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Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler

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Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler
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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.

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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

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- Order printed, bound volumes.

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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

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Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft 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 *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (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 (|).

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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.

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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.

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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.

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PeopleSoft Process Scheduler Preface

This preface provides a general overview of the contents discussed in PeopleSoft Process Scheduler.

PeopleSoft Process Scheduler

PeopleTools Process Scheduler is a centralized tool that enables application developers, system administrators, and application users to manage PeopleSoft batch processes. Using PeopleSoft Pure Internet Architecture, you can access a list of processes through a web browser and queue and run a process request.

As a licensee of PeopleTools, you are licensed to use the reporting tools, which are limited to tools available from the menu. You must license PeopleSoft Enterprise Portal to use the Report Manager pagelet.

Note. *DB2 UDB for OS/390 and z/OS* is the official IBM name for the DBMS. In the current PeopleTools release, PeopleSoft no longer supports the OS/390 operating system, only z/OS, its replacement. For the sake of brevity, this PeopleBook sometimes refers to DB2 UDB for OS/390 and z/OS as *DB2 z/OS*, and it sometimes refers to DB2 UDB for Linux, UNIX and Windows as*DB2 UNIX/NT*.

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CHAPTER 1

Getting Started With PeopleSoft Process Scheduler

This chapter provides an overview of PeopleSoft Process Scheduler and discusses:

- PeopleSoft Process Scheduler implementation
- Other sources of information

PeopleSoft Process Scheduler Overview

PeopleSoft Process Scheduler is a centralized tool that enables application developers, system administrators, and application users to manage PeopleSoft batch processes. Using PeopleSoft Pure Internet Architecture, you can access a list of processes through a web browser and queue and run a process request. Process requests using PeopleSoft Pure Internet Architecture have the added functionality of new distribution options that enable you to distribute output through the web in different formats (HTML, PDF, Excel, and so on) to other users based on their user or role ID. You also can send reports as email to other users.

The following diagram describes the overall PeopleSoft Process Scheduler architecture.

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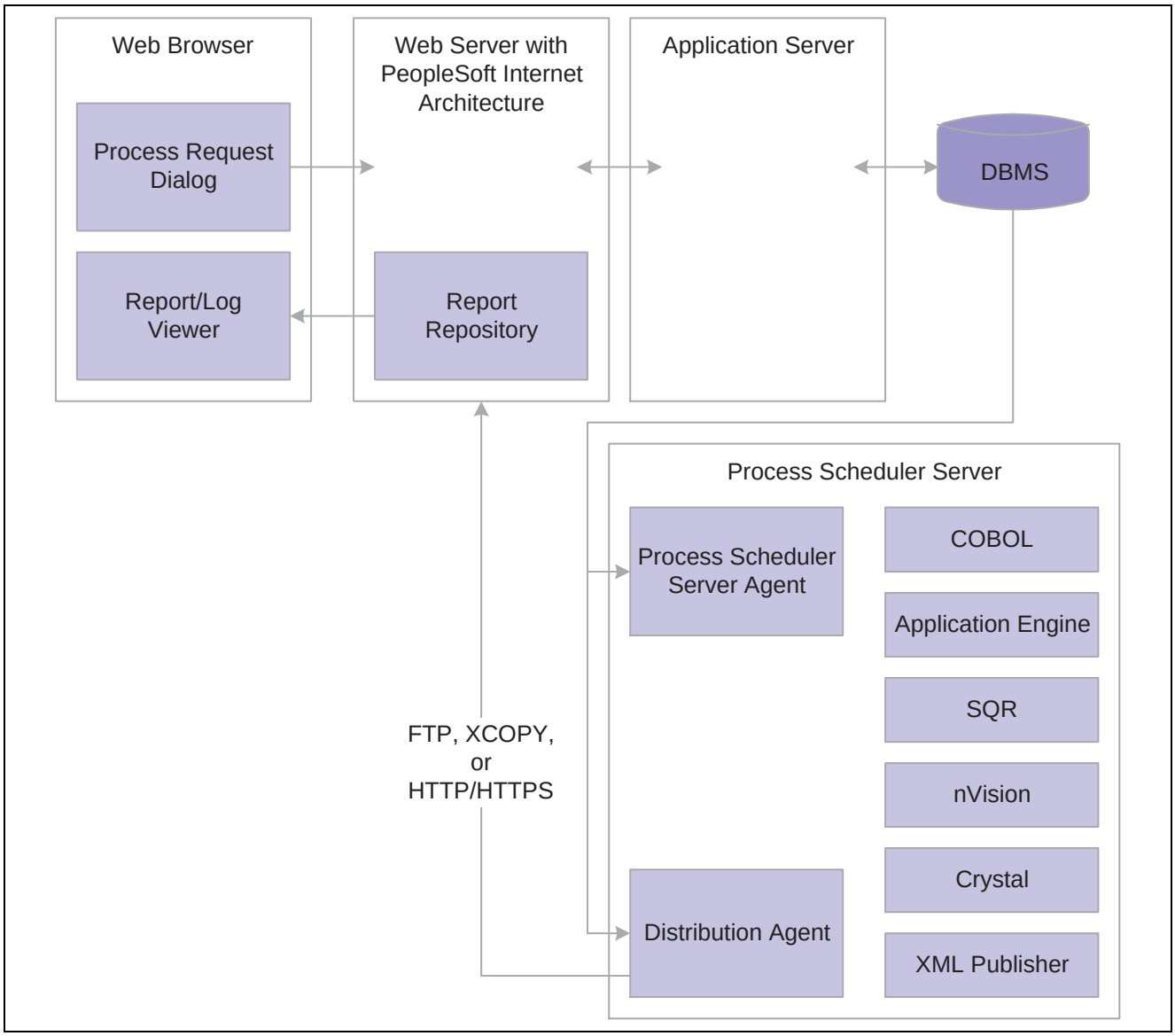

PeopleSoft Process Scheduler Architecture

PeopleSoft Process Scheduler Implementation

This section provides information to consider before you begin to use PeopleSoft Process Scheduler.

Implementation of PeopleSoft Process Scheduler can be categorized into the following activities:

- Configure Process Scheduler general settings.
- Configure process security.
- Set server definitions.
- Configure jobs and jobsets.

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Configuring Process Scheduler General Settings

To maintain a single-row table that stores system-wide parameters and system defaults, you perform the following steps:

Step	Reference
1. Define system settings.	See Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining System Settings, page 54.
2. Define process type definitions.	See Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining Process Type Definitions, page 65.
3. Define process definitions.	See Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining Process Definitions, page 79.
4. Define recurrence definition.	See Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining Recurrence Definitions, page 89.

Configuring Process Security

To secure access to the processes, you perform the following steps:

Step	Reference
1. Configure permission lists, roles, and user profiles.	See *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*, "Understanding PeopleSoft Security," Security Basics.
2. Set up Process Scheduler privileges and profiles.	See Appendix C, "Setting Up PeopleSoft Process Scheduler Security," page 167.
3. Grant PeopleSoft Process Scheduler system administration role.	See Appendix C, "Setting Up PeopleSoft Process Scheduler Security," Granting a PeopleSoft Process Scheduler System Administration Role, page 169.

Setting Server Definitions

To set up server definitions, you perform the following steps:

Step	Reference
1. Create server definitions.	See Chapter 7, "Setting Server Definitions," Creating Server Definitions, page 95.
2. Define report nodes.	See Chapter 7, "Setting Server Definitions," Defining Report Nodes, page 103.

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Step	Reference
3. Define daemon groups.	See Chapter 7, "Setting Server Definitions," Defining Daemon Groups, page 106.
4. Define batch timings.	See Chapter 7, "Setting Server Definitions," Defining Batch Timings, page 107.

Configuring Jobs and JobSets

To run several processes in one batch, you perform the following steps to define jobs and jobsets:

Step	Reference
1. Create job definitions.	See Chapter 8, "Defining Jobs and JobSets," Creating Job Definitions, page 110.
2. Define scheduled jobsets.	See Chapter 8, "Defining Jobs and JobSets," Defining Scheduled JobSets, page 116.

Other Sources of Information

In addition to implementation considerations presented in this chapter, take advantage of all PeopleSoft sources of information, including the installation guides, release notes, and PeopleBooks.

See Also

"PeopleSoft Process Scheduler Preface," page xxi

Enterprise PeopleTools 8.49 PeopleBook: Getting Started with PeopleTools

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CHAPTER 2

Understanding PeopleSoft Process Scheduler

This chapter discusses:

- PeopleSoft Process Scheduler.
- PeopleSoft Process Scheduler architecture.
- PeopleSoft Process Scheduler components.

PeopleSoft Process Scheduler

The primary role of Process Scheduler is to support the PeopleSoft application environment. With a PeopleSoft application, you might want to perform certain processes (such as running programs, batch programs, reports, and so on) in the background of the online system. Running reports, posting journal entries, loading benefit enrollment forms, and calculating payroll deductions are all examples of processes that you might want to perform independently of the PeopleSoft application.

Using PeopleSoft Process Scheduler can streamline your business practices by enabling you to take advantage of the distributed computing environment at your site, whereby you can schedule performance-sensitive jobs to run on a powerful server while the online system is still available to end users.

PeopleSoft Process Scheduler enables you to:

- Schedule recurring processes.
- Create jobs (groups of processes).
- Schedule a process request to run on any date or during any time interval that your business requires, such as monthly, daily, hourly, or by the minute.
- Submit a job to run several processes and conditionally schedule successive processes based on the status of a previous process in the job.

PeopleSoft Process Scheduler Architecture

End users need to be concerned only with successfully submitting process requests, monitoring their progress, and viewing their output in Report Manager. However, it is important to understand how each part of PeopleSoft Process Scheduler functions.

The following sections describe the role of each of the basic components in a three-tier environment.

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PeopleSoft Application Server

The application server runs the appropriate SQL against the database to add a row to the Process Request table (PSPRCSRQST) for the submitted process request. Process Monitor also uses SQL to fetch the process status from the Process Request table.

Note. In this context, *application server* refers to the physical machine on which the PeopleSoft Application Server runs. The PeopleSoft Application Server is the actual set of server processes that are controlled by BEA Tuxedo. The PeopleSoft Process Scheduler Server is a separate component that does not necessarily need to run on the application server.

PeopleSoft Process Scheduler Server Agent

The PeopleSoft Process Scheduler Server Agent is the component that resides on a server and runs as a process; that is, after it is initiated, it runs continuously in the background and requires no user interaction until it receives a request to shut down. Although the PeopleSoft Process Scheduler Server can run on the application server machine, it can also run on any supported batch server or database server.

As with each of the server processes, such as PSAPPSRV, that run within a PeopleSoft Application Server domain, the PeopleSoft Process Scheduler Server maintains its own SQL connection to the database server.

The PeopleSoft Process Scheduler Server Agent becomes idle for a specified interval of time so that it does not consume server resources. It continues alternating between being idle and active until the database administrator stops it manually.

The PeopleSoft Process Scheduler Server Agent polls the Process Request table at a regular, user-defined interval to determine whether any process requests have been directed toward the server. If so, it starts the appropriate process, based on the requested run date and time. The agent also updates the run status of that process instance to Initiated and updates the session ID with the process ID (PID) of that process.

After the PeopleSoft Process Scheduler Server Agent initiates a process, the started process—if it is API-Aware—is responsible for updating the Run Status column in PSPRCSRQST accordingly. However, during the polling cycle, the agent also:

- Cancels (at the operating system-level) processes that have been canceled through the Process Monitor.
- Checks for processes with a run status of Initiated and Processing to determine whether these processes are actually running.

To make this determination, it uses the PID that is stored in the database when the process is started. If the PID does not exist, the process is then set to Error.

Database Server

The database server houses the Process Request tables that contain a variety of data that are related to the requests, such as command line parameters, output options, and process status.

Distribution Agent

Report distribution in the PeopleSoft system is closely associated with PeopleSoft Process Scheduler. Process Scheduler uses the PeopleSoft Process Scheduler Server Agent to run the reports and log files that you submit using a process request. When they have finished, the Distribution Agent transfers these reports and log files to the Report Repository where you can view them from a web browser using PeopleSoft Pure Internet Architecture. You can transfer the following files to the Report Repository:

- Reports
- Logs

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- Trace files

Report distribution options enable you to restrict access to these reports based on user ID or role ID, as defined in PeopleSoft Security Administration.

For the Distribution Agent to pass authentication, you must ensure that the following rules are enforced:

- The User ID that you use to start the Process Scheduler server must include the *ProcessSchedulerAdmin* role.

  See Chapter 9, "Managing PeopleSoft Process Scheduler," Granting PeopleSoft Process Scheduler Administrative Rights, page 131.

- On the Report Node Definition page, the Universal Resource Locator (URL) Host must contain a fully qualified name.

  If you specify the Auth Token Domain name during the PeopleSoft Pure Internet Architecture installation, you must also include the domain name on the URL Host.

  See Chapter 7, "Setting Server Definitions," Defining HTTP Distribution Nodes, page 104.

The Distribution Agent process runs on the same server as the PeopleSoft Process Scheduler Server Agent. When you use the Server Definition page to set up the PeopleSoft Process Scheduler Server Agent with a distribution node, either the PeopleSoft Process Scheduler Server Agent or BEA Tuxedo starts the Distribution Agent, depending on the operating system in which you start PeopleSoft Process Scheduler. In Windows 2000 and UNIX, BEA Tuxedo starts the Distribution Agent, while in OS390, the PeopleSoft Process Scheduler Server Agent starts it.

The PeopleSoft Process Scheduler Server Agent and the Distribution Agent both check the status of each process in the Report List table (PS_CDM_LIST). When the PeopleSoft Process Scheduler Server Agent initiates a process request that has an output destination type of Web, or if the Server Definition page is set up to transfer system log or trace files to Report Manager, then an entry is inserted into the Report List table. When the program that is associated with the process finishes, the status in the Report List table is updated to Generated, indicating that the files are ready to transfer to the Report Repository. In Windows 2000 and UNIX, where PeopleSoft Process Scheduler servers are started through BEA Tuxedo, the Process Scheduler (PSPRCSRV) sends a Tuxedo service to the Distribution Agent (PSDSTSRV) to initiate transferring of reports to the Report Repository. In OS390, the Distribution Agent polls the Report List table to determine which process requests have finished running and then transfers them to Report Repository.

See Appendix D, "Using the PSADMIN Utility," page 171.

Report Repository

The Report Repository is the designated server where the Distribution Agent transfers reports that are generated from the PeopleSoft Process Scheduler Server. The repository can be set up on either a UNIX or Microsoft Windows 2000 machine by installing PeopleSoft Pure Internet Architecture and certified web server software, (Oracle Application Server, WebLogic or WebSphere), and can be used by multiple PeopleSoft databases. The Distribution Agent determines the Report Repository to which it should transfer the reports based on the setting that is specified in the server definition. When the Distribution Agent transfers all the files for a specific request, it creates a subdirectory under the designated directory that is specified in the PeopleSoft Pure Internet Architecture as the PSReports home directory, for example,<Database Name>/<Transfer date in YYYMMDD format>/<Report Instance>

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PeopleSoft Process Scheduler Components

Process Scheduler has several components that work together to help you run reports and processes offline. After a job has been submitted, use Process Monitor to check the status of the job, and then use Report Manager to view the output of the job through a web browser.

Process Scheduler Manager involves the interaction of these components, which you can select from the menu:

Process Type Definitions	Set global definitions for processes.
Process Definitions	Define settings that are specific to a process.
Job Definitions	Group processes.
Schedule JobSet Definitions	Describe the jobsets that run on a recurring basis, such as weekly or monthly.
Recurrence Definitions	Describe the frequency of processes that run on a recurring basis, such as weekly or monthly.
Server Definitions	Define to instances of the PeopleSoft Process Scheduler Server Agent.
Report Node Definitions	Define the report distribution node, including URL, home directory, and File Transfer Protocol (FTP) address. Use this component to set the parameters that are needed for the PeopleSoft Process Scheduler Server to transfer reports and log and trace files that are generated from a process request to Report Manager.
Process System Settings	View or change the last process instance number, as well as the system's default operating system.
Process Request	Submit a job or process to run. This component is commonly integrated into applications to support process requests that you make by selecting Run from PeopleSoft applications. The Process Request page enables you to specify variables, such as where a process runs and in what format the process output is generated.

Note. Depending on your role at your site, you might be concerned with only one or two of these components. Most end users are concerned with only the basic tasks of submitting a process request, checking its progress, and viewing it in Report Manager.

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CHAPTER 3

Submitting and Scheduling Process Requests

This chapter provides an overview of run control IDs and discusses how to:

- Submit process requests.
- Schedule process requests.

Note. This chapter is intended for the PeopleSoft application user who uses PeopleSoft Process Scheduler from a web browser to run background processes, such as PeopleSoft Application Engine, COBOL, or Structured Query Report (SQR). Depending on your security authorizations, you can run background processes on your browser or on a network server.

Understanding Run Control IDs

To run a report, you must tell the system when and where you want the report to run. For example, you might tell the system to run the report on the database server at midnight or on a Microsoft Windows server every Sunday afternoon, or you might tell it to run the report immediately. For most reports, you must also set parameters that determine the content of the report, such as the business unit or time period on which to report.

A run control is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create and save a run control with those settings. The next time that you run the report, you select the run control, and the system completes the settings.

You can create run controls that apply to several related reports. For example, suppose that all of the reports that you run at the end of a month require the same parameters: business unit, department, and from and to dates. You can create a single run control that provides values for these parameters and use it for every report.

Conversely, you can create several run controls for the same report to manage different situations. For example, you can create one run control that sets the parameters for a quarterly report and another run control that sets them for a year-to-date version of the same report. Each time that you run the report, you select the appropriate run control. This way, you can print several variations of the same report without changing the settings every time.

A run control ID is used as a key (with a user ID) for records that contain the parameters that a process needs at runtime. Storing the parameters in a table that the process can query using the run control ID and user ID enables the process to run without user intervention. Run control IDs are stored in a minimum of two tables: an application run control table and the Tools Run Control table (PSPRCSRQST). You can examine the PS_PRCSRUNCNTL table as a sample application run control table.

The PeopleTools Run Control table stores information that is required by PeopleSoft Process Scheduler, such as output type, format, distribution, file dependency, and destination. The application run control table stores information that is required to run a process, such as the from date, department ID, employee ID, and so on. All application run control tables are keyed by user ID and run control ID.

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Note. Run control IDs are product-specific. See your PeopleSoft product documentation for details on the run control IDs that you will be using. It is recommended to use alphanumeric characters when possible since some special characters may cause conflicts with some products.

Submitting Process Requests

This section discusses how to:

- Use the Process Request Dialog page.
- Run processes from PeopleSoft applications.

Page Used to Submit Process Requests

Page Name	Object Name	Navigation	Usage
Process Request Dialog	PRCSSAMPLEPNL1	PeopleTools, Process Scheduler, System Process Requests Select a run control ID and submit a process request.	Run processes from PeopleSoft applications.

Using the Process Request Dialog Page

The Process Request Dialog page shows the run control ID that you selected or added for submitting your process request. It also includes links to Report Manager and Process Monitor so that you can check the progress of your job and view its content immediately after it is posted.

The Process Request Dialog page has two additional pages that show your options for submitting requests if you do not run the process from the browser:

- The Component Interface page enables you to run the process from a component.
- The ProcessRequest PeopleCode page enables you to run the process using PeopleCode.

This chapter is written with the primary focus of submitting process requests from the browser. Click the *Run* button to access the Process Scheduler Request page.

See Also

Appendix A, “Using Process Request APIs,” Scheduling Processes from Outside the PeopleSoft System, page 150

Appendix A, “Using Process Request APIs,” Using the PeopleCode ProcessRequest Class, page 155

Running Processes from PeopleSoft Applications

To expedite the process of running reports, PeopleTools delivers Run Control subpages for application developers. Using these subpages, application developers can run reports without accessing the Process Request Dialog page.

The following subpages are recommended for application developers to use:

- PRCSRUN_LC_SBP

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- PRCSRUN_RL_SBP
- PRCSRUN_SBP
- PRCSRUN_SBP2

The subpages comprise the following buttons:

Run Now Click to request a process to run without launching the Process Request Dialog page. Process Scheduler will run the first process as listed on the Process Request Dialog page. If the process has previously been run, the system will retain the default output type based on the Run Control record.

Advance Schedule Click to launch the Process Scheduler Request page to submit requests and configure the output type and output format of the process. This option is synonymous with the Run button on the Process Request Dialog page.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Application Designer, "Using Page Controls," Defining a Subpage

Scheduling Process Requests

This section provides an overview of PeopleSoft Process Scheduler Requests and discusses how to:

- Specify process variables.
- Set job detail information.
- Select output types and formats.
- Set report distribution.
- Set log/output directory and report repository.

Understanding PeopleSoft Process Scheduler Requests

The Process Scheduler Request page enables you to submit a job or process to run. This page is commonly integrated into applications to support process requests that you make from a PeopleSoft application by clicking Run.

When you click Run, the Process Scheduler Request page appears, showing all of the jobs and processes that you have the security to run.

The Process Scheduler Request page enables you to specify variables, such as where a process runs and in what format the process output is generated. You can set:

- Server name.
- Run date, run time, and time zone.
- Recurrence.
- Output type.
- Output format.

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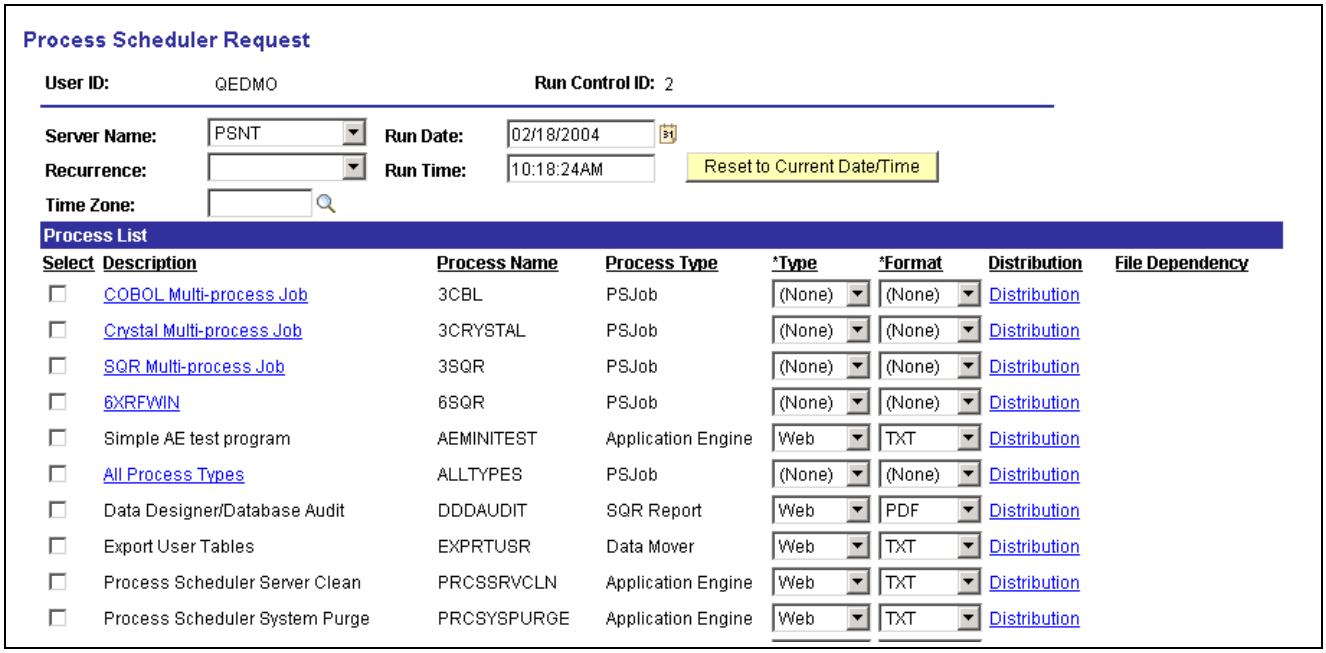
- Output destination.
- Distribution.

