the Toolbar.

   You can also double-click the task to toggle between the enabled and disabled conditions.
5. Repeat steps 2-3 for each task you want to enable or disable.
6. When you have finished refining the task list, click the Save button on the toolbar.

   Saving your configuration saves your changes to the Master Task Relationship table (F9001), so your changes will be available to all users who access that same database. Solution Explorer will prompt you to select the role to which your changes apply.

   If you fail to save the changes, your changes will not remain when you exit from the Solution Explorer and then launch it again later.
7. Click the Show All in Menu Design mode to toggle between hiding and displaying disabled tasks in the current task view menu for the currently selected role. This role is displayed beside the root node of the task view.

Understanding Task View Roles

You can use roles to customize certain task views or parts of task views for specific user groups. Roles define a subset of the tasks in the original task view. They enable you to customize and simplify task views for the end user.

Roles apply only to users who have access to those roles.

You can use roles to make different versions of task objects available to users, and you can vary the descriptions of the tasks, as well.

Filtering a Task View by Role

To filter a task view by role, you refine the task view using the Menu Filtering mode, and then save the results. You define the role or based on your needs analysis of the users.

Access a task view in Solution Explorer.

1. In a task view of Solution Explorer, click the Menu Filtering button on the Toolbar.
2. Select a parent task and expand the task tree to expose tasks that you want to disable.
3. Select each task that you want to disable, and then click the Disable button.
4. After you have disabled all of the tasks that you do not want to appear in the role, select the parent task.
5. Right-click and then select Save Role, or click the Save button on the tool bar.
6. In Save Role, select an existing role and then click Select, or create a new role.

Note. For information about creating a new role, see Adding Users to a Role in the Security Administration Guide.

See Also

PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Security Administration, "Working with User and Role Profiles," Adding Users to a Role

Changing a Role's View of a Task View

By modifying roles, you can control users' task view. Changing the name and version for the role helps you and other users understand the difference between different roles. The changes that you make to the role, such as assigning new task names, apply only to that role. The system preserves the properties that define the default task view. You are not replacing the original view; you are creating an alternative view to be used in specific situations that your business requires.

Access Solution Explorer.

1. In a Solution Explorer task view, click the Menu Filtering button on the Toolbar.
2. Right-click any task in the task view, and then select View By Role from the menu.
3. In View by Role, select the role to which you want to change, and then click Select.
4. Double-click a task to make its relationship active or inactive, or right-click a task in the task view and select Override Name to change the task name.
5. Right-click any task and select Save Role.
6. Select the role, and then click Select.

Chapter 4

Using the Task Launching Mode

The Task Launching Mode is the default mode for Solution Explorer. Use the Task launching mode to navigate to the windows applications either through the menu or through the Fast Path.

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. 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. 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. 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.

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.

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. 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