
Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Optimization Framework

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Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Optimization Framework
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About This PeopleBook

PeopleSoft Enterprise PeopleBooks provide you with the information that you need to implement and use PeopleSoft Enterprise applications from Oracle.

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- 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 elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

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

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

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most 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 Enterprise applications. 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.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
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.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().

Typographical Convention or Visual Cue	Description
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	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 Enterprise 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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.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

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Optimization Framework Preface

This PeopleBook describes PeopleSoft Optimization Framework.

PeopleSoft Optimization Framework

PeopleSoft Optimization Framework provides a foundation for building applications that use the optimization-based, decision-making capability in the PeopleTools environment. This PeopleBook is written for PeopleSoft application developers who write PeopleCode to use optimization transactions.

CHAPTER 1

Getting Started with PeopleSoft Optimization Framework

PeopleSoft Optimization Framework provides a foundation for building applications that use the optimization-based, decision-making capability in the PeopleTools environment. This chapter provides an overview of the PeopleSoft Optimization Framework and discusses how to implement the optimization framework.

PeopleSoft Optimization Framework Overview

This section provides an overview of the conceptual information available about the PeopleSoft Optimization Framework

- Understanding PeopleSoft Optimization discusses optimization, the framework components and architecture, as well as doing optimization-based development.
- Designing Analytic Type Definitions provides overviews of analytic type definitions and optimization application records. It also discusses how to use these items and develop your own application-based optimization.
- Optimization PeopleCode contains the reference material for the PeopleCode used in PeopleSoft Optimization Framework, as well as considerations for creating optimization PeopleCode programs.
- Administering Optimization Server Components provides an overview of optimization administration and discusses configuring the optimization engines.

See Also

[Chapter 2, “Understanding PeopleSoft Optimization Framework,” page 3](#)

[Chapter 3, “Designing Analytic Type Definitions,” Creating Analytic Type Definitions, page 10](#)

[Chapter 4, “Optimization PeopleCode,” page 25](#)

[Chapter 5, “Administering Optimization Server Components,” page 101](#)

PeopleSoft Optimization Framework Implementation

The functionality to use the PeopleSoft Optimization Framework, as well as to create your own Optimization plug-in (OPI) is delivered as part of standard PeopleSoft PeopleTools that are provided with all PeopleSoft products.

Several activities must be completed before you can use the PeopleSoft Optimization Framework in your implementation.

- Install your PeopleSoft application according to the installation guide for your database type. See the Enterprise PeopleTools and PeopleSoft application installation guides for your platform and product line.

See *Enterprise PeopleTools 8.49 Installation for your database platform*.

See the PeopleSoft installation guide for your application product line.

- Establish a user profile that gives you access to PeopleSoft Application Designer and any other processes you will use. See *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*.
- Follow the general overview and instructions in this document to design your application to take advantage of the PeopleSoft Optimization Framework, populate the appropriate records, build the application pages, retrieve the result data, as well as configure the application server, the analytic server, and the optimization engines.

See Also

Chapter 2, “Understanding PeopleSoft Optimization Framework,” page 3

Chapter 5, “Administering Optimization Server Components,” page 101

CHAPTER 2

Understanding PeopleSoft Optimization Framework

This chapter discusses:

- Optimization.
- PeopleSoft Optimization Framework components.
- PeopleSoft Optimization Framework system architecture.
- Optimization-based application development.

Optimization

In the context of PeopleSoft Optimization Framework, *optimization* means deciding on the best course of action given a range of alternatives. You use PeopleSoft Optimization Framework and the PeopleTools environment to build applications that use optimization-based decision-making. PeopleSoft Optimization Framework enables applications to specify their business objectives, define the conditions, and set resource constraints. PeopleSoft Optimization Framework then applies advanced mathematical modeling and solution techniques to find solutions that fit input criteria. In contrast to sequential, query-based applications, which require users to analyze criteria and make decisions one by one, the solution generated by optimization exceeds, or at least matches, a solution generated by a person.

PeopleSoft Optimization Framework Components

PeopleSoft Optimization Framework contains the following main elements:

- Optimization application tables.

PeopleSoft database tables that store source data, result data, control parameters, and user state information.

- Optimization engine.

An instance of the optimization engine is a process managed by a type of PeopleSoft application server, called an Analytic Server. The optimization engine has a generic interface to bind with different optimization plug-ins to provide a variety of optimization services. It also brings data from the optimization application tables into memory. This in-memory data is synchronized with the database changes with each optimization transaction.

- Optimization dispatcher.

Within the analytic server, the optimization dispatcher provides a generic interface for application programmers to use PeopleCode to access the optimization engine.

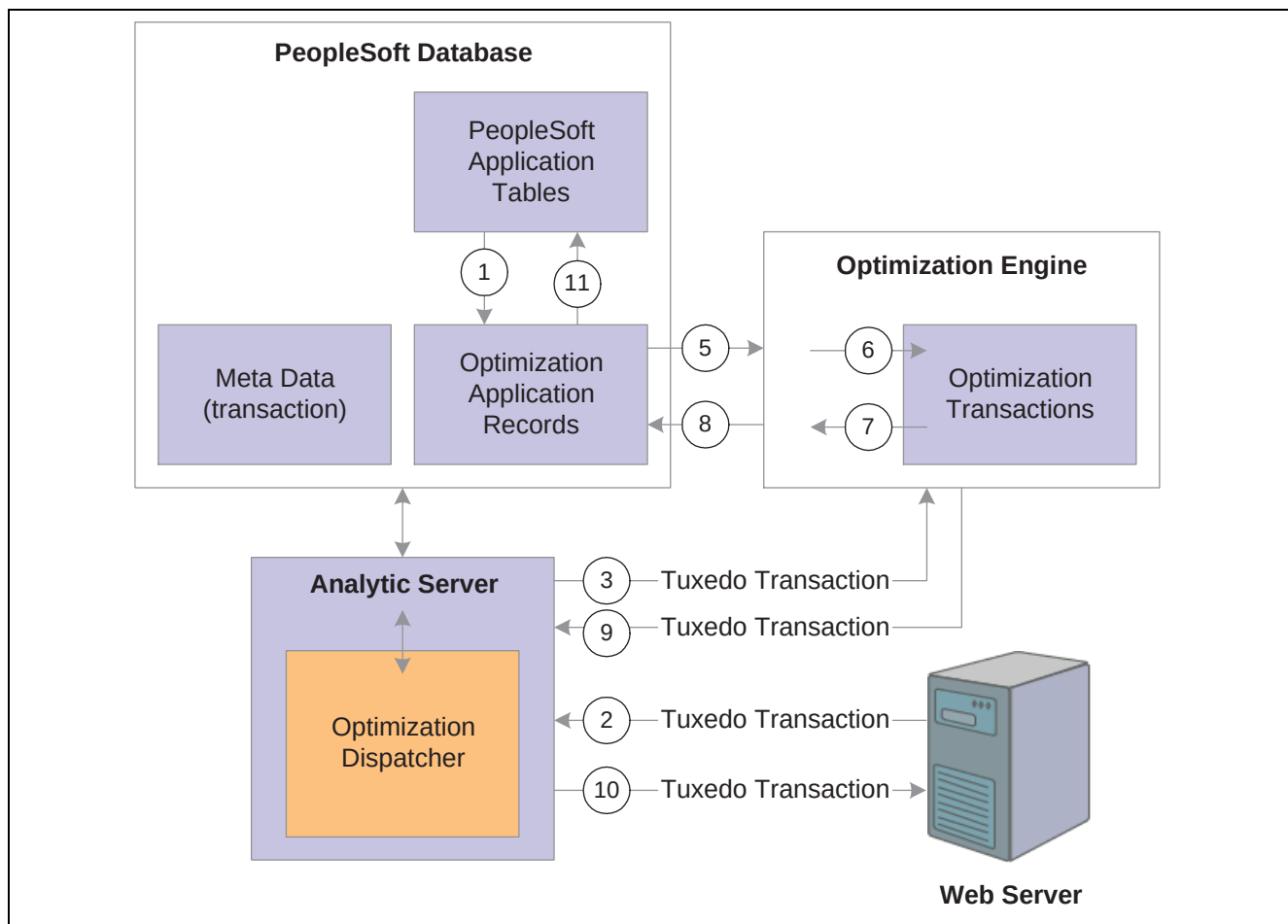
- Optimization plug-in (OPI).

An OPI is created specifically for optimization-based applications, such as consultant scheduling or supply chain planning and scheduling. The application knowledge and business logic of an optimization problem resides in the OPI. The OPI implements the optimization transactions that solve the problem using the source data as input and generating the result data as output. If your application is delivered with the *Optimization PeopleCode* plug-in, you'll be able to adapt the plug-in to a variety of different optimization tasks.

Note. An OPI is created by PeopleTools development with support from PeopleSoft application development. An OPI is provided with the installed PeopleSoft applications that use PeopleSoft Optimization Framework. There is no OPI in the PeopleTools installation. Your PeopleSoft application documentation discusses the available plugins and their required implementation steps and parameters.

PeopleSoft Optimization Framework System Architecture

The following diagram illustrates PeopleSoft Optimization Framework architecture components and shows the sequence of use during a typical optimization transaction:



PeopleSoft Optimization Framework architecture

When an optimization-based application runs, the following actions occur:

1. The source data is loaded from PeopleSoft application tables into the optimization application records. Depending on the amount of data, this can typically be done as a batch job.

2. A web server sends a request through BEA Tuxedo to have the analytic server perform a PeopleSoft transaction using optimization.
3. Upon receiving the request, the optimization dispatcher, within the analytic server, locates the correct optimization engine and sends the optimization transaction to it through BEA Tuxedo.
4. The optimization engine gets the metadata (optimization transaction name, parameters, and data types of the parameters) from the analytic type definition in the PeopleSoft application database.
It uses this information to check the integrity of the optimization transaction request. It also synchronizes the data in memory with changes in the optimization application tables.
5. The optimization engine reads the changed data (all the data, if this is the first time the data is being read) from the optimization application records into memory.
6. The optimization engine loads the appropriate OPI and passes the optimization transaction request to it.
The OPI is loaded during the first request to the optimization engine. It remains loaded until the optimization engine is shut down.
7. The OPI processes the transaction and provides result data in the form of output parameters to the optimization engine.
The OPI might also change data in memory to be saved to the database.
8. The optimization engine writes the changed data in memory to the optimization application tables.
9. The optimization engine returns the result data to the optimization dispatcher.
10. The application server completes the PeopleSoft transaction with the result data and returns a success code to the user and to the web server through BEA Tuxedo.
11. Once the user is satisfied with the optimization result data, the result data can be copied from the optimization application tables to the PeopleSoft application tables.

Optimization-Based Application Development

To build an optimization-based application:

1. Design the analytic type definition.

Define the structure of the optimization application records and the specifications for the optimization transactions that you need for your application. Using PeopleSoft Application Designer:

- a. Create record definitions for the optimization application records and build them to create the database tables.
- b. Create an analytic type definition, including the record definitions that you created, and the specifications for the optimization transactions.
- c. You might also need to insert one or more *optimization models* into the analytic type definition. Optimization models are developed specifically for, and delivered with, your PeopleSoft application. Each optimization model is a mathematical representation of the business problem for the optimization engine to solve.

2. Populate the application records with appropriate source data.

Using standard tools (such as PeopleCode, PeopleSoft Application Engine, and PeopleSoft Integration Broker), provide a mechanism to populate the optimization application records with source data. You can also use PeopleSoft application records directly instead of creating special optimization application records. By accessing the tables directly, you use fewer computer resources. However, accessing the application tables directly increases the dependency between the application design and the OPI design.

Note. Though you can populate the source data using PeopleSoft Integration Broker, you cannot actually access the analytic server or use analytic or optimization PeopleCode in a messaging PeopleCode program.

3. Build the application pages.

Using PeopleSoft Application Designer, build pages using the optimization application records to enable users to edit or view the source and result data and to interact with the optimization application. These pages use the PeopleCode OptEngine or AnalyticInstance class, provided by the optimization dispatcher, to send optimization transactions to the optimization engine. Building pages for optimization applications uses the same process as building pages for any PeopleSoft application.

4. Retrieve the result data.

Using standard PeopleTools, provide a mechanism to retrieve the result data in the optimization application records and copy it to the PeopleSoft application tables.

Note. If you rename any records or record fields that are used by your optimization-based application, the analytic type and optimization model definitions that use the record or field automatically reflect your changes. However, you must also ensure that any PeopleCode program, Application Engine program, or other tools account for those changes as well.

CHAPTER 3

Designing Analytic Type Definitions

This chapter provides overviews of analytic type definitions and optimization application record design and discusses how to:

- Create and build optimization records.
- Create analytic type definitions.
- Run the optimization system audit.
- Change existing analytic type definitions.
- Administer optimization engines.
- Administer optimization tables.
- Update solver licenses.

Understanding Analytic Type Definitions

An analytic type definition groups the optimization application records, the optimization transactions, and the OPI together as one entity. The optimization application records contain the data stored in the database. The data is populated into memory in the optimization engine. The optimization transactions define the interface between the application server and the OPI, which performs the optimization computation. Use PeopleSoft Application Designer to create the analytic type definition for an optimization application.

An Optimization Problem Example

To illustrate the steps of creating an optimization-based application, consider the following example: Create an optimal exercise schedule that makes use of exercise machine availability and satisfies individuals' exercise preferences. To create an optimization application for this problem, you need input data about:

- Exercises that burn a set number of calories per minute.
- People who know how long they want to exercise and how many calories they want to burn.

The goal of your application is to generate a list containing an exercise and the duration of exercise appropriate to each person, based on the input data.

To implement the analytic type definition for this example, you would:

1. Create and populate a set of records containing the input data about the exercises and the participants.
These are the optimization application records for this application.
2. Define a set of optimization transactions and their parameters that, when implemented, process the optimization application records to achieve the goal.

Note. For this example, assume that an OPI (QEOPT.DLL) already exists that implements these transactions.

Understanding Optimization Application Record Design

This section discusses:

- Optimization application records.
- Scenario management.

Optimization Application Records

You use PeopleSoft Application Designer to design optimization application records to contain source data, result data, and other data. You also decide how the optimization engine uses these records for synchronization. For each record that you create, decide:

- Which data fields the record should contain.

Among other data, these records contain the data from the PeopleSoft application database that is used in the optimization process.

- How the optimization engine uses the record for synchronization.

If the record is read once, the optimization engine reads this data during the initial load only. If the record is readable, the optimization engine checks for updates with every optimization transaction. If the record is writable, the optimization engine is allowed to modify the data in the database. All records except read-once records must have a VERSION field.

- Whether the record should be scenario-managed.

A record should be scenario-managed if it contains data pertaining to multiple analytic instances. Such records must have a PROBINST key field, which the optimization engine uses as an additional key for storing and retrieving multiple solutions.

Scenario Management

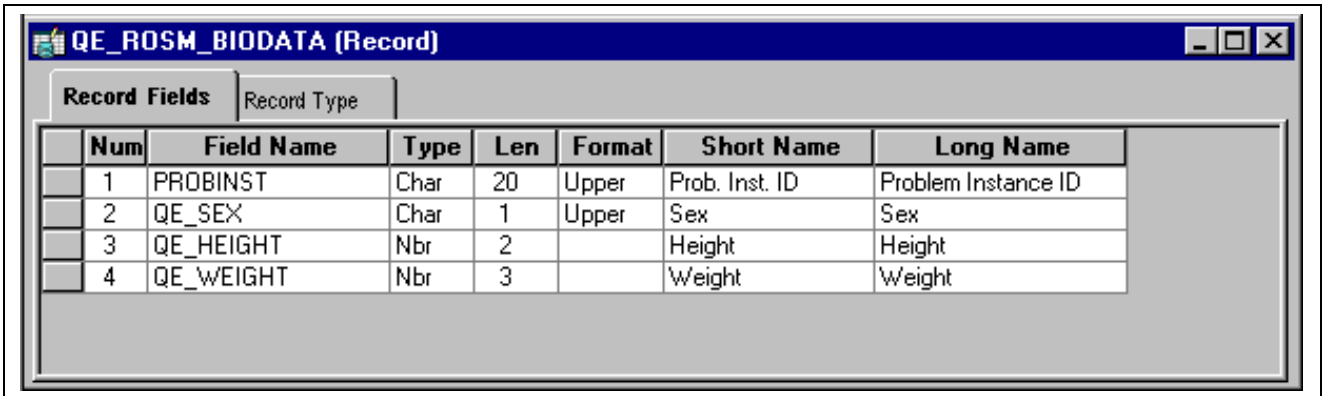
In PeopleSoft Optimization Framework, scenario management is the mechanism to manage different source and result data sets using the same tables. A set of source data and associated result data is called an analytic instance. You can break down large optimization problems into smaller, more manageable problems (or analytic instances) that can each be solved independently. Individual analytic instances can share common data.

This concept can be extended to what-if scenarios to plan for potential business situations. Separate analytic instances can be created with what-if data and solved using optimization separately, without fear of affecting live data.

In terms of the exercise example, any number of people might want exercise schedules using the optimization application. Exercise goal data and the optimization-generated exercise schedule data are unique to each person. However, different people share the same set of exercise machines. In this case, it is logical to treat the generation of an individual person's exercise schedule as a separate analytic instance.

In the exercise example, you would mark the data that is specific to each person (such as exercise goals and exercise schedules) as scenario-managed, and the data that is shared by all people (such as exercise machines) as non-scenario-managed. All scenario-managed records must include the PROBINST field as part of the primary key. This 20-character field identifies data specific to an analytic instance. During runtime, the optimization engine loads data for scenario-managed records based on the user-specified value for the PROBINST field. At any moment, the optimization engine contains data for only one analytic instance.

The following record, QE_ROSM_BIODATA, contains the name of a person who exercises, and physical data about the person. This record is read once and scenario-managed. Notice the use of the PROBINST field.



QE_ROSM_BIODATA (Record)							
Record Fields				Record Type			
	Num	Field Name	Type	Len	Format	Short Name	Long Name
	1	PROBINST	Char	20	Upper	Prob. Inst. ID	Problem Instance ID
	2	QE_SEX	Char	1	Upper	Sex	Sex
	3	QE_HEIGHT	Nbr	2		Height	Height
	4	QE_WEIGHT	Nbr	3		Weight	Weight

QE_ROSM_BIODATA record

Creating and Building Optimization Records

To create and build optimization application records:

1. Create the optimization application record definitions using PeopleSoft Application Designer.
2. For every optimization application record that is readable, create an optimization delete record by cloning the optimization application record.

Clone the record by performing a Save As operation on the optimization application record and renaming the optimization delete record to be similar to the original optimization application record. Use a naming convention for all optimization delete records. For example, the optimization delete record for the record QE_R_HOLIDAYS might be named QE_R_HOLIDAYDEL.

Alternately, use a sub-record definition that's shared by the optimization application record and the delete record.

Note. It is very important to keep the optimization application record and its associated optimization delete record in sync with each other.

3. For every optimization application record that is readable, associate that record with its optimization delete record.
 - a. Open the optimization application record.
 - b. Select File, Definition Properties.
 - c. Select the Use tab in the Record Properties dialog box.
 - d. Enter the name of the optimization delete record in the Optimization Delete Record field.
4. Open (or create) a project and insert all the optimization application records and optimization delete records into the project.
5. Create the tables from these records.
 - a. Select Build, Project.

The Build dialog box appears, showing the optimization application records and optimization delete records in the project.

- b. Select the Create Tables check box, and make sure that the Create Triggers check box is clear.
 - c. Click the Build button.
6. Create optimization database triggers from these records.
 - a. Select Build, Project.

The Build page appears, showing the optimization application records and optimization delete records in the project.
 - b. Select the Create Triggers check box.
 - c. Click the Build button.

Note. Optimization delete records may be used by several analytic types. When a record is deleted from an analytic type, the associated delete record is not needed if this record is not used elsewhere.