Pages Used to Schedule Process Requests

Page Name	Object Name	Navigation	Usage
Process Scheduler Request	PRCSRQSTDLG	PeopleTools, Process Scheduler, System Process Requests Click Run on the Process Request Dialog page.	Specify process variables.
Job Detail	PRCSRQSTITEMS_DLG	Click a job description listed on the Process Scheduler Request page.	Set job detail information.
Distribution Detail	PRCSRQSTCDMAUTH	Click a Distribution link on the Process Scheduler Request page.	Set report distribution.
File Dependency	PRCSRQST_FILE	Click a File Dependency link on the Process Scheduler Request page.	Change the file dependency filename.

Specifying Process Variables

Access the Process Scheduler Request page.



Process Scheduler Request page

Server Name Select the name of the server on which you want the process to run.

Recurrence Select the recurring time intervals for the process to run.

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For example, to run a process every weekday at 5:00 p.m., select the predefined recurrence definition *M-F at 5pm.*

Time Zone Select the time zone in which the process will run.

For example, you might be in Eastern Standard Time (EST) and schedule a process to run in Pacific Standard Time (PST).

Run Date Select the date on which you want the process to run.

Run Time Select the time when you want the process to run.

Reset to Current Date/Time Click to reset the run date and time to the present date and time.

Select Select a job or process to run. You can select multiple jobs and processes.

Description Identifies a process or job. Jobs are listed as links. Click the link to display the Job Detail page, which shows all of the individual processes and jobs that are associated with the selected main job.

Process Name and **Process Type** Identifies the name and type (such as COBOL or Crystal) of the process as it appears in the process or job definition.

Type Select the output type for this job or process.

An output type that is selected for a process at the process definition level overwrites the output type, and the output type drop-down list box becomes unavailable.

An output type that is selected for a job at the main job level carries through to the job items. An output type that is selected for individual job items overwrites the output type that is entered for the parent job.

Output type for an XML Publisher report is set at the report definition level. Options set at that level may render the output type drop-down list box unavailable.

File: Writes the output to the file that you indicate in the Output Destination field.

Note. For PS/nVision, the Output Destination must contain the full path and the name of the file.

Printer: Sends the output to a printer. You can enter a custom printer location in the Output Destination field if you have the appropriate security access. If the Output Destination field is left blank, the printer that is defined on the Process Profile Permissions page is used. If that printer is undefined, the default printer that is defined for the process scheduler is used.

Email: Sends the output by email. To distribute a report to an email list, enter the appropriate information on the Distribution Detail page by clicking the Distribution link. By default, the output is sent by email to the person running the process. This option is available for SQR, PS/nVision, and Crystal reports.

Web: Sends all output of the process to the report repository, including log and trace files. The format of the report is specified by the format list.

Window: Sends the output to a new browser window. The status of the process now appears in the new browser window before the results are displayed. The different states can be *Queued, Initiated, Processing, Success, Error,* or

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Warning. All output for the process is also sent to the report repository, including log and trace files. The format of the report is specified by the format list.

When multiple processes are requested, a new browser window is opened for each request.

Note. This output type is not available if the user does not have REN server *Report Window* permission, or no active REN server cluster is available for Reporting.

To grant access to the new browser window, the permission lists of the users must include full access for the Realtime Event Notification for Reporting Window and the WEBLIB_RPT web library with full access.

Format

Select the output format for this job or process.

When an output format is selected for a process at the process definition level, it cannot be changed. Therefore, the Format drop-down list box becomes unavailable.

An output format that is selected for a job at the main job level carries through to the job items. The format that is selected for individual processes or jobs that are attached to a job override the format that is entered for the parent job.

Output format for an XML Publisher report is set at the report definition level. Options set at that level may render the output format drop-down list box unavailable.

Distribution

Click the Distribution link to access the Distribution Detail page, where you enter additional distribution information when the output type is *Web, Window,* or *Email.* Also use this page to select a folder name to which the output should be distributed when the output type is *Web* or *Window.*

File Dependency

Click the File Dependency link to access the File Dependency page, where you can change the name of the file that is currently listed.

Note. File dependency information is saved with the run control ID. Therefore, information that is changed in the process definition will not appear here.

Output Destination

Enter the file path or printer destination for the output. This field is available only when the output type that you select is *File* or *Printer.*

If you select an output destination for a process at the process definition level, this field is populated with that output destination.

Note. For PS/nVision, if the output type is *File,* the output destination must contain the full path and the name of the file.

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See Also

Chapter 6, “Defining PeopleSoft Process Scheduler Support Information,” Defining Recurrence Definitions, page 89

Chapter 6, “Defining PeopleSoft Process Scheduler Support Information,” Defining Process Type Definitions, page 65

Chapter 6, “Defining PeopleSoft Process Scheduler Support Information,” Defining Process Output Types, page 57

Chapter 6, “Defining PeopleSoft Process Scheduler Support Information,” Defining Process Output Formats, page 57

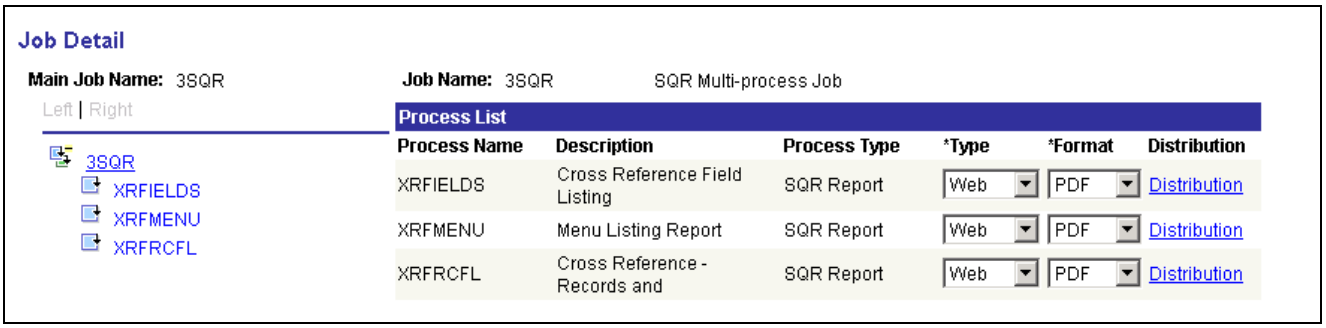
Chapter 6, “Defining PeopleSoft Process Scheduler Support Information,” Setting Process Definition Options, page 83

Enterprise PeopleTools 8.49 PeopleBook: Security Administration, “Setting Up Permission Lists,” Defining Permissions

Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise, “Defining Report Definitions,” Setting Output Options

Setting Job Detail Information

Access the Job Detail page.



Job Detail page

When a job or JobSet is listed, only the main job appears on the Process Scheduler Request page. The Job Detail page displays all of the jobs and processes that are attached to the main job in a hierarchical view that assists you with specifying output options and distribution information for individual processes.

Note. You can specify the output options for jobs either at the main job level or for each job or process in the job.

See Also

Chapter 8, “Defining Jobs and JobSets,” page 109

Selecting Output Types and Formats

Access the Process Scheduler Request page.

You can choose from several file output types and formats for your process. The following table lists file output types by process type. The output type for PS/nVision is the same as the default output type on the PS/nVision Report Request page.

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Note. The*Window* output type is not available if the user does not have REN server *Report Window* permission, or no active REN server cluster is available for Reporting.

To grant access to the new browser window, the permission lists of the users must include full access for the Realtime Event Notification for Reporting Window and the WEBLIB_RPT web library with full access.

See *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*, "Setting Up Permission Lists," Defining Permissions.

Note. If you select the *Window* output option for your process on the Process Request Dialog page, a message indicating that report notification is not supported on Apple Safari appears. The process is submitted to the web instead.

Note. For Process Type XML Publisher, available output options are based on the report definition template type.

See *Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise*, "Defining Report Definitions," Creating Report Definitions.

Process Type	Output Type	Default
AppEngine (PeopleSoft Application Engine)	FILE, WEB, WINDOW	WEB
COBOL	NONE, WINDOW, WEB	NONE
Crystal	WEB, WINDOW, EMAIL, FILE, PRINTER	WEB
Cube	NONE	NONE
nVision (PS/nVision)	WEB, WINDOW, EMAIL, FILE, PRINTER, DEFAULT	DEFAULT
SQR	WEB, WINDOW, EMAIL, FILE, PRINTER	WEB
WinWord (Microsoft Word)	WEB, WINDOW	WEB
Data Mover	FILE, WEB, WINDOW	WEB

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Process Type	Output Type	Default
XML Publisher	FILE, WEB, PRINTER	WEB
OTHER	WEB, WINDOW, EMAIL, FILE, PRINTER, NONE	NONE

The following table lists valid file output formats by process type.

Process Type	Output Type	Output Format	Default
AppEngine	FILE	PDF, XLS, TXT, HTM	TXT
AppEngine	WEB	PDF, XLS, TXT, HTM	TXT
AppEngine	WINDOW	PDF, XLS, TXT, HTM	TXT
COBOL	NONE	NONE	NONE
COBOL	WEB	TXT	TXT
COBOL	WINDOW	TXT	TXT
Crystal	EMAIL	DOC, HTM, PDF, RPT, RTF, TXT, XLS	PDF
Crystal	FILE	DOC, HTM, PDF, RPT, RTF, TXT, XLS	PDF
Crystal	PRINTER	RPT	RPT
Crystal	WEB	DOC, HTM, PDF, RPT, RTF, TXT, XLS	PDF
Crystal	WINDOW	DOC, HTM, PDF, RPT, RTF, TXT, XLS	HTM
Cube	NONE	NONE	NONE
nVision	EMAIL	HTM, XLS	XLS
nVision	FILE	HTM, XLS	XLS

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Process Type	Output Type	Output Format	Default
nVision	PRINTER	HTM, XLS	XLS
nVision	WEB	HTM, XLS	XLS
nVision	WINDOW	HTM, XLS	XLS
nVision	DEFAULT	DEFAULT	DEFAULT
SQR	EMAIL	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
SQR	FILE	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
SQR	PRINTER	HP, LP, PS, WP	PS
SQR	WEB	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
SQR	WINDOW	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
WinWord	WEB	DOC	DOC
WinWord	WINDOW	DOC	DOC
Data Mover	FILE	TXT	TXT
Data Mover	WEB	TXT	TXT
Data Mover	WINDOW	TXT	TXT
XML Publisher	FILE	PDF, HTM, RTF, XLS	HTM
XML Publisher	PRINTER	PDF	PDF
XML Publisher	WEB	PDF, HTM, RTF, XLS	HTM
OTHER	NONE	NONE	NONE

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Note. You must install Adobe Acrobat Reader on your workstation to read PDF files.

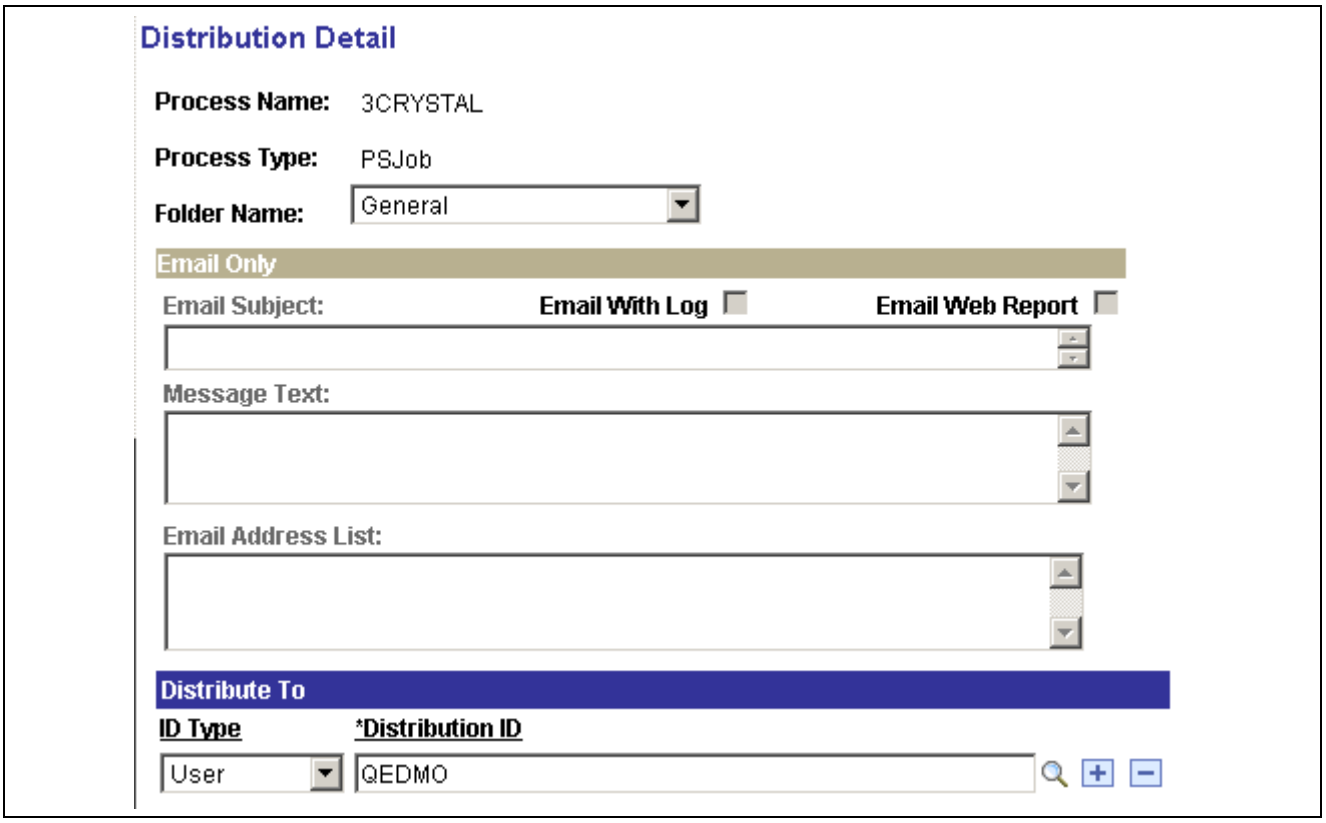
Note. For Process Type Crystal, output format HTM is available with Crystal Reports 9 only.

When using BusinessObjects Enterprise XI, the default output format for Window output type is PDF.

Setting Report Distribution

Access the Distribution Detail page.

Note. You must specify an output type of *Web, Window,* or *Email* for the distribution list to be accepted when the process instance is created



Distribution Detail page

Folder Name

Select the folder in which the report results are posted. Folders organize report results into meaningful groups and can be viewed from Report Manager.

Note. This option is available only when the output type on the Process Scheduler Request page for this process is *Web* or *Window.*

Distribute To

Select the recipients of the process output. Select an ID type of *User* or *Role* and the corresponding distribution ID.

Email recipients must be authorized to view the content of the email and their email addresses must be entered in their security user profiles.

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Email Subject Enter the text that appears in the subject line of the email. If this field is empty, the following default text message is used:

Output from <Program Name>(<Process Instance>).

Email With Log Select to include log files resulting from the SQR program as attachments to the email file (SQR only).

Email Web Report Select to send an email with a link to the completed report output. This option is available only when the output type for the request is *Web*.

Message Text Enter text to appear in the body of the email. If this field is empty, the following default text message is used:

Message from Process Scheduler running on system <Process Scheduler Server Agent> using database <Database Name>.

Email Address List Enter a list of email addresses, separated by semicolons, to which the email should be sent.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Security Administration, "Administering User Profiles"

Setting Log/Output Directory and Report Repository

When Process Scheduler submits a request, the system creates a new subdirectory to store the log, trace, and reports that were generated by the request. This subdirectory is created in the directory that is specified in the Log/Output Directory parameter in the Process Scheduler configuration file psprcs.cfg. When a high volume of requests is being processed by the Process Scheduler server, limitations imposed by the operating system can prevent additional directories from being generated for the new requests. For instance, certain UNIX flavors only allocate 32K Inodes for a directory.

To prevent the Log/Output directory from reaching the limit that is imposed by the operating system, you can set up additional subdirectories using meta variables. You can modify the Log/Output directory parameter to include any of the meta variables that are listed below in order to build additional subdirectories.

The meta variables are:

Meta Variable	Description
%OPRID%	PeopleSoft User ID
%REPORTID%	Report Instance
%PRCSINSTANCE%	Process Instance
%PRCSTYPE%	Process Type
%SERVER%	Process Scheduler Server
%CURRDATE%	Current Date
%CURRHOUR%	Current Hour

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Meta Variable	Description
%JOBNAME%	Job Name
%JOBINSTANCE%	Job Instance

Log/Output Directory

By default, the Log/Output directory is `%PS_SERVDIR%\log_output`. You can modify the structure of the subdirectory to include the date and hour as subdirectories by changing the default parameter to:

```
%PS_SERVDIR%\log_output\%CURRDATE%\%CURRHOUR%
```

Report Repository

You can use the same mechanism to alter the subdirectory structure for the Report Repository. To change the directory structure in the Report Repository, you need to modify the definition of the Report Node stored in the PS_CDM_DIST_NODE.

In the PS_CDM_DIST_NODE table, the field CDM_DIR_TEMPLATE sets the directory structure like this:

```
%DBNAME%/%CURRDATE%/%REPORTID
```

You can alter the value of the field to include any of the meta-variables listed previously.

See Also

Appendix B, “Understanding Logging Systems,” Log and Output Directory, page 157

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CHAPTER 4

Using Process Monitor

This chapter provides an overview of the Process Monitor and discusses how to view the status of:

- Processes.
- Servers.

Understanding Process Monitor

After you submit a job using the Process Scheduler Request page, use Process Monitor to review the status of scheduled or running processes. You can view all processes to see the status of any job in the queue and control processes that you initiated. Process Monitor consists of two pages: the Process List page and the Server List page.

Use the Process List page to monitor the process requests that you submit. If a process encounters an error, or if a server is down, you can find out almost immediately. You can also see what processes are queued to run in the future.

Use the Server List page to view information about each of the PeopleSoft Process Scheduler Server Agents that are defined in the system.

Viewing the Status of Processes

This section discusses how to view:

- The process list.
- Process details.
- Process request parameters.

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Pages Used to View the Status of Processes

Page Name	Object Name	Navigation	Usage
Process List	PMN_PRCSLIST	PeopleTools, Process Scheduler, Process Monitor. PeopleTools, Process Scheduler, System Process Requests, Process Request Dialog. Click the Process Monitor link on the Process Request Dialog page.	Monitor the process requests that you submit.
Process Detail	PMN_PRCSLISTTREE	PeopleTools, Process Scheduler, Process Monitor. Click the main job name on the Process List page.	View the status of all jobs and processes that are attached to the main job in tree format.
Process Detail	PMN_PRCSRQSTDETAIL	PeopleTools, Process Scheduler, Process Monitor. Click the Details link on the Process List page.	View process detail information and manipulate the program run.
Process Request Parameters	PMN_PRCSRQSTPARMS	Click the Parameters link on the Process Detail page.	View additional information about the process parameters.
Message Log	PMN_BAT_MSGLOG	Click the Message Log link on the Process Detail page.	View messages that are inserted into the message log by the programs that are running.
Batch Timings - Summary	PMN_BAT_TIMINGS	Click the Batch Timings link on the Process Detail page.	View statistics the system administrator can use to tune the system for better performance.
View Log/Trace	PMN_CDM_INDEX	Click the View Log/Trace link on the Process Detail page.	View files posted to the Report Repository.

Viewing the Process List

Access the Process List page.

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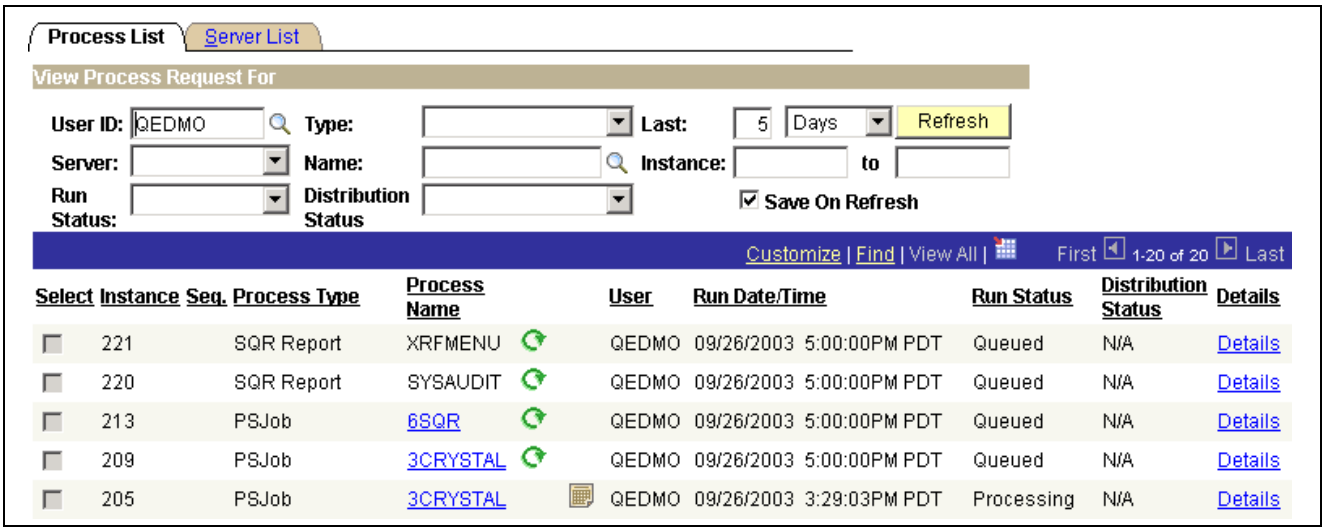

Process List page

User ID View the processes submitted by a user ID. Usually, you view your own user ID. Leave blank to view all of the processes that you are authorized to view.

Type View by a process type, such as Application Engine, Crystal, COBOL, SQR, or Application Engine processes.

Last Specify an interval of time by which to limit the process requests that appear in the list. Enter a custom numerical value in the field, and then select a unit type: *Days, Hours,* or *Minutes.*

Server View processes that are run on a particular server.

Name View processes by a process name.

Note. You won't be able to select a value for this field until you first select a Process Type.

Instance Specify a range of instances by which to limit the process requests that appear in the list. To limit the view to a single request, enter the required instance ID in the first text field.

Run Status View processes by status, such as *Success* or *Error.*

Save on Refresh Select the check box to save changes to filter criteria when you select the Refresh button.

The rules applying to *Save on Refresh* are listed later in this section.

Refresh Click to check the current status of a submitted process.

Select All and **Deselect All** The Select All and Deselect All buttons display at the bottom of the page when the process list contains processes that can be deleted, cancelled, held, or restarted.

Click Select All to select all valid processes. Once selected click Delete Request to delete all the selected processes. Click Cancel Request to cancel all of the selected processes. Click Hold Request to hold all of the selected processes. Click Restart Request to restart *multiple* processes or jobs that are on hold.

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Click Deselect All to deselect all valid processes.

Use the check box displayed to the left of each process to select individual processes. The check box will only be active for valid processes.

Note. The Delete, Cancel, Hold, and Restart options can be performed only on processes with specific run statuses. Therefore, the options will only be visible when processes are filtered by a valid run status for that option.

Instance Displays the process instance; that is, the order in which the process appears in the queue. This number is automatically generated.

Seq (Sequence) Within a PSJob, each individual process request has a defined sequence in which it runs in relation to the others. This column displays this sequence, such as *1, 2, 3,* and so on.

Process Type Displays the type of process, such as *Application Engine, COBOL,* or *SQL.*

Process Name Displays the name of the process.

When a job or a jobset is listed, only the main job appears and its name is displayed as a link. Click to see the status of all jobs and processes that are attached to the main job.

Click the Recurrence icon to go to the Recurring Process/Job page where you can perform one of the following actions on the current queued request.

Hold: Suspend initiating and recurring.

Stop: Stop from recurring a new request.

Restart: Resume activity based on the last action selected.

This page displays the Recurrence Name, Process Type, and Process Name of the selected recurring process. Also listed is a history of the recurrence process. The most current instance is listed first.

Click the Schedule JobSet icon to go to the Schedule JobSet page. This page displays a history of the scheduled jobset.

Click Return to return to the Process Monitor page.

User Displays the user ID of the person who submitted the request.

Run Date/Time Displays the time and date at which the process request was created.

Run Status Indicates the status of the process, such as *Queued, Initiated,* or *Cancelled.*

A complete list of Run Status values appears later in this section.

Distribution Status Displays the distribution status for each individual job and process. Valid states are: *N/A, None, Generated (OS390), Not Posted, Posting,* and *Posted.*

Details Click to display the Process Details page.

See Chapter 8, “Defining Jobs and JobSets,” page 109 and Chapter 6, “Defining PeopleSoft Process Scheduler Support Information,” Defining Recurrence Definitions, page 89.

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Process Request Run Status

The Run Status column on the Process List page indicates the current state of a process. Knowing the status of a job helps you determine where it is in the queue or identify a problem if the process has an error.

Run Status	Description	Updated By
Blocked	The running of this process has been blocked. This indicates that this process is waiting for the number of active occurrences of this process to drop below Max Concurrent value, a process recognized as mutually exclusive to complete or a dependent file to be located.	Batch program
Cancel	Indicates that a user has requested to cancel the scheduling of a process request.	Process Monitor See Appendix F, "Editing JCL Templates in OS390 for COBOL and SQR," Understanding Limitations of Process Scheduler Server Running from USS (UNIX System Services), page 213.
Cancelled	Indicates that the server agent has successfully canceled the request after it has started.	PeopleSoft Process Scheduler Server Agent
Error	Indicates that the program that is associated with the process request encountered an error while processing transactions within the program. In this case, delivered programs are coded to update the run status to Error before terminating.	Batch Program
Hold	Indicates that a user has requested the scheduling of a process request be put on hold.	Process Monitor
Initiated	Indicates that a PeopleSoft Process Scheduler Server has acknowledged the new request. At this time, PeopleSoft Process Scheduler validates the parameters that are associated with this request and submits the command line to start the process.	PeopleSoft Process Scheduler

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Run Status	Description	Updated By
No Success	Indicates that the program encountered an error within the transaction. No Success is different from Error because the process is marked as restartable. (Application Engine is the only delivered process type that is restartable).	Batch Program
Pending	Status assigned to an item of a new PSJob request. This indicates that this item is waiting for a previous item in the job before PeopleSoft Process Scheduler releases this item. When the previous item has completed successfully, PeopleSoft Process Scheduler changes the status of item to Queued.	Process Request Dialog or ProcessRequest() PeopleCode function
Processing	Indicates that PeopleSoft Process Scheduler has successfully initiated the program. A status Processing indicates that the program is running.	Batch Program
Queued	Status assigned to a new process request. The process request remains Queued until a PeopleSoft Process Scheduler Server picks up the new request.	Process Request Dialog or ProcessRequest() PeopleCode function
Restart	Indicates that a process, which encountered an error is attempting to restart.	Batch program
Success	Indicates that the program has successfully completed.	Batch Program
Warning	A warning status is available to use in a job definition. A job definition may continue or stop when a process encounters a warning. The warning status must be set using PeopleSoft Application Engine. Set the AE_APPSTATUS field to *1*.	Batch program

Save on Refresh

The following rules apply to the Save on Refresh check box:

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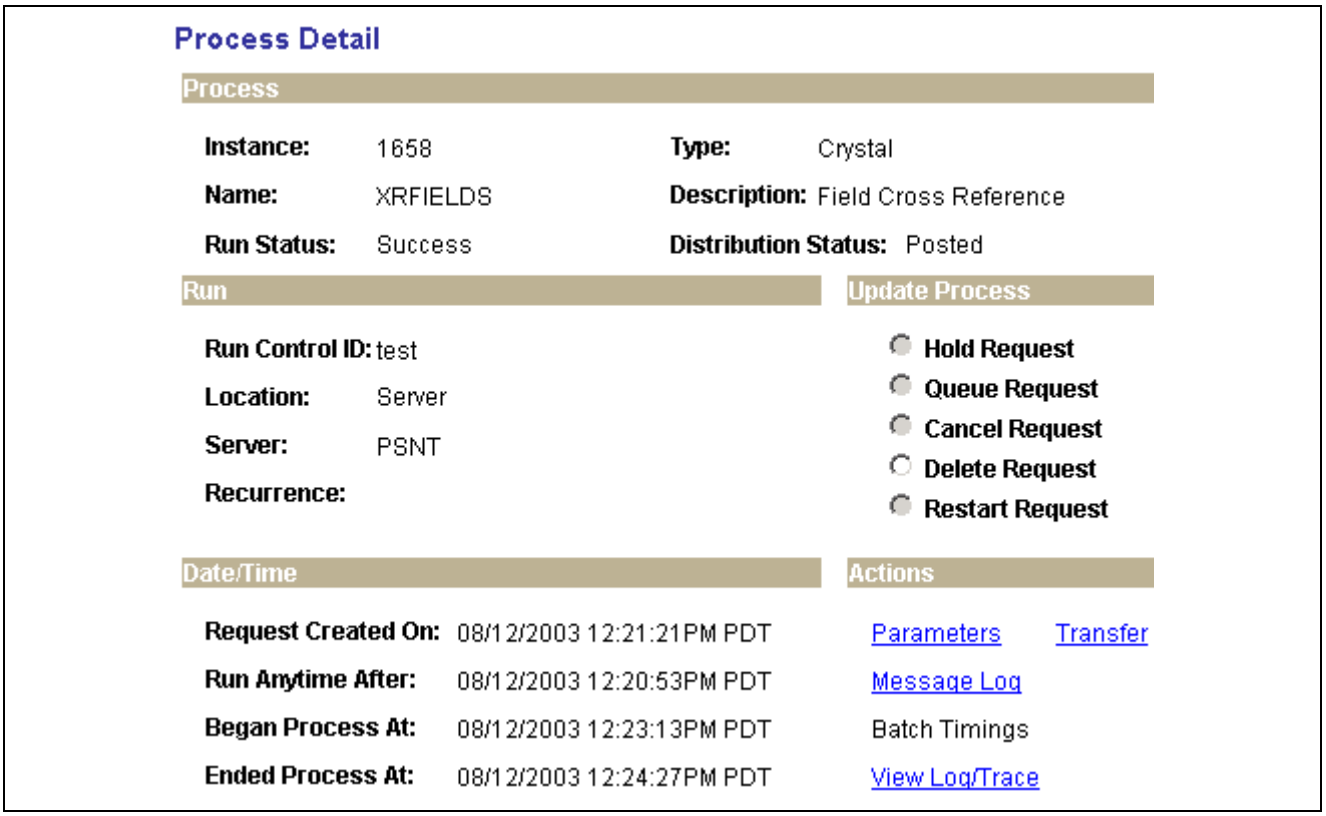
- The Save on Refresh check box is selected by default.
- Instance to values are not saved, even if the Save on Refresh check box is selected.
- Selecting Save saves any changed filter criteria.
- Changed filter criteria is saved if you select the Refresh button, and the Save on Refresh check box is selected.
- Changed filter criteria is not saved if you select the Refresh button, and the Save on Refresh check box is not selected.

  However, a warning message displays when you attempt to leave the page.
- The save warning message displays when changes have been made to filter criteria and you attempt to leave the page without selecting the Refresh button.

Viewing Process Details

Access the Process Detail page.



Process Detail page

Use the Process Detail page to view details, such as request parameters, message logs, and any recovery instances that have been run. Many of the items on this page are display-only. However, you can use some controls to manipulate the program run.

Note. You must click OK to confirm the Update Process request on the Process Detail page.

Process

This display-only group box contains general descriptive information to help you identify the process request, including the run and distribution states.

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Run

Run Control ID and **Location** Displays the run control ID and the run location.

Server Displays the name of server utilized, if the process runs on the server.

Note. When the process is in queue status, the name of the requested server is displayed.

Recurrence Displays the recurrence name if this process has a recurring schedule.

Update Process

The actions that are available in this group box depend on your user authorizations and the current status of the request. This group box is available only if your user ID is authorized to update the selected request.

The option that you select depends on the current run status of the process request. For instance, you can't cancel a job that has already completed, and you can't hold a request that is currently processing. The valid actions based on the current status of each process request appear in the following table:

Current Status	Valid Actions
Blocked	Hold, Cancel
Cancelled	Delete
Error	Delete
Hold	Delete, Cancel, Restart
Initiated	Cancel
No Success	Delete
Pending	Hold, Cancel
Processing	Cancel
Queued	Hold, Cancel
Restart	Hold, Cancel
Success	Delete
Warning	Delete

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Note. The action *Resend Content* is available when the Distribution Status for a process is *Not Posted.*

Date/Time

Request Created On Displays the date and time at which the request appeared in the Process Request table (PSPRCSRQST). This is the same as the Start Request field on the Recurrence Definition page.

Run Anytime After Indicates the date and time at which the user selected File, Run in a PeopleSoft application.

Began Process At Displays the actual date and time at which the process was selected and initiated.

For server-based requests, there could be a large gap between the Request Created On and Began Process At values, due to PeopleSoft Process Scheduler Server Agent sleep time and other server processing activity.

Ended Process At Indicates the date and time at which the selected process status updated to Success.

Note. If the request fails at initiation, the begin and end times do not appear.

Actions

This group box contains links to other pages, including Parameters, Message Log, Batch Timings, Transfer, and Temp Tables, and View Log/Trace. These pages provide additional details about the process.

Additional information about these actions is provided in the following Viewing Process Detail Actions section of this chapter.

Viewing Process Detail Actions

This section discusses the process detail action pages.

Note. All action pages contains a group box that displays general information about the process.

Viewing Process Request Parameters

Access the Process Request Parameters page.

Use this page to view additional information about the process parameters.

All non-secure, runtime definition variables are expanded for both client and server requests in this group box. Having this information should help eliminate configuration problems by identifying incorrect entries in either the PeopleSoft Configuration Manager (PSADMIN) or the operating environment.

Command Line Displays the path and program used to run the process.

You can select the command line and copy it into other tools. This is useful when trying to isolate a request-related problem originating outside of PeopleSoft Process Scheduler, such as an incorrect entry in Configuration Manager or an SQR compile problem.

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For example, after copying the command line, you might paste the parameters directly into the target of an SQRW icon and then run the process outside of PeopleSoft Process Scheduler to isolate a problem.

Working Dir (working directory) Displays the directory in which the database connectivity software is installed.

Destination Displays the location of the completed output that is generated by the process, such as %%OutputDirectory%%.

When the output destination for the process is Web, the destination lists the user or role IDs that are authorized to view the report in Report Manager.

Message Text Displays additional information about the process status. Typically, this displays built-in messages that describe the status of the program that you are running.

Note. You must manually provide passwords (CP %OPPPSWD% params) that are required in the request parameters, because they are not exposed on the Process Request Parameters page for security reasons.

Viewing the Message Log

Access the Message Log page.

Use the Message Log page to view messages that are inserted into the message log by the program that are running.

Explain Click to display a detailed explanation of the message.

Note. This option is available for PeopleSoft Application Engine and COBOL processes only.

Viewing Batch Timings

Click the Batch Timings link on the Process Detail page to access the Batch Timings report.

Note. The Batch Timings link is only available for process requests with a process type of *Application Engine.*

The Batch Timings report contains a set of statistics that system administrators can use to tune the system to gain better performance. This report relates specifically to PeopleSoft Application Engine program performance.

Viewing Transfer Pages

Click the Transfer link on the Process Detail page to access the page defined on the Page Transfer page for this process definition.

Viewing Temporary Tables

Click the Temp Tables link on the Process Detail page to access the Temporary Tables page.

Temporary tables can be important assets for many PeopleSoft Application Engine programs. They are used to:

- Store transient or intermediate results during a program run.
- Improve performance.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Application Engine*, “Using Temporary Tables”.

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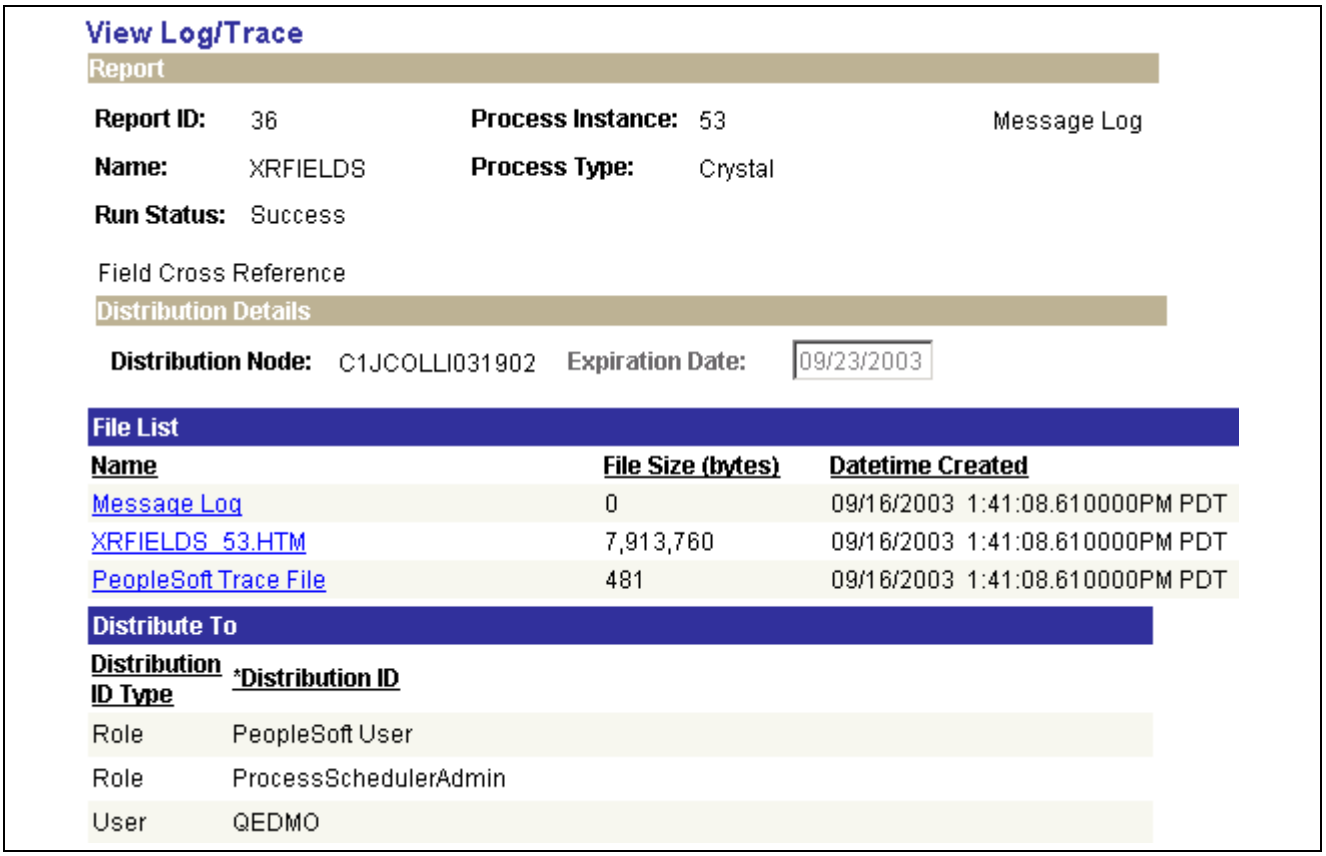
Viewing Log and Trace Files

Click the View Log/Trace link on the Process Detail page to access the View Log/Trace page.



View Log/Trace page

The View Log/Trace page enables you to view the output file, message log and trace file in a browser. The View Log/Trace link appears active on the Process Detail page when at least one of the following conditions is met:

- The output destination for the process request is *Web,* and the report and log files were successfully posted to the Report Repository by the Distribution Agent.

  The process must have a run status of *Success.*

  - If the report hasn't been transferred to the Report Repository, the run status of the process request remains *Processing* and the View Log/Trace link is not active.
  - If the status of the request remains *Processing,* check the message log for messages from the Distribution Agent indicating that there were problems transferring files to the Report Repository.

- The process request ran from a PeopleSoft Process Scheduler Server Agent that was set up using the Server Definition page with a distribution node.

  You must have also selected to transfer log files to the Report Repository when you set up the preferences on this page.

Note. The View Log/Trace option can be viewed from the web only. This option is not available when accessing Process Monitor details from a Windows version of PeopleTools.

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Viewing the Status of Servers

This section discusses how to view:

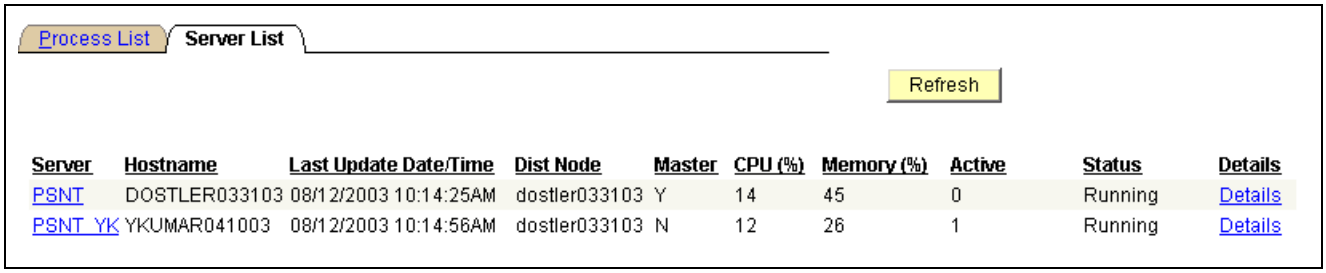
- The server list.
- Server activity.
- Server details.

Pages Used to View the Status of Servers

Page Name	Object Name	Navigation	Usage
Server List	PMN_SRVRLIST	PeopleTools, Process Scheduler, Process Monitor, Process List	View information about each of the PeopleSoft Process Scheduler Server Agents that are defined in the system.
Server Activity	PMN_SRVR_ACTVTY	PeopleTools, Process Scheduler, Process Monitor, Server List Click the name of a server on the Server List page.	View the selected server's activity details by process and by process category.
Server Detail	PMN_SRVRDETAIL	PeopleTools, Process Scheduler, Process Monitor, Server List Click the Details link on the Server List page.	View server detail information and update its status.

Viewing the Server List

Access the Server List page.



Server	Hostname	Last Update Date/Time	Dist Node	Master	CPU (%)	Memory (%)	Active	Status	Details
PSNT	DOSTLER033103	08/12/2003 10:14:25AM	dostler033103	Y	14	45	0	Running	Details
PSNT_YK	YKUMAR041003	08/12/2003 10:14:56AM	dostler033103	N	12	26	1	Running	Details

Process Monitor - Server List page

Server Displays the system name that identifies the server. Click to view activity details for the selected server.

Hostname Displays the name of server on which the PeopleSoft Process Scheduler Server Agent was started.

Last Update Date/Time Displays the last time that you refreshed the server list to display the most current information.

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Dist Node (distribution node) Displays the name of the report node where the Distribution Agent posted all generated reports, logs, or trace files.

Master Displays *Y* if this server is designated as a Master Scheduler.

CPU (%) Displays current CPU usage.

Memory (%) Displays current memory usage.

Active Displays the number of processes that are currently in an active state of processing.

Status Status of the server. *Running, Down,* or *Suspended.*

A complete list of Status values appears later in this section.

Details Click to display detailed information about the selected server agent.

Refresh Click to display the most current status of a server.

Server Status

The Status column on the Server List page indicates the current state of a PeopleSoft Process Scheduler server. Knowing the status of a server helps you identify a problem if the server has an error. This table describes each server status:

Status	Description
Running	Server is active and querying the process request for any queued request to schedule.
Running With No Report Node	The server has not been assigned a report node in the server definition, so reports with output destination of web will remain in posting status until a report node is specified. **Note.** Server is active and querying the process request for any queued request to schedule.
Down	Server was shut down.
Suspended - Disk Low	Server determined that the current Log/Output directory is below the disk threshold specified in Process Scheduler configuration file. The server will not schedule new requests until space becomes available.
Suspended - Offline	Server is suspended because current day and time is not within the allowed operation times defined in the server definition.
Overload	The amount of CPU or memory used exceeds the percentage value thresholds entered. The server will wait to launch any new processes.

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See Chapter 7, “Setting Server Definitions,” Defining Servers, page 96.

Viewing Server Activity

Access the Server Activity page.