Creating Analytic Type Definitions

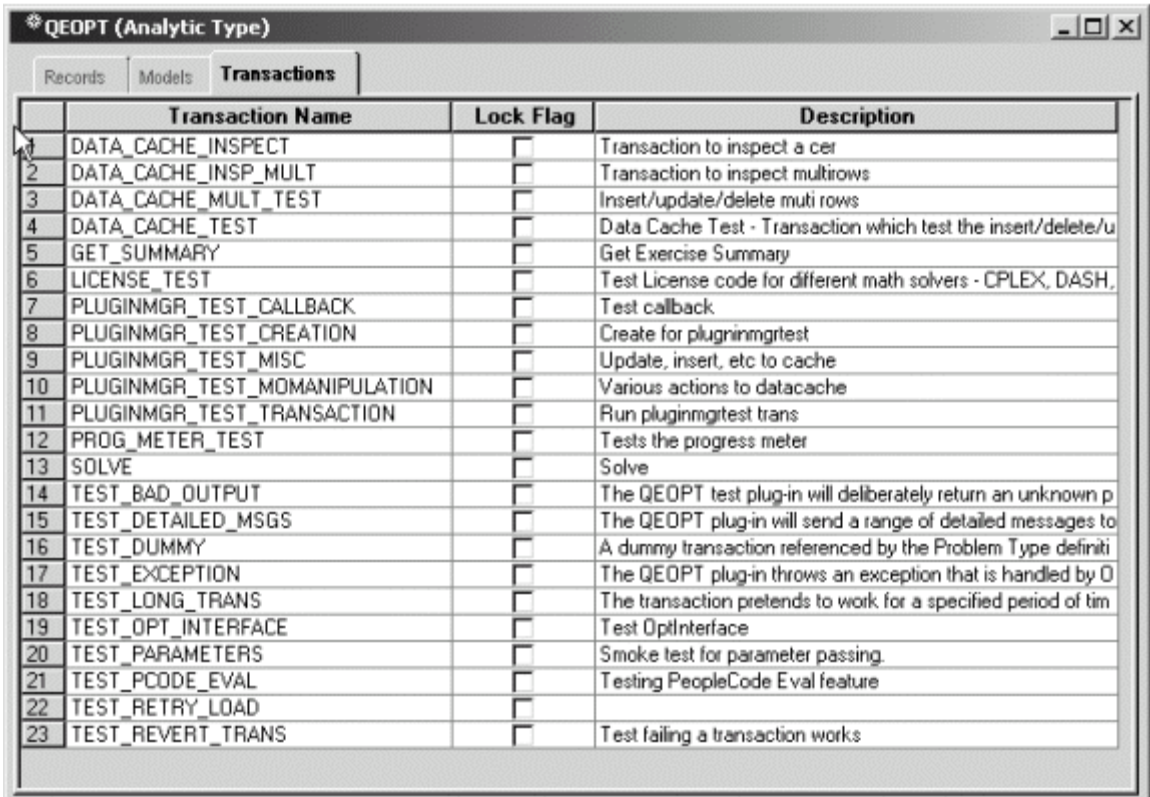
This section discusses how to:

- Define an analytic type.
- Configure analytic type records.
- Configure analytic type models.
- Configure analytic type transactions.

Note. When working with analytic type definitions, you can use the typical drag-and-drop features offered by PeopleSoft Application Designer. For example, you can drag record definitions and drop them into the analytic type record list, which is maintained on the Record tab of the analytic type definition.

Defining an Analytic Type

In PeopleSoft Application Designer, select File, New, Analytic Type. A new analytic type definition appears, containing tabs for transactions, records, and models. The definition combines these items with an OPI to form the basis of an optimization application.



	Transaction Name	Lock Flag	Description
1	DATA_CACHE_INSPECT	☐	Transaction to inspect a cer
2	DATA_CACHE_INSP_MULT	☐	Transaction to inspect multirows
3	DATA_CACHE_MULT_TEST	☐	Insert/update/delete multi rows
4	DATA_CACHE_TEST	☐	Data Cache Test - Transaction which test the insert/delete/u
5	GET_SUMMARY	☐	Get Exercise Summary
6	LICENSE_TEST	☐	Test License code for different math solvers - CPLEX, DASH,
7	PLUGINMGR_TEST_CALLBACK	☐	Test callback
8	PLUGINMGR_TEST_CREATION	☐	Create for pluginmgrtest
9	PLUGINMGR_TEST_MISC	☐	Update, insert, etc to cache
10	PLUGINMGR_TEST_MOMANIPULATION	☐	Various actions to datacache
11	PLUGINMGR_TEST_TRANSACTION	☐	Run pluginmgrtest trans
12	PROG_METER_TEST	☐	Tests the progress meter
13	SOLVE	☐	Solve
14	TEST_BAD_OUTPUT	☐	The QEOPT test plug-in will deliberately return an unknown p
15	TEST_DETAILED_MSGS	☐	The QEOPT plug-in will send a range of detailed messages to
16	TEST_DUMMY	☐	A dummy transaction referenced by the Problem Type definiti
17	TEST_EXCEPTION	☐	The QEOPT plug-in throws an exception that is handled by Q
18	TEST_LONG_TRANS	☐	The transaction pretends to work for a specified period of tim
19	TEST_OPT_INTERFACE	☐	Test OptInterface
20	TEST_PARAMETERS	☐	Smoke test for parameter passing.
21	TEST_PCODE_EVAL	☐	Testing PeopleCode Eval feature
22	TEST_RETRY_LOAD	☐	
23	TEST_REVERT_TRANS	☐	Test failing a transaction works

Analytic Type - transactions tab

To complete the analytic type definition, you'll find it most useful to configure the analytic type properties, then insert and configure the records, the optimization models, and the transactions, in that order.

Access the Analytic Type Properties dialog box, and select the Attributes tab.

Analytic Type Properties

General | **Attributes**

PeopleCode Plugin ☒

Plugin Library Name

Plugin Library Version

Message Set ID

Plugin Application Class

Package

Class

Analytic Instance Application Class

Package

Class

OK Cancel

Analytic Type properties — Attributes tab

PeopleCode Plugin

Select to indicate that the analytic type should use the Optimization PeopleCode plug-in. Only select this check box if the analytic type is to be used with optimization. If the analytic type is to be used with the analytic calculation engine, do not select this check box.

Psopidplugin is automatically entered in the Plugin Lib Name field, which is read-only.

If you use this plug-in, you must also use the Package and Class fields to specify an application class that's been developed to adapt the Optimization PeopleCode plug-in to your optimization application.

See [Chapter 4, "Optimization PeopleCode," Invoking the Optimization PeopleCode Plug-In, page 29.](#)

Plugin Lib Name (plug-in library name)

Enter the name of the OPI library. Enter only the portion of the name that is specific to this library. Ignore operating system-specific prefixes (such as lib) and suffixes (such as .dll). In the exercise example, on Microsoft Windows, the library is libqeo.dll. You would enter only *qeo* here.

If you selected the PeopleCode Plugin check box, this field contains the value *psopidplugin*, and is read-only.

Plugin Lib Version (plug-in library version)	Enter the application release version of the plug-in. The optimization engine uses this to confirm that the correct version of the plug-in library is used at runtime.
Message Set ID	Enter the message set ID in the message catalog containing the messages for the optimization application. The OPI uses this to access messages from the message catalog.
Plugin Application Class — Package	If you selected the PeopleCode Plugin check box, you must specify here the application package containing the application class to use with the Optimization PeopleCode plug-in for your optimization application.
Plugin Application Class — Class	If you selected the PeopleCode Plugin check box, you must specify here the application class containing the optimization PeopleCode program to use with the Optimization PeopleCode plug-in for your optimization application. This class must be a subclass of the PT_OPT_BASE:OptBase application class.
AnalyticInstance Application Class — Package	If this analytic type is to be used with the PeopleSoft Analytic Calculation Engine, specify the application package name that should be associated with this analytic type, that contains the functionality to be used with the analytic type when it is created, deleted or copied. See <i>Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration</i>, “Managing Analytic Servers,” Creating, Deleting, and Copying Analytic Instances.
AnalyticInstance Application Class — Class	If this analytic type is to be used with the PeopleSoft Analytic Calculation Engine, specify the name of the class in the application package that contains the Create, Copy and Delete classes.

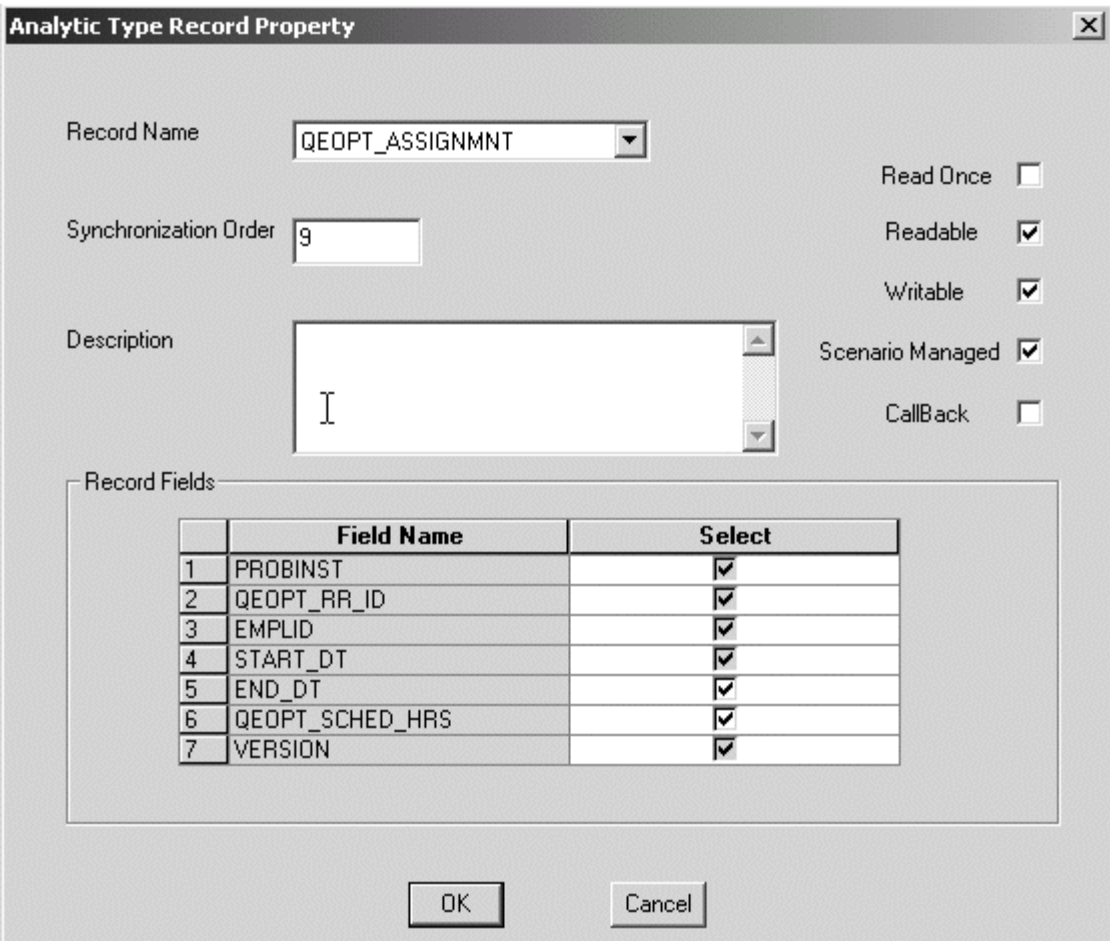
See Also

[Chapter 4, “Optimization PeopleCode,” page 25](#)

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Application Designer

Configuring Analytic Type Records

In the analytic type definition, select the Records tab, then select Insert, Record. The Analytic Type Record Property dialog box appears.



The dialog box is titled "Analytic Type Record Property". It contains the following fields and controls:

- Record Name:** A dropdown menu showing "QEOPT_ASSIGNMNT".
- Synchronization Order:** A text box containing the value "9".
- Description:** A large text area with a cursor.
- Properties (Checkboxes):**
 - Read Once: ☐
 - Readable: ☒
 - Writable: ☒
 - Scenario Managed: ☒
 - CallBack: ☐
- Record Fields:** A table with 7 rows and 2 columns: "Field Name" and "Select".

	Field Name	Select
1	PROBINST	☒
2	QEOPT_RR_ID	☒
3	EMPLID	☒
4	START_DT	☒
5	END_DT	☒
6	QEOPT_SCHED_HRS	☒
7	VERSION	☒

At the bottom are "OK" and "Cancel" buttons.

Analytic Type Record Property dialog box

Note. You can access the properties of an existing analytic type record by right-clicking the record and selecting Analytic Type Record Properties.

Record Name

Select the record to use in the analytic type definition.

Note. If you select a derived/work record, keep in mind that its scope in optimization PeopleCode is different than in other PeopleCode. When you use the CreateOptEngine or CreateAnalyticInstance function, each derived/work record is instantiated at level zero of the analytic instance rowset. The record persists, and you can continuously modify its data across multiple transactions, until you shut down the optimization engine using the ShutDown method.

Synchronization Order

Indicates the order in which the optimization engine reads the optimization application records. If a record has dependencies on another record, the dependent record should be read later. For example, the QE_RSM_EXERTGT record (synchronization order number is 4) depends on data in the QE_RO_MACH_CALS record (synchronization order number is 1). This order is determined by the application logic.

Read Once

Select to have the record read only once during the initial load of the analytic instance into the optimization engine. You cannot select Writeable if this check box is selected.

The optimization engine reads these records only once during the initial data load. It is assumed that the data in these records does not change (or the user doesn't care if it changes) from the initial load of the optimization engine until shutdown.

For the exercise machine problem, you might create a record that contains the name of an exercise machine and the number of calories one can burn on it. This information only needs to be read once by the optimization engine. Furthermore, the information will not change, so a VERSION field is not required.

Readable

Select to have the record checked for updates by the optimization engine with every optimization transaction.

Readable records, besides being loaded during the initial load, are checked for updates by the optimization engine at the beginning of every optimization transaction. For every readable optimization application record, you must also create a corresponding optimization delete record and associate the readable record with the delete record. This process is explained later in this chapter.

Note. It is important to keep the analytic type records in sync with the optimization delete records.

For the exercise machine example, an appropriate readable record contains the name of a person who exercises, the start time and duration of the exercise, and the number of calories that the person wants to burn. This record is readable and scenario-managed. It has a VERSION field and a PROBINST field that contains the name of the person. Because this is pure source data, this data is not writable.

Writable

Select to enable the optimization engine to modify rows for this record. A record can be both readable and writable. It's more common for records to be readable and writable instead of just writable.

A writable record contains result data from the optimization engine. For the exercise machine example, the system calculates this data every time you request an exercise summary. For this reason, it is purely writable.

Scenario-Managed

Select to indicate that the record will contain data pertaining to multiple analytic instances.

Note. Scenario-managed records must have a PROBINST key field.

See [Chapter 3, “Designing Analytic Type Definitions,” Scenario Management, page 8](#).

Callback

Select to enable the optimization engine to update its working data whenever this record changes.

Your analytic type definition might include a record that you expect to change during the course of the optimization. If you want those changes to be taken into account by the optimization, you can define it as a callback record, so you can use provided PeopleCode callback methods to dynamically propagate

those changes to the optimization's derived data structures. A callback record must be readable and writable.

Warning! If you select this check box for a record, you must ensure that you override all of the abstract callback placeholder methods that are defined in the extended PT_OPT_BASE:OptBase application class, even if it contains only a **Return** statement. Otherwise your Optimization PeopleCode plug-in will fail.

See [Chapter 4, "Optimization PeopleCode," OptBase Application Class, page 72](#).

Record Fields

In the Record Fields list, select the fields in this record that need to be read into the optimization engine.

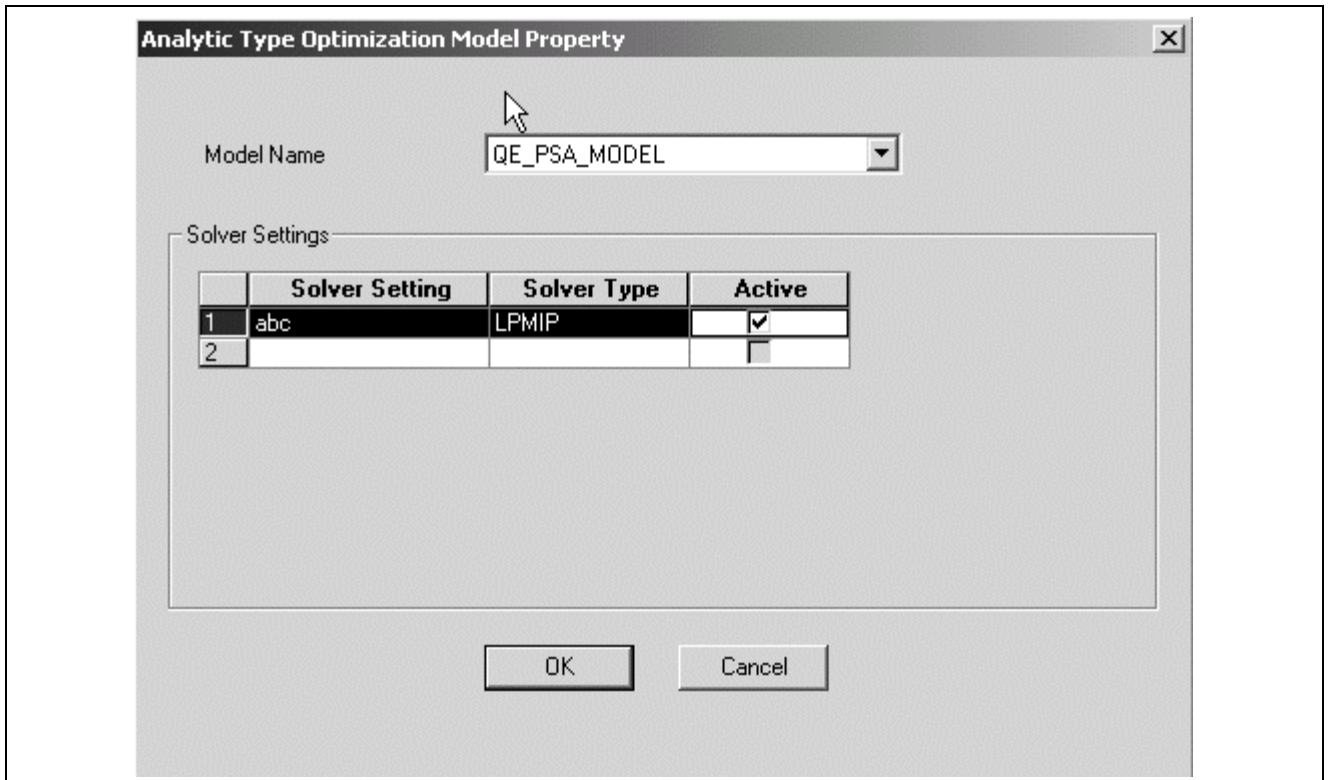
These are the fields that the OPI can access. Key fields and the VERSION field (if it exists) are always selected automatically. To conserve memory used by the optimization engine, select only the necessary fields.

Configuring Models for Optimization

You need to specify and configure analytic type models for optimization only if both of the following are true:

- You selected PeopleCode Plugin in the analytic type properties, indicating that your analytic type definition should use the Optimization PeopleCode plug-in.
- Your application documentation indicates that an optimization model is necessary for the optimization application you're developing.

In the analytic type definition, select the Models tab, then select Insert, Optimization Model. The Analytic Type Optimization Model Property dialog box appears.



Analytic Type Optimization Model Property dialog box

Note. Your application documentation discusses which models to specify, and what configuration settings to make for each model. You can access the properties of an existing analytic type model by right-clicking the model and selecting Analytic Type Model Properties.