Server Activity

Server Name PSNT

Refresh

Process Category	Priority	Max Concurrent	Active
Default	Medium	5	5
QEHIGH	High	2	0
QELOW	Low	2	0
QEMEDIUM	Medium	2	0
QEZEROMAX	Medium	0	0

Process Type	Priority	Max Concurrent	Active
Application Engine	Medium	3	0
COBOL SQL	Medium	3	0
Crw Online	Medium	3	0
Crystal	Medium	3	1
Cube Builder	Medium	3	0
Data Mover	Medium	3	0
Optimization Engine	Medium	2	0
PSJob	Medium	3	0
QE Unit Test	Medium	3	0
SQR Process	Medium	3	0
SQR Report	Medium	3	3
SQR Report For WF Delivery	Medium	3	0
Winword	Medium	3	1
nVision-Report	Medium	3	0
nVision-ReportBook	Medium	3	0

Server Activity page

Use this page to view the following server activity information by process type and by process category:

- Priority.
- Max. Concurrent.
- Active.

Click the Refresh button to refresh the information. Click Return to return to the Server List page.

Viewing Server Details

Access the Server Detail page.

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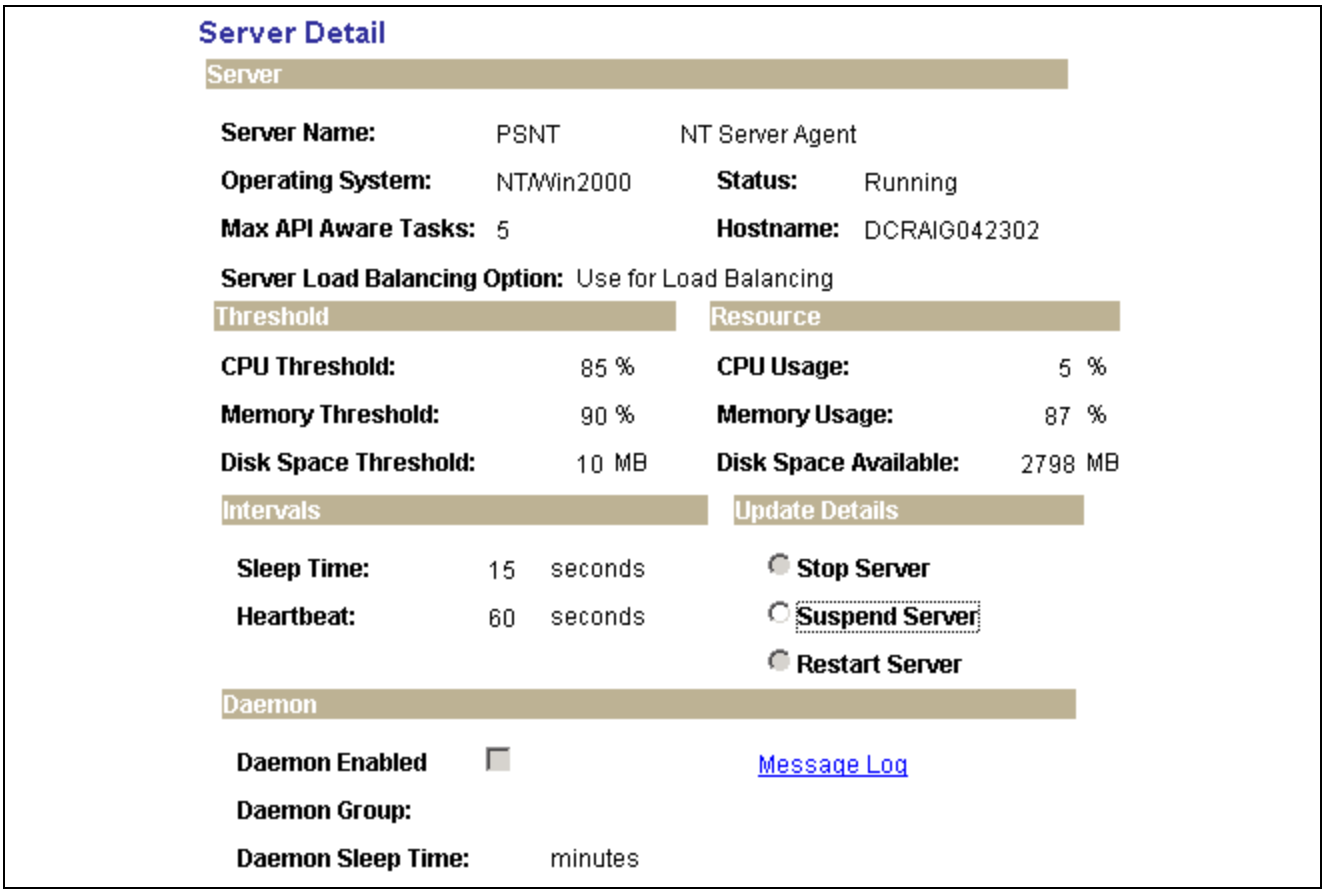

Server Detail page

Server

Server Name	Displays the name of the server on which this process runs.
Operating System	Displays the name of the operating system of the server.
Status	Displays the current status of the server: *Running, Down* or *Suspended.*
Max API Aware Tasks (maximum application programming interface aware tasks)	Displays the number of concurrent processes that can run on this PeopleSoft Process Scheduler Server.
Hostname	Displays the name of the server on which the PeopleSoft Process Scheduler Server Agent was started.
Server Load Balancing Option	Displays the Server Load Balancing Option value selected for this server.

See Appendix A, “Using Process Request APIs,” page 143.

Threshold

CPU Threshold	Displays the CPU threshold percentage value specified in the server definition. If CPU usage exceeds this value, the server will not schedule new requests until CPU usage drops below this amount.

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Memory Threshold Displays the Memory threshold percentage value specified in the server definition.

If memory usage exceeds this value, the server will not schedule new requests until memory availability drops below this amount.

Disk Space Threshold Displays the disk threshold specified in Process Scheduler configuration file. The server will not schedule new requests until space becomes available.

Usage

CPU Usage Displays current CPU usage.

Memory Usage Displays current memory usage.

Disk Space Available Displays the amount of disk space available.

Intervals

Sleep Time Displays the specified interval at which the PeopleSoft Process Scheduler Server Agent wakes up and polls the Process Request table.

Heartbeat Displays the value used by the PeopleSoft Process Scheduler Server Agent to track server status. Each time the server issues a heartbeat message, it updates the last date and time stamp in this table with the current date and time. This prevents the database from accepting more than one PeopleSoft Process Scheduler Server Agent with the same name.

Update Details

Stop Server (OS390 only) Select to shut down a PeopleSoft Process Scheduler Server that is running or exhibiting problematic behavior.

Suspend Server Select to prevent a running PeopleSoft Process Scheduler Server from accepting new process requests.

Restart Server Select to restart a PeopleSoft Process Scheduler Server that has been suspended. If a server has been stopped, you must restart it using PSADMIN.

Note. After selecting one of these options, you must click OK to run the command.

Daemon

Daemon Enabled, Daemon Group, and **Daemon Sleep Time** Displays the selections specified in the server definition.

Message Log Click to go to the Message Log page. A Delete button is located on this page, but it remains hidden when the daemon is running. When the Delete button appears, click it to delete all the messages in the log.

See Also

Chapter 7, “Setting Server Definitions,” page 95

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CHAPTER 5

Using Report Manager

This chapter provides an overview of Report Manager and discusses how to:

- Administer Report Manager.
- View reports.
- Maintain reports.
- Use the My Reports pagelet.

Understanding Report Manager

As part of PeopleSoft Process Scheduler, Report Manager provides several different methods of viewing reports, based on the level of access granted. For example, only users who are assigned to a Report Manager Administration role in PeopleSoft Security can delete reports from the database using the Report Manager - Administration page.

Using Report Manager, you can see all of the reports that you are authorized to view by opening your report list in a browser. Folders are provided to assist in organizing reports and reducing the size of the report lists.

Note. A warning message appears the first time you open the page if more than 1000 reports are in your view or when changing the filter criteria causes more than 1000 reports to appear.

Administering Report Manager

This section discusses how to:

- Grant Report Manager administrative roles.
- Understand report folders.
- Configure Integration Broker.
- Monitor the status of reports.

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Pages Used to Administer Report Manager

Page Name	Object Name	Navigation	Usage
User Profile - Roles	USER_ROLES	PeopleTools, Security, User Profiles, User Profiles, Roles	Grant Report Manager administrative roles.
Report Folders Administration	PSRF_FOLDER_ADM	PeopleTools, Process Scheduler, System Settings, Report Folders Administration	Define report folders to organize report results in Report Manager.

Granting Report Manager Administrative Roles

Access the User Profiles - Roles page.

User Profiles - Roles page

Any user who maintains the content of Report Manager must be assigned a Report Manager administrator role in PeopleSoft Security. With this administrator role, the user can:

- Change the distribution list by adding or deleting a user or role ID.
- Delete a report from Report Manager.
- Alter the report's expiration date.

A *super user* role is also available that allows you to delete and update all report output in Report Manager. Super users are allowed to delete the report entry and update the distribution list or expiration date of report entries.

The difference between the administrator (ReportDistAdmin) and super user (ReportSuperUser) roles is that the administrator role can access and update any report in the Report Manager. The super user role can update only reports that they are authorized to view.

To grant a Report Manager administrator role to a user ID:

1. In the role list, insert a new row, if necessary.
2. Click the search button next to the Role Name field.
3. Select *ReportDistAdmin* or *ReportSuperUser*.
4. Save your changes.

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Understanding Report Folders

The Distribution Agent determines the report folder in which the report is viewed in Report Manager using the following rules:

- The report folder was specified at the time that the request was scheduled, either through the Process Request Dialog page or the PeopleCode ProcessRequest class.
- If the report folder was not specified when the process request was scheduled, the Distribution Agent verifies whether a folder was set in the process definition.
- If the report folder was not specified when the process request was scheduled or in the process definition, the Distribution Agent assigns the default folder that is specified in the Report Folder Administration page.

See Also

Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining Report Folders, page 61

Configuring Integration Broker

To view reports on the Report Manager - Explorer and Report Manager - List pages, the service operations that are used to send reports must be added to the local node and the domain must be activated.

To add service operations to the local node:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Open the service operation PSRF_FOLDER_CREATE.
3. Make sure the Active field is checked in the Default Service Operation Version section.
4. Save the service.
5. Perform the same steps as listed above for all of these services:
   - PSRF_FOLDER_CREATE
   - PSRF_REPORT_CREATE
   - PSRF_REPORT_DATE_CHANGE
   - PSRF_REPORT_DELETE

Note. Reports that have already run do not appear on the Report Manager - Explorer and Report Manager - List pages. To distribute previously run reports to the List and Explorer pages, you must rerun them.

Note. Integration Broker must be configured and your domain must be active.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker*, "Understanding Creating and Implementing Integrations," Activating Pub/Sub Server Domains and *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker*, "Managing Service Operations," Configuring Service Operation Definitions.

Monitoring the Status of Reports

When a report fails to post to the Report Repository or fails to send the message to have the report added on the Report Manager - Explorer or Report Manager - List page, check the following sources to trace the problem:

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- The distribution status on the Report Manager - Administration page and the Process Monitor - Process List page.
- The message log on the Report Manager - Report Detail page.
- The run status on the Process Monitor - Process List page.
- The Service Operations Monitor in PeopleSoft Integration Broker.
- The Distribution Agent log files.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker*, "Understanding PeopleSoft Integration Broker".

Distribution Status on the Report Manager - Administration Page

The Report Manager - Administration page displays the current state of a report. The distribution status of the report shows the process of a request without having to check the Process Monitor. The following table lists the available statuses.

Status	Description
N/A or None	The process has just been added to the report request, but processing has not yet started. No file is available to post. An error has occurred and no file is available to post.
Generated (OS390 and SQR only)	The report has finished processing and all files are available for transferring.
Posting	The report is in the process of being transferred to the Report Repository.
Posted	The report was successfully transferred to the Report Repository.
Not Posted	The Distribution Agent was unsuccessful in transferring the files from the PeopleSoft Process Scheduler server into the Report Repository.

Message Log on the Report Manager Detail page

When the Distribution Agent receives the request to post the report, the agent inserts information into the Message Log table, detailing any important event. This information can be helpful in tracking down problems that the Distribution Agent encountered. If HTTP is used to transfer reports to the Report Repository, the message log includes error messages that are received from the Java servlet (SchedulerTransfer). This example illustrates a message log entry.

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Customize | Find | View All | First 1-3 of 3 Last

Severity	Log Time	Message Text	Explain
10	2:38:44PM	Process request completed successfully.	Explain
	2:38:53PM	Published message with Transaction ID of 101 to request to have report added in folder GENERAL	Explain
	2:38:53PM	Successfully posted generated files to the report repository	Explain

Example message log entry

Run Status on the Process Monitor Detail Page

The Process Monitor − Process Detail page in PeopleSoft Process Scheduler displays the run status of a scheduled request. As PeopleSoft Process Scheduler processes the reports, it updates the status of the request. The following table shows:

- The different stages that a process request, with an output destination type of *Web,* goes through from the time that the PeopleSoft Process Scheduler Server Agent initiates the process to the time that the Distribution Agent transfers the files to the Report Repository.
- How the Report Manager distribution status changes as each stage is completed.

Note. The table illustrates only process requests with an output destination type of *Web.* Other process requests can be tracked through the message log.

Stage of Process Request	Distribution Status (Report Manager)
A new process request is created.	N/A or None
The program for the process request is started.	N/A
The program has finished.	N/A
The Distribution Agent attempts to transfer the files to the Report Repository.	Posting
The Distribution Agent failed to transfer a file to the Report Repository and hasn't reached the Maximum Transfer Retries value. **Note.** Maximum Transfer Retries value is the number that sets how many times the Distribution Agent should retry the report Repository file transfer when it fails. The message log for the process request is updated.	Posting

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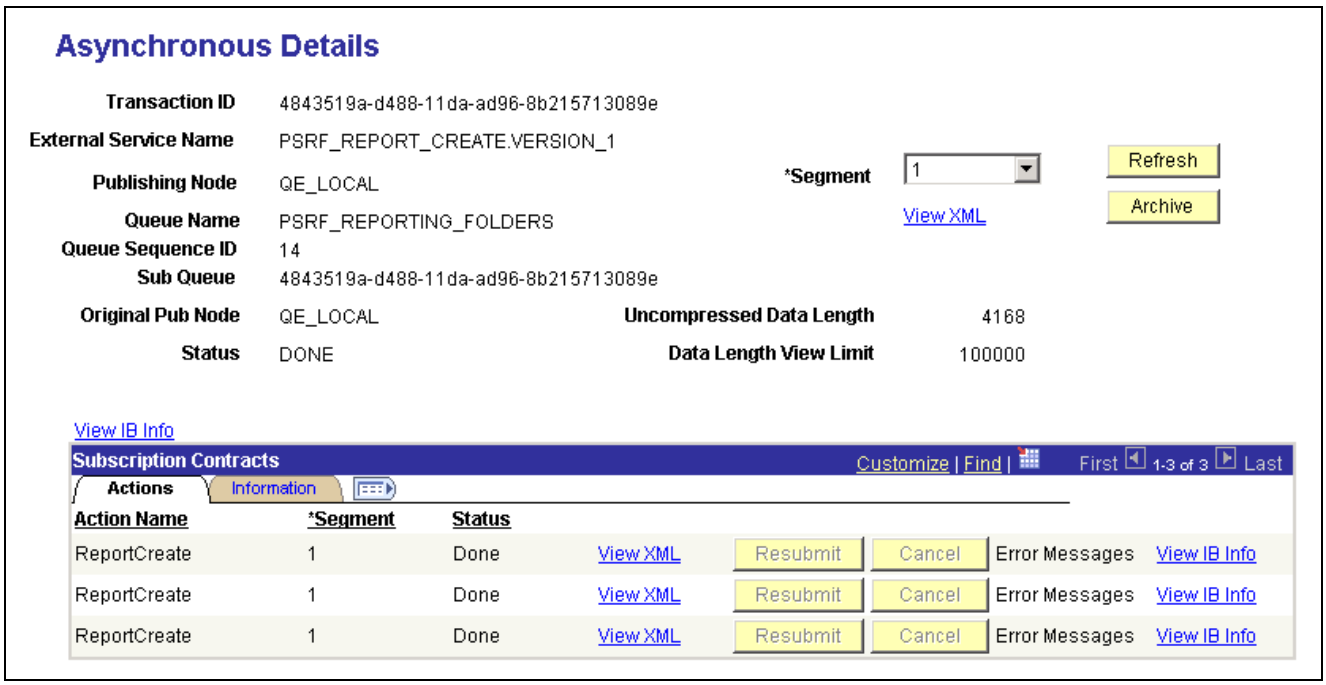
Stage of Process Request	Distribution Status (Report Manager)
All files are successfully transferred to the Report Repository.	Posted
The Distribution Agent failed to transfer files to the Report Repository and has used up the maximum transfer retries.	Not Posted

See Chapter 4, "Using Process Monitor," Viewing Process Details, page 29.

Service Operations Monitor in PeopleSoft Integration Broker

Select PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Details to access the Asynchronous Details page.

Note. This page can also be accessed by selecting the Details link for a specific transaction ID on the PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services, Publications Contracts page.



Asynchronous Details page

After the Distribution Agent posts the report to the Report Repository, the final task is to send a message to have the entry added to the report folder table. The Distribution Agent writes the transaction information, which includes the transaction ID and the report folder. The transaction ID can be used to monitor the status of the sent message in PeopleSoft Integration Broker.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker*, "Understanding Messaging" and *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker*, "Using the Service Operations Monitor".

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Distribution Agent Log Files

Additional information can be found in the Distribution Agent log files.

See Appendix B, “Understanding Logging Systems,” page 157.

Viewing Reports

This section provides an overview of the Report Manager views and discusses how to:

- View a list of reports to which you have access.
- View a hierarchical view of folders and reports.

Understanding the Report Manager Views

Use the Report Manager - Explorer and Report Manager - List pages to view all of the reports that are in the PeopleSoft system (across multiple databases) that the user is authorized to access. When a user first accesses Report Manager, the Report Manager - Explorer page appears, showing a hierarchical view of folders and reports.

Unlike the Report Manager - Administration page, the Report Manager - Explorer and Report Manager - List pages list reports when both of the following events occur:

1. The Distribution Agent has successfully posted the report to the report repository.

   When the report has posted, the Distribution Agent sends a message to have an entry added to the report folder table for the new report.

2. The local message node has received the message that was sent by the Distribution Agent by adding an entry for the report in the report folder table.

New reports that have been scheduled or are in the process of being posted to the report repository are viewed only through the Report Manager - Administration page.

Note. Folders that have been deleted remain active until all reports have been purged from them. However, new reports cannot be added to a deleted folder.

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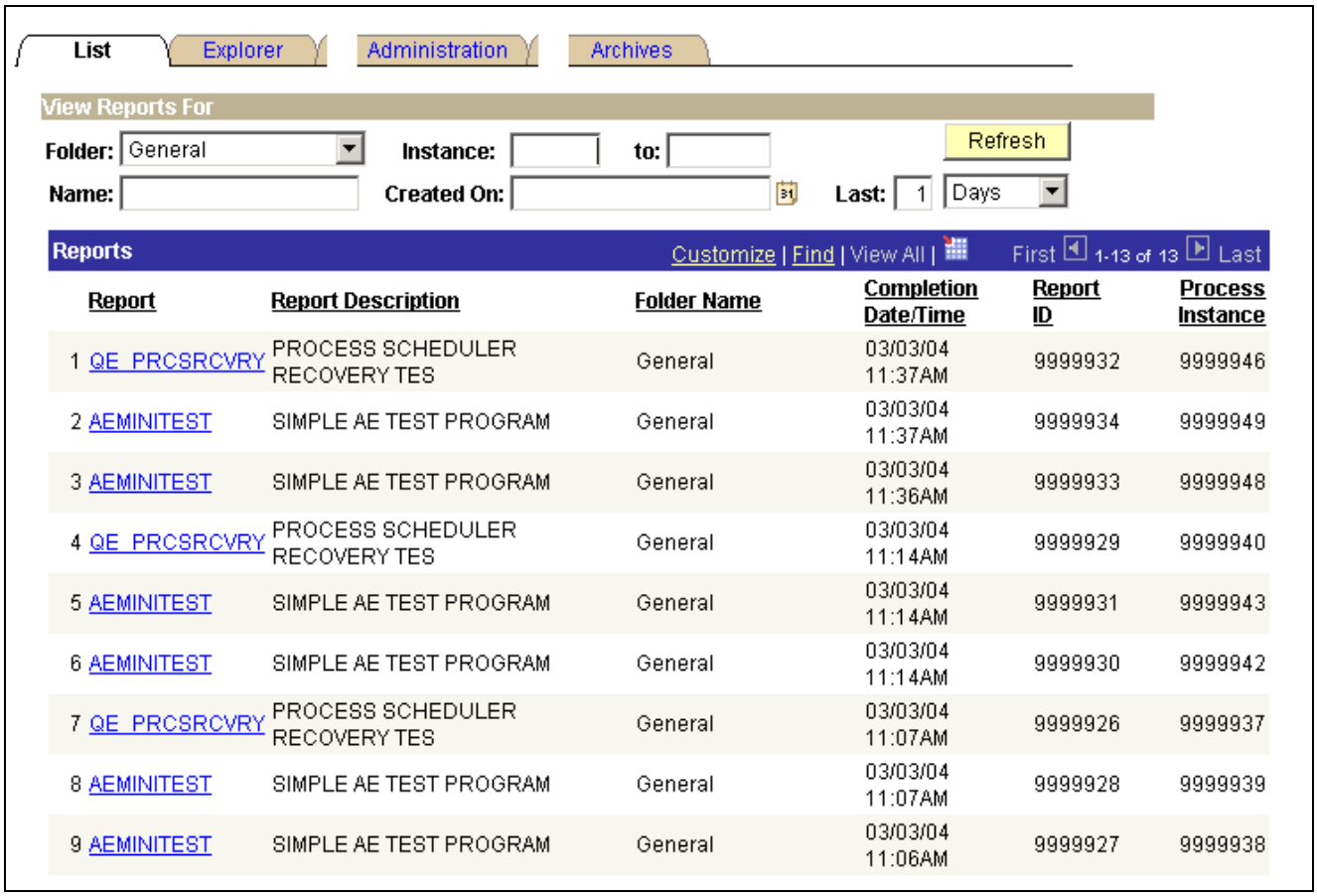
Pages Used to View Reports

Page Name	Object Name	Navigation	Usage
Report Manager - List	PSRF_REPORTS_CHRON	Reporting Tools, Report Manager, List	View a List of Reports to Which You have Access.
Report Manager - Explorer	PSRF_REPORT_VIEWER	Reporting Tools, Report Manager, Explorer PeopleTools, Process Scheduler, System Process Requests. Click the Report Manager link on the System Process Requests page.	View a Hierarchical View of Folders and Reports.

Viewing a List of Reports to Which You have Access

Access the Report Manager - List page.