Model Name

Select the optimization model required to implement an optimization application with this analytic type.

Solver Settings

A solver setting is a collection of solver parameters with default values that define a particular solver behavior suitable for the optimization model. Specify one or more solver settings to make available to your optimization application, including:

- Solver Setting.

Enter the name of the solver setting.

- Solver Type.

Select the solver type: *LP* (linear programming), *MIP* (mixed integer programming), or *LPMIP* (both).

- Active.

Select the active solver setting — only one solver setting can be active at a time.

Configuring Solver Parameters

For each solver setting you specify, you can configure one or more *solver parameters*.

Double-click on a solver setting to access the Analytic Type Optimization Solver Property dialog box. This dialog box has a grid with two columns: Parameter ID and Parameter Value.

Each solver type has a different set of available parameters, and each parameter has a default value. When you select a solver parameter from the Parameter ID dropdown list, its default value appears in the Parameter Value cell, and a new row appears for adding another parameter. Your application documentation discusses which parameters to specify for each solver setting, and what value to specify for each parameter.

Creating Mathematical Formulation Files

In addition to the analytic server log files, you can also create a mathematical formulation file for debugging. This file is written in either MPS or LP format and maybe requested for technical debugging purpose. The file type is generally LP, however, if the system cannot create an LP file it creates an MPS file. The filename is either *AnalyticType_AnalyticInst.LP* or *AnalyticType_AnalyticInst.MPS*, with *AnalyticType* being the name of the analytic type and *AnalyticInst* being the name of the analytic instance ID. This file is generally written to the same directory as the application server log. Also, this directory can be configured in the application server configuration file.

You indicate whether or not to write this file or not by specifying a solver parameter.

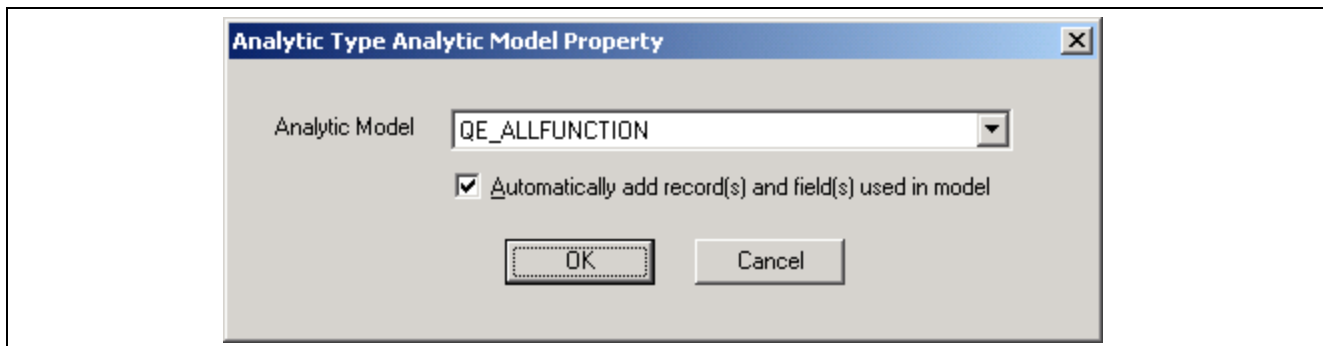
Double-click on a solver setting to access the Analytic Type Optimization Solver Property dialog box. This dialog box has a grid with two columns: Parameter ID and Parameter Value.

Select *WriteMPS* for Parameter ID. In the Parameter Value column, specify a 1 to write the file or a 0 to not write the file.

Associating Analytic Types with Analytic Models

For PeopleSoft Analytic Calculation Engine, you only need to associate an analytic type with an analytic mode.

In the analytic type definition, select the Models tab, then select Insert, Analytic Model.

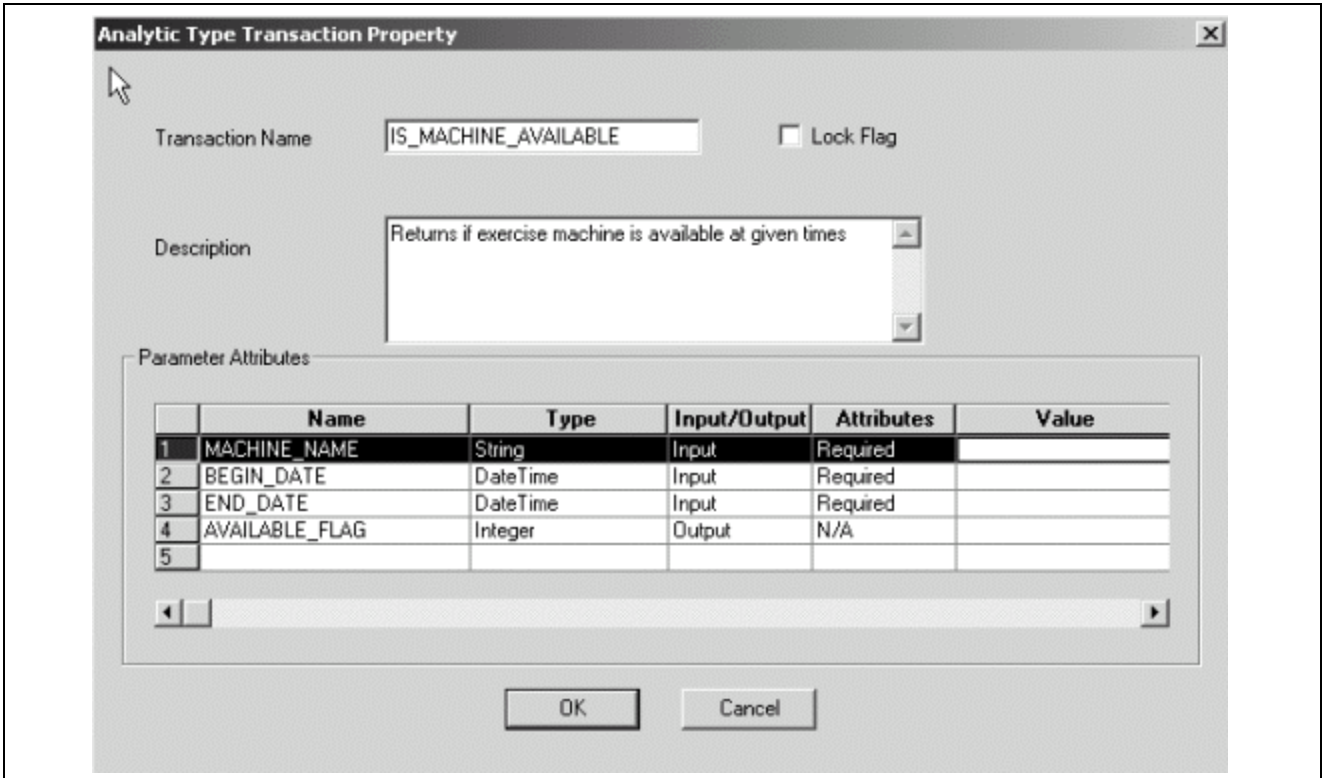


Analytic Type Analytic Model Property

In the Analytic Type Analytic Model Property dialog box, select the name of the analytic model that you want to associate with the analytic type. If you specify to add all the record and fields used in the model, they are automatically added to the records on the Records tab.

Configuring Analytic Type Transactions

In the analytic type definition, select the Transactions tab, then select Insert, Transaction. The Analytic Type Transaction Property dialog box appears.



The dialog box is titled "Analytic Type Transaction Property". It contains the following fields and controls:

- Transaction Name:** A text box containing "IS_MACHINE_AVAILABLE".
- Lock Flag:** A checkbox that is currently unchecked.
- Description:** A text box containing "Returns if exercise machine is available at given times".
- Parameter Attributes:** A table with 5 rows and 6 columns: Name, Type, Input/Output, Attributes, and Value.

	Name	Type	Input/Output	Attributes	Value
1	MACHINE_NAME	String	Input	Required	
2	BEGIN_DATE	DateTime	Input	Required	
3	END_DATE	DateTime	Input	Required	
4	AVAILABLE_FLAG	Integer	Output	N/A	
5					

At the bottom of the dialog are "OK" and "Cancel" buttons.

Analytic Type Transaction Property dialog box

Note. You can access the properties of an existing analytic type transaction by right-clicking the transaction and selecting Analytic Type Transaction Properties.

Transaction Name

Enter the case-sensitive name of the transaction.

If the PeopleCode Plugin check box is selected in the analytic type properties, this value must match the name of a method defined in the application class you specified for this analytic type.

If the PeopleCode Plugin check box is *not* selected in the analytic type properties, this value must match the name of a service defined in the OPI that you selected in the analytic type properties.

The transaction name you specify must be distinct within an analytic type.

For the exercise machine example, three transactions are needed. The QEOPT.DLL OPI implements these transactions:

- SOLVE solves the exercise machine problem.
- GET_SUMMARY produces a summary of exercises for a person.
- IS_MACHINE_AVAILABLE returns whether an exercise machine is available for a specified time.

The transaction name can contain up to 30 characters.

See [Chapter 4, "Optimization PeopleCode," OptBase Application Class, page 72.](#)

Lock Flag

Enter this flag to prevent changes to the optimization application tables while this transaction runs. Typically, this flag should be set for extremely fast but

critical transactions where data integrity is crucial. In the exercise planning example, optimization transactions do not need the lock flag.

Important! The lock flag can hamper performance, so use it with caution.

Parameter Attributes

Each transaction can have any number of parameters.

If the application class method corresponding to this transaction has parameters, you must define a row in this grid with equivalent attributes for each of the parameters.

Name	Enter the name of the parameter. The name must match the transaction parameter name defined in the OPI, or the equivalent method parameter defined in the application class you specified for this analytic type. The transaction parameter name can contain up to 20 characters, and it must be distinct within an analytic type.
Type	Select the parameter type (<i>String</i>, <i>Integer</i>, <i>Double</i>, <i>Date</i>, <i>DateTime</i>, <i>Time</i>, or arrays of these types, or <i>Record Array</i>). The type must match the transaction parameter type defined in the OPI, or the equivalent method parameter type defined in the application class you specified for this analytic type. Note. Do not pass an array of type <i>Integer</i> as a transaction parameter. Use an array of type <i>Number</i> instead.
Input/Output	Select <i>Input</i> , <i>Output</i> , or <i>Both</i> .
Attributes	Select <i>Required</i>, <i>Optional</i>, or <i>Default</i> (the parameter has a default value). This is not applicable to output parameters. Note. If an input parameter is required, it must be supplied when you use either the <i>RunSynch</i> or <i>RunAsynch</i> PeopleCode methods.
Value	If the Attributes field is set to <i>Default</i>, enter a default value for this parameter. If the type is <i>Record Array</i>, enter the name of the record. Otherwise, leave this blank.

Running the Optimization System Audit

After you have created the analytic type definition, run SYSAUDIT with the optimization options selected. This ensures that the definition is valid and consistent.

To run the optimization system audit:

1. From the PeopleTools Utilities menu, select Audit, Perform System Audit.
2. Enter a run control ID.
3. On the System Audit page, select Audit Optimization Integrity, and click Run.

4. On the Process Scheduler Request page, ensure that the System Audit check box is selected, select a server name, and click OK.
5. When the System Audit page reappears, click Process Monitor (to the left of the Run button).
6. On the Process List page, at the end of the line for SYSAUDIT, click Details.
7. On the Process Detail page, click View Log/Trace.
8. On the View Log/Trace page, click the SYSAUDIT_XX file name.

This file contains the audit report for your optimization.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Data Management, “Ensuring Data Integrity,” Running SYSAUDIT

Changing Existing Analytic Type Definitions

This section discusses how to change:

- Optimization application records.
- Optimization transactions.

Changing Optimization Application Records

To change optimization application records in an analytic type definition:

1. Shut down all the running optimization engines that use this analytic type definition.
2. Shut down other optimization engines if record definitions are being shared by other analytic type definitions.
3. Delete all existing analytic instances using the DeleteOptProbInst PeopleCode function.
See [Chapter 4, “Optimization PeopleCode,” DeleteOptProbInst, page 46](#).
4. Empty the optimization application tables.
5. Make record definition changes and build the records in PeopleSoft Application Designer.
See [Chapter 3, “Designing Analytic Type Definitions,” Creating and Building Optimization Records, page 9](#).
6. Open the analytic type in PeopleSoft Application Designer, insert any new records or make appropriate changes to reflect changed record definitions, and save the analytic type.
Run SYSAUDIT with the optimization options selected.
Skip the steps about inserting transactions.
7. Change the OPI to reflect the changes to optimization application records.
If the records do not match the plug-in, the program will fail.
8. Call the InsertOptProbInst PeopleCode function to recreate analytic instances.
See [Chapter 4, “Optimization PeopleCode,” InsertOptProbInst, page 49](#).

Changing Optimization Transactions

To change optimization transactions in an analytic type definition:

1. Shut down all the running optimization engines that use the analytic type definition.
2. Open the analytic type definition in PeopleSoft Application Designer, insert any new transactions or make appropriate changes to existing ones, and save the analytic type.
Skip the steps about inserting records.
3. Change the OPI to reflect the changes to optimization transactions.
4. Change optimization PeopleCode to reflect the changes (add, remove, and update parameters).

Administering Optimization Engines

An optimization engine is an instance of an analytic server.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*, “Managing Analytic Servers”.

Setting Up Integration Broker

Before you can use lights-out mode and other optimization features, you must first configure PeopleSoft Integration Broker for basic messaging.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker*.

The only PeopleSoft Integration Broker elements specific to optimization engine administration are two transactions delivered with your PeopleSoft application. One transaction is type *InSync*, the other is type *OutSync*, and both use the OPT_CALL message. Ensure that they’re both active on the Transactions page of the default local node definition.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker*, “Adding and Configuring Nodes”.

Updating Solver Licenses

Use the Administer license page to update a solver software license. PeopleSoft Optimization Framework uses third-party solver software. In some cases, the solver software is activated by a license.

Note. Currently, no optimization application requires updating the solver license. You should update solver licenses only on instructions from PeopleSoft.

To update solver licenses:

1. In a browser, select PeopleTools, Utilities, Optimization, Solver Licenses.
2. Enter an optimization solver type, such as LP/MIP.

The optimization engine identifies the third-party solver software by its solver type.

3. On the Administer license page, enter the new license code in the Encrypted License Code field.

CHAPTER 4

Optimization PeopleCode

This chapter discusses how to:

- Use optimization PeopleCode on the application server.
- Use optimization PeopleCode in an Application Engine program.
- Perform optimization in PeopleCode.
- Use lights-out mode with optimization.
- Use optimization built-in functions.
- Use OptEngine class methods.
- Use OptEngine class properties.
- Use the OptBase application class.
- Use OptBase class methods.
- Use OptInterface class methods.

Using Optimization PeopleCode on the Application Server

While running optimization PeopleCode on the application server, ensure that changed data is committed to the database before calling the CreateOptEngine optimization function and the following OptEngine class methods:

- RunSynch
- RunAsynch
- CheckOptEngineStatus
- ShutDown
- SetTraceLevel
- GetTraceLevel
- InsertOptProbInst
- DeleteOptProbInst

Note. The PeopleCode functions CommitWork and DoSaveNow can be called within a step to save uncommitted data to the database before calling the listed functions and methods. Keep in mind that forcing a commit on pending database updates is a serious step; it prevents roll-back on error. CreateOptEngine, ShutDown, InsertOptProbInst and DeleteOptProbInst modify the database, so take care when terminating the Application Engine program without committing the changes made by those calls.

Using Optimization PeopleCode in an Application Engine Program

When you write an optimization PeopleCode program in an Application Engine program and you schedule it in PeopleSoft Process Scheduler, you must set the process definition with a process type of *Optimization Engine*. Other process types do not allow optimization PeopleCode in Application Engine programs.

While using optimization PeopleCode in Application Engine programs, make sure data is committed before calling the `CreateOptEngine` optimization function and the following `OptEngine` class methods:

- `RunSynch`
- `RunAsynch`
- `CheckOptEngineStatus`
- `ShutDown`
- `SetTraceLevel`
- `GetTraceLevel`
- `InsertOptProbInst`
- `DeleteOptProbInst`

Note. You can call the PeopleCode functions `CommitWork` and `DoSaveNow` within a step to save uncommitted data to the database before calling the listed functions and class methods. Keep in mind that forcing a commit on pending database updates is a serious step; it prevents roll-back on error. `CreateOptEngine`, `ShutDown`, `InsertOptProbInst` and `DeleteOptProbInst` modify the database, so take care when terminating the Application Engine program without committing the changes made by those calls.

Performing Optimization in PeopleCode

This section discusses how to:

- Create new analytic instances.
- Load analytic instances into an analytic server.
- Run optimization transactions.
- Invoke the Optimization PeopleCode plug-in.
- Shut down optimization engines.
- Delete existing analytic instances.
- Program for database updates.

Creating New Analytic Instances

To create a new analytic instance for an analytic type:

1. Call the function `InsertOptProbInst` with the analytic type and analytic instance as parameters to create an analytic instance ID.
2. Use PeopleSoft Application Engine or a similar mechanism to load the optimization application tables with data.

Use the analytic instance ID as the key value in scenario-managed optimization application tables.

The analytic instance is now ready to be loaded into an analytic server.

Note. You can load multiple copies of the same analytic instance into multiple instances of an analytic server, provided that each instance of the analytic server resides in a different application server domain. Each analytic instance loaded into a given domain must be unique. Within a given domain, you cannot have the same analytic instance in more than one analytic server. The analytic server maintains data integrity by checking to see if the data has been altered by another user (refer to the steps in the optimization system architecture description). Try to maintain data consistency when the same analytic instance uses the same database in different domains.

See Also

[Chapter 2, “Understanding PeopleSoft Optimization Framework,” PeopleSoft Optimization Framework System Architecture, page 4](#)

[Chapter 4, “Optimization PeopleCode,” InsertOptProbInst, page 49](#)

Loading Analytic Instances Into an Analytic Server

Use the CreateOptEngine function to load an analytic server with an analytic instance. It takes analytic instance ID and a mode parameter with %Synch and %Asynch as possible values and returns a PeopleCode object of type OptEngine.

You can run the PeopleCode on the application server or from PeopleSoft Application Engine.

Loading Analytic Instances by Running PeopleCode on the Application Server

To block PeopleCode from running on the application server until the load is done (synchronous mode), use the %Synch value for the mode parameter. An error is generated if the load isn't successful. The application server imposes a timeout beyond which the PeopleCode and optimization engine load are terminated. Here is a code example:

```
Local OptEngine &myopt;
&myopt = CreateOptEngine("PATSMITH", %Synch);
```

To load the analytic server without blocking the PeopleCode from running (asynchronous mode) on the application server, use the %Asynch value for the mode parameter. The analytic server performs a preliminary check of the load request and returns the OptEngine object if it is successful or an error if it is unsuccessful. A successful return does not mean that the load was successful. You must then use repeated CheckOptEngineStatus methods on the returned OptEngine object to determine whether the analytic engine is done with the load and whether it was successful. Here is a code example:

```
Local OptEngine &myopt;
&myopt = CreateOptEngine("PATSMITH", %Asynch);
```

Loading Analytic Instances by Running PeopleCode in PeopleSoft Application Engine

Both synchronous (%Synch) and asynchronous (%Asynch) modes block the PeopleCode from running on PeopleSoft Application Engine until the load is done. Use only %Asynch while loading an optimization engine.

The absolute number of optimization engine instances that may be loaded in a given domain is governed by a configuration file loaded by Tuxedo during its domain startup.