	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	QE_PRCSRCVRY	PROCESS SCHEDULER RECOVERY TES	General	03/03/04 11:37AM	9999932	9999946
2	AEMINITEST	SIMPLE AE TEST PROGRAM	General	03/03/04 11:37AM	9999934	9999949
3	AEMINITEST	SIMPLE AE TEST PROGRAM	General	03/03/04 11:36AM	9999933	9999948
4	QE_PRCSRCVRY	PROCESS SCHEDULER RECOVERY TES	General	03/03/04 11:14AM	9999929	9999940
5	AEMINITEST	SIMPLE AE TEST PROGRAM	General	03/03/04 11:14AM	9999931	9999943
6	AEMINITEST	SIMPLE AE TEST PROGRAM	General	03/03/04 11:14AM	9999930	9999942
7	QE_PRCSRCVRY	PROCESS SCHEDULER RECOVERY TES	General	03/03/04 11:07AM	9999926	9999937
8	AEMINITEST	SIMPLE AE TEST PROGRAM	General	03/03/04 11:07AM	9999928	9999939
9	AEMINITEST	SIMPLE AE TEST PROGRAM	General	03/03/04 11:06AM	9999927	9999938

Report Manager - List page

View Reports For

Enter criteria to filter the reports to list. Report Manager ignores criteria for fields which are blank.

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Note. A warning message appears if more than 1,000 rows are available for display on the Report Manager List page.

Folder	Select a specific folder to list only the reports that are contained in that folder.
Instance and **to**	Enter a range of process instances. Leave the to field blank to list all instances after the number that you enter in the Instance field.
Name	Enter the name or part of a name to list only reports that match the name that you enter.
Created On	Use the calendar, or enter a specific date to list only reports that are created on that date.
Last	Use to display only those reports that were created in the last number of days, hours, or minutes. For example, to list only those reports that were created within the last two hours, enter *2* and select *Hours.*
Refresh	Click to update the report list with newly run reports and to use any newly entered filtering criteria.

Reports

This grid includes all of the reports in the PeopleSoft system that you are authorized to view across multiple databases. Filtering criteria is used to better manage the list.

Report	Click the name of the report to display the Report Detail page. The File group box lists the output file names and any associated log or message file names. Click the output file name, or associated log or message file name, to display the report or message log in another browser window.
Report Description	Displays a detailed description of the report.
Folder Name	Displays the folder in which the report is located.
Completion Date/Time	Displays the date and time when the report was created.
Report ID	Displays the report ID that was automatically assigned when the report was run.
Process Instance	Displays the process instance number that was automatically assigned when the report was run.
	Click the Download icon on the navigation bar to download the list to a Microsoft Excel spreadsheet.

Viewing a Hierarchical View of Folders and Reports

Access the Report Manager - Explorer page.

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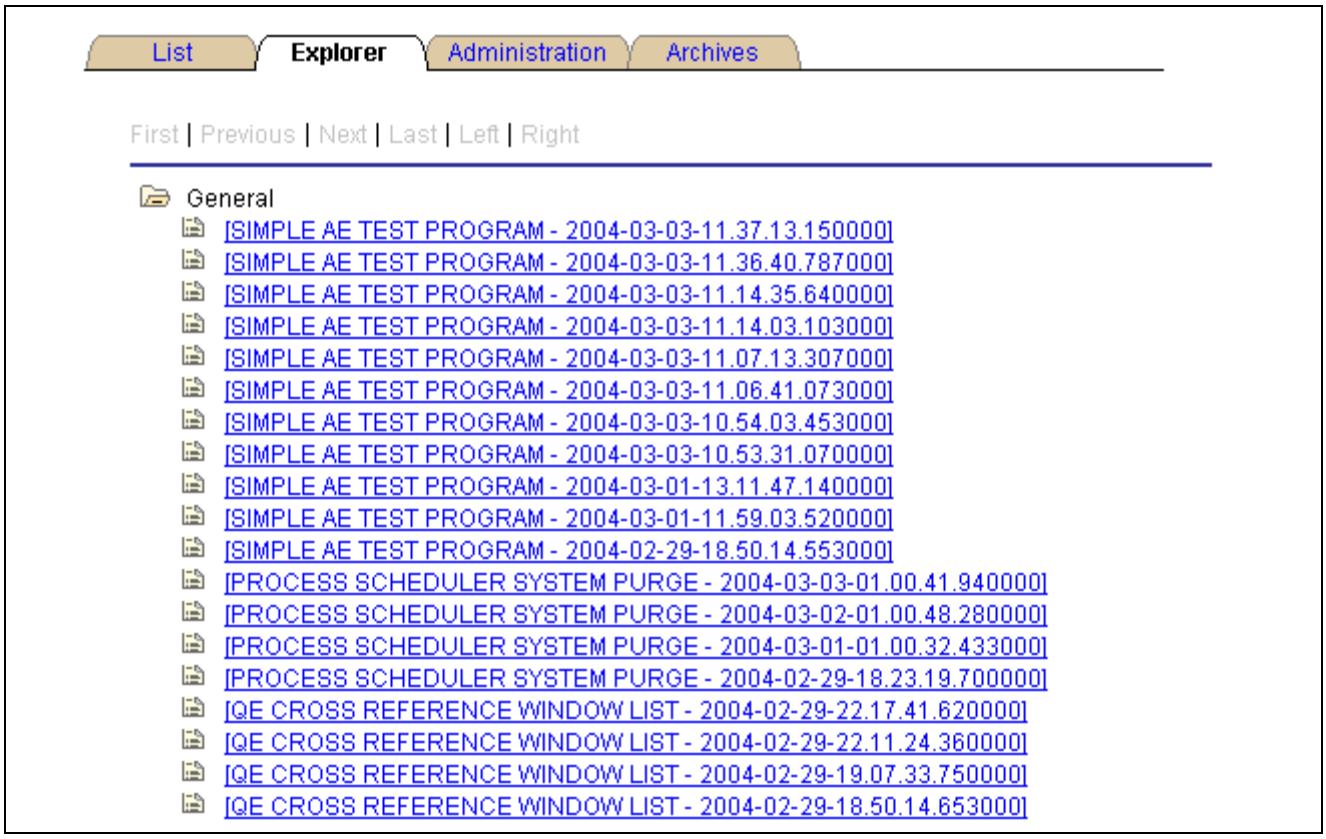

Report Manager - Explorer page

Click to open a folder and view the contents. Click the folder again to close it.

Click the Report Description link to display the Report Detail page. The File List group box lists the output file names and any associated log or message file names.

Click the output file name, or associated log or message file name, to display the report or message log in another browser window.

The Report Manager - Explorer page displays a hierarchical view of the same reports that are listed on the Report Manager - List page. Subfolders can be created only in PS/nVision for organizing nVision reports.

Note. Empty folders are not included in the hierarchical view.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PS/nVision, "Running PS/nVision Reports on the Web," Creating Report Requests

Maintaining Reports

This section discusses how to:

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- Understand purge reports process.
- Delete reports and add users to the distribution list.
- View archived reports.

Pages Used to Maintain Reports

Page Name	Object Name	Navigation	Usage
Report Manager - Administration	CDM_CONTLIST	Reporting Tools, Report Manager, Administration	Delete unwanted reports from the system.
Report Detail	CDM_INDEX	Click the Detail link on the Report Manager - Administration page.	Add users to the distribution list.
Report Manager - Archives	CDM_CONTLIST_ARCH	Reporting Tools, Report Manager, Archives	View reports that have been archived.
Process System	PRCSSYSTEM	PeopleTools, Process Scheduler, System Settings, Process System	Set the retention days that are used to determine the expiration date.
Process System Purge	PRCSSYSTEMPURGE	PeopleTools, Process Scheduler, System Settings, System Purge Options	Set the option to purge reports from the Report Repository and archive data to the Report Archive table (PS_CDM_LIST_ARCH).

Understanding the Purge Reports Process

When PeopleSoft Process Scheduler is set to perform a periodic purge on the System Purge tab in the system settings, it triggers the Application Engine program PRCSYSPURGE. This program purges both the Process Request and Report Manager tables. As part of the Report Manager cleanup, it also purges the reports from the Report Repository and archives the data into the Report Archive table.

Note. The purge process will not run unless the user ID that starts the Process Scheduler has TLSALL listed as a process group within the primary process profile. The PRCSYSPURGE program is delivered with the TLSALL process group.

If multiple Process Schedulers are running against the same database, and each has its own Report Repository, PRCSYSPURGE is initially responsible for the purge process. It will remove all entries from the PS_CDM_LIST table and then purge all reports that match its server name or report node from its report repository. The PRCSYSPURGE program then inserts entries to the PS_CDM_LIST_PURGE table where neither the server name nor the report node name matches. If the PRCSYSPURGE program detects that more than one Process Scheduler is active, it schedules the Application Engine PRCSRVCLN program to run on all the other active Process Scheduler servers. The PRCSRVCLN program checks whether the server uses its own Report Repository and if so, the program deletes reports from the report Repository that is used by the server.

Note. If two Process Schedulers have the same report node (report repository), then one scheduler performs the deletions for both schedulers.

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For XML Publisher reports, metadata related to expired reports is archived when the process PSXPARCHATTR runs. This process runs automatically as part of the PRCSYSPURGE program. The URLs of the report files are archived along with the process information in the PSXP_FLURL_ARCH table. Search data related to XML Publisher reports is stored along with the process information in the PSXP_RATTR_ARCH table.

Expiration Date for Reports

The PeopleSoft Process Scheduler system settings feature has an option for retention days that is used to calculate the expiration date of reports that are displayed in the Report Manager. The expiration date is determined by adding the retention days from the date on which the report was generated.

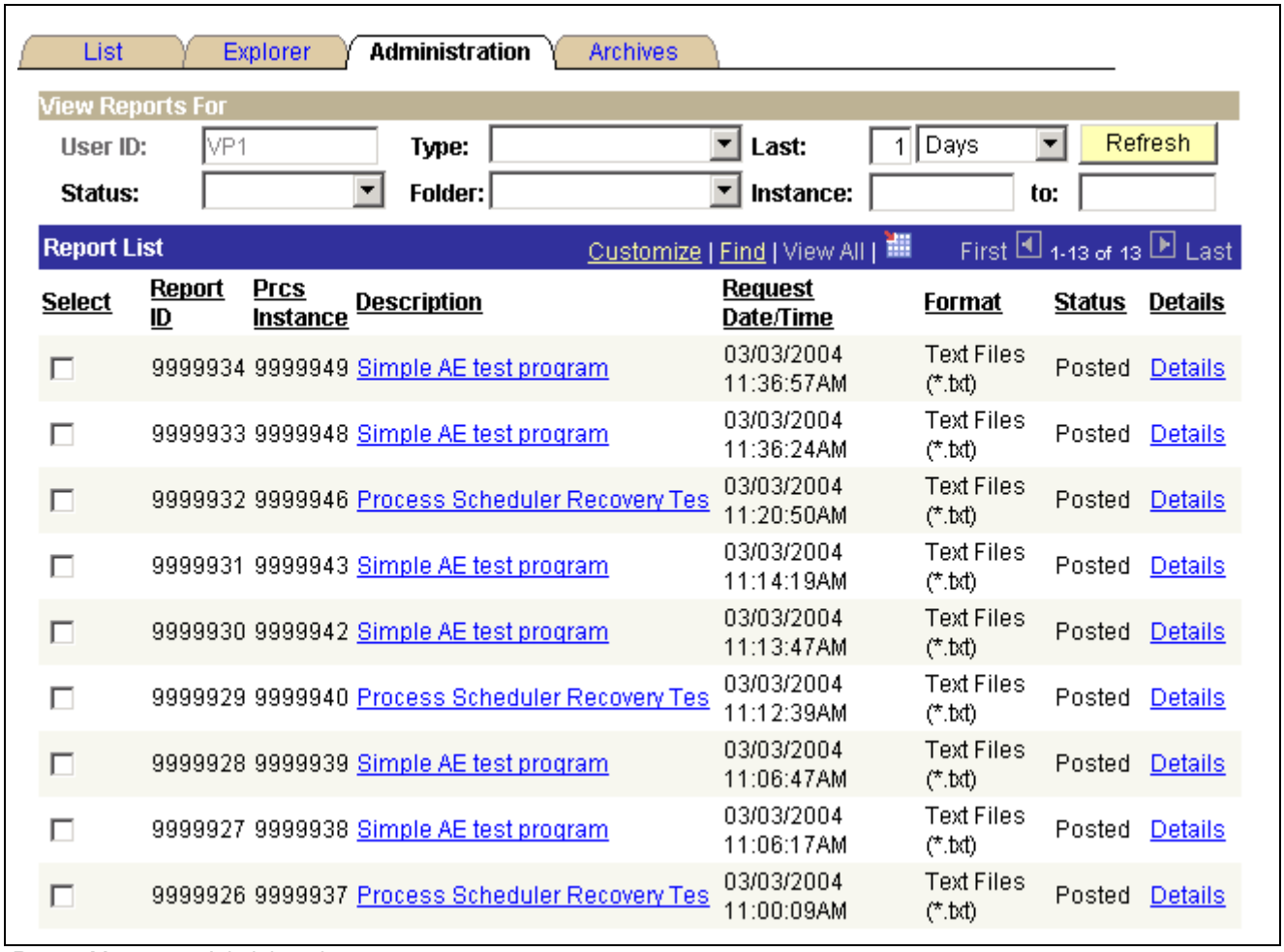
See Also

Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining System Purge Options, page 58

Enterprise PeopleTools 8.49 PeopleBook: Security Administration, "Setting Up Permission Lists," Setting Process Permissions

Deleting Reports and Adding Users to the Distribution List

Access the Report Manager - Administration page.



Report Manager - Administration page

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To view the report results in another browser window, click the description of the required report. To view the report results or any associated log or message file, click the Details link. Click the name of the required report or message to display the output in another browser window.

Note. The reports that are listed on the Report Manager - Administration page are from only the database to which you are signed in.

This section discusses how to:

- Delete reports.
- Add users to the distribution list.

Deleting Reports

Select	Use the check box to the left of each report to select individual reports
Select All and **Deselect All**	Click Select All to select all the reports that you are authorized to delete. When they are selected, click the Delete button to delete all the selected reports. Click Deselect All to deselect all reports.

Adding Users to the Distribution List

To add users to the distribution list:

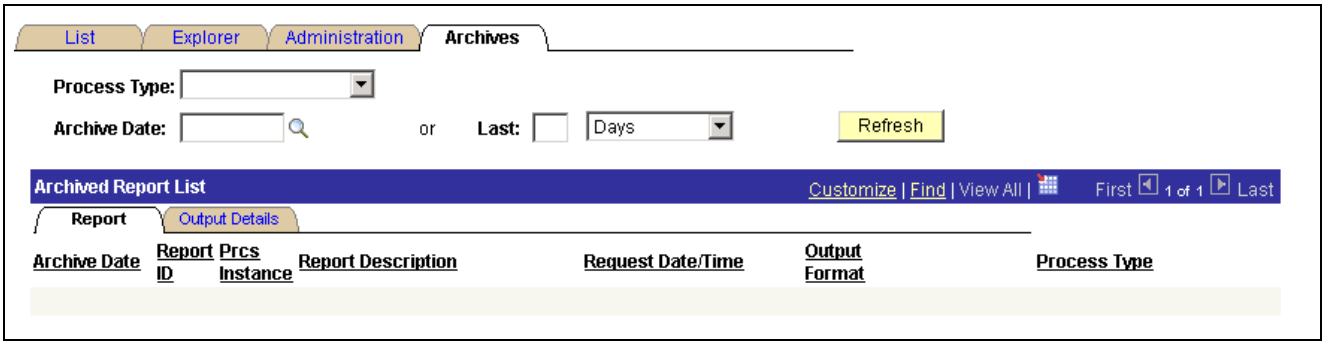
1. Click the Details link for the required report.

   The Report Detail page appears. If you don't have authorization to add users, the page is display-only.
2. Click the Add button to add user or role IDs to the distribution list.

Note. You can save a report to your local workstation by right-clicking the appropriate Detail link, and selecting *Save Target As*.

Viewing Archived Reports

Access the Report Manager - Archives page.



Report Manager - Archives page

Use the Report Manager - Archives page to view reports that have been purged from the report list after they have passed their expiration date. You cannot retrieve a purged report from the list, but the list displays the information that you need in order to retrieve a report from the backup or history copies of reports.

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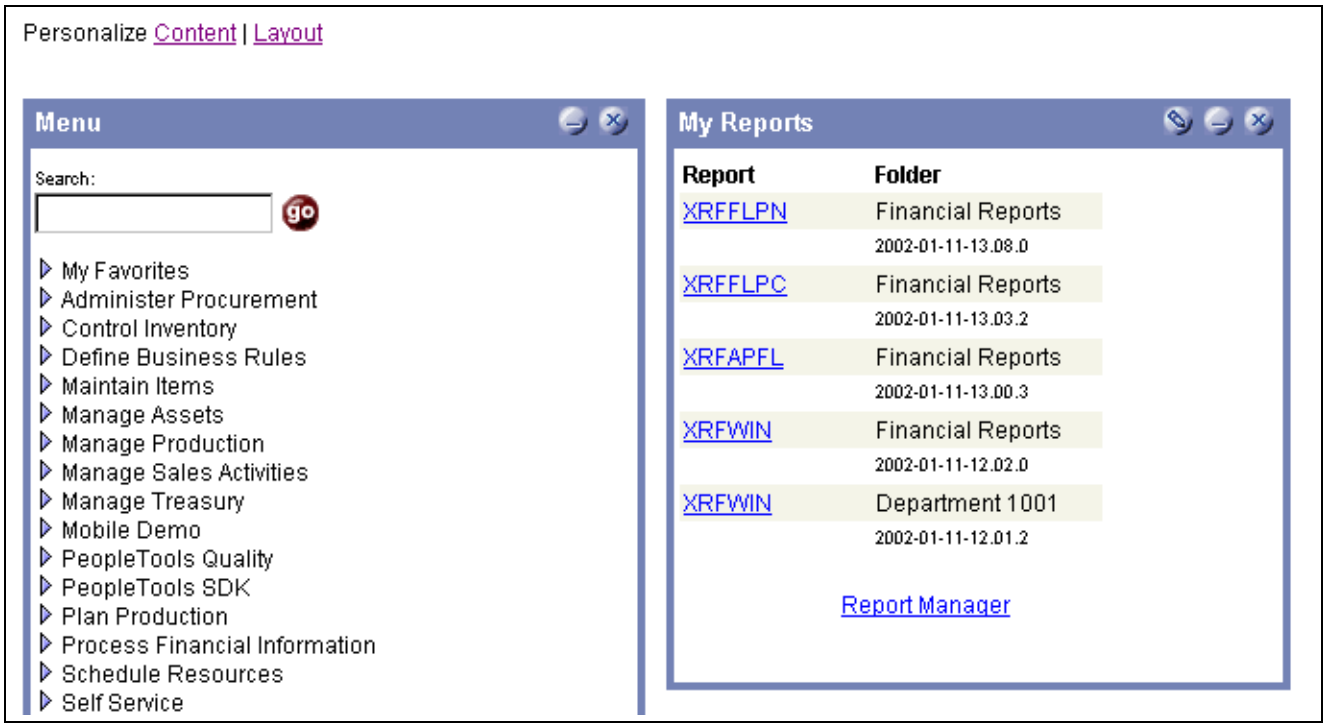
Using the My Reports Pagelet

The My Reports pagelet enables you to display selected reports on your PeopleSoft homepage.

Note. As a licensee of PeopleTools, you are licensed to use the reporting tools, which are limited to tools that are available from the menu. You must license PeopleSoft Enterprise Portal to use the Report Manager pagelet.



Example of My Reports pagelet

Note. Use the Report Manager link to access the Report Manager - Explorer page.

To display the My Reports pagelet:

1. Select Personalize Content, which is located above the PeopleSoft menu.
2. Select My Reports from the PeopleSoft Applications menu.
3. Click Save to return to the home page.
4. Rearrange the home page layout by selecting Personalize Layout and making the required changes.
5. Click Save to return to the home page.
6. Click the Customize button at the top of the My Reports pagelet.

   The Personalize My Reports page appears.
7. Enter the maximum number of reports to display.
8. Select to display reports created within a specified number of days or hours.
9. Click the Save Options button.
10. Click the Close and Return to Home Page link.

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CHAPTER 6

Defining PeopleSoft Process Scheduler Support Information

This chapter provides an overview of PeopleSoft Process Scheduler support information and discusses how to:

- Define system settings.
- Define process type definitions.
- Define process definitions.
- Define recurrence definitions.

Note. You should map out the types of processes that you plan to schedule. Then gather the parameter information for each process before you begin.

Understanding PeopleSoft Process Scheduler Support Information

Before you can schedule processes to run, you must first define the basic information that PeopleSoft Process Scheduler uses. PeopleSoft Process Scheduler is delivered with a complete set of process type, process, and server definitions for all processes that are delivered with each PeopleSoft application. You might need to configure some of the definitions to suit your specific needs, but otherwise, they are set up to run immediately.

PeopleSoft Process Scheduler uses the concepts of *process types* and *process definitions* to define the kinds of processes that you typically run. All process definitions are grouped under a process type. For example, most Structured Query Report (SQR) reports are defined in the PeopleSoft system with the process type of SQR Report, which contains settings that apply to all SQR process definitions under that process type. Within each process type, you must define specific process definitions, such as an SQR report named XRFWIN that you can run on a regular or as-needed basis.

You can also define the servers on which you want to run the process types or use the server definitions that PeopleSoft delivers with Process Scheduler. You must analyze the processes that you plan to schedule and group them logically, both to maximize server resources and to simplify procedures for users. Typically, a developer must establish PeopleSoft Process Scheduler definitions only once and then maintain them.

You must also consider other factors when incorporating PeopleSoft Process Scheduler into applications, including:

- Third-party application programming interface (API) support for COBOL and SQR.
- Types of PeopleCode that you can employ to interact with PeopleSoft Process Scheduler.

See Also

Appendix A, “Using Process Request APIs,” page 143

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Defining System Settings

PeopleSoft Process Scheduler maintains a single-row table that stores system-wide parameters and system defaults that are related to all processes.

This section discusses how to:

- Define process system settings.
- Define process output types.
- Define process output formats.
- Define system purge options.
- Define distribution file options.
- Define report folders.
- Define event notifications and configure a real-time event notification (REN) server.
- Test event notifications.
- Define process categories.

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Pages Used to Define System Settings

Page Name	Object Name	Navigation	Usage
System Settings	PRCSSYSTEM	PeopleTools, Process Scheduler, System Settings, Process System	Define process system settings.
Process Output Type Settings	PRCSOUTDESTTYPELST	PeopleTools, Process Scheduler, System Settings, Process Output Type	Specify active and default output types for each process type.
Process Output Format Settings	PRCSOUTPUTSETTINGS	PeopleTools, Process Scheduler, System Settings, Process Output Format	Specify active and default output formats for each process type.
Purge Settings	PRCSSYSTEMPURGE	PeopleTools, Process Scheduler, System Settings, System Purge Options	Enter purge settings to empty the PeopleSoft Process Scheduler tables and file system.
Distribution File Options	PRCSCDMFILE	PeopleTools, Process Scheduler, System Settings, Distribution File Options	Identify all the different types of files and the manner in which they are distributed throughout the system.
Report Folders Administration	PSRF_FOLDER_ADM	PeopleTools, Process Scheduler, System Settings, Report Folders Administration	Create folders for organizing reports in Report Manager.
Event Notification	PRCSRENSRV	PeopleTools, Process Scheduler, System Settings, Event Notification	View information for REN servers that have been configured with the REN server cluster owner as either *Reporting* or *All* (PeopleSoft Multi-Channel Framework, Optimization, and Reporting).
Test REN Server	PRCSRENSRV_TEST	Click the Test button on the Event Notification page.	Perform buffer and ping tests on the REN server.
Process Categories Administration	PRCS_GROUP_ADM	PeopleTools, Process Scheduler, System Settings, Process Category Admin	Create process categories for grouping processes together for the purpose of server load balancing and prioritization.

Defining Process System Settings

Access the System Settings page.

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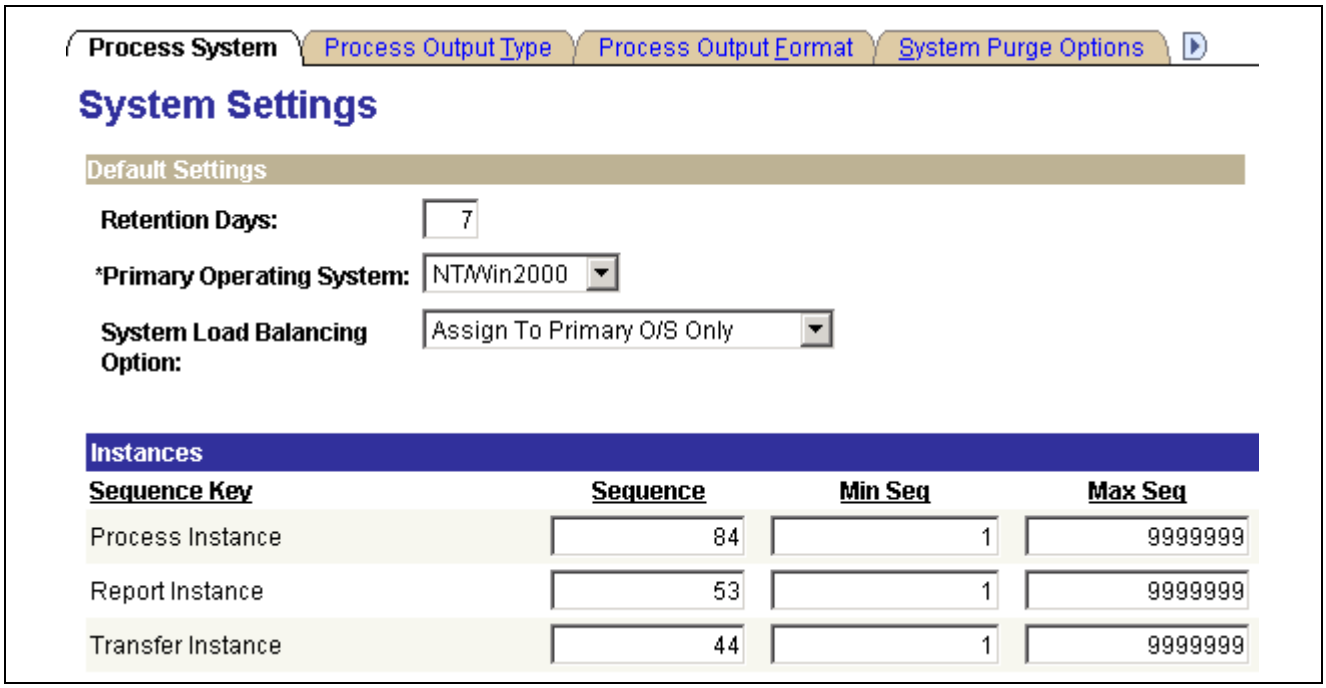

System Settings page

Retention Days Enter the number of days before the files that are on the report repository are deleted. This value is used with the current date to calculate the expiration date on reports in Report Manager.

Primary Operating System Enter the default operating system. A run location of Any picks a server of this type.

Note. If this field is left blank, the request will be scheduled by a Process Scheduler server with the default O/S.

System Load Balancing Option Select to assign to primary O/S only or server in any O/S.

Assign To Primary O/S Only: Select to have Master Scheduler reassign workload to another Process Scheduler server with the primary O/S

Assign To Server In Any O/S: Select to have Master Scheduler reassign workload to any available Process Scheduler server.

When the *Do Not Use Option* is selected on the Server Definition page, the server takes a request only when the name of the server has been specified on the Process Request page or in any of the definition tables.

Note. This field is used in conjunction with a Master Scheduler server. This field will be ignored if no Master Scheduler server is available to perform the load balancing.

System Settings

Set system settings for the following sequence keys: Process Instance, Report Instance, and Transfer Instance. The instance number acts as a counter.

Sequence Indicates the last instance number that was used.

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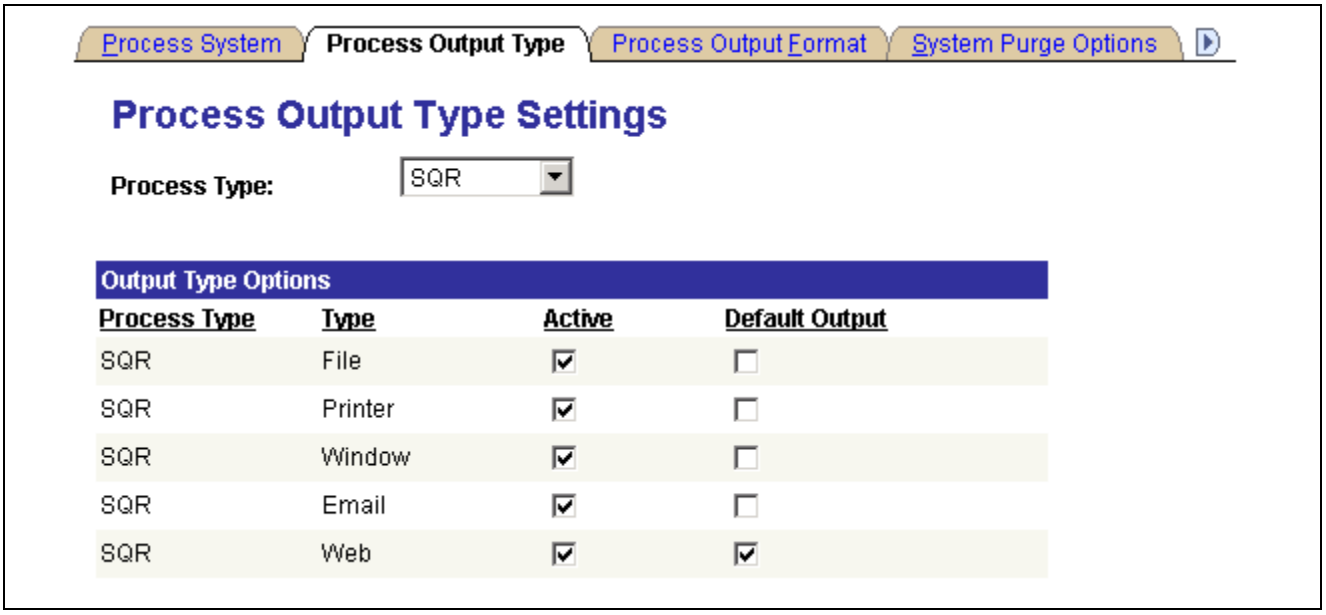
Min Seq (minimum sequence) Indicates the lowest instance number to be used.

Max Seq (maximum sequence) Indicates the highest instance number to be used. When this number is reached, the system starts numbering again from the minimum sequence number.

Defining Process Output Types

Access the Process Output Type Settings page.



Process Output Type Settings page

Use this page to specify active and default output types for each process type.

Note. When you are scheduling a process through PeopleCode using the ProcessRequest object, the default output type is used when the output type that is specified has been deactivated, or the output type was not specified.

Process Type Select the process type that you want to edit, or leave blank to display all process types.

Type Lists the output types that are available for the selected process type. This field is display-only.

Active Select the appropriate check box to make the output type active for the selected process type.

Default Output Select the check box next to the output type that you want to display as the default on the Process Request page.

Note. The Process Output Format Settings page uses information about output types; therefore, you need to save any changes that were made to output type settings before attempting to change an output format setting.

Defining Process Output Formats

Access the Process Output Format Settings page.

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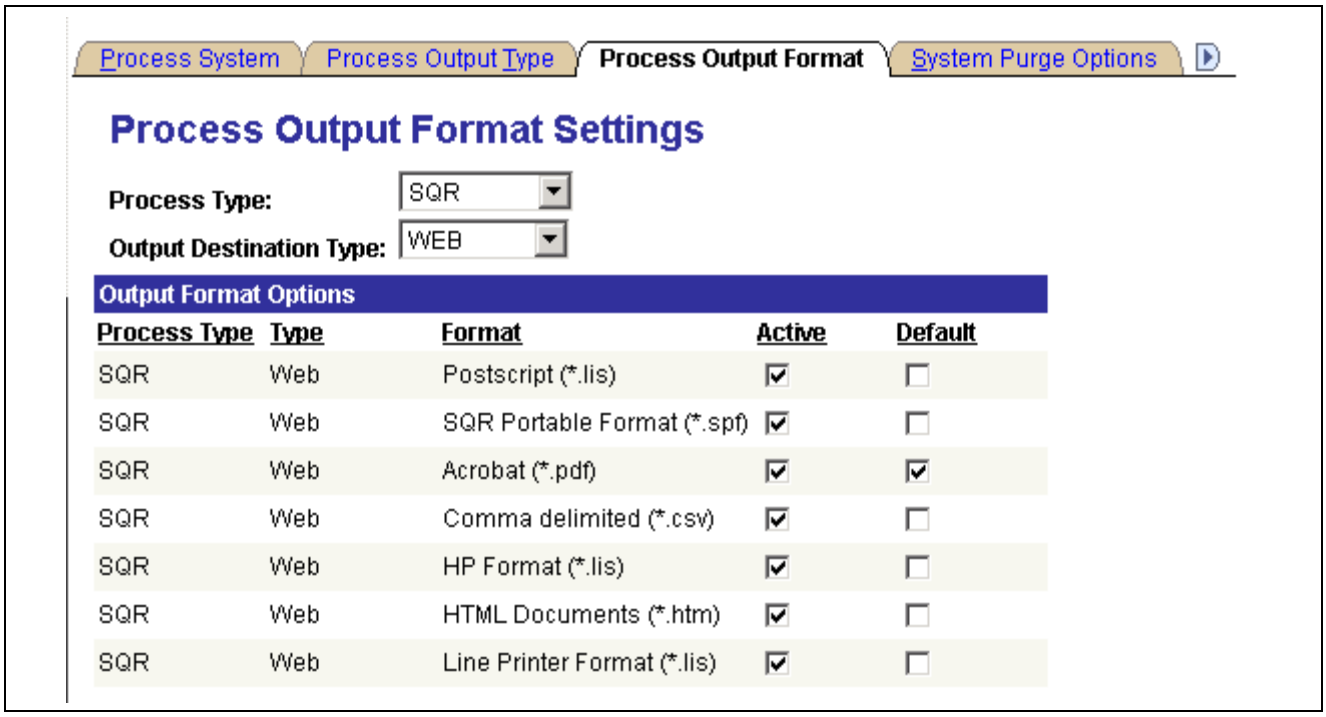

Process Output Format Settings page

Use the Process Output Format Settings page to specify active and default output formats for each process type.

Note. When you are scheduling a process through PeopleCode using the ProcessRequest object, the default output format is used when the output format that is specified has been deactivated, or the output format was not specified.

Process Type Select the process type, or leave blank to display all process types.

Output Destination Type Select a specific output type to further define the output format options. Select *Any* to list all active output types. Only output types specified as *Active* are displayed.

Format Lists the format types that are available for the selected process type and output type. This field is display-only.

Active Select the appropriate check box to make the format type active for the selected process type and output type.

Default Select the check box next to the format type that you want to display as the default output on the Process Request page. A message appears, informing you that the format type is disabled if you select a format type for which the Active check box is cleared.

Defining System Purge Options

Access the Purge Settings page.

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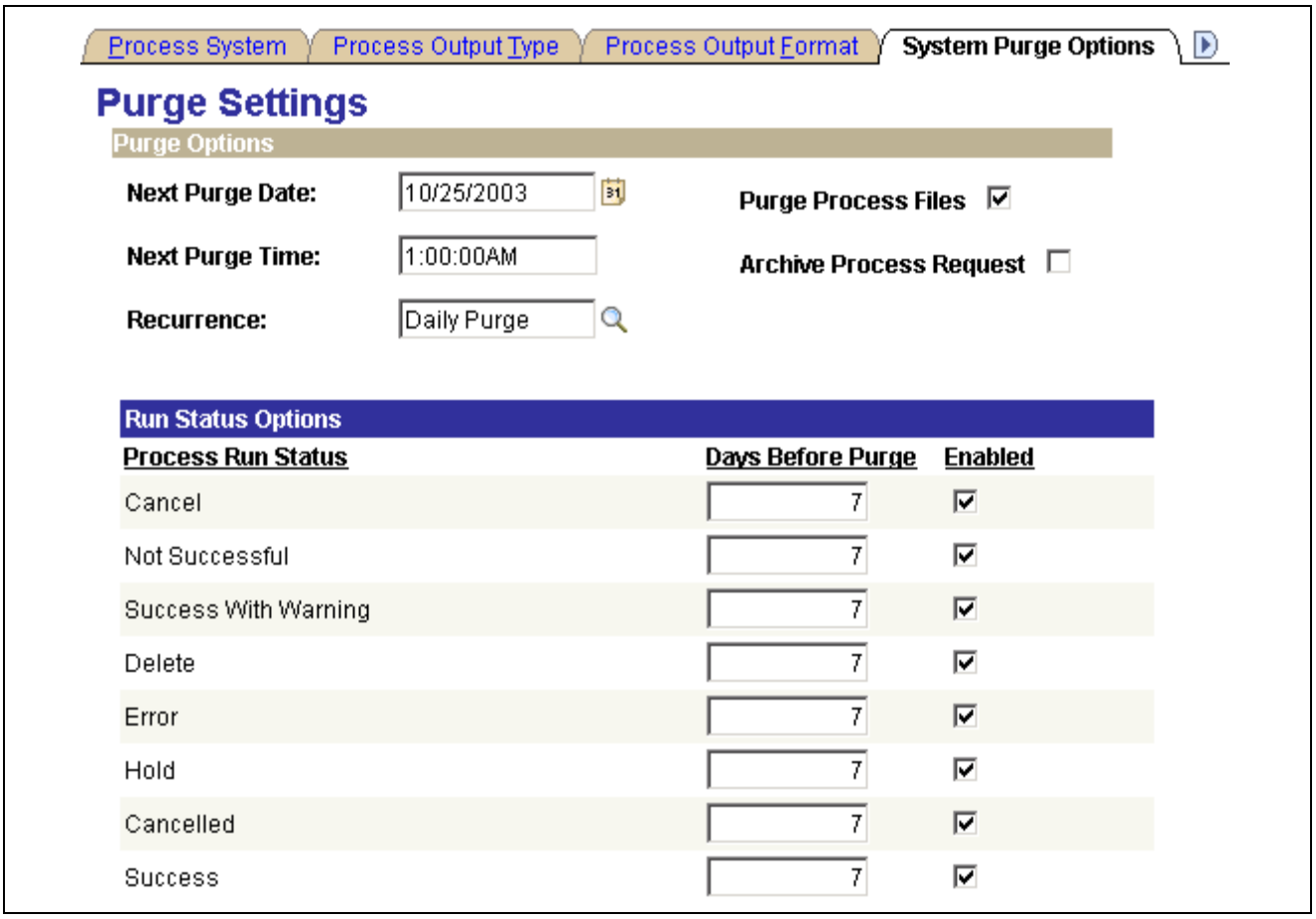

Purge Settings page

Use the Purge Settings page to empty the PeopleSoft Process Scheduler tables and file system. This operation will schedule the Application Engine program PRCSYSPURGE.

The PRCSYSPURGE program:

- Updates statistics to all of the process request tables before deleting content.
- Purges all process requests with a last update date that is past the Days Before Purge value for the specified run statuses.
- Deletes all of the subdirectories in the Log_Output directory that are associated with the process requests that are purged from the process request table if the Purge Process Files option was selected.
- Purges the report repository tables with expired dates, based on the specified number of retention days.
- Deletes all directories from the report repository that are associated with processes that were purged from the report repository tables.
- Schedules the Application Engine PRCSRVCLN program if more than one active Process Scheduler server exists.

  PRCSRVCLN refreshes the Log/Output directory for all active servers.
- Purges the BusinessObjects Enterprise XI report repository.
- Schedules the Application Engine PSXPARCHATTR program for XML Publisher reports to archive report-related metadata and the URLs of the report files.

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Next Purge Date Enter the date on which the next file purge process is to run on the server. This is based on the recurrence schedule.

Next Purge Time Enter the time when the next file purge process is to run on the server. This is based on the recurrence schedule.

Recurrence Select a recurrence schedule for the purge process.

Purge Process Files Select to purge files that are associated with all of the processes from the table.

Archive Process Request Not used. This option is reserved for future use.

Purge Settings

Specify purge criteria for each process run status that is listed.

Days Before Purge Enter the number of days before a process should be physically deleted from the request table.

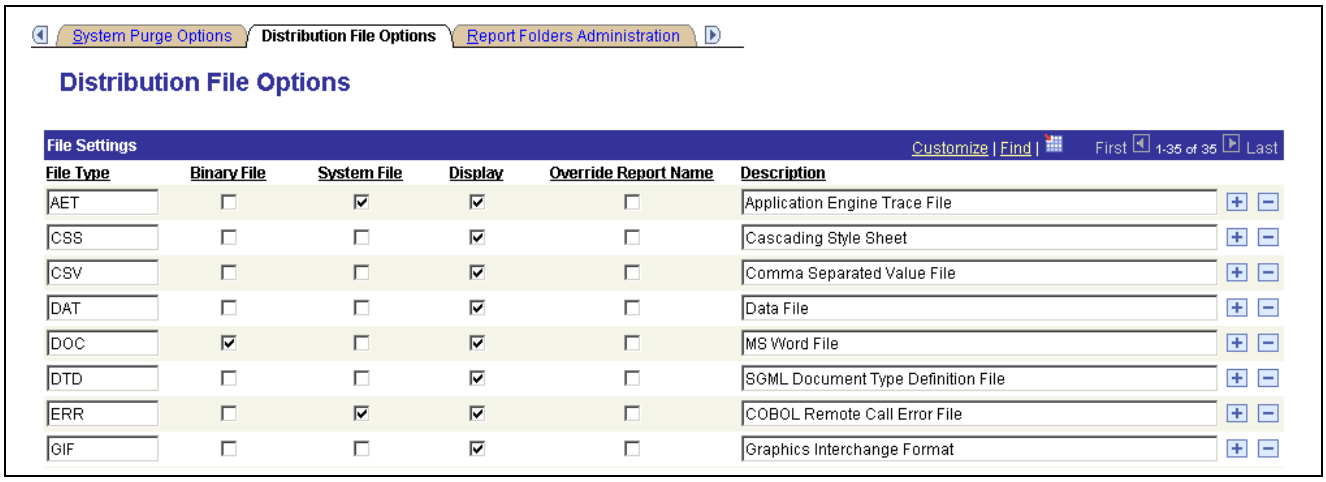
Enabled If this check box is cleared, process requests with this run status are not purged.

See Also

Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining Recurrence Definitions, page 89

Defining Distribution File Options

Access the Distribution File Options page.



Distribution File Options page

Use the Distribution File Options page to identify all the different types of files and the manner in which they are distributed throughout the system. File types are identified based on the file extensions. This is used by the Distribution Agent to determine how a specific file type will be transferred to the Report Repository using File Transfer Protocol (FTP) or HTTP. Also, this determines the description that is displayed in the Report Manager.

Use the Add and Delete buttons to add and remove available file types.

File Type Identifies the type of file.

Binary File Uncheck for TXT and HTML files.

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Note. When this check box is selected, the report distribution system will not perform a conversion on the file when moving it between operating systems.

System File Select to mark this file type as a system file. The file will be available to be viewed in the Process Monitor regardless of output type.

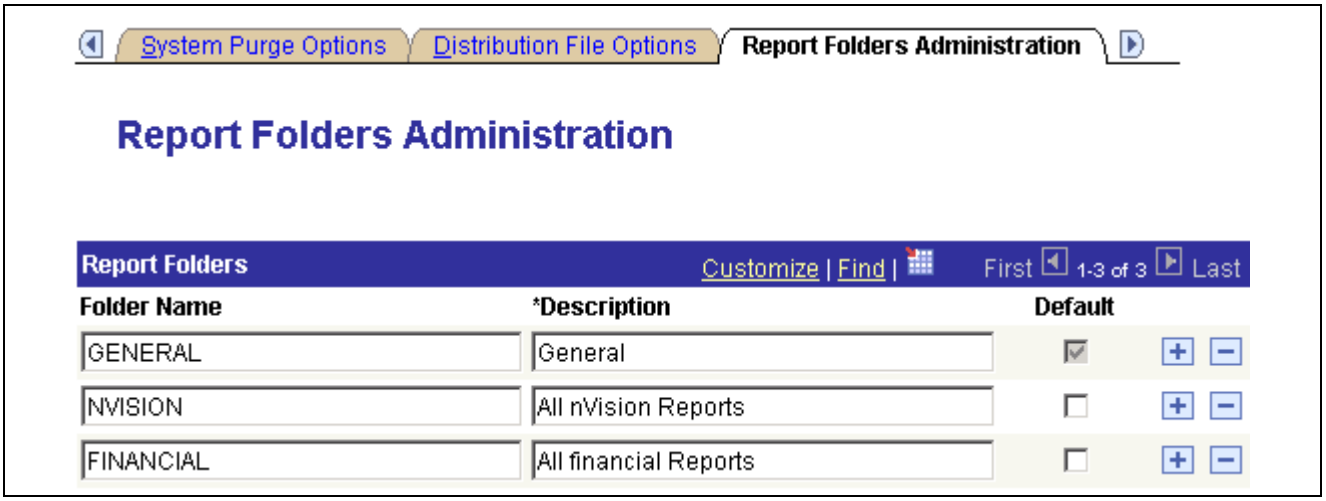
Note. This feature requires that the Process Scheduler server definition has the attribute *Transfer System Files to the Report Repository* selected.

Display Select to have the file shown on the report list page.

Description Enter a description to be used for this file when it is displayed for viewing. If a description is not specified, the name of the file is used.