See Also

[Chapter 4, “Optimization PeopleCode,” CheckOptEngineStatus, page 52](#)

[Chapter 5, “Administering Optimization Server Components,” page 101](#)

Running Optimization Transactions

You send an optimization transaction to the optimization engine using the RunSynch and RunAsynch methods. Both are methods on an OptEngine object. The OptEngine object can be created either by calling CreateOptEngine (if the optimization engine is not loaded already) or by calling GetOptEngine (if the optimization engine is already loaded). Both RunSynch and RunAsynch have the same signature, except that RunSynch runs the optimization transaction in synchronous mode and RunAsynch runs it in asynchronous mode. Both return an integer status code. You can run transactions either on the application server or with PeopleSoft Application Engine.

To invoke an optimization transaction:

1. Use the GetOptEngine function to get the OptEngine object as a handle for the optimization engine that has loaded an analytic instance ID.

Use the CreateOptEngine function to create the OptEngine object for a new optimization engine if the analytic instance has not been loaded.

2. Call RunSynch or RunAsynch to send an optimization transaction to the optimization engine to be run in synchronous or asynchronous mode.
3. If the transaction is run in synchronous mode (RunSynch), use the OptEngine methods GetString, GetNumber, and so on, to retrieve the output result from the optimization transaction.

The transaction names, parameter names, and data types are viewable in the analytic type in PeopleSoft Application Designer.

4. If the transaction is run in asynchronous mode, use the OptEngine method CheckOptEngineStatus to check the status of the optimization transaction in the optimization engine.

After the transaction is done, result data is available in the database for retrieval using standard PeopleCode mechanisms.

Running Optimization Transactions from the Application Server

To block the PeopleCode from running on the application server until the optimization transaction is done (synchronous mode) and receives the results, use RunSynch to send an optimization transaction. An error status code is returned if the transaction isn't successful. If successful, you can use other methods to retrieve the results from the transaction call. The application server imposes a timeout beyond which the PeopleCode and optimization engine transaction are terminated.

To run a transaction without blocking PeopleCode from running (asynchronous mode) on the application server, use RunAsynch to send an optimization transaction. In this mode, the optimization engine performs a preliminary check of the transaction request and returns a success or failure status code. A successful return does not mean that the transaction is successful; it means only that the syntax is correct. You must then use repeated calls to the CheckOptEngineStatus method on the OptEngine object to determine whether the optimization engine is done with the transaction and whether it is successful.

RunAsynch does not allow transaction output results to be returned. Use this method for long-running transactions that return results entirely through the database.

Running Optimization Transactions from PeopleSoft Application Engine

Both synchronous (RunSynch) and asynchronous (RunAsynch) methods block the PeopleCode from running on PeopleSoft Application Engine until the optimization transaction is done. RunSynch allows output results to be returned, but it should be used for transactions that are fast (less than 10 seconds). RunAsynch does not have a time limit, but it does not return output results.

See Also

[Chapter 4, “Optimization PeopleCode,” RunAsynch, page 64](#)

Invoking the Optimization PeopleCode Plug-In

If you’re developing an optimization application that uses the Optimization PeopleCode plug-in, you must do the following to invoke the plug-in:

- Develop a PeopleCode application class that extends the PT_OPT_BASE:OptBase class.
- Define methods in your application class that use the PeopleCode OptInterface class to perform your optimization functions.
- Define an analytic type that specifies the Optimization PeopleCode plug-in, by selecting the PeopleCode Plugin check box in the analytic type properties.
- Also in the analytic type properties, specify the application package and application class that you developed.
- Define transactions in your analytic type definition that correspond to the methods you developed in your application class, with corresponding parameters.

See Also

[Chapter 3, “Designing Analytic Type Definitions,” Creating Analytic Type Definitions, page 10](#)

[Chapter 4, “Optimization PeopleCode,” CreateOptInterface, page 45](#)

[Chapter 4, “Optimization PeopleCode,” OptBase Application Class, page 72](#)

[Chapter 4, “Optimization PeopleCode,” OptInterface Class Methods, page 88](#)

Shutting Down Optimization Engines

Use the GetOptEngine function to get the OptEngine object as a handle for the optimization engine that loaded an analytic instance ID.

Use the OptEngine method named ShutDown to shut down the optimization engine. This ends the optimization engine process with the current analytic instance ID. Based on application server settings, the system restarts a new, unloaded optimization engine process that can be loaded with any other analytic instance.

See Also

[Chapter 4, “Optimization PeopleCode,” ShutDown, page 69](#)

Deleting Existing Analytic Instances

To delete an existing analytic instance for an analytic type:

1. Shut down any optimization engines that have this analytic instance currently loaded.

2. Using PeopleSoft Application Engine or a similar mechanism, delete the data in the optimization application tables pertaining to that analytic instance.

Use the analytic instance ID as the key value to find and delete analytic instance rows from scenario-managed optimization application tables.

3. Use the function `DeleteOptProbInst` with the analytic type and analytic instance as arguments to delete the analytic instance ID from PeopleTools metadata.

Note. If you try to delete an existing analytic instance that is loaded in a running optimization engine, `DeleteOptProbInst` returns `%OptEng_Fail`, and the optional status reference parameter is set to `%OptEng_Exists`.

See Also

[Chapter 4, “Optimization PeopleCode,” DeleteOptProbInst, page 46](#)

Programming for Database Updates

You must plan for uncommitted database changes in your optimization PeopleCode. The Optimization Framework detects pending database updates, and generates a failure status if data is not committed to the database before certain optimization methods are called.

This checking for database updates happens in runtime for the `CreateOptEngine` function and the following methods: `RunSync`, `RunAsync`, `Shutdown`, `GetTraceLevel`, and `SetTraceLevel`. Ensure that your PeopleCode performs proper database updates and commits before you execute these methods. If you use the optional parameter for detailed status that is available for these functions, or the `DetailedStatus` property that is available for the methods, you can check for the status of `%OptEng_DB_Updates_Pending` to see if there is a pending database update.

Note. The pending database update may have happened considerably earlier in the code. Forcing a commit within your PeopleCode to avoid this problem prevents roll-back on database error. Forcing a commit should be used with care.

The `InsertOptProbInst` and `DeleteOptProbInst` functions can be called only inside `FieldChange`, `PreSaveChange` and `PostSaveChange` PeopleCode events, and in `Workflow`.

This database update checking happens in compile time for the following functions: `InsertOptProbInst` and `DeleteOptProbInst`. Make sure that there are no pending database updates before you execute these methods.

Using Lights-Out Mode with Optimization

This section provides an overview of lights-out mode, and discusses how to:

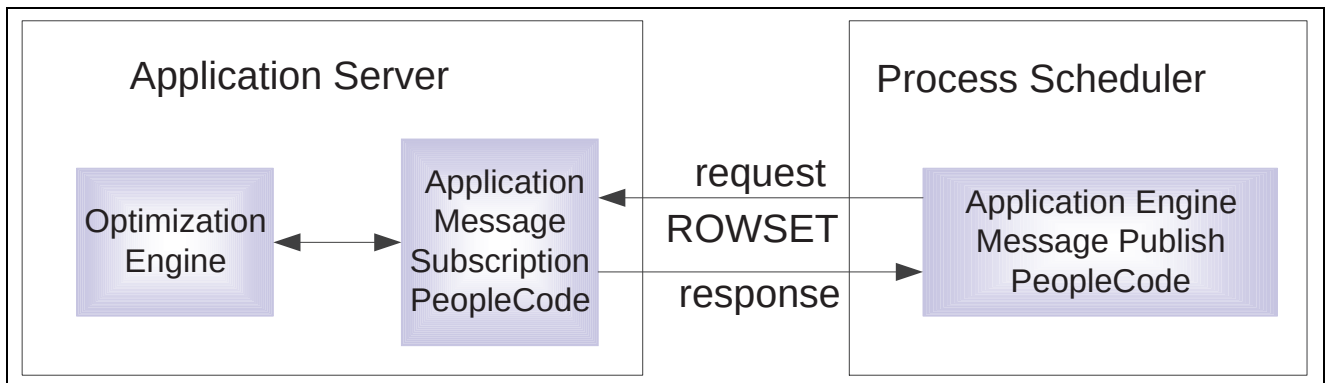
- Create a request message.
- Create a response message.
- Edit the request PeopleCode.
- Edit the response PeopleCode.

Understanding Lights-out Mode

Some optimization applications can take several hours to run. These are typically run as overnight batch jobs every night when the work load is small to regenerate the optimization solution and have it ready for end users to use in the morning — hence the term *lights-out mode*.

In the current release, application messages communicate between the Application Engine batch job and the online optimization engine. After the Application Engine job completes and the optimization solution has been written to the database, an application message initiates the download of the data from the database batch job to the online optimization engine.

Lights-out mode uses an Application Engine PeopleCode program within PeopleSoft Process Scheduler to send requests to an application server and receive responses from it. Within the application server, the OnRequest PeopleCode runs an optimization engine process.



Lights-out process

This request and response is in the form of a rowset as shown by the example supplied with optimization, the OPT_CALL message. Also supplied as an example is an Application Engine message publish PeopleCode program called PT_OPTCALL.

Important! PeopleSoft Application Engine includes an action of type *Log Message*, which PeopleSoft Process Scheduler uses to record its activity in the PS_MESSAGE_LOG table. The PeopleCode MessageBox and WinMessage built-in functions also record their activity in the PS_MESSAGE_LOG table.

During lights-out optimization, these processes can conflict with each other or with the optimization engine when one process locks a row of the table, and another process tries to access the same row.

To prevent this conflict, pay close attention to where the MessageBox or WinMessage built-in functions are used in your Application Engine PeopleCode. In general, there can't be any outstanding database updates pending when communicating with the optimization engine using application messages.

The OPT_CALL Message

The OPT_CALL message is an example of what the lights-out process uses as the message for optimization. The OPT_CALL message has a structure using a record, PT_OTPPARMS, having the fields PARMKEY and VALUE which represent a name/value pair. These send requests and responses from the Application Engine PeopleCode in PeopleSoft Process Scheduler to and from the message OnRequest PeopleCode in the application server.

The OPT_CALL message also uses a record, PT_OPTDETMSG, which contains the information needed for processing a detailed message.

Message Definition

Schema

Message:

OPT_CALL

Version:

VERSION_1

Description:

Optimization Msg

Owner ID:

PeopleTools

Comments:

Use for AE to kick out Optimization Job under App Server domain

Schema Exists:

No

☐ Part Message

Message Type

☒ Rowset-based
 ☐ Nonrowset-based
 ☐ Container

[Service Operation References](#)

[Add Record to Root](#)

Left | Right

OPT_CALL

PT_OPTDETMSSGS

PT_OPTPARMS

✓

PARMKEY

✓

VALUE

Save

Save As

Return to Search

Add

Update/Display

[Message Definition](#) | [Schema](#)

OPT_CALL message definition

The OPT_CALL message is associated with the OPT_CALL service operation. The OPT_CALL service operation defines the OPT_CALL application package as a handler. This application package implements the Integration Broker methods needed to handle any messaging PeopleCode.

Creating a Request Message

This section provides an overview of the request message and describes how to create messages that:

- Create an optimization engine.
- Check optimization engine status.
- Run an optimization engine transaction.
- Set the trace level.
- Get the trace level.
- Shutdown an optimization engine.

Understanding the Request Message

For optimization, the Application Engine PeopleCode in PeopleSoft Process Scheduler sends a request OPT_CALL message. The message uses rowsets built from PT_OTPARMS records as the request. You can use the following rowset structures as an example of how to perform certain optimization actions, by sending them as requests from the application engine program in the process scheduler to the message notification PeopleCode in the application server.

Creating an Optimization Engine

To create an optimization engine, structure the rowset as follows, using the PT_OTPARMS record. You set key values using the PARMKEY field, and then set a value for that key field in the VALUE field.

PARMKEY Field	VALUE Field
OPTCMD	CREATE Causes the PeopleCode program implementing the Integration Broker OnRequest method to load an optimization engine. The OPT_CALL example executes the CreateOptEngine function.
PROBINST	The name of the analytic instance.
PROCINSTANCE	The name of the process instance for this process scheduler job.
SYNCH	Y if this optimization engine load is to occur synchronously, N if asynchronously.

Checking Optimization Engine Status

To check optimization engine status (for example, to see when it finishes loading), structure the rowset as follows, using the PT_OTPARMS record.

PARMKEY Field	VALUE Field
OPTCMD	CHECK_STATUS Causes the PeopleCode program implementing the Integration Broker OnRequest method to check the status of an optimization engine. The OPT_CALL example executes the CheckOptEngineStatus function.
PROBINST	The name of the analytic instance.
PROCINSTANCE	The name of the process instance for this process scheduler job.

Running a Transaction

To run a transaction, structure the rowset as follows, using the PT_OTPARMS record.

PARMKEY Field	VALUE Field
OPTCMD	RUN Causes the PeopleCode program implementing the Integration Broker OnRequest method to run an optimization transaction. The OPT_CALL example executes the GetOptEngine method and either the RunSynch or RunAsynch method.
PROBINST	The name of the analytic instance.
PROCINSTANCE	The name of the process instance for this process scheduler job.
SYNCH	Y for a synchronous transaction, N for asynchronous.
TRANSACTION	The name of the transaction to run.
The names of one or more transaction parameters.	The value of each named transaction parameter.

Setting the Trace Level

To set a trace level, structure the rowset as follows, using the PT_OTPPARMS record.

PARMKEY Field	VALUE Field
OPTCMD	SET_TRACE_LEVEL Causes the PeopleCode program implementing the OnRequest Integration Broker method to set the severity level at which events will be logged for an optimization engine. The OPT_CALL example executes the SetTraceLevel method.
PROBINST	The name of the analytic instance.
PROCINSTANCE	The name of the process instance for this process scheduler job.

PARMKEY Field	VALUE Field
COMPONENT	One of the following values: • %Opt_Engine — server activity of the running optimization engine. • %Opt_Utility — low level elements that support the running optimization engine. • %Opt_Datacache — the in-memory database cache. • %Opt_Plugin — the plugin being used for the running optimization engine.
SEVERITY_LEVEL	The severity level to log. The following list starts with the most severe level; the level you specify includes all higher levels. For example, if you specify %Severity_Error, it logs %Severity_Fatal, %Severity_Status, and %Severity_Error messages and filters out the others. • %Severity_Fatal • %Severity_Status • %Severity_Error • %Severity_Warn • %Severity_Info • %Severity_Trace1 • %Severity_Trace2

Getting the Trace Level

To get a trace level, structure the rowset as follows, using the PT_OTPPARMS record.

PARMKEY Field	VALUE Field
OPTCMD	GET_TRACE_LEVEL Causes the PeopleCode program implementing the OnRequest Integration Broker method to get the severity level at which events will be logged for an optimization engine. The OPT_CALL example executes the GetTraceLevel method.
PROBINST	Set to the name of the analytic instance.
PROCINSTANCE	Set to the name of the process instance for this process scheduler job.
COMPONENT	One of the following values: • %Opt_Engine — server activity of the running optimization engine. • %Opt_Utility — low level elements that support the running optimization engine. • %Opt_Datacache — the in-memory database cache. • %Opt_Plugin — the plugin being used for the current opt engine.

Shutting Down an Optimization Engine

To shut down an optimization engine, structure the rowset as follows, using the PT_OTPARMS record.

PARAMKEY Field	VALUE Field
OPTCMD	SHUTDOWN Causes the PeopleCode program implementing the OnRequest Integration Broker method to shut down an optimization engine. The OPT_CALL example executes the Shutdown method.
PROBINST	The name of the analytic instance.
PROCINSTANCE	The name of the process instance for this process scheduler job.

Creating a Response Message

This section provides an overview of the response message and describes how to create messages that:

- Send optimization status.
- Send a detailed message.

Understanding the Response Message

For optimization, the message PeopleCode in application server receives the request messages, performs an optimization actions, and sends response OPT_CALL messages. One message uses rowsets built from PT_OTPARMS records, the other uses rowsets from PT_DETMSGs records. You can use the following rowset structures as an example of how to send responses from the message notification PeopleCode in the application server to the application engine program in the process scheduler.

Sending Optimization Status

To send the status of the optimization functions and methods called within the PeopleCode program implementing the OnRequest Integration Broker method, structure the rowset as follows using the PT_OTPARMS record. The optimization functions and messages are called in response to the request input message. You set key values using the PARAMKEY field, and then set a value for that key field in the VALUE field.

PARAMKEY Field	VALUE Field
STATUS	The return status of the optimization function or method that is called in the message PeopleCode.
DETAILED_STATUS	The optional detailed status returned by many of the optimization functions and methods.

Sending a Detailed Message

To send a detailed message, structure the rowset as follows, using the PT_DETMSGs record. You set key values using the PARAMKEY field, and then set a value for that key field in the VALUE field.

PARMKEY Field	VALUE Field
MSGSET	The message set number. In the case of optimization, the message set number is 148.
MSGNUM	The name of the detailed message.
PARMCOUNT	The number of message parameters for the detailed message. There can be up to five parameters.
MSGPARAM1	The first parameter value.
MSGPARAM2	The second parameter value.
MSGPARAM3	The third parameter value.
MSGPARAM4	The fourth parameter value.
MSGPARAM5	The fifth parameter value.

Editing the Request PeopleCode

The PT_OPTCALL Application Engine program serves as a template. It is delivered with all the sections marked as inactive. You can edit the program to suit your needs, then mark the appropriate sections active before running it. You can also use the program as a guide to creating your own Application Engine program.

The program uses these steps to send request messages to perform the following tasks:

1. Load the optimization engine.
2. Wait for the optimization engine load to finish.
3. Run an optimization transaction against the loaded optimization engine.
4. Wait for the optimization transaction to finish running.
5. Set the trace level.
6. Get the trace level.
7. Shut down the optimization engine.

You can edit steps 1 and 3 to run an optimization transaction. You can also use the entire program as a template to create your own Application Engine program.

Loading an Optimization Engine

In step 1, enter the name of your analytic instance. In this example, the name of the analytic instance is FEMALE1.

If you have multiple domains, enter the local node name and the machine name and port number for your application server. In this case, the local node name is %LocalNode and the machine name and port number are foo111111:9000.

```
Local Message &MSG;
Local Message &response;

Component string &probid;
```

```

Component string &isSync;
Component string &procinst;
Local integer &nInst;
Local string &url;

Local Rowset &rs;
Local Row &row;
Local Record &rec;

Local string &stName;
Local integer &stVal;

&MSG = CreateMessage (OPERATION.OPT_CALL);
&rs = &MSG.GetRowset();

&row = &rs.GetRow(1);
&rec = &row.GetRecord(Record.PT_OTPARMS);
&rec.PARMKEY.Value = "OPTCMD";
&rec.VALUE.Value = "CREATE";

&rs.InsertRow(1);
&rec = &rs.GetRow(2).PT_OTPARMS;
&rec.PARMKEY.Value = "PROBINST";
&rec.VALUE.Value = "FEMALE1";
&probid = "FEMALE1";

&rs.InsertRow(2);
&rec = &rs.GetRow(3).PT_OTPARMS;
&rec.PARMKEY.Value = "PROCINSTANCE";
&nInst = Record.PT_OPT_AET.PROCESS_INSTANCE.Value;
&rec.VALUE.Value = String(&nInst);
&procinst = String(&nInst);

&rs.InsertRow(3);
&rec = &rs.GetRow(4).PT_OTPARMS;
&rec.PARMKEY.Value = "SYNCH";
&rec.VALUE.Value = "N";
&isSync = "N";

/* Specify the Application Server domain URL (foo111111:9000 in this example)
*/
&response = %IntBroker.SyncRequest(%LocalNode, "//foo111111:9000 e");

If &response.ResponseStatus = 0 Then
    &stName = &response.GetRowset().GetRow(1).GetRecord(Record.PT_OTPARMS).Get⇒
Field(Field.PARMKEY).Value;
    &stVal = Value(&response.GetRowset().GetRow(1).GetRecord(Record.PT_⇒
OTPARMS).GetField(Field.VALUE).Value);
    If &stName = "STATUS" And

```

```

        &stVal = %OptEng_Fail Then
        /* Check detailed message here */
        throw CreateException(148, 2, "Can not send to OptEngine");
    End-If;
End-If;

```

Running An Optimization Transaction

In step 3, enter the name of your optimization transaction and its parameter name/value pairs. In this example, the transaction name is TEST_LONG_TRANS, the first parameter name/value pair is Delay_in_Secs and 30, and the second parameter name/value pair is Sleep0_Work1 and 0.

The parameter values are stored as strings. You may need to convert them in the OnRequest PeopleCode.

```

Local Message &MSG;
Local Message &response;

Local Rowset &rs, &respRS;
Local Row &row;
Local Record &rec, &msgRec;

Component string &probid;
Component string &procinst;
Component string &isSync;
Local string &url = "";
Local integer &parmCount, &msgSet, &msgNum;

&MSG = CreateMessage(OPERATION.OPT_CALL);
&rs = &MSG.GetRowset();

&row = &rs.GetRow(1);
&rec = &row.GetRecord(Record.PT_OTPARMS);
&rec.PARMKEY.Value = "OPTCMD";
&rec.VALUE.Value = "RUN";

&rs.InsertRow(1);
&rec = &rs.GetRow(2).PT_OTPARMS;
&rec.PARMKEY.Value = "PROBINST";
&rec.VALUE.Value = &probid;

&rs.InsertRow(2);
&rec = &rs.GetRow(3).PT_OTPARMS;
&rec.PARMKEY.Value = "PROCINSTANCE";
&rec.VALUE.Value = &procinst;

&rs.InsertRow(3);
&rec = &rs.GetRow(4).PT_OTPARMS;
&rec.PARMKEY.Value = "SYNCH";
&rec.VALUE.Value = &isSync;

&rs.InsertRow(4);

```

```

&rec = &rs.GetRow(5).PT_OTPARMS;
&rec.PARMKEY.Value = "TRANSACTION";
&rec.VALUE.Value = "TEST_LONG_TRANS";

&rs.InsertRow(5);
&rec = &rs.GetRow(6).PT_OTPARMS;
&rec.PARMKEY.Value = "Delay_in_Secs";
&rec.VALUE.Value = "30";

&rs.InsertRow(6);
&rec = &rs.GetRow(7).PT_OTPARMS;
&rec.PARMKEY.Value = "Sleep0_Work1";
&rec.VALUE.Value = "0";

/* SyncRequest will carry a url */
SQLExec("select URL from PSOPTSTATUS where PROBINST=:1 AND URL NOT LIKE ':%:0';", =>
    &probid, &url);
If &url = "" Then
    throw CreateException(148, 2, "Can not send to OptEngine");
End-If;

/* Specify the Application Server domain URL.
   (This was specified in Step 1 in this example.)
*/
&response = %IntBroker.SyncRequest(%LocalNode, &url);

If &response.ResponseStatus = 0 Then
    &stName = &response.GetRowset().GetRow(1).GetRecord(Record.PT_OTPARMS).Get=>
Field(Field.PARMKEY).Value;
    &stVal = Value(&response.GetRowset().GetRow(1).GetRecord(Record.PT_>
OTPARMS).GetField(Field.VALUE).Value);

    If &stName = "STATUS" And
        &stVal = %OptEng_Fail Then
        throw CreateException(148, 2, "Can not send to OptEngine");
    End-If;

/* Check Detailed msg here */
If &isSync = "Y" And
    &stVal = %OptEng_Success Then

    &respRS = &response.GetRowset();
    &rowNum = &respRS.ActiveRowCount;
    For &iloop = 1 To &rowNum
        &msgRec = &respRS.GetRow(&iloop).GetRecord(Record.PT_OPTDETMSG);
        If (&msgRec.GetField(Field.MSGSET).Value <> 0) Then
            &msgSet = Value(&msgRec.GetField(Field.MSGSET).Value);
            &msgNum = Value(&msgRec.GetField(Field.MSGNUM).Value);
            &parm1 = &msgRec.GetField(Field.MSGPARAM1).Value;
            &parm2 = &msgRec.GetField(Field.MSGPARAM2).Value;

```

```

        &parm3 = &msgRec.GetField(Field.MSGPARAM3).Value;
        &parm4 = &msgRec.GetField(Field.MSGPARAM4).Value;
        &parm5 = &msgRec.GetField(Field.MSGPARAM5).Value;
        &string = MsgGetText(&msgSet, &msgNum, "Message Not Found", &parm1,⇒
&parm2, &parm3, &parm4, &parm5);

        End-If;
    End-For;

End-If;

End-If;

```

Editing the Response PeopleCode

The OPT_CALL message definition serves as a template. It is delivered to work with the PT_OPTCALL Application Engine program. You can edit the program to suit your needs, or use it as a guide when creating your own response message program.

OPT_CALL Message Program

The OPT_CALL application package implements the Integration Broker method OnRequest. The PeopleCode in this method shows application messages for lights-out mode.

Depending upon the request message, the OnRequest method PeopleCode calls appropriate optimization functions and methods to perform these tasks, and sends a response message containing the returned status and detailed messages from the optimization functions and methods.

You can use the OnRequest method PeopleCode as a template to create your own response message PeopleCode program. For example, you can edit it to run an optimization transaction, which is shown below as an example. This example is edited to match the examples for step 1 and step 3 in the PT_OPTCALL program.

Processing the Transaction Parameters

Edit the OPT_CALL application program OnRequest method to enter the name of your optimization transaction and the name/value pairs for its parameters. In this example, the transaction name is TEST_LONG_TRANS, the first parameter name/value pair is &delayParm and &delay (maps to Delay_in_Secs from the request message), and the second parameter name/value pair is &sleepParm and &isSleep (maps to Sleep0_Work1 from the request message).

The parameter values are stored as strings in step 3 of the Application Engine program. You may need to convert them here to your desired format. Here is a section of the application program showing the places to edit.

```

If &trans = "TEST_LONG_TRANS" Then
    &REC = &rs.GetRow(6).PT_OPTPARMS;
    &delayParm = &REC.PARMKEY.Value;
    &delay = Value(&REC.VALUE.Value);

    &REC = &rs.GetRow(7).PT_OPTPARMS;
    &sleepParm = &REC.PARMKEY.Value;
    &isSleep = Value(&REC.VALUE.Value);

    &myopt = GetOptEngine(&inst, &detStatus);

```

```

If (&myopt = Null) Then
    &optstatus = %OptEng_Fail;
End-If;

If &myopt <> Null And &isSync = "Y" Then
    &optstatus = &myopt.RunSynch(&trans, &delayParm, &delay, &sleepParm, &isSleep⇒
);
    &detStatus = &myopt.DetailedStatus;
End-If;

If &myopt <> Null And &isSync = "N" Then
    &myopt.ProcessInstance = &procInst;
    &optstatus = &myopt.RunASynch(&trans, &delayParm, &delay, &sleepParm, &is⇒
Sleep);
    &detStatus = &myopt.DetailedStatus;
End-If; /* iif myopt=null */
End-If;

```

Building a Status Response Message

This section shows the a response message to send a status message for the OPT_CALL message in the application server.

```

/* Insert detailed status and detailed msgs into Response msg rowset */
&respRS = &response.GetRowset();
&respRS.GetRow(1).GetRecord(Record.PT_OPTPARMS).GetField(Field.PARMKEY).Value ⇒
"STATUS";
&respRS.GetRow(1).GetRecord(Record.PT_OPTPARMS).GetField(Field.VALUE).Value ⇒
String(&optstatus);

&respRS.InsertRow(1);
&respRS.GetRow(2).GetRecord(Record.PT_OPTPARMS).GetField(Field.PARMKEY).Value ⇒
"DETAILED_STATUS";
&respRS.GetRow(2).GetRecord(Record.PT_OPTPARMS).GetField(Field.VALUE).Value ⇒
String(&detStatus);

```

Building a Detailed Response Message

This section shows a response message to send a detailed message for the OPT_CALL message on the application server.

```

/*Either optcmd or inst is not passed in correctly, or optengine is not loaded⇒
/created correctly */
If &myopt = Null Then
    &msgRec = &respRS.GetRow(1).GetRecord(Record.PT_OPTDETMSG);
    If &isParmBad = True Then
        &msgRec.GetField(Field.MSGSET).Value = 148;
        &msgRec.GetField(Field.MSGNUM).Value = 505;
    End-If;
End-If;

/* If it is sync transaction, insert DetailMsg to response msg */

```

```

If &myopt <> Null And
    &isSync = "Y" And
    &optcmd = "RUN" And
    &optstatus = %OptEng_Success Then
    &arrArray = &myopt.DetailMsgs;
    For &iLoop = 1 To &arrArray.Len
        /* First two rows have been inserted because of PT_OPTPARMS for two status⇒
codes */
        If &iLoop > 2 Then
            &respRS.InsertRow(&iLoop - 1);
        End-If;

        &msgRec = &respRS.GetRow(&iLoop).GetRecord(Record.PT_OPTDETMSGGS);
        &msgRec.GetField(Field.MSGSET).Value = String(&arrArray [&iLoop] [1]);
        &msgRec.GetField(Field.MSGNUM).Value = String(&arrArray [&iLoop] [2]);
        &msgRec.GetField(Field.PARMCOUNT).Value = String(&arrArray [&iLoop] [3]);
        &msgRec.GetField(Field.MSGPARAM1).Value = String(&arrArray [&iLoop] [4]);
        &msgRec.GetField(Field.MSGPARAM2).Value = String(&arrArray [&iLoop] [5]);
        &msgRec.GetField(Field.MSGPARAM3).Value = String(&arrArray [&iLoop] [6]);
        &msgRec.GetField(Field.MSGPARAM4).Value = String(&arrArray [&iLoop] [7]);
        &msgRec.GetField(Field.MSGPARAM5).Value = String(&arrArray [&iLoop] [8]);
    End-For;

End-If;

```

Optimization Built-in Functions

This section discusses the optimization functions. The functions are discussed in alphabetical order.

CreateOptEngine

Syntax

```
CreateOptEngine(analytic_inst, {%Synch | %ASynch}[, &detailedstatus] [, processinstance])
```

Description

The CreateOptEngine function instantiates an OptEngine object, loads an optimization engine with an analytic instance and returns a reference to it.

Parameters

Parameter	Description
<i>Analytic_inst</i>	Specify the analytic instance ID, which is a unique ID for this analytic instance in this optimization engine. This is supplied by users when they request that an optimization be run.
%Synch %Asynch	Specify whether the optimization engine is synchronous or asynchronous. The values are: • %Synch: run the optimization engine synchronously. • %Asynch: run the optimization engine asynchronously.
<i>&detailedstatus</i>	Specify a variable that the engine uses to give further information about the evaluation of this function. The value returned is one of the following: • %OptEng_Success: The function completed successfully. • %OptEng_Fail: The function failed. • %OptEng_Invalid_Aiid: The analytic instance ID passed to the function is invalid. • %OptEng_Exists: An optimization engine instance already exists and is loaded. • %OptEng_Method_Disabled: A method is disabled or not valid. • %OptEng_DB_Updates_Pending: indicates that database updates are pending.
<i>processinstance</i>	Enter the process instance id. You use this parameter only with lights-out processing, most likely with the subscription PeopleCode for application message. Note. This optional parameter is positional. If you use it, you must also use the <i>&detailedstatus</i> parameter. See Chapter 4, “Optimization PeopleCode,” Using Lights-Out Mode with Optimization, page 30 . The state record that you use with Application Engine contains the process instance id. See <i>Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Application Engine</i> , “Developing Efficient Programs,” Using State Records.

Returns

If successful, CreateOptEngine returns an OptEngine PeopleCode object. If the function fails, it returns a null value. Examine the optional status reference parameter in case of a Null return for additional information regarding the failure.

Example

An OptEngine object variable can be scoped as Local, Component, or Global.

You declare OptEngine objects as type OptEngine. For example:

```
Local OptEngine &MyOptEngine;
Component OptEngine &MyOpt;
Global OptEngine &MyOptEng;
```

The following example loads an optimization engine with the analytic instance:

```
Local OptEngine &myopt;
Local string &probinst;
```

```

Local string &transaction;
Local integer &detailedstatus;

&probinst = GetRecord(Record.PSOPTPRBINST).GetField(Field.PROBINST).Value;
&myopt = CreateOptEngine(&probinst, %Synch);

```

The following example shows the use of the optional status parameter:

```

&myopt = CreateOptEngine(&probinst, %Synch, &detailedstatus);
if &myopt = Null then
    if &detailedstatus = %OptEng_Invalid_Piid then
        /*perform some action */
    end_if;
end_if;

```

CreateOptInterface

Syntax

```
CreateOptInterface()
```

Description

The CreateOptInterface function instantiates an OptInterface object.

Note. You can use this function — and the OptInterface methods — only within an application class that you extend from the OptBase application class, or within PeopleCode that you call from that application class. This ensures that the OptInterface PeopleCode runs only on the optimization engine.

Parameters

None.

Returns

If successful, CreateOptInterface returns an OptInterface PeopleCode object. If the function fails, it returns a null value.

Example

You declare OptInterface objects as type OptInterface. For example:

```

Local OptInterface &MyOptInterface;
Component OptInterface &MyOptInt;
Global OptInterface &MyOptInt;

```

The following example instantiates an OptInterface object:

```

Local OptInterface &myInterface;
Int &status;

&myInterface = CreateOptInterface(&additionalStatus);
if (&myInterface != NULL) then
    &status = &myInterface.ActivateModel("RMO_TEST");
    if (&status = %OptInter_Fail) then

```

```

        /* examine &myInterface.DetailedStatus for reason */
        ...
    end-if;
else
    /* CreateOptInterface has returned NULL */
    /* take some corrective action here */
    ...
end-if;

```

DeleteOptProbInst

Syntax

`DeleteOptProbInst(probinst[, &detailedstatus])`

Description

The DeleteOptProbInst function deletes the analytic instance ID from PeopleTools metadata. This function can be called only inside FieldChange, PreSaveChange and PostSaveChange PeopleCode events, and in Workflow.

Note. Use this function to delete the analytic instance ID after deleting data in optimization application tables for this analytic instance.

Parameters

Parameter	Description
<i>probinst</i>	Enter the analytic instance ID to delete.
<i>&detailedstatus</i>	(Optional) This status reference parameter returns an integer value giving further information about the evaluation of this function. The value returned is one of the following: • %OptEng_Success: The function completed successfully. • %OptEng_Fail: The function failed. • %OptEng_Invalid_Piid: The analytic instance ID passed to the function is invalid. • %OptEng_Sql_Exception: A SQLerror is encountered when access database. • %OptEng_Exists: An analytic server loaded with this analytic instance still exists.

Returns

Returns %OptEng_Success if successful; otherwise returns %OptEng_Fail.

Example

The following example deletes the instance for an analytic type:

Note. Whenever you add records to an analytic type, you must call DeleteOptProbInst to delete the old analytic type instances and then call InsertOptProbInst to recreate them.

```

Local string &probinst;
Local string &proptype;

```

```

Local integer &ret;
&probinst = "PATSMITH";
&prodtype = "QEOPT";
&ret = DeleteOptProbInst(&probinst, &prodtype);
If &ret <> %OptEng_Success Then
    QEOPT_WRK.MESSAGE_TEXT = "Delete of analytic instance " | &probinst | "=>
    failed.";
Else
    QEOPT_WRK.MESSAGE_TEXT = "Analytic Instance " | &probinst | " deleted.";
End-If;

```

The following example shows the use of the optional status parameter:

```

Local integer &detailedstatus;
&ret = DeleteOptProbInst(&probinst, &prodtype, &detailedstatus);
If &ret <> %OptEng_Success AND &detailedstatus=%OptEng_Invalid_Piid then
    QEOPT_WRK.MESSAGE_TEXT = "Delete of analytic instance " | &probinst | " failed
    for bad piid.";
Else
    QEOPT_WRK.MESSAGE_TEXT = "Analytic Instance " | &probinst | " deleted.";
End-If;

```

GetOptEngine

Syntax

GetOptEngine(*probinst* [, &*detailedstatus*])

Description

The GetOptEngine function returns a handle to an optimization engine that is already loaded with the analytic instance.

Note. You cannot call GetOptEngine from a domain other than the application server.

Parameters

Parameter	Description
<i>probinst</i>	Enter the analytic instance ID, which is unique ID for this analytic instance in this optimization engine.
<i>&detailedstatus</i>	(Optional) This status reference parameter returns an integer value giving further information about the evaluation of this function. The value returned is one of the following: %OptEng_Success: The function completed successfully. %OptEng_Fail: The function failed. %OptEng_Invalid_Piid: The analytic instance ID passed to the function is invalid.

Returns

Returns an OptEngine PeopleCode object if successful, a null value otherwise.

Example

The following example causes an optimization engine to shut down its analytic instance:

```
Global string &probinst;
Local OptEngine &myopt;
Local integer &status;

&myopt = GetOptEngine(&probinst);
If &myopt <> NULL then
&status = &myopt.ShutDown();
QEOPT_WRK.MESSAGE_TEXT = "Analytic Instance ID " | &probinst
| " has been shutdown successfully.";
End-if;
```

Or, you can use the optional status parameter:

```
&myopt = GetOptEngine(&probinst, &detailedstatus);
if &myopt=NULL and &detailedstatus=%OptEng_Invalid_Piid then
/* perform some action */
End-if;
```

GetOptProbInstList

Syntax

GetOptProbInstList(*ProblemType* , *OutputErrorCode* [, *Prefix*] [, &*detailedstatus*])

Description

The GetOptProbInstList function gets the list of all analytic instance IDs in an analytic type.

Parameters

Parameter	Description
<i>ProblemType</i>	Enter the name of the analytic type that you created in PeopleSoft Application Designer.
<i>OutputErrorCode</i>	Future use. Always returns zero.
<i>Prefix</i>	(Optional) Enter a string. If used, this prefix causes the returned list to include only the analytic instance IDs that start with this prefix. If not used, all the analytic instance IDs in the analytic type are returned.
& <i>detailedstatus</i>	(Optional) This status reference parameter returns an integer value giving further information about the evaluation of this function. The value returned is one of the following: • %OptEng_Success: The function completed successfully. • %OptEng_Fail: The function failed. • %OptEng_Invalid_Piid: The analytic type name passed to the function is invalid.

Returns

Returns an array of strings containing the optimization analytic instance list.

Example

The following example shows the usage of `GetOptProbInstList` to fill the display field on a page:

```
Global string &probinst;
Local integer &detailedstatus;
Local integer &iloop;
Local array of string &instarray;

QEOPT.OPERATOR = %UserId;

&instarray = GetOptProbInstList(QEOPT.PROBTYPE, &ret, &detailedstatus);

If &ret <> %OptEng_Success Then
    QEOPT_WRK.MESSAGE_TEXT = "Could not get analytic instances
    for analytic type " | QEOPT.PROBTYPE ;
Else
    For &iloop = 1 To &instarray.Len
        QEOPT_WRK.MESSAGE_TEXT = QEOPT_WRK.MESSAGE_TEXT | &instarray[&iloop] | " ";
    End-For;
End-If;
```

The following example shows the use of the optional status parameter:

```
&instarray = GetOptProbInstList(QEOPT.PROBTYPE, &ret, &detailedstatus);
If &ret <> %OptEng_Success and &detailedstatus=%OptEng_Invalid_Piid Then
    QEOPT_WRK.MESSAGE_TEXT = "Could not get analytic instances for analytic type "
    | QEOPT.PROBTYPE | "because bad piid" ;
End-If;
```

InsertOptProbInst

Syntax

```
InsertOptProbInst(probinst, ProblemType[, &detailedstatus] [,Description])
```

Description

The `InsertOptProbInst` function inserts a new analytic instance ID into the PeopleTools metadata.

The `InsertOptProbInst` function can be called only inside `FieldChange`, `PreSave` and `PostSave` PeopleCode events, and in `Workflow`.

Note. You must use this function to create the analytic instance ID before inserting data into optimization application tables for this analytic instance.