Defining Report Folders

Access the Report Folders Administration page.



Report Folders Administration page

Use the Report Folders Administration page to create folders for organizing reports in Report Manager.

Folder Name Use the Add and Delete buttons to add and remove folder names.

Description Enter a more detailed description for the folder to identify its use.

Default Select the check box next to the folder that you want to display as the default. The default folder is automatically selected on the Process Scheduler Request-Distribution Detail page.

Note. A default folder is required.

See Also

Chapter 5, "Using Report Manager," Understanding Report Folders, page 41

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Defining Event Notifications and Configuring a REN Server

Event Notification is a feature that is associated with the PeopleTools Reporting process output type *Window.* It is also used by Multi-Channel Framework. A new Application Server process called PSRENSRV is required, which acts as a special web server to deliver report results to a new browser window.

Any Process Scheduler can use a REN server. The REN server is an optional component of the PeopleSoft Application Server. Four parameters are located in the PSRENSRV section of the Application Server configuration file that may have to be configured.

If you already have a REN Server configured, you can bypass the remainder of this section and go to the task Testing Event Notification.

Note. To configure a REN server, you must enter authentication token domain when installing PeopleSoft Pure Internet Architecture.

To edit the PeopleSoft Application Server configuration file:

1. Select Start, Command Prompt.
2. Change the directory to *<PS_HOME>\appserv*.
3. Type *psadmin,* and press ENTER.
4. Select Application Server from the Server Administration menu by typing *1* and pressing ENTER.
5. Select to administer a domain by typing *2* and pressing ENTER.
6. Select the domain number to administer from the list of existing domains, and then press ENTER.
7. Select to configure the domain by typing *4* and pressing ENTER.

   Reply *y* to the question: This option will shutdown the domain. Do you want to continue? <y/n> [n] Press ENTER.
8. Reply *y* to the question: Do you want to change any config values <y/n>? [n] Press ENTER.
9. Reply *n* to the question: Do you want to change any values <y/n> [n]? for all sections until you get to the PSRENSRV section, and then answer *y.*

   Note. The PSRENSRV section is near the end of the configuration, and will require approximately 28 returns to reach it.

   Make the following changes:

Parameter	Value
log_severity_level	Accept the default value of *Warning.*
io_buffer_size	Change the buffer size to *56000* if the REN server is configured on NT.

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Parameter	Value
default_http_port	Accept the default value of *7180.*
default_auth_token	The fully qualified domain name of the application server. This value should match the value of the Web server's Authentication Token Domain. See *PeopleTools 8.49 Installation Guide for your database platform.*

10. Accept the defaults for the remaining options except Do you want Event Notification configured <PSRENSRV> <y/n>? [n].Enter *y,* and press ENTER.

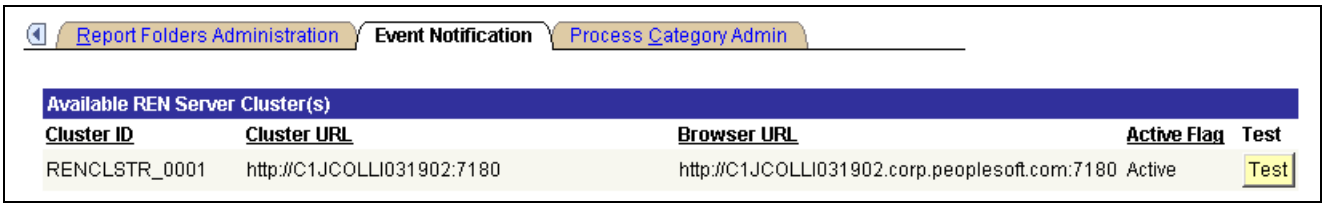
When the configuration is complete, boot the Application Server.

Testing Event Notifications

Access the Event Notification page.

Note. A REN server must be configured before you can test Event Notification.

See Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining Event Notifications and Configuring a REN Server, page 62.



Event Notification page

Multiple REN servers can be used by the system. However, only information for REN servers that have been configured with the REN server cluster owner as either *Reporting* or *ALL* (PeopleSoft Multi-Channel Framework, Optimization, and Reporting), are listed on this page.

To verify the REN server cluster owner, select PeopleTools, REN Server Configuration, REN Server Cluster - Select the desired REN Server, REN Server Cluster Owner.

Cluster ID Displays the unique ID for the REN server.

Cluster URL Displays the following URL:

http://<hostname>:7180

hostname: Application server machine name.

7180: Default REN server port number.

Note. If you change the default, then you must change the values for the Cluster and Browser URLs.

Browser URL Displays the following URL:

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http://<hostname>.<default_auth_token>:7180

hostname: Application server machine name.

default_auth_token: PIA Auth Token Domain name, specified as the default_auth_token when configuring the REN server.

Active Flag Indicates whether the REN server is *Active* or *Inactive.*

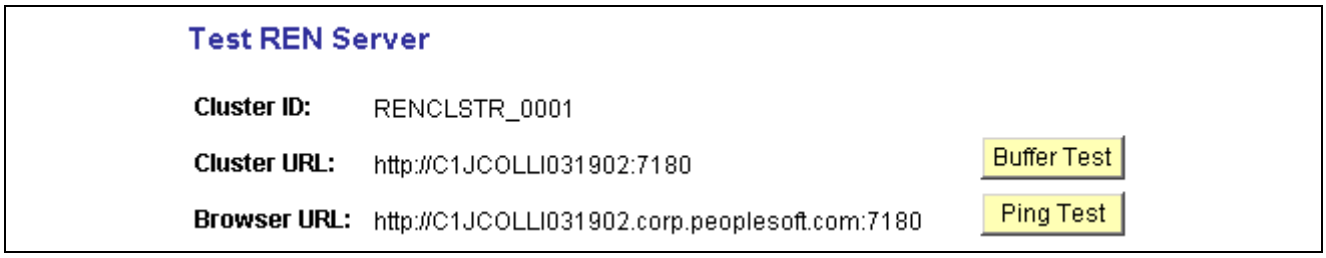
An active REN server enables the *Window* output type. An inactive REN server does not accept the *Window* output type. However, pending reports will finish on current popup windows.

Test Click to display the Test REN Server page.

Use this page to verify that the URLs are valid.

Testing Cluster and Browser URLs

Access the Test REN Server page.



Test REN Server page

Two different tests can be performed:

- *Buffer:* This test is performed on the Cluster URL. It tests the ability of PSRENSRV to break up and send a large file (over 50,000 characters) using multiple internal buffers. The numbered blocks count visible characters, but invisible HTML markup commands are on every line, so the actual server reply content length is 55,902 characters.

  Note. The test is successful if all characters are shown and an End of file message is at the bottom of the page.

- *Ping:* This test is performed on the Browser URL. It sends a sequence of ping events to the PSRENSRV, waiting for each to respond before sending the next.

  Note. The test is successful if Events Sent and Events Received both reach the same final value. The average latency depends on network configuration, machine load, and whether debugging is enabled.

To perform a Buffer test:

1. Click the Buffer Test button.

   The Buffer Test for PSRENSRV page is displayed in a new browser window.
2. Verify that all characters are displayed, and that an *End of File* message is at the bottom of the page.
3. Close the browser window.

To perform a Ping test:

1. Click the Ping Test button.

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The Ping Test for PSRENSRV page is displayed in a new browser window.

2. Click the Run Ping Test button.

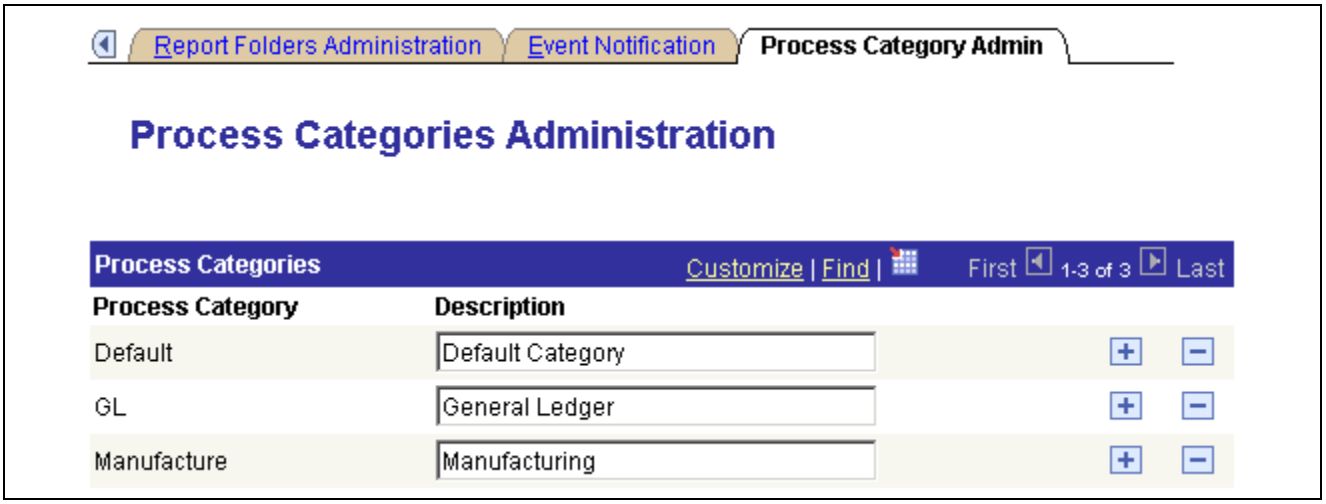
   The system performs a total of 10 pings.

3. Close the browser window.

Click the Return button to return to the Event Notification page.

Defining Process Categories

Access the Process Categories Administration page.



Process Categories Administration page

Use process categories to group processes together for the purpose of server load balancing and prioritization. You can select to run jobs or processes belonging to certain process categories on specific servers, and then you can set a priority of high, medium, or low for each category.

For example, you can group your manufacturing processes into one category and your General Ledger (GL) processes into another category. You can then set the priority for your GL category to high so that GL processes always run first.

Process Category and **Description**

Enter the name and description for each new process category.

Note. The category *Default* is delivered with your system. If this is the only category that is available, all process or job definitions are automatically assigned to this category.

Defining Process Type Definitions

This section provides an overview of process type definitions and discusses how to:

- Enter global definitions for processes.
- Set OS390 options.

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Understanding Process Type Definitions

The primary purpose of the process type definition is to globally define the command line, parameter list, working directory, and other general parameters for a specific process type. Consequently, the information doesn't need to be duplicated for each process definition of the same type, and you can vary these global parameters as needed, depending on the target operating system and database platform.

PeopleSoft Process Scheduler supports all operating systems and database environments that are supported by PeopleSoft. However, not every operating system and database environment combination supports every process type. For example, process types of Crystal or PS/nVision are supported on Microsoft Windows 2000 operating systems only, but SQR, COBOL, and PeopleSoft Application Engine can run on other operating systems, as well.

PeopleSoft Process Scheduler uses the following variables during runtime:

- Meta-strings.

  Meta-strings provide runtime values to the definition and support the management of sensitive data, such as passwords, which are not written to the database.
- In-line bind variables.
- Client and server variables.

For each process request, all defined variables are evaluated and expanded, if possible. (For security reasons, %%OPRID%% is not expanded.) All variables that are not resolved through any of these sources might cause the process request to fail. You can detect unresolved variables easily by reviewing the Process Request Detail page for the failed request.

Meta-Strings

The predefined meta-strings must be enclosed in a set of double percent signs. When processing a request, if PeopleSoft Process Scheduler encounters a string that is enclosed inside a set of double percent signs, it compares the variable name with an internal list of predefined meta-strings. If the variable name is not one of these meta-strings, it is assumed to be a server-based environment variable.

The following table includes all predefined meta-strings and their associated runtime values.

Predefined Meta-String	Runtime Value
%%ACCESSID%%	Database Access ID.
%%ACCESSPSWD%%	Database Access Password.
%%DBNAME%%	Database Name.
%%INSTANCE%%	Process Instance.
%%OPRID%%	User's Signon ID.
%%OPRPSWD%%	User's Password (encrypted).

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Predefined Meta-String	Runtime Value
%%OUTDEST%%	Output Destination. For example, C:\%TEMP%; \\PrintServer1\Printer1.
%%OUTDESTTYPE%%	Output Type. For example, File, Printer; Web, Window, Email.
%%OUTDESTFORMAT%%	Output Format. For example, SPF; HTM; PDF; TXT.
%%PRCSNAME%%	Process Name. For example, XRFAPFL, GLPJEDIT.
%%RUNCNTLID%%	Run Control ID. For example, NTClient, CrystalServer.
%%SERVER%%	Reference the Database Server Name.
%%EMAILID%%	User's email address that is stored in the user profile.
%%CLIENTTIMEZONE%%	Time zone that is specified for the client initiating the request.
%%APPSERVER%%	Application Server (used for three-tier).
%%LOG/OUTPUTDIRECTORY%%	Directory in the PeopleSoft Process Scheduler Server Agent to which a file that is generated from a process request is written.
%%DEFAULTPRINTER%%	Default printer defined in the Process Scheduler Configuration file.

In-Line Bind Variables

The parameter list may contain in-line bind variables. In-line bind variables represent any field (record.field) that is used in the current page and they are defined like this:

```
:RECORD.FIELD
```

For example, specify the following code to pass the value of the User ID field from the RPT_RQST_WRK record as a parameter:

```
:RPT_RQST_WRK.OPRID
```

Variables must be enclosed in a set of *double* percent signs, as in %%OutputDirectory%%. At runtime, Process Scheduler first looks at all double-percent variables to determine whether these represent a predefined meta-string value, such as %%OPRID%%. Because the meta-string is predefined, it can resolve the variable at initiation of each request. If the variable is not defined as a meta-string, Process Scheduler tries to find it in the Process Scheduler configuration file. If none is found, it leaves the value unresolved.

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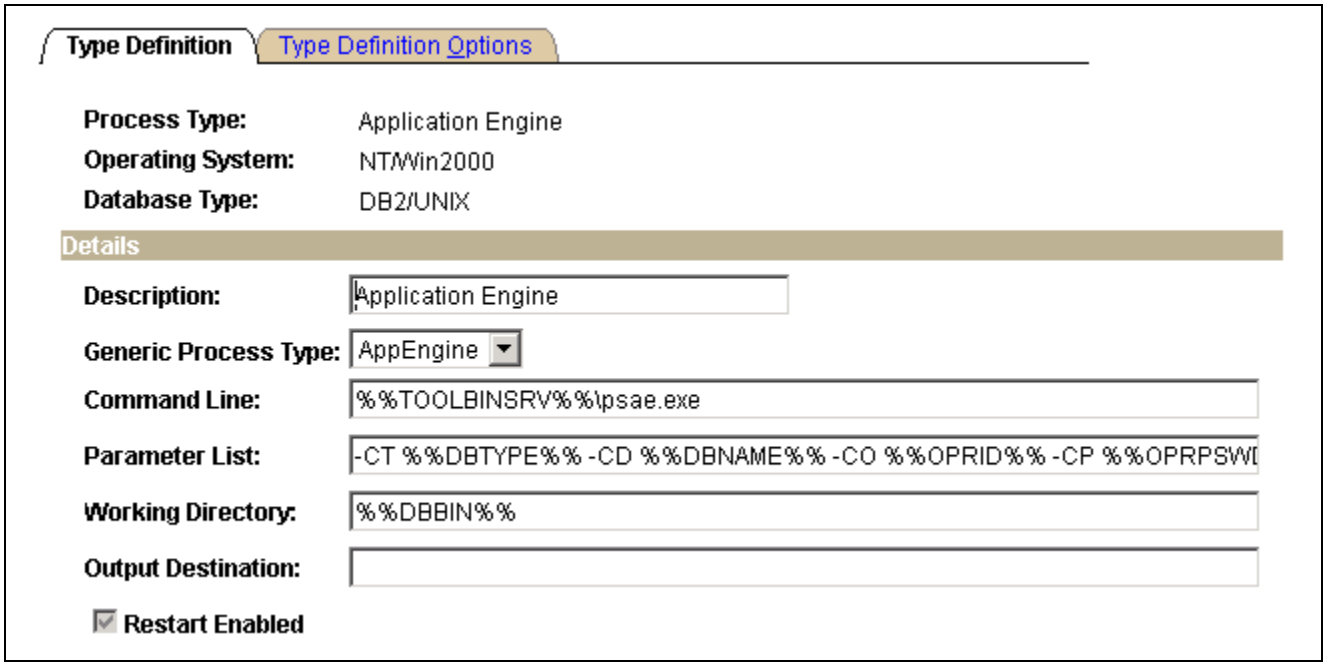
Note. This documentation is not a substitute for the PeopleSoft Application Engine, COBOL, SQR, or Crystal Reports documentation. If you need additional information about parameters that are discussed here, the documentation from the appropriate vendor is your best reference.

Pages Used to Define Process Type Definitions

Page Name	Object Name	Navigation	Usage
Type Definition	PRCSTYPEDEFN	PeopleTools, Process Scheduler, Process Types	Enter or update global definitions for processes.
Type Definition Options	PRCSTYPEDEFNOPT	PeopleTools, Process Scheduler, Process Types, Type Definition Options	Set OS390 options. **Note.** This page is necessary only if you are using an OS390 operating system for the database.

Entering Global Definitions for Processes

Access the Type Definition page.



Type Definition page

Use the Type Definition page to enter or update global definitions for processes.

A process type must be defined for each database and operating system platform on which you want processes to run. PeopleSoft delivers process type definitions for many of the following types of processes, so if you're adding a new process definition, you may be able to associate it with an existing process type, rather than having to add a new one.

- PeopleSoft Application Engine.
- SQR.
- COBOL.

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- Crystal.
- Data Mover.
- XML Publisher.

Note. Be sure to use unique names when defining new process types. This makes it easier to select a process based on the process type.

Important! Insert two colons (::) to define a colon in any variable string, as in *C::\PT80\<executable>,* if you are not using the %%<value>%% variable. The extra colon is required to distinguish these types of parameters from in-line bind variables, which use a single colon to prefix the record name.

Generic Process Type

Indicates the type of process that you are updating, for example, *AppEngine* (PeopleSoft Application Engine), *COBOL Crystal Cube Other SQR Winword* (Microsoft Word for Windows), or *nVision* (PS/nVision).

Note. The Generic Process Type for XML Publisher is *AppEngine*.

Command Line

Indicates the executable program based on the generic process type that is selected.

Enclose local (client) environment strings within a single pair of percent signs for example, %TOOLBIN%. Enclose all server environment strings within a double pair of percent signs, for example, %%TOOLBIN%%.

Note. If the path contains spaces, you will need to add quotation marks around the entry, for example, " %%WINWORD%%\WINWORD.EXE".

Parameter List

Indicates the string of command line variables that are passed to the program.

Working Directory

Indicates the directory containing the database drivers. The working directory is applicable only to the client and Microsoft Windows 2000 servers.

Output Destination

Indicates the output destination for this process type. This is used for any process definition with an output destination source of Process Type, meaning that the process uses the values in the process type definition to determine where to send the output.

Restart Enabled?

Select to enable a process request to be restarted from Process Monitor. Restarting is allowed only if the user or class of users can currently update a request (Cancel or Delete).

The parameter list for the failed request is modified to append the current process instance before the request is assigned a new instance and reinserted with a status of Queued. All date and time stamps and runtime variables are reset, as appropriate.

Note. If this check box is selected and the request fails, the status is No Success (not Error).

This section discusses the specific values for:

- PeopleSoft Application Engine process type definitions.

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- SQR report process type definitions.
- COBOL SQL process type definitions.
- Crystal process type definitions.
- Data Mover process type definitions.
- XML Publisher process type definitions.

PeopleSoft Application Engine Process Type Definitions

When the generic process type is AppEngine, the Type Definition page contains these fields:

Command Line Indicates the executable program PSAE.EXE, which is preceded by the directory name or environment string where the program resides.

Output Destination Not required for PeopleSoft Application Engine processes.

PSAE.EXE requires the following arguments in the Parameter List field:

-CT %%DBTYPE%% -CD %%DBNAME%% -CO %%OPRID%% -CP %%OPRPSWD%% -R %%RUNCNTLID%% -I %%INSTANCE%% -AI %%PRCSNAME%%

Following these arguments, you can add additional arguments, as needed. This table contains details about the required and optional arguments that apply to all PeopleSoft Application Engine process requests.

Flag	Value and Notes
-CT	Connect database type.
-CS	Connect server name, if required on sign-in dialog page.
-CD	Database to which you are connected.
-CO	User ID with which you are signed in.
-CP	User password (encrypted).
-R	Process run control ID.
-I	Process instance.
-AI	Name of the PeopleSoft Application Engine program.
-FP	The full path of the directory where files will be generated through FileObject. To use the value that is assigned to this flag, use the PeopleCode system variable %FilePath

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Flag	Value and Notes
-DEBUG	Enables PeopleSoft Application Engine trace. This is equivalent to values that are assigned to TraceAE in the Process Scheduler Configuration file.
-DBFLAGS	Bit flag that enables or disables running statistics to a table when the meta-SQL %Update Stats% is coded in the PeopleSoft Application Engine program: *0:* Enable. *1:* Disable.
-TOOLSTRACESQL	Enables PeopleSoft SQL trace. This is equivalent to values that are assigned to TRACESQL in the Process Scheduler Configuration file.
-TOOLSTRACEPC	Enables PeopleCode trace. This is equivalent to values that are assigned to TracePC in the Process Scheduler Configuration file.

SQR Report Process Type Definitions

When the generic process type is SQR, the Type Definition page contains this field:

Command Line Indicates the executable program PSSQR.EXE, a wrapper program to run SQR reports.

Important! PSSQR.EXE is not designed to run manually outside of Process Scheduler.

PSSQR.EXE requires the following arguments in the Parameter List field:

-CT %%DBTYPE%% -CS %%SERVER%% -CD %%DBNAME%% -CA %%ACCESSID%% -CAP %%ACCESSPSWD%% -RP %%PRCSNAME%% -I %%INSTANCE%% -R %%RUNCNTLID%% -CO %%OPRID%% -OT %%OUTDESTTYPE%% -OP "%%OUTDEST%%" -OF %%OUTDESTFORMAT%%

Following these arguments, you can add additional arguments, as needed. This table contains details about the required and optional arguments that apply to all SQR process requests.

Flag	Value and Notes
-CT	Connect database type.
-CS	Connect server name, if required on the sign-in page.
-CD	Database to which you are connected.

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Flag	Value and Notes
-CA	Access ID with which you are signed on.
-CAP	Access password (encrypted).
-RP	Name of the report (SQR) file. No path is required. PSSQR searches for the SQR report in configuration setting PSSQR1-4.
-I	Process instance.
-R	Process run control ID.
-CO	User ID with which you are signed in.
-OT	Output type: *0:* Any. *1:* None. *2:* File. *3:* Printer. *5:* Email. *6:* Web. *7:* Default.
-OP	Output path. If the output type is 1 (printer), you can specify a logical printer name, such as *\\printserver1\printer1*. If the output type is 2 (file), you must specify a file path.
-OF	Output destination format, such as *HTML*.