Parameters

Parameter	Description
<i>probinst</i>	Enter the analytic instance ID to be inserted into the analytic type.
<i>ProblemType</i>	Enter the name of the analytic type that you created in PeopleSoft Application Designer.
<i>&detailedstatus</i>	(Optional) This status reference parameter returns an integer value giving further information about the evaluation of this function. The value returned is one of the following: • %OptEng_Success: The function completed successfully. • %OptEng_Fail: The function failed. • %OptEng_Invalid_Piid: The analytic instance ID passed to the function is invalid.
<i>Description</i>	(Optional) Specify a description for the analytic instance. This parameter takes a string value.

Returns

This method returns a constant. Valid values are:

Value	Description
%OptEng_Success	Returned if method succeeds.
%OptEng_Fail	Returned if the method fails.

Example

```

Local string &probinst;
Local string &probtype;
Local integer &ret;
Local integer &detailedstatus;

&probinst = "PATSMITH";
&probtype = "QEOPT";
&probDescr = "New QEOPT instance";
&ret = InsertOptProbInst(&probinst, &probtype, &probDescr);
If &ret <> %OptEng_Success Then
    QEOPT_WRK.MESSAGE_TEXT = "Insert of analytic instance "
    | &probinst | " failed.";
Else
    QEOPT_WRK.MESSAGE_TEXT = "Analytic Instance " | &probinst | " created.";
End-If;

```

The following example shows the use of the optional status parameter:

```

&ret = InsertOptProbInst(&probinst, &probtype, &detailedstatus);
If &ret <> %OptEng_Success and &detailedstatus=%OptEng_Invalid_Piid Then
    QEOPT_WRK.MESSAGE_TEXT = "Insert of analytic instance "

```

```

    | &probinst | " failed for bad piid.";
End-if;

```

IsValidOptProbInst

Syntax

```
IsValidOptProbInst(probinst [, &detailedstatus])
```

Description

IsValidOptProbInst determines if a given analytic instance exists in the optimization metadata.

Parameters

Parameter	Description
<i>probinst</i>	Enter the analytic instance ID to be validated.
<i>&detailedstatus</i>	(Optional) This status reference parameter returns an integer value giving further information about the evaluation of this function. The value returned is one of the following: • %OptEng_Success: The function completed successfully. • %OptEng_Invalid_Piid: The analytic type name passed to the function is invalid.

Returns

This method returns a constant. Valid values are:

Value	Description
%OptEng_Success	Returned if method succeeds.
%OptEng_Fail	Returned if the method fails.

Example

```

Local string &probinst;
Local integer &detailedstatus;
Local integer &ret;

&probinst = "PATSMITH";
&ret = IsValidOptProbInst(&probinst, &detailedstatus);
If &ret <> %OptEng_Success and &detailedstatus=%OptEng_Invalid_Piid Then
    <perform some action>
End-if;

```

OptEngine Class Methods

This section discusses the optimization methods for the OptEngine PeopleCode class. The methods are listed in alphabetical order.

CheckOptEngineStatus

Syntax

```
CheckOptEngineStatus()
```

Description

The CheckOptEngineStatus method returns the status of the optimization engine, using a combination of its return value and the DetailedStatus OptEngine class property. Keep the following in mind:

- The value returned by CheckOptEngineStatus is the operational status of the optimization engine.
- The DetailedStatus property indicates the completion status of the OptEngine method call CheckOptEngineStatus.

For example, CheckOptEngineStatus can return %OptEng_Idle and DetailedStatus is %OptEng_Success. For CheckOptEngineStatus, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Not_Available

Note. Before this method is called, the CreateOptEngine or GetOptEngine must be called.

Returns

Returns an integer for the status of the optimization engine. These numbers are message IDs belonging to message set 148 in the message catalog.

Numeric Value	Constant Value	Description
21	%OptEng_Not_Loaded	The optimization engine process is running, but is not currently loaded with an application problem.
22	%OptEng_Busy>Loading	The optimization engine is busy loading an application problem. It will not accept transaction requests until loading completes.
23	%OptEng_Idle	The optimization engine is loaded with an application problem and waiting for a transaction request.
24	%OptEng_Busy	The optimization engine is busy processing a transaction request for the loaded application problem. It will not accept additional transaction requests until the current one completes.
26	%OptEng_Unknown	An error has occurred. The optimization engine status cannot be determined.

Example

This PeopleCode example shows optimization engine status being checked:

```
Local OptEngine &myopt;
Local string &probinst;
Local integer &status;
&myopt = GetOptEngine("PATSMITH");
/* Initialize the DESCRLONG field in the QE_FUNCLIB_OPT record to null. */
GetLevel0().GetRow(1).GetRecord(Record.QE_FUNCLIB_OPT).DESCRLONG.Value = "";
&status = &myopt.CheckOptEngineStatus();
GetLevel0().GetRow(1).GetRecord(Record.QE_FUNCLIB_OPT).DESCRLONG.Value = "Opt⇒
Engine status = " | MsgGet(148, &status, "Could not send to the OptEngine.");
```

You can also retrieve the detailed status:

```
Local integer &detailedstatus
&status = &myopt.CheckOptEngineStatus();
&detailedstatus = &myopt.DetailedStatus;
```

FillRowset

Syntax

```
FillRowset(PARAM_NAME, &Rowset[, &functionstatus])
```

Description

This method gets the value of a transaction output parameter that is a rowset. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

When using the OptEngine DetailedStatus property, keep the following in mind:

- The value returned by FillRowset is the operational status of the optimization engine.
- The OptEngine DetailedStatus property indicates the completion status of the OptEngine method call FillRowset.

For example, FillRowset returns %OptEng_Fail, and DetailedStatus is %OptEng_Method_Disabled.

For FillRowset, the DetailedStatus property can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled.

This indicates that the method is disabled or not valid.

- %OptEng_Wrong_Parm_Type

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.
<i>&Rowset</i>	Enter the rowset containing the values. This rowset must be a single record rowset, and the record must match the record name associated with the transaction parameter in the analytic type definition.
<i>&functionstatus</i>	(Optional) This status reference parameter returns an integer value giving further information about the evaluation of this function. The value returned is one of the following: • OptEng_Success: The function completed successfully. • OptEng_Fail: The function failed. • OptEng_Method_Disabled: A method is disabled or not valid.

Returns

This method returns a constant. Valid values are:

Value	Description
%OptEng_Success	Returned if method succeeds.
%OptEng_Fail	Returned if the method fails.

Example

The following PeopleCode example runs a synchronous optimization transaction named RETURN_MACHINE_UNAVAILABLE. It has these parameters:

- Input: MACHINE_NAME to specify the machine for which we need unavailable times.
- Output: RETURN_TIMES to specify a rowset and MACHINE_WRK record containing the BEGIN_DATE and END_DATE fields.

This PeopleCode example sets input parameter values and gets an output parameter value:

```

Local OptEngine &myopt;
Local integer &status;
Local string &machname;
Local Rowset &rs;
&myopt = GetOptEngine("PATSMITH");
&machname = QEOPT_WRK.MACHINE_NAME.Value;
/* Run the RETURN_MACHINE_UNAVAILABLE transaction synchronously with input values.⇒
*/
&status = &myopt.RunSynch("RETURN_MACHINE_UNAVAILABLE", "MACHINE_NAME", &machname);
If Not &status Then
    QEOPT_WRK.MESSAGE_TEXT = " RETURN_MACHINE_UNAVAILABLE transaction failed.";

```

```

    Return;
End-If;
/* Get output value from the RETURN_MACHINE_UNAVAILABLE transaction. */
&rs = CreateRowset(Record.MACHINE_WRK);
&status = &myopt.FillRowset("RETURN_TIMES", &rs);

```

You can also use the [new->] DetailedStatus property as follows:

```

&status = &myopt.FillRowset("RETURN_TIMES", &rs);
if &status=%OptEng_Fail and &myopt.DetailedStatus=%OptEng_Method_Disabled then
    /* perform some action */
End-if;

```

GetDate

Syntax

GetDate(*PARAM_NAME*[, &*status*])

Description

This method gets the value of a transaction output parameter with a data type of Date. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The OptEngine DetailedStatus property indicates the completion status of the OptEngine method call GetDate. For GetDate, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

Returns a Date object; use this method when that is the data type of the transaction output parameter value.

Example

See [Chapter 4, “Optimization PeopleCode,” GetNumber, page 58](#).

GetDateArray

Syntax

GetDateArray(*PARAM_NAME*)

Description

This method gets the value of a transaction output parameter with a data type Array of Date. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The OptEngine DetailedStatus property indicates the completion status of the OptEngine method call GetDateArray. For GetDateArray, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

Returns an Array of Date object; use this method when that is the data type of the transaction output parameter value.

Example

See [Chapter 4, “Optimization PeopleCode,” GetStringArray, page 60.](#)

GetDateTime

Syntax

GetDateTime (*PARAM_NAME*)

Description

This method gets the value of a transaction output parameter with a data type of DateTime. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call GetDateTime. For GetDateTime, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

Returns a DateTime object; use this method when that is the data type of the transaction output parameter value.

Example

See [Chapter 4, “Optimization PeopleCode,” GetNumber, page 58.](#)

GetDateTimeArray

Syntax

GetDateTimeArray (*PARAM_NAME*)

Description

This method gets the value of a transaction output parameter with a data type Array of DateTime. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call GetDateTimeArray. For GetDateTimeArray, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

Returns an Array of DateTime object; use this method when that is the data type of the transaction output parameter value.

Example

See [Chapter 4, “Optimization PeopleCode,” GetStringArray, page 60.](#)

GetNumber

Syntax

GetNumber (*PARAM_NAME*)

Description

This method gets the value of a transaction output parameter with a data type of Number. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call GetNumber. For GetNumber, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

Returns a Number object; use this method when that is the data type of the transaction output parameter value.

Example

The following PeopleCode example runs a synchronous optimization transaction named IS_MACHINE_AVAILABLE. It has these parameters:

- Input MACHINE_NAME to specify the machine.
- Inputs BEGIN_DATE and END_DATE to specify the time slot.
- Output AVAILABLE_FLAG to specify whether the machine is available in that time slot.

This PeopleCode example sets input parameter values and gets an output parameter value:

```
Local OptEngine &myopt;
Local integer &status;
Local string &machname;
Local datetime &begindate;
Local datetime &enddate;
&myopt = GetOptEngine("PATSMITH");
```

```

&machname = QEOPT_WRK.MACHINE_NAME.Value;
&begindate = QEOPT_WRK.BEGIN_DATE.Value;
&enddate = QEOPT_WRK.END_DATE.Value;
/* Run the IS_MACHINE_AVAILABLE transaction synchronously with input values. */
&status = &myopt.RunSynch("IS_MACHINE_AVAILABLE", "MACHINE_NAME",
    &machname, "BEGIN_DATE", &begindate, "END_DATE", &enddate);
If Not &status Then
    QEOPT_WRK.MESSAGE_TEXT = "IS_MACHINE_AVAILABLE transaction failed.";
    Return;
End-If;
/* Get output value from the IS_MACHINE_AVAILABLE transaction. */
QEOPT_WRK.AVAILABLE_FLAG = &myopt.GetNumber("AVAILABLE_FLAG");

```

You can use the DetailedStatus property as follows:

```

QEOPT_WRK.AVAILABLE_FLAG = &myopt.GetNumber("AVAILABLE_FLAG");
if &myopt.DetailedStatus=%OptEng_Fail then
    /* perform some action */
End-if;

```

GetNumberArray

Syntax

GetNumberArray (*PARAM_NAME*)

Description

This method gets the value of a transaction output parameter with a data type Array of Number. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call GetNumberArray. For GetNumberArray, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled

This indicates that the method is disabled or not valid.

Note. Do not pass an array of type Integer as a transaction parameter. Use an array of type Number instead.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

Returns an Array of Number object; use this method when that is the data type of the transaction output parameter value.

Example

See [Chapter 4, “Optimization PeopleCode,” GetStringArray, page 60.](#)

GetString

Syntax

GetString (*PARAM_NAME*)

Description

This method gets the value of a transaction output parameter with a data type of String. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call GetString. For GetString, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

Returns a String object; use this method when that is the data type of the transaction output parameter value.

Example

See [Chapter 4, “Optimization PeopleCode,” GetNumber, page 58.](#)

GetStringArray

Syntax

GetStringArray (*PARAM_NAME*)

Description

This method gets the value of a transaction output parameter with a data type Array of String. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call GetStringArray. For GetStringArray, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions.” Configuring Analytic Type Transactions, page 18.

Returns

Returns an Array of String object; use this method when that is the data type of the transaction output parameter value.

Example

The following PeopleCode example runs a synchronous optimization transaction named ARE_MACHINES_AVAILABLE. It has these parameters:

- Inputs BEGIN_DATE and END_DATE to specify the time slot.
- Output MACHINE_NAMES to specify the machines available in that time slot.

This PeopleCode example sets input parameter values and gets an output parameter value:

```
Local OptEngine &myopt;
Local integer &status;
Local array of string &machnames;
Local datetime &begindate;
Local datetime &enddate;
&myopt = GetOptEngine("PATSMITH");
&begindate = QEOPT_WRK.BEGIN_DATE.Value;
&enddate = QEOPT_WRK.END_DATE.Value;
/* Run the ARE_MACHINES_AVAILABLE transaction synchronously with input values. */
&status = &myopt.RunSynch("ARE_MACHINES_AVAILABLE",
    "BEGIN_DATE", &begindate, "END_DATE", &enddate);
If &status=%OptEng_Fail Then
    QEOPT_WRK.MESSAGE_TEXT = "ARE_MACHINES_AVAILABLE transaction failed.";
    Return;
End-If;
```

```
/* Get output value from the ARE_MACHINES_AVAILABLE transaction. */
&machnames = &myopt.GetStringArray("MACHINE_NAMES");
```

The following example shows the use of the DetailedStatus property:

```
Local array of string &machnames;
&machnames = &myopt.GetStringArray("MACHINE_NAMES");
if &myopt.DetailedStatus=%OptEng_Fail then
    /* perform some action */
End-if;
```

GetTime

Syntax

GetTime (*PARAM_NAME*)

Description

This method gets the value of a transaction output parameter with a data type of Time. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call GetTime. For GetTime, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

Returns a Time object; use this method when that is the data type of the transaction output parameter value.

Example

See [Chapter 4, “Optimization PeopleCode,” GetNumber, page 58.](#)

GetTimeArray

Syntax

GetTimeArray (*PARAM_NAME*)

Description

This method gets the value of a transaction output parameter with a data type Array of Time. This cannot be used with the RunAsynch method; RunSynch is needed to make the transaction output parameter values immediately available.

The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call GetTimeArray. For GetTimeArray, DetailedStatus can have the value:

- %OptEng_Success.
- %OptEng_Fail.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.

Parameters

Parameter	Description
<i>PARAM_NAME</i>	Enter a string for the name of the output parameter to get from the transaction that was just performed with RunSynch. This parameter must be defined as an output or both (input and output) in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

Returns an Array of Time object; use this method when that is the data type of the transaction output parameter value.

Example

See [Chapter 4, “Optimization PeopleCode,” GetStringArray, page 60.](#)

GetTraceLevel

Syntax

GetTraceLevel (*component*)

Description

GetTraceLevel gets the severity level at which events are logged for a given component.

The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call GetTraceLevel. For GetTraceLevel, DetailedStatus can have the value:

- %OptEng_Success.
This indicates that the function completed successfully.
- %OptEng_Fail.
This indicates that the function failed.
- %OptEng_Method_Disabled.
This indicates that the method is disabled or not valid.
- %OptEng_DB_Updates_Pending.

This indicates that database updates are pending.

Parameters

Parameter	Description
<i>component</i>	Enter one of the following PeopleCode constants: Opt_Engine, Opt_Utility, Opt_Datacache, or Opt_Plugin.

Returns

Returns one of the following.

- %Severity_Fatal
- %Severity_Status
- %Severity_Error
- %Severity_Warn
- %Severity_Info
- %Severity_Trace1
- %Severity_Trace2

Example

```

Local OptEngine &myopt;
Local integer &tracelevel;

&myopt = GetOptEngine("PATSMITH");

&tracelevel = &myopt.GetTraceLevel(%Opt_Engine);
if &myopt.DetailedStatus = %OptEng_Success then

    if (&tracelevel = %Severity_Info_ then
        winmessage("Severity level for the OptEngine is 'Info'");
    End-if;
End-if;
```

RunAsynch

Syntax

RunAsynch (TRANSACTION, PARM_PAIRS)

Description

The RunAsynch method requests the optimization engine to run the transaction in asynchronous mode.

When using the DetailedStatus OptEngine property, keep the following in mind:

- The value returned by RunASynch is the operational status of the optimization engine.
- The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call RunASynch.

For example, RunASynch can return %OptEng_Fail and DetailedStatus is %OptEng_DB_Updates_Pending. For RunASynch, DetailedStatus can have the value:

- %OptEng_Success: indicates that the function completed successfully.
- %OptEng_Fail: indicates that the function failed.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.
- %OptEng_DB_Updates_Pending: indicates that database updates are pending.

Parameters

Parameter	Description
<i>TRANSACTION</i>	Enter a string for the name of the transaction to run.
<i>PARAM_PAIRS</i>	Enter the name and value pairs (string name and value) for this transaction. Not used if the transaction has no parameters. Parameters are defined in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18.

Returns

This method returns a constant. Valid values are:

Value	Description
%OptEng_Success	Returned if method succeeds.
%OptEng_Fail	Returned if the method fails.

Example

This PeopleCode example runs an asynchronous optimization transaction named SOLVE. It has no input or output parameters. The SOLVE transaction solves the exercise scheduling problem and puts the results into the QE_RWSM_EXERSCH table.

```

Local OptEngine &myopt;
Local integer &status;
&myopt = GetOptEngine("PATSMITH");
/* Run the SOLVE transaction asynchronously with input values. */
&status = &myopt.RunAsynch("SOLVE");
If &status=%OptEng_Fail Then
    QEOPT_WRK.MESSAGE_TEXT = "SOLVE transaction failed.";
    Return;
End-If;

```

The following example shows the use of the DetailedStatus property.

```

Local integer &status;
&status = &myopt.RunAsynch("SOLVE");
if &status=%OptEng_Fail and &myopt.DetailedStatus=%OptEng_Method_Disabled then
    <perform some action>
End-if;

```

RunSynch

Syntax

RunSynch (*TRANSACTION*, *PARAM_PAIRS*)

Description

The RunSynch method requests the optimization engine to run the transaction in synchronous mode.

When using the DetailedStatus OptEngine property, keep the following in mind:

- The value returned by RunSynch is the operational status of the optimization engine.
- The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call RunSynch.

For example, RunSynch can return %OptEng_Fail and DetailedStatus is %OptEng_DB_Updates_Pending. For RunSynch, DetailedStatus can have the value:

- %OptEng_Success: indicates that the function completed successfully.
- %OptEng_Fail: indicates that the function failed.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.
- %OptEng_DB_Updates_Pending: indicates that database updates are pending.

Parameters

Parameter	Description
<i>TRANSACTION</i>	Enter a string for the name of the transaction to run.
<i>PARAM_PAIRS</i>	Enter the name and value pairs (string name and value) for this transaction. Not used if the transaction has no parameters. Parameters are defined in the analytic type definition. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Transactions, page 18 .

Returns

This method returns a constant. Valid values are:

Value	Description
%OptEng_Success	Returned if method succeeds.
%OptEng_Fail	Returned if the method fails.

Example

The following PeopleCode example runs a synchronous optimization transaction named IS_MACHINE_AVAILABLE. It has these parameters:

- Input MACHINE_NAME to specify the machine.
- Inputs BEGIN_DATE and END_DATE to specify the time slot.
- Output AVAILABLE_FLAG to specify whether the machine is available in that time slot.

This PeopleCode example sets input parameter values and gets an output parameter value:

```

Local OptEngine &myopt;
Local integer &status;
Local string &machname;
Local datetime &begindate;
Local datetime &enddate;
&myopt = GetOptEngine("PATSMITH");
&machname = QEOPT_WRK.MACHINE_NAME.Value;
&begindate = QEOPT_WRK.BEGIN_DATE.Value;
&enddate = QEOPT_WRK.END_DATE.Value;
/* Run the IS_MACHINE_AVAILABLE transaction synchronously with input values. */
&status = &myopt.RunSynch("IS_MACHINE_AVAILABLE",
    "MACHINE_NAME", &machname, "BEGIN_DATE", &begindate, "END_DATE", &enddate);
If &status=%OptEng_Fail Then
    QEOPT_WRK.MESSAGE_TEXT = "IS_MACHINE_AVAILABLE transaction failed.";
    Return;
End-If;
/* Get output value from the IS_MACHINE_AVAILABLE transaction. */
QEOPT_WRK.AVAILABLE_FLAG = &myopt.GetNumber("AVAILABLE_FLAG");

```

Or, the following example shows the use of the DetailedStatus property.

```

Local integer &status;
&status = myopt.RunSynch("SOLVE");
if &status=%OptEng_Fail and &myopt.DetailedStatus=%OptEng_Method_Disabled then
    <perform some action>
End-if;

```

SetTraceLevel

Syntax

SetTraceLevel(*component*, *severity*)

Description

SetTraceLevel sets the severity level at which events are logged for a given component.

When using the DetailedStatus OptEngine property, keep the following in mind:

- The value returned by SetTraceLevel is the operational status of the optimization engine.
- The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call SetTraceLevel.

For example, SetTraceLevel can return %OptEng_Fail and DetailedStatus is %OptEng_DB_Updates_Pending. For SetTraceLevel, DetailedStatus can have the value:

- %OptEng_Success: indicates that the function completed successfully.
- %OptEng_Fail: indicates that the function failed.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.
- %OptEng_DB_Updates_Pending: indicates that database updates are pending.

Parameters

Parameter	Description
<i>component</i>	Use one of the following PeopleCode constants: Opt_Engine, Opt_Utility, Opt_Datacache, or Opt_Plugin.
<i>severity</i>	Use one of the following PeopleCode constants. These options set the degree to which errors are logged. You can set the tracing levels differently for various parts of your program. This enables you to control the amount of trace information that your program generates. The following list shows the order of the severity, starting with the highest level. For example, %Severity_Error logs %Severity_Fatal, %Severity_Status, and %Severity_Error messages, while the system filters out other messages. Keep in mind that the higher the severity, the greater the performance overhead. • %Severity_Fatal • %Severity_Status • %Severity_Error • %Severity_Warn • %Severity_Info • %Severity_Trace1 • %Severity_Trace2

Returns

This method returns a constant. Valid values are:

Value	Description
%OptEng_Success	Returned if method succeeds.
%OptEng_Fail	Returned if the method fails.

Example

```

Local OptEngine &myopt;
Local integer &status;
Local string &machname;
Local datetime &begindate;
Local datetime &enddate;

&myopt = GetOptEngine("PATSMITH");

&status = &myopt.SetTraceLevel(%Opt_Engine, %Severity_Warn);
if &status = %OptEng_Fail then
    <example: notify user that set trace action has failed>
End-if;
```

ShutDown

Syntax

ShutDown ()

Description

The ShutDown method requests the optimization engine to shut down.

If the optimization engine cannot be contacted for shutdown, the return status is %OptEng_Fail and the DetailedStatus property is OptEng_Not_Available.

When using the DetailedStatus OptEngine property, keep the following in mind:

- The value returned by Shutdown is the operational status of the optimization engine.
- The DetailedStatus OptEngine property indicates the completion status of the OptEngine method call Shutdown.

For example, Shutdown can return %OptEng_Fail and DetailedStatus is %OptEng_DB_Updates_Pending. For Shutdown, DetailedStatus can have the value:

- %OptEng_Success: indicates that the function completed successfully.
- %OptEng_Fail: indicates that the function failed.
- %OptEng_Method_Disabled: indicates that the method is disabled or not valid.
- %OptEng_DB_Updates_Pending: indicates that database updates are pending.

Note. Before this method is called, CreateOptEngine or GetOptEngine must be called. Call ShutDown to shut down optimization engines even when running in PeopleSoft Application Engine.

Parameters

None.

Returns

This method returns a constant. Valid values are:

Value	Description
%OptEng_Success	Returned if method succeeds.
%OptEng_Fail	Returned if the method fails.

Example

This PeopleCode example shows an optimization engine being shut down:

```
Local OptEngine &myopt;
Local integer &status;
&myopt = GetOptEngine("PATSMITH");
/* Shut down the optimization engine */
&status = &myopt.ShutDown();
If &status=%OptEng_Fail Then
    QEOPT_WRK.MESSAGE_TEXT = "PATSMITH optimization engine shutdown failed.";
```

```

        Return;
    Else
        QEOPT_WRK.MESSAGE_TEXT = "PATSMITH optimization engine shutdown successful.";
        Return;
    End-If;

```

The following example shows the use of the DetailedStatus property:

```

Local integer &status;
&status = myopt.ShutDown();
if &status=%OptEng_Fail and &myopt.DetailedStatus=%OptEng_Method_Disabled then
    <perform some action>
End-if;

```

OptEngine Class Properties

This section lists the optimization properties for the OptEngine PeopleCode class. The properties are listed in alphabetical order.

DetailMsgs

Description

The DetailMsgs property returns a list of messages generated by an optimization engine. Use DetailMsgs after you use the RunAsynch and RunSynch methods to check the status messages for an optimization transaction.

If the transaction fails, detailed messages are automatically shown to the user. If the transaction succeeds, warnings and informational messages may be generated by the transaction. Use this property to retrieve those messages and make them available to the user.

DetailMsgs provides a two-dimensional array containing the message set ID, the message number in the message catalog, and any arguments. Each row in the two-dimensional array has the following structure:

1. Message set ID.
2. Message number.
3. Number of message arguments.
4. Argument1.
5. Argument2.
6. Argument3.
7. Argument4.
8. Argument5.

A maximum of five arguments is supported for each message.

Note. To hold the property value returned, you need to declare an array of array of type Any.

Note. Before this method is called, you must call CreateOptEngine or GetOptEngine.

Example

```

Local OptEngine &myopt;
Local integer &status;
Local string &piid;

Local string &string;
Local array of array of any &arrArray;

&NEWLINE = Char(10);
&string = "";

&piid = GetRecord(Record.PSOPTPRBINST).GetField(Field.PROBINST).Value;
&myopt = GetOptEngine(&piid);

&status = &myopt.RunSynch("TEST_TRANSACTION");

If (&status = %OptEng_Success) then

    &arrArray = &myopt.DetailMsgs;
    For &iloop = 1 To &arrArray.Len

        &string = &string | &NEWLINE | MsgGetText(&arrArray [&iloop] [1] /*message set*⇒
        /,
        &arrArray [&iloop] [2] /*message id*/, "Message Not Found",&arrArray [&iloop] [4],
        &arrArray [&iloop] [5],&arrArray [&iloop] [6],
        &arrArray [&iloop] [7],&arrArray [&iloop] [8]);

    End-For;

GetLevel0().GetRow(1).GetRecord(Record.QE_FUNCLIB_OPT).DESCRLONG.Value = &string;
End-If;

```

DetailedStatus

Description

The DetailedStatus property contains the detailed execution status of an OptEngine method after the method is executed.

Example

```

Local integer &status;
&status = myopt.ShutDown();
if &status=%OptEng_Fail and &myopt.DetailedStatus=%OptEng_Method_Disabled then
    <perform some action>
End-if;

```

OptBase Application Class

This PeopleCode application class is part of the PT_OPT_BASE application package. It establishes the basic framework for developing PeopleCode that invokes the Optimization PeopleCode plug-in. To use the plug-in, you develop a application class that extends the OptBase application class. OptBase contains the following types of methods:

- A set of base methods that you can extend for the purpose of handling input and output parameters.
You can use them within any method you develop that corresponds by name to a transaction in an analytic type definition. These methods apply to the parameters that are defined for the transaction in the analytic type.
- A set of abstract placeholder methods that you can use to implement callback capability.
You must extend these if you designate one or more records as callback records in your analytic type definition, even if you don't add any functionality to the methods.
- An abstract placeholder method, Init, that you can extend if you want to do any preprocessing before your first Optimization PeopleCode plug-in transaction runs.

Note. The analytic type definition to which these methods apply is the one that specifies this derived application class.

The CreateOptInterface function is the only optimization built-in function that you can use within an application class that you extend from the OptBase application class, or within PeopleCode that you call from that application class.

Optbase Callback Methods

PeopleSoft Optimization Framework has a built-in callback functionality — when the OptInterface PeopleCode calls an Optimization PeopleCode plug-in transaction, it first determines whether you designated one or more records in your analytic type definition as callback records. For each callback record, the framework determines if any the record's database rows have been inserted, deleted, or updated since the optimization datacache was populated. If any changes have occurred, the framework propagates those changes to the datacache before invoking the transaction.

PeopleSoft provides methods that the framework uses to apply its callback functionality. In combination with the framework's callback changes, you might want to perform additional processing for your own purposes, including updating any derived data structures that are used by your optimization application. You can accomplish this by extending the callback methods and adding your own PeopleCode. Each callback method launches under different circumstances.

Note. Don't call any of these methods in your own PeopleCode. They're called automatically at the appropriate moment by PeopleSoft Optimization Framework, which enables your added functionality to run within each method.

Following is a list of the abstract callback placeholder methods documented as part of the PT_OPT_BASE:OptBase application class:

- OptInsertCallback
This method launches when the framework propagates to the datacache any database insertions encountered for a callback record.
- OptDeleteCallback

This method launches when the framework propagates to the datacache any database deletions encountered for a callback record.

- **OptPreUpdateCallback**

This method launches before the framework propagates each database update encountered for a callback record.

- **OptPostUpdateCallback**

This method launches after the framework propagates each database update encountered for a callback record.

- **OptRefreshCallback**

This method launches after the framework propagates all database deletions, insertions, and updates encountered for all callback records.

Important! If any record in your analytic type definition is designated a callback record, you must ensure that you extend all of the callback methods in your extended class, even if each extended method contains only a Return statement. Otherwise your Optimization PeopleCode plug-in will fail.

See [Chapter 3, “Designing Analytic Type Definitions,” Configuring Analytic Type Records, page 13](#).

OptBase Class Methods

This section discusses the abstract base class placeholder methods for the PT_OPT_BASE:OptBase application class. The methods are listed in alphabetical order.

GetParmDate

Syntax

GetParmDate(*parmName*, &*parmVal*)

Description

The GetParmDate method retrieves a Date parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
& <i>parmVal</i>	Specify a Date variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmDateArray

Syntax

```
GetParmDateArray(parmName, &parmVal)
```

Description

The GetParmDateArray method retrieves a Date array parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
& <i>parmVal</i>	Specify a Date array variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmDateTime

Syntax

```
GetParmDateTime(parmName, &parmVal)
```

Description

The GetParmDateTime method retrieves a DateTime parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
& <i>parmVal</i>	Specify a DateTime variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmDateTimeArray

Syntax

```
GetParmDateTimeArray(parmName, &parmVal)
```

Description

The `GetParmDateTimeArray` method retrieves a `DateTime` array parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the `OptBase` application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a <code>DateTime</code> array variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmNumber

Syntax

`GetParmNumber`(*parmName*, *&parmVal*)

Description

The `GetParmNumber` method retrieves a `Number` parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the `OptBase` application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a <code>Number</code> variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmNumberArray

Syntax

`GetParmNumberArray`(*parmName*, *&parmVal*)

Description

The `GetParmNumberArray` method retrieves a `Number` array parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the `OptBase` application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Number array variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmInt

Syntax

```
GetParmInt(parmName, &parmVal)
```

Description

The GetParmInt method retrieves an Integer parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify an Integer variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmIntArray

Syntax

```
GetParmIntArray(parmName, &parmVal)
```

Description

The GetParmIntArray method retrieves a Number array parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Number array variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmString

Syntax

```
GetParmString(parmName, &parmVal)
```

Description

The GetParmString method retrieves a String parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a String variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmStringArray

Syntax

```
GetParmStringArray(parmName, &parmVal)
```

Description

The GetParmStringArray method retrieves a String array parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a String array variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmTime

Syntax

```
GetParmTime(parmName, &parmVal)
```

Description

The GetParmTime method retrieves a Time parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Time variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

GetParmTimeArray

Syntax

```
GetParmTimeArray(parmName, &parmVal)
```

Description

The GetParmTimeArray method retrieves a Time array parameter value that's passed as input by any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Time array variable to contain the value passed as input by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

Init

Syntax

```
Init()
```

Description

The Init method launches when the CreateOptEngine built-in function loads an analytic instance that uses the Optimization PeopleCode plug-in.

Use this method to perform additional processing for your own purposes, including checking table data, or any functionality you want to apply before any plug-in transactions run. You accomplish this by adding your own PeopleCode to the extended method.

Don't call this method in your own PeopleCode. It's called automatically at the appropriate moment by PeopleSoft Optimization Framework, which enables your added functionality to run before any other code in your extended class.

Note. If you don't extend this method, PeopleSoft Optimization Framework calls its base version from the OptBase application class.

Parameters

None.

Returns

A Boolean value: True if the method is successful, False otherwise.

OptDeleteCallback

Syntax

```
OptDeleteCallback(&Record)
```

Description

The OptDeleteCallback method launches when PeopleSoft Optimization Framework propagates to the datacache any database deletions that it encounters for a callback record.

Use this method to perform additional processing for your own purposes, including modifying any derived data structures that might be affected by the deletion. You accomplish this by adding your own PeopleCode to the extended method.

Don't call this method in your own PeopleCode. It's called automatically at the appropriate moment by PeopleSoft Optimization Framework, which enables your added functionality to run.

Important! If you designate any record in the analytic type definition as a callback record, you must ensure that you extend this callback method in your derived class, even if the extended method contains only a Return statement. Otherwise the Optimization PeopleCode plug-in will fail.

Parameters

Parameter	Description
<i>&Record</i>	Specifies a record variable that contains the keys of the data row to be deleted.

Returns

A Boolean value: True if the method is successful, False otherwise.

OptInsertCallback

Syntax

`OptInsertCallback (&Record)`

Description

The OptInsertCallback method launches when PeopleSoft Optimization Framework propagates to the datacache any database insertion that it encounters for a callback record.

Use this method to perform additional processing for your own purposes, including modifying any derived data structures that might be affected by the insertion. You accomplish this by adding your own PeopleCode to the extended method.

Don't call this method in your own PeopleCode. It's called automatically at the appropriate moment by PeopleSoft Optimization Framework, which enables your added functionality to run.

Important! If you designate any record in the analytic type definition as a callback record, you must ensure that you extend this callback method in your derived class, even if the extended method contains only a Return statement. Otherwise the Optimization PeopleCode plug-in will fail.

Parameters

Parameter	Description
<i>&Record</i>	Specifies a record variable that contains the new data row to be inserted.

Returns

A Boolean value: True if the method is successful, False otherwise.

OptPostUpdateCallback

Syntax

`OptPostUpdateCallback (&OldRecord, &NewRecord)`

Description

The `OptPostUpdateCallback` method launches after PeopleSoft Optimization Framework propagates to the datacache any database update that it encounters for a callback record.

Use this method to perform additional processing for your own purposes, including modifying any derived data structures that might have been affected by the update. You accomplish this by adding your own PeopleCode to the extended method. The parameters provide the previous and current content of the row.

Don't call this method in your own PeopleCode. It's called automatically at the appropriate moment by PeopleSoft Optimization Framework, which enables your added functionality to run.

Important! If you designate any record in the analytic type definition as a callback record, you must ensure that you extend this callback method in your derived class, even if the extended method contains only a Return statement. Otherwise the Optimization PeopleCode plug-in will fail.

Parameters

Parameter	Description
<i>&OldRecord</i>	Specifies a record variable that contains the pre-update content of the data row that was updated.
<i>&NewRecord</i>	Specifies a record variable that contains the post-update content of the data row that was updated.

Returns

A Boolean value: True if the method is successful, False otherwise.

OptPreUpdateCallback

Syntax

```
OptPreUpdateCallback(&OldRecord, &NewRecord)
```

Description

The `OptPreUpdateCallback` method launches before PeopleSoft Optimization Framework propagates to the datacache any database update that it encounters for a callback record.

Use this method to perform additional processing for your own purposes, including modifying any derived data structures that might be affected by the update. You accomplish this by adding your own PeopleCode to the extended method. The parameters provide the current and future content of the row.

Don't call this method in your own PeopleCode. It's called automatically at the appropriate moment by PeopleSoft Optimization Framework, which enables your added functionality to run.

Important! If you designate any record in the analytic type definition as a callback record, you must ensure that you extend this callback method in your derived class, even if the extended method contains only a Return statement. Otherwise the Optimization PeopleCode plug-in will fail.

Parameters

Parameter	Description
<i>&OldRecord</i>	Specifies a record variable that contains the pre-update content of the data row to be updated.
<i>&NewRecord</i>	Specifies a record variable that contains the post-update content of the data row to be updated.

Returns

A Boolean value: True if the method is successful, False otherwise.

OptRefreshCallback

Syntax

```
OptRefreshCallback()
```

Description

The OptRefreshCallback method launches after PeopleSoft Optimization Framework propagates to the datacache all database insertions, deletions, and updates that it encounters for all callback records.

Use this method to perform additional processing for your own purposes, including modifying any derived data structures that might be affected by the modifications. You accomplish this by adding your own PeopleCode to the extended method.

Don't call this method in your own PeopleCode. It's called automatically at the appropriate moment by PeopleSoft Optimization Framework, which enables your added functionality to run.

Important! If you designate any record in the analytic type definition as a callback record, you must ensure that you extend this callback method in your derived class, even if the extended method contains only a Return statement. Otherwise the Optimization PeopleCode plug-in will fail.

Parameters

None.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmDate

Syntax

```
SetOutputParmDate(parmName, &parmVal)
```

Description

Use the SetOutputParmDate method to pass a Date parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Date variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmDateArray

Syntax

```
SetOutputParmDateArray(parmName, &parmVal)
```

Description

Use the SetOutputParmDateArray method to pass a Date array parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Date array variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmDateTime

Syntax

```
SetOutputParmDateTime(parmName, &parmVal)
```

Description

Use the SetOutputParmDateTime method to pass a DateTime parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a DateTime variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmDateTimeArray

Syntax

```
SetOutputParmDateTimeArray(parmName, &parmVal)
```

Description

Use the SetOutputParmDateTimeArray method to pass a DateTime array parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a DateTime array variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmNumber

Syntax

```
SetOutputParmNumber(parmName, &parmVal)
```

Description

Use the SetOutputParmNumber method to pass a Number parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Number variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmNumberArray

Syntax

```
SetOutputParmNumberArray(parmName, &parmVal)
```

Description

Use the SetOutputParmNumberArray method to pass a Number array parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Number array variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmInt

Syntax

```
SetOutputParmInt(parmName, &parmVal)
```

Description

Use the SetOutputParmInt method to pass an Integer parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify an Integer variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmIntArray

Syntax

```
SetOutputParmIntArray(parmName, &parmVal)
```

Description

Use the SetOutputParmIntArray method to pass a Number array parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Number array variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmString

Syntax

```
SetOutputParmString(parmName, &parmVal)
```

Description

Use the SetOutputParmString method to pass a String parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a String variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmStringArray

Syntax

```
SetOutputParmStringArray(parmName, &parmVal)
```

Description

Use the SetOutputParmStringArray method to pass a String array parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a String array variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmTime

Syntax

```
SetOutputParmTime(parmName, &parmVal)
```

Description

Use the SetOutputParmTime method to pass a Time parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Time variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

SetOutputParmTimeArray

Syntax

```
SetOutputParmTimeArray(parmName, &parmVal)
```

Description

Use the SetOutputParmTimeArray method to pass a Time array parameter value as output from any method you develop that corresponds to an Optimization PeopleCode plug-in transaction. You develop the transaction method in an application class that you derive from the OptBase application class.

Parameters

Parameter	Description
<i>parmName</i>	Specify the name of the parameter as it's defined for the Optimization PeopleCode plug-in transaction.
<i>&parmVal</i>	Specify a Time array variable that contains a value to be passed as output by the parameter.

Returns

A Boolean value: True if the method is successful, False otherwise.

OptInterface Class Methods

This section discusses the optimization methods for the OptInterface PeopleCode class. The methods are listed in alphabetical order.

Note. You can use the OptInterface class methods only within an application class that you extend from the OptBase application class, or within PeopleCode that you call from that application class. This ensures that the OptInterface PeopleCode runs only on the optimization engine.

ActivateModel

Syntax

ActivateModel (*ModelID*, *SolverSettingID*)

Description

The ActivateModel method designates the specified model and solver setting as active. The model and the solver are initialized and populated with data from the current analytic instance.

Note. This method fails if the specified model (and by extension, one of its solver settings) is already active. If you want to activate a different solver setting for the same model, you must first deactivate the model.

See [Chapter 4, “Optimization PeopleCode,” DeactivateModel, page 90](#).

Parameters

Parameter	Description
<i>ModelID</i>	Specify the name of the optimization model you want to activate. This must be the name of one of the models associated with the analytic type definition.
<i>SolverSettingID</i>	Specify the name of the solver setting you want to activate. This is the name you specified for the solver setting in the analytic type definition.

Returns

This method returns a constant value. Valid values are:

Value	Description
%OptInter_Success	Returned if method succeeds.
%OptInter_Fail	Returned if the solver fails to solve the problem.

Example

```
Local integer &result;
Local OptInterface &oi = CreateOptInterface();

&result = &oi.ActivateModel("QE_PSA_MODEL", "abc");
```

ActivateObjective

Syntax

ActivateObjective (*Model_Name*, *Objective_Name*)

Description

Use the ActivateObjective method to activate the specified objective for an optimization model.

Parameters

Parameter	Description
<i>Model_Name</i>	Specify the name of the model.
<i>Objective_Name</i>	Specify the name of the objective.

Returns

This method returns a constant value. Valid values are:

Value	Description
%OptInter_Success	Returned if method succeeds.
%OptInter_Fail	Returned if the solver fails to solve the problem.

DeactivateModel

Syntax

DeactivateModel (*ModelID*)

Description

The DeactivateModel method detaches the solver from the specified model.

Parameters

Parameter	Description
<i>ModelID</i>	Specify the name of the optimization model you want to deactivate. This must be the name of one of the models associated with the analytic type definition.

Returns

This method returns a constant value. Valid values are:

Value	Description
%OptInter_Success	Returned if method succeeds.
%OptInter_Fail	Returned if the solver fails to solve the problem.

Example

```
Local integer &result;
Local OptInterface &oi = CreateOptInterface();

&result = &oi.DeactivateModel("QE_PSA_MODEL");
```

DumpMsgToLog

Syntax

```
DumpMsgToLog(LogSeverity, Message)
```

Description

The DumpMsgToLog method writes the specified status message to the optimization engine log file, with the specified severity.

Parameters

Parameter	Description
<i>LogSeverity</i>	Specify the severity level of the message, as one of the following system constants: • %Severity_Fatal • %Severity_Status • %Severity_Error • %Severity_Warn • %Severity_Info • %Severity_Trace1 • %Severity_Trace2
<i>Message</i>	Specify as a string the text of the log message.

Returns

None.

FindRowNum

Syntax

```
FindRowNum(&Record [, startrow [, endrow [, field_list]])
```

Where *field_list* is a list of field names in the form:

```
[fieldname1 [, fieldname2]]...
```

Description

The FindRowNum method determines the row number of a row in the datacache rowset. You provide a record with key values, and this method finds the row with the same key values and returns its row number.

Parameters

Parameter	Description
<i>&Record</i>	Specify a record with the same structure as the records that comprise the rowset, with its key fields populated.
<i>startrow</i>	Specify as an integer the starting row number of the search. Specify 0 to search from the first row in the rowset.
<i>endrow</i>	Specify as an integer the ending row number of the search. Specify 0 to search through the last row in the rowset.
<i>fieldname</i>	Specify the name of a field in the input record which contains a value to be matched. You can specify one or more field names, in any order. Note. If you use this parameter, the fields specified here are used to search, instead of the record's key fields. Any value that doesn't correspond to a field name is ignored.

Returns

The row number of the row containing the specified key values, or 0 if no row is found.

Example

The following example searches the whole scroll to find the partial key OPT_SITE:

```
Local Record &rec = CreateRecord(Scroll.OPT_TRANSCOST);
Local Optineterface &oi;

&rec.OPT_SITE.value = "New York";
int numRows = &oi.FindRowNum(&rec, 0, 0, "OPT_SITE");
```

The following example searches from row 5 to row 15 with the full key values New York and San Jose:

```
Local Record &rec = CreateRecord(Scroll.OPT_TRANSCOST);
Local Optineterface &oi;

&rec.OPT_SITE.value = "New York";
&rec.OPT_STORE.value = "San Jose";
int numRows = &oi.FindRowNum(&rec, 5, 15);
```

GetSolution

Syntax

```
GetSolution(ModelID, varArrayID, skipZero [, KeyFieldNames, KeyFieldValues [, &Solution]])
```

Description

The GetSolution method retrieves the model solution values generated by the Solve method.

Parameters

Parameter	Description
<i>ModelID</i>	Specify as a string the name of the optimization model for which you want the solution. This is the name used for the model definition in Application Designer.
<i>varArrayID</i>	Specify as a string the name of the variable array being optimized. Your application documentation should provide this name.
<i>skipZero</i>	Indicate whether solutions with a value of zero should be fetched. This parameter takes a Boolean value: • True: Don't fetch solutions with a zero value. This can increase the performance of the GetSolution method if zero values aren't meaningful. • False: Do fetch solutions with a zero value.
<i>KeyFieldNames</i> and <i>KeyFieldValues</i>	Specify a set of key field names as an array of string and a set of key field values as an equal length array of ANY, with one key field value corresponding to each key field name. You use these arrays to restrict the set of returned solutions. Solutions are returned only for model variables with the specified key field values. Note. If you provide either of these arrays, you must provide both. You can include each parameter from the variable array at most only once.
<i>&Solution</i>	Specify a rowset to contain the solutions.

Returns

This method returns a constant value. Valid values are:

Value	Description
%OptInter_Success	Returned if method succeeds.
%OptInter_Fail	Returned if the solver fails to solve the problem.

Example

```

Local array of string &strArray;
Local array of any &valArray;
Local integer &index;
Local Rowset &rowSet;
Local integer &result;
Local string &modelId = "QE_PSA_MODEL";
Local string &varArrayName = "X";
Local boolean &bSkipZero = True;

Local OptInterface &oi = CreateOptInterface();

&strArray = CreateArrayRept("", 0);
&valArray = CreateArrayAny();
&rowSet = CreateRowset(Record.QEOPT_VAL_X_WRK);

&strArray [1] = "EMPLID";

```

```

&valArray [1] = 1;
&strArray [2] = "ORDER_ID";
&valArray [2] = 23;

/* fetch only the part of the solution where  EMPLID = 1 and ORDER_ID = 23 */
&result = &oi.GetSolution(&modelId, &varArrayName,
    &bSkipZero, &strArray, &valArray, &rowSet);

```

GetSolutionDetail

Syntax

GetSolutionDetail(*ModelID*, *SolutionType*, *Name*, &*Solution*)

Description

The GetSolutionDetail method retrieves the model solution detail of the specified type generated by the Solve method. You can retrieve dual value, slack value, or reduced cost information.

Parameters

Parameter	Description
<i>ModelID</i>	Specify as a string the name of the optimization model for which you want the solution detail. This is the name used for the model definition in Application Designer.
<i>SolutionType</i>	Specify a system constant indicating the type of solution detail you want to retrieve. The value you specify here determines the content of the <i>Name</i> and & <i>Solution</i> parameters. • %OPT_DUAL: Retrieve the dual value attributes of the specified constraint block. • %OPT_SLACK: Retrieve the slack value attributes of the specified constraint block. • %OPT_RCost: Retrieve the reduced cost attributes of the specified variable array.
<i>Name</i>	If you specified a <i>SolutionType</i> of %OPT_DUAL or %OPT_SLACK, specify here the name of a constraint block from the active model. If you specified a <i>SolutionType</i> of %OPT_RCost, specify here the name of a variable array from the active model.
& <i>Solution</i>	Specify a rowset to contain the solution details. The rowset should have the same key fields as the constraint block or the variable array you specified with the <i>Name</i> parameter.

Returns

This method returns a constant value. Valid values are:

Value	Description
%OptInter_Success	Returned if method succeeds.
%OptInter_Fail	Returned if solver fails to solve the problem.

Example

```

Local Rowset &dual_rowset;
Local integer &result;
Local OptInterface &oi = CreateOptInterface();
Local string &modelId = "QE_PSA_MODEL";
Local string &varArrayName = "X";
Local string &constrName = "Constraint_1";

/* fetch dual values for Constraint "Constraint_1"
   in a rowset based on the QEOPT_C1_WRK record */

&dual_rowset = CreateRowset(Record.QEOPT_C1_WRK);
&result = &oi.GetSolutionDetail(&modelId, %Opt_Dual, &constrName, &dual_rowset);

```

IsModelActive

Syntax

IsModelActive (*ModelID*)

Description

Use the IsModelActive method to determine if the model specified by *ModelID* is active before it is used.

Parameters

Parameter	Description
<i>ModelID</i>	Specify the model ID as a string. This is the name used for the model definition in PeopleSoft Application Designer.

Returns

A boolean value: true if the model is active, false otherwise.

RestoreBounds

Syntax

RestoreBounds (*modelID* [, *varArrayID*])

Description

The RestoreBounds method returns the bounding values of the specified variable array or arrays to the current settings in the specified model.

If you previously called the SetVariableBounds method with the *changeModelBounds* parameter set to true for any variable or variable array, those bounding values still apply.

Parameters

Parameter	Description
<i>modelID</i>	Specify as a string the name of the optimization model for which you want to restore the bounding values. This is the name used for the model definition in PeopleSoft Application Designer.
<i>varArrayID</i>	Specify as a string the name of a variable array for which you want to restore the bounding values. Your application documentation should provide this name. If you don't specify a variable array name, the bounding values are restored for all variable arrays in the specified model.

Returns

%OptInter_Success if the method succeeds, %OptInter_Fail otherwise.

SetVariableBounds

Syntax

```
SetVariableBounds(modelID, varArrayID, boundType, lowerBound, upperBound,  
&keyRecord [, changeModelBounds])
```

Description

The SetVariableBounds method overrides the bounding values specified for a model variable array, or for a variable within the array.

Parameters

Parameter	Description
<i>modelID</i>	Specify as a string the name of the optimization model for which you want to override the bounding values. This is the name used for the model definition in Application Designer.
<i>varArrayID</i>	Specify as a string the name of the variable array being optimized. Your application documentation should provide this name.
<i>boundType</i>	Specify a system constant indicating which bounding values to override. The value you specify here determines how the <i>lowerBound</i> and <i>upperBound</i> parameters are applied to the specified model. • %OPT_LOWER_BOUND: Override only the lower bound as specified by the <i>lowerBound</i> parameter. The <i>upperBound</i> parameter is ignored. • %OPT_UPPER_BOUND: Override only the upper bound as specified by the <i>upperBound</i> parameter. The <i>lowerBound</i> parameter is ignored. • %OPT_BOUND_BOTH: Override both the lower bound and the upper bound as specified by the <i>lowerBound</i> and <i>upperBound</i> parameters, respectively.
<i>lowerBound</i>	Specify as a number the lower bound that should be applied to a variable or a variable array if the <i>boundType</i> parameter permits the override. You can also set this parameter to one of the following system constants:
<i>upperBound</i>	Specify as a number the upper bound that should be applied to a variable or a variable array if the <i>boundType</i> parameter permits the override. You can also set this parameter to one of the following system constants:
<i>&keyRecord</i>	Specify a record with the same key fields as the variable array being optimized. To override the bounding values specified for a single variable within the array, populate the record's key fields to specify the variable. To override the bounding values specified for the entire variable array, set all of the record's fields to a null value. Note. You must either provide values for all keys, or set them all to null values.
<i>changeModelBounds</i>	Specify a Boolean value: • true: Indicates that the specified model should be updated in memory to reflect the specified variable bounds. Any analytic instance that invokes this model from the active optimization engine is affected by these settings, which are propagated to the solver in memory. This is the default value if you omit this parameter. • false: Indicates that the specified model should not be updated in memory, and that the specified variable bounds apply only to the next time the Solve method is called.

Returns

%OptInter_Success if the method succeeds, %OptInter_Fail otherwise.

Example

```

Local Record &rec;
Local integer &result;
Local OptInterface &oi = CreateOptInterface();
Local float &objval = 0.0;
Local string &modelId = "QE_PSA_MODEL";

```

```

Local string &varArrayName = "X";
Local float &lb = 0.0;
Local float &ub = 0.0;

&rec = CreateRecord(Record.QEOPT_VAL_X_WRK);
&rec.QEOPT_RESINDEX.Value = 1;
&rec.QEOPT_SOLINDEX.Value = 2;
&rec.QEOPT_TIMEINDEX.Value = 3;

&result = &oi.SetVariableBounds(&modelId, &varArrayName,
    %Opt_Upper_Bound, &lb, &ub, &rec, False);

```

SetVariableType

Syntax

```
SetVariableType(modelID, varArrayID, varType)
```

Description

Use the SetVariableType method to change the data type of a model variable array.

Parameters

Parameter	Description
<i>ModelID</i>	Specify as a string the name of the optimization model for which you want to change the variable type. This must be the name of one of the models associated with the analytic type definition.
<i>varArrayID</i>	Specify as a string the name of the variable array for which you want to change the variable type. Your application documentation should provide this name.
<i>varType</i>	Specify one of the following system constants representing the new variable type: • %Opt_Var_Cont: Represents a continuous variable type, which can be any floating point value. • %Opt_Var_Bin: Represents a binary variable type, for which the value can be only 0 or 1. • %Opt_Var_Int: Represents an integer variable type, which can be any integer.

Returns

%OptInter_Success if the method succeeds, %OptInter_Fail otherwise.

Example

```

Local OptInterface &oi = CreateOptInterface();
Local string &varArrayName = "X";
Local integer &result;

&result = &oi.SetVariableType("QE_PSA_MODEL", &varArrayName, %Opt_Var_Bin);

```

```

If (&result <> %OptInter_Success) Then
    &oi.DumpMsgToLog(%Severity_Status, "Failed to change variable type ");
End-If;

```

Solve

Syntax

Solve(*modelID*, *SolutionType* [, *&objValue* [, *name-value_pairs*]])

Where *name-value_pairs* is a list of solver setting parameter values in the form:

[*parmname1*, *parmvalue1* [, *parmname2*, *parmvalue2*]]...

Description

The Solve method solves the specified model using the currently active solver settings, and provides an objective value as the solution output. You can override the solver setting parameters. The returned solution status is a predefined system constant.

Parameters

Parameter	Description
<i>ModelID</i>	Specify as a string the name of the optimization model you want to solve. This is the name used for the model definition in Application Designer.
<i>SolutionType</i>	Specify a system constant indicating the type of solution detail you want the model to be solved for. • %OPT_DUAL: Generate dual value attributes. • %OPT_SLACK: Generate slack value attributes. • %OPT_RCost: Generate reduced cost attributes. You can also combine any or all of these system constants, by connecting them with a plus sign (+), for example: %OPT_DUAL + %OPT_RCost.
<i>&objValue</i>	Specify a reference to a variable of type float. This variable contains the output objective value produced by the solver upon successfully solving the specified optimization model.
<i>parmname</i> and <i>parmvalue</i>	Specify a solver setting parameter ID and value to override the original value you specified for the solver setting in the analytic type definition. You can override any or all of the solver setting parameter values. See Chapter 3, “Designing Analytic Type Definitions,” Configuring Models for Optimization, page 16 .

Returns

One of the following system constants:

%OptInter_Fail: The solver fails to solve the problem.

%Opt_Optimal: The solution is optimal.

%Opt_Infeasible: The solution is infeasible.

%Opt_Unbounded: The solution is unbounded.

%Opt_Timeup: The solver reached the time limit specified in the solver setting.

%Opt_Iterlimit: The solver reached the limit on the number of iterations specified in the solver setting.

%Opt_LP_Max_Sols: The solver generated maximum number of solutions without improvement.

%Opt_Idle: The solution shows no improvement in a specified time limit.

%Opt_Unknown: The solver status is unknown.

%Opt_MIP_NumSolutions: The specified number of solutions corresponding to an MIP solver reached.

%Opt_MIP_NumNodes: The specified number of nodes corresponding to an MIP solver reached.

%Opt_Aborted: The solver aborted.

%Opt_User_Exit: A user exit was encountered.

%Opt_First_LP_NoOpt: While solving an MIP, the first LP solution obtained was not optimal.

Example

Following is an example of the basic use of the Solve method:

```
Local OptInterface &oi = CreateOptInterface();

Local float &objval = 0.0;
Local integer &result;
Local string &modelId = "QE_PSA_MODEL";
Local string &varArrayName = "X";
Local integer &solType;

&solType = %Opt_RCost + %Opt_Dual + %Opt_Slack;

/* Solve the problem */
&result = &oi.Solve("QE_PSA_MODEL", &solType, &objval);

If & result = %Opt_Optimal Then
    &oi.DumpMsgToLog(%Severity_Warn, " Solution Status = " Optimal !!!");
Else
    &oi.DumpMsgToLog(%Severity_Warn, " Solution Status = " | &result );
End-If;
```

Following is an example of a solver setting parameter override:

```
Local OptInterface &oi = CreateOptInterface();
Local float &objval = 0.0;
Local integer &result;

/* This overrides the solver setting for MPS_Filename and generates
   an MPS file called myfile.mps instead of the name specified
   in the current solver setting parameter. */

&result = &oi.Solve("QE_PSA_MODEL", %Opt_Primal, &objval, "MPS_FileName", =>
    "myfile");
```

CHAPTER 5

Administering Optimization Server Components

An analytic server is a type of PeopleSoft application server. An optimization engine is an analytic server loaded with optimization analytic instance. You administer optimization engines using the standard application server tools.

See Also

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration

Glossary of PeopleSoft Enterprise Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i>.
business unit constraints	In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
buy event	In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction. For bidders, the sale of goods or services.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
cash drawer	A repository for monies and payments taken locally.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
constraint	A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

	3C access groups so that you can assign data-entry or view-only privileges across functions.
	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
direct receipt	Items shipped from a warehouse or vendor to another warehouse.
direct ship	Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i>).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event constraints	In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.
event propagation process	In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
financial sanctions	For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment. For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GDS	Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
global constraints	In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
ideal response	In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

incentive rule	In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
itinerary	In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.
landlord	In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
lease	In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.
lease abstract	In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
NDP	Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
phase	A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.
pickup quantity	The product quantity that the customer is taking with them from the counter sales environment.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product adds	The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i>).
product bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
proxy bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.

REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
sell event	In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
short-term customer	A customer not in the system who is entered during sales order entry using a template.

single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
sourcing objective	For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch). When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
task	A deliverable item on the detailed sourcing plan.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
tenant	In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
tiered pricing	Enables different portions of a schedule to be priced differently from one another.
time span	A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.
total cost	In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.
travel partner	In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access*.

user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation

In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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