Note. Determine the output format for the output file by specifying the output format on the Process Scheduler Request page.

COBOL SQL Process Type Definitions

When the generic process type is COBOL, the Type Definition page contains these fields:

Command Line Indicates the command to start the Windows-based COBOL program, preceded by the directory name or environment string that indicates where the program resides.

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Output Destination Not required for COBOL.

Crystal Process Type Definitions

When the generic process type is Crystal, the Type Definition page contains these values:

Command Line Indicates the executable program PSCRRUN.EXE, a PeopleSoft API program to run Crystal reports, which is prefaced by the directory name or environment string that indicates where the program resides.

Note. The executable program for Crystal Reports 9 is PSCRRUN.EXE. PSBOERUN.EXE is the executable used with BusinessObjects Enterprise XI. The command line executable changes when you convert your reports to the Crystal XI format.

See *The Enterprise PeopleTools 8.49 Installation guide for your database platform, Installing and Configuring Software for Crystal Reports, Converting Crystal Reports, Converting Reports from Crystal Reports 9 format to Crystal Reports XI format*.

Output Destination Not required for Crystal.

PSCRRUN.EXE requires the following arguments in the Parameter List field:

-CT MICROSFT -CD%%DBNAME%% -CO%%OPRID%% -CP%%OPRPSWD%% -I%%INSTANCE%% -RP"%%PRCSNAME%%" -OT%%OUTDESTTYPE%% -OP%%OUTDEST%% -LG:PRCSRUNCNTL.LANGUAGE_CD -OF%%OUTDESTFORMAT%%

Following these arguments, you can add additional arguments, as needed. This table contains details about the required and optional arguments that apply to all Crystal process requests.

Flag	Value and Notes
-CT	Connect database type.
-CS	Connect server name, if required in the sign-in (NULL for client requests).
-CD	Database to which you are connected.
-CO	User ID with which you are signed in.
-CP	User password (encrypted).
-I	Process instance.
-CX	Application server name (if applicable).

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Flag	Value and Notes
-RP	Name of the report (.RPT) file. The .RPT extension is optional. PSCRRUN searches the directories that are specified by the Process Scheduler configuration file variable CRWRPTPATH. PSBOERUN searches the directories in the BusinessObjects Enterprise report repository.
-OT	Output type: *0:* Any. *1:* None. *2:* File. *3:* Printer. *5:* Email. *6:* Web. *7:* Default.
-OP	Output Path. If Output Type = 3 (printer), then you can specify a logical printer name, such as \\printserver1\printer1 If Output Type = 2 (file), you must specify a file path.
-LG	Defines the requested language code for the specified Crystal report. This corresponds to a child directory below the Crystal Reports base directory, where the report should exist in the specified language. Various child directories can exist for each supported language.
-OF	Specifies the output destination format, such as PDF.

Crystal requires the following printer orientation and other report-specific arguments to be set in the process definition.

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Argument	Value and Notes
-ORIENT	*NULL.* *P:* Portrait. *L:* Landscape. If the output type is 3 (printer), and the output destination is not NULL, you must specify a printer orientation. This should be specified as an appended parameter in the process definition.
-SP	Optional. Separate page indicator for HTML reports. *Blank or 0:* One HTML file (default). *1:* Separate HTML file for each page. **Note.** This argument is only valid for use with Crystal Reports 9.
-DHTML	Optional. HTML type indicator for HTML reports. *Blank or 0:* HTML 3.2 std (default). *1:* HTML 4.0 (DHTML) **Note.** This argument is only valid for use with Crystal Reports 9.
-LX	Optional. Disable locale formatting option. *0:* Disables the automatic adjustment of report formats based on the user's International and Regional personalizations. **Note.** This flag should be used only if you require dates, times, and numbers in Crystal Report output to always be formatted in the locale of the server machine instead of the locale of the user submitting the report.
-PAPERLG	Print Crystal reports using legal sized paper.
-PAPERLT	Print Crystal reports using letter sized paper. **Note.** This flag is used as the default for printer paper size.
-CPI	Set the character per inch parameter when you export a file to text. *<Value>* If the value is not set, a default of *12* is used.

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Note. Determine the output format for the output file by specifying the output format on the Process Scheduler Request page.

For Crystal Reports 9, you must also set the following environment strings on the Crystal page in Configuration Manager.

Parameter	Description
Crystal EXEs Path	Path to Crystal executable programs (PSCRRUN.EXE).
Default Crystal Reports	Path to Crystal report (.RPT) files.

Data Mover Process Type Definitions

When the generic process type is Data Mover, the Type Definition page contains this field:

Command Line Indicates the executable program PSDMTX.EXE, which is preceded by the directory name or environment string where the program resides.

PSDMTX.EXE requires the following arguments in the Parameter List field:

-CT %%DBTYPE%% -CD %%DBNAME%% -CO %%OPRID%% -CP %%OPRPSWD%% -I %%INSTANCE%% -FP %%PRCSNAME%%.dms

Following these arguments, you can add additional arguments, as needed. This table contains details about the required and optional arguments that apply to all PeopleSoft Data Mover process requests.

Flag	Value and Notes
-CT	Connect database type
-CS	Connect server name, if required on logon dialog page.
-CD	Database to which you are connected.
-CO	User ID with which you are signed in.
-CP	User password (encrypted).

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Flag	Value and Notes
-I	Process instance.
-FP	File name of the Data Mover script. If the value doesn't include the absolute path, Data Mover will search the script from the directory that is specified in the *LastScriptsDir* parameter found in the Data Mover section of the Process Scheduler configuration file. See Appendix D, "Using the PSADMIN Utility," page 171.

By default, Process Scheduler uses the name that is specified in the Process Definition as the Data Mover script file name value for the –FP flag. It will formulate the Data Mover script as <*Process Definition Name*>.dms

---

Note. If you want to assign a specific Data Mover script, you can do so by entering the script name in the Parameter List field that is found in the Override Options tab of the Process Definition page, for example, *-FP userexport.dms.*

XML Publisher Process Type Definitions

When the process type is XML Publisher, the generic process type is AppEngine and the Type Definition page contains these fields:

Command Line Indicates the executable program PSAE.EXE, which is preceded by the directory name or environment string where the program resides.

Output Destination Not required for PeopleSoft XML Publisher processes.

PSAE.EXE requires the following arguments in the Parameter List field:

-CT %%DBTYPE%% -CD %%DBNAME%% -CO %%OPRID%% -CP %%OPRPSWD%% -R %%RUNCNTLID%% -I %%INSTANCE%% -AI %%PRCSNAME%%

Following these arguments, you can add additional arguments, as needed. This table contains details about the required and optional arguments that apply to all PeopleSoft XML Publisher process requests.

Flag	Value and Notes
-CT	Connect database type.
-CS	Connect server name, if required on sign-in dialog page.
-CD	Database to which you are connected.
-CO	User ID with which you are signed in.

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Flag	Value and Notes
-CP	User password (encrypted).
-R	Process run control ID.
-I	Process instance.
-AI	Name of the PeopleSoft Application Engine program.
-OT	Output type: *2:* File. *3:* Printer. *6:* Web.
-FP	The full path of the directory where files will be generated through FileObject. To use the value that is assigned to this flag, use the PeopleCode system variable %FilePath
-OF	Specifies the output destination format, such as HTML.
-DEBUG	Enables PeopleSoft Application Engine trace. This is equivalent to values that are assigned to TraceAE in the Process Scheduler Configuration file.
-DBFLAGS	Bit flag that enables or disables running statistics to a table when the meta-SQL %Update Stats% is coded in the PeopleSoft Application Engine program: *0:* Enable. *1:* Disable.
-TOOLSTRACESQL	Enables PeopleSoft SQL trace. This is equivalent to values that are assigned to TRACESQL in the Process Scheduler Configuration file.
-TOOLSTRACEPC	Enables PeopleCode trace. This is equivalent to values that are assigned to TracePC in the Process Scheduler Configuration file.

Note. For Process Type XML Publisher, available output options are based on the report definition template type.

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See *Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise*, "Defining Report Definitions," Creating Report Definitions.

See Also

Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Modifying Values That Are Passed to Processes, page 85

Setting OS390 Options

Access the Type Definition Options page.

Note. This page is necessary only if you are using an OS390 operating system for the database.

Job Shell ID	Enter the ID that relates the process type to the Job Control Language (JCL) shell that contains the replaceable parameters for the process.
Meta Parameter	Enter the Meta-string parameter that is contained in the job shell.
Meta Parm Value (Meta Parameter Value)	Enter the value that replaces the meta-string parameter.

Note. SQR for PeopleSoft now supports configurable space allocation for datasets on the zOS platform. The space allocation can be defined at the process level. For example, you can enter a setting to allocate 1 track for a small report or 100 cylinders for a large one.

Defining Process Definitions

This section provides an overview of process definitions and discusses how to:

- Add new process definitions.
- Set process definition options.
- Modify values that are passed to processes.
- Set destination options.
- Set page transfer options.
- Set notification options.
- Set notification messages.
- Set OS390 options.
- Associate URLs.

Understanding Process Definitions

After you specify a process type, you must create a process definition, specify the available options, and set up associated page transfers that might apply.

Use the following pages to complete the tasks for creating a process definition:

- Process Definition.
- Process Definition Options.

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- Override Options.
- Destination.
- Page Transfer.
- Notification.
- Message.
- OS390 Option.
- URL Links.

Pages Used to Define Process Definitions

Page Name	Object Name	Navigation	Usage
Process Definition	PRCSDEFN	PeopleTools, Process Scheduler, Processes, Process Definition	Add new process definitions, or update existing ones.
Process Definition Options	PRCSDEFNOPT	PeopleTools, Process Scheduler, Processes, Process Definition, Process Definition Options	Specify that a process runs from a specific location, server, component, or process group. Also specify system recovery processes and file dependency information.
Override Options	PRCSDEFNOVRD	PeopleTools, Process Scheduler, Processes, Process Definition, Override Options	Modify values that are passed to the process.
Destination	PRCSDEFNCNTDIST	PeopleTools, Process Scheduler, Processes, Process Definition, Destination	Set destination options.
Page Transfer	PRCSDEFNXFER	PeopleTools, Process Scheduler, Processes, Process Definition, Page Transfer	Enables a user to go directly from the Process Monitor to a designated page in the PeopleSoft application. Specify navigational route that an end user must follow through the PeopleSoft menu interface.
Notification	PRCSDEFNNOTIFY	PeopleTools, Process Scheduler, Processes, Process Definition, Notification	Send messages to a group (using a role ID) or individuals (using a user ID) when a specific activity occurs with the process, such as an error or a successful completion of the job.
Message	PRCSDEFNMESSAGE	PeopleTools, Process Scheduler, Processes, Process Definition, Message	Specify the messages that are sent when the Notification feature is used.

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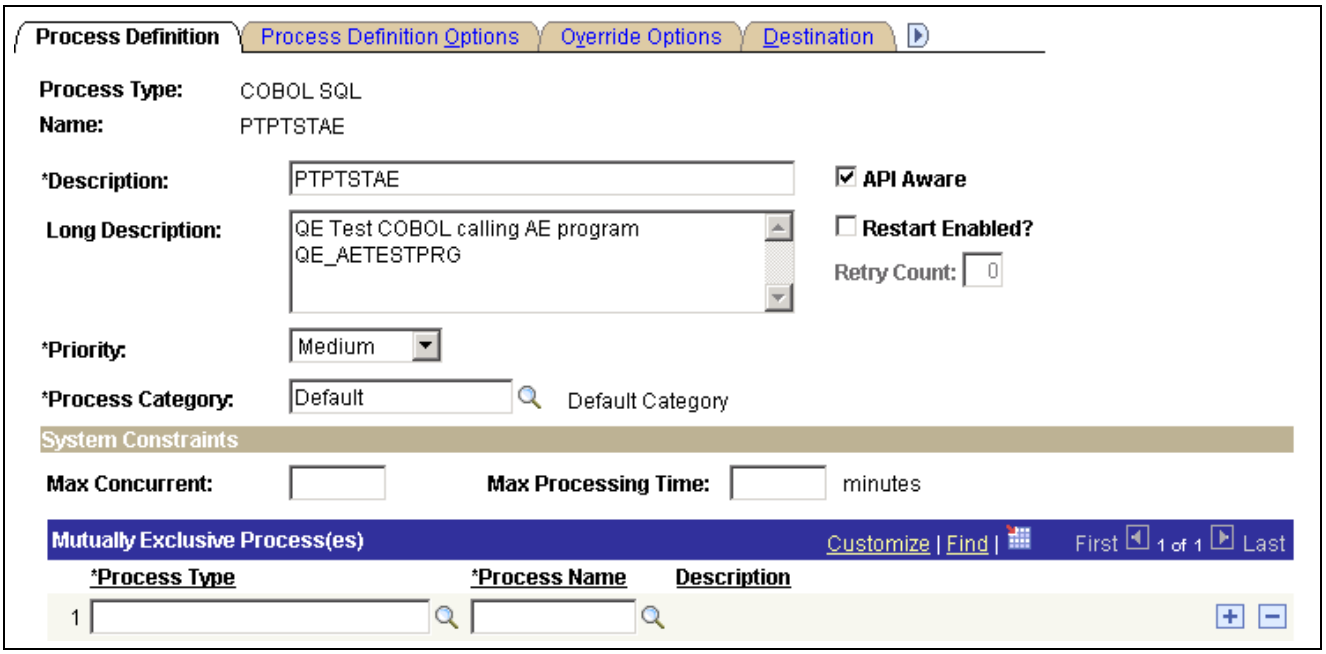
Page Name	Object Name	Navigation	Usage
OS390 Option	PRCSDEFNOS390OPT	PeopleTools, Process Scheduler, Processes, Process Definition, OS390 Option	Enter additional meta-string parameters for a process definition. **Note.** This page is necessary only if you are using an OS390 operating system for the database.
URL Links	PRCSDEFNURLS	PeopleTools, Process Scheduler, Processes, Process Definition, URL Links	Associate multiple URLs with a process definition. The links appear on the Report detail page, which is accessible from the Process Monitor and Report Manager.
Edit URL Details	PRCSDEFNURLDETAILS	Click the URL Keys link on the URL Links page.	View and edit key fields for the selected URL.

Adding New Process Definitions

Access the Process Definition page.



Process Definition page

Process Type Indicates the Process Type selected.

Name This name must match the file name of the process that you are defining. For example, if you are defining a SQR report named MYSQR.SQR, you must define the process name as MYSQR.

Long Description This field is optional.

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Priority Select *High, Medium,* or *Low* to define the relative priority that is used by the PeopleSoft Process Scheduler Agent to determine which process to initiate first if multiple processes are queued to run on a server.

Process Category Select a process category for this process.

Note. The process category *Default* is delivered with your system. If this is the only category available, all process definitions are automatically assigned to this category. If additional process categories are created, this field value is blank.

API Aware Select this check box if this process is an API-aware process. If this check box is selected for any process that is not API-aware, PeopleSoft Process Scheduler includes this process in the concurrent task count. This can result in improper server load balancing.

Selecting this option does not mean that the process becomes API-aware. You must still add API code to the process.

The PeopleSoft Application Engine, COBOL, SQR, Cube Builder, nVision, Crystal, Data Mover, XML Publisher and Database Agent process types should be API-aware. If API Aware is cleared for any of these process types, it is recorded on the SYSAUDIT report.

Restart Enabled? Select if the system should attempt to automatically restart this process if it is marked with a run status of *Error*.

Retry Count Enter the number of times the system should attempt to automatically restart this process.

Note. This field becomes active only if the Restart Enabled? check box is selected.

System Constraints

Access the System Constraints section.

Important! For system constraints to be evaluated, you must configure the system with a master scheduler. In the absence of a master scheduler, the system ignores settings for the following options.

Max. Concurrent (Maximum Concurrent) Enter the maximum number of occurrences of this process that can be active at one time across all process schedulers. If this field is left blank (default), the value becomes *Unlimited.*

Processes exceeding the maximum appear in the Process Monitor with a run status of *Blocked.* As active occurrences finish, blocked processes are released and queued.

Max. Processing Time (Maximum Processing Time) Enter the maximum processing time for this process. If this field is left blank (default), the value becomes *Unlimited.*

The system cancels the process if processing exceeds the time that is entered here.

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Important! This field is not supported for SQR and COBOL process types that are scheduled on an OS390 operating system, and run from UNIX System Services (USS).

Mutually Exclusive Process(es)

Enter the type and name all the processes that must not run at the same time as this process.

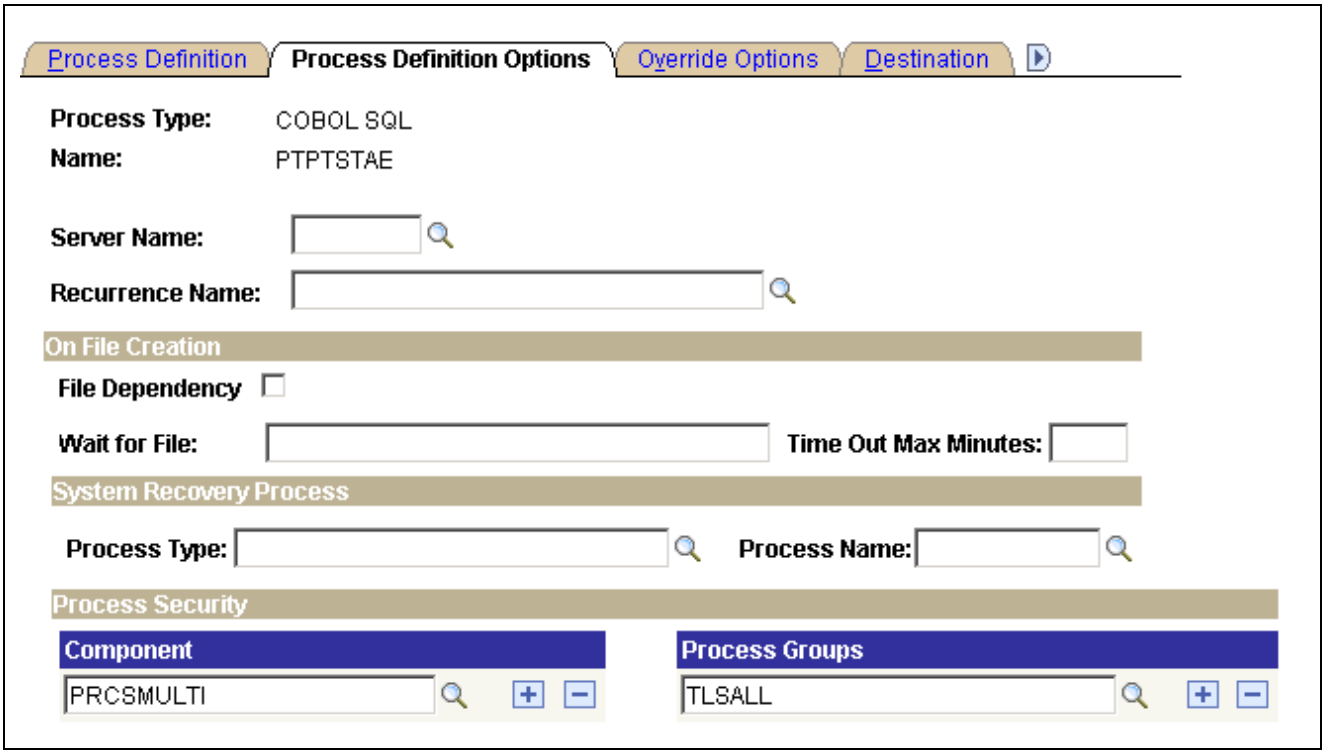
Processes failing this constraint appear on the Process Monitor with a run status of *Blocked*. When mutually exclusive processes finish, blocked processes are released and queued.

See Also

Appendix A, "Using Process Request APIs," page 143

Setting Process Definition Options

Access the Process Definition Options page.



Process Definition Options page

Use the Process Definition Options page to specify a specific location, server, component, or process group that a process runs from.

(Optional) Server Name

Specify a server on which the process should run. Specify the server name only to restrict this particular process to this server definition (or if you have only one server platform to submit your requests).

Leave blank to have the process requested for the first server or default operating system that can process requests for the specified process class. This

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enables you to balance the load between multiple process servers because your request is initiated by the first available server on the default operating system.

Important! For the system to evaluate values that are entered for the On File Creation feature, you must provide a server name. This is validated when you save your process definition.

(Optional) Recurrence Name Specify a predefined recurrence definition for this process.

On File Creation

Access the On File Creation section.

File Dependency Select to activate the On File Creation feature.

If this option is activated, Process Scheduler checks for the existence of the file. If the file is found and no other process is using it, the process will run.

If the file is not found or file is in use, the process does not run but enters a *Blocked* state. Time counting starts at this point. Process Scheduler keeps checking for the file. If the file is found and is not in use, the process will run.

If the file is not found or file is in use even after the time interval specified in Time Out Max Minutes, the process will go to *Error* state.

If Max Time Out Minutes field is left blank, the process scheduler does not schedule the process as long as the file is not found in the specified location.

Wait for File Enter the location and name of the file that this process depends on. The process will not run until this file has been found if the file dependency option is activated.

Processes on hold due to dependent files not being found appear on the Process Monitor with a run status of *Blocked.* When the dependent files have been located, blocked processes are released and queued.

Note. This information can also be entered or changed at runtime if the File Dependency check box has been selected.

Time Out Max. Minutes Enter a time limit for the system to locate the dependent files.

The system compares the current date time to the timestamp of the time that the process was queued. If the time limit is exceeded, the process is marked as *Error* and the restart procedure is attempted.

See Chapter 3, “Submitting and Scheduling Process Requests,” Specifying Process Variables, page 12.

System Recovery Process

Access the System Recovery Process section.

Process Type and **Process Name** Enter the type and name of an optional process that can be run if this process runs to an error. The original process will not restart until the system recovery optional process that is entered here has run.

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Process Security

Access the Process Security section.

Component Attach the process to components. Adding a component to a process definition causes that process definition to appear on the Process Scheduler Request page when you select File, Run in that component, if you have security to run the process.

Process Group Make the process definition a member of the group. A process definition can be a member of multiple process groups.

Process groups are then assigned to security profiles in PeopleSoft Security Administrator, which enables you to specify the process requests that classes of users can run.

Modifying Values That Are Passed to Processes

Access the Override Options page.

Use the Override Options page to modify values that are passed to the process.

Override Options Select a value if you have custom values to send through the parameter list, command line, or working directory:

Append: Adds custom parameters to the end of the PeopleSoft string.

Override: Sends custom parameters in place of the PeopleSoft defaults.

Prepend: Adds custom parameters to the front of the PeopleSoft string.

Parameters Enter the custom parameter values.

Setting Destination Options

Access the Destination page.

Note. The output source destinations are enforced for users who are *not* allowed to override the output destination by their operator process profiles. If a user is allowed to override it, the user-run control destination is used in the process request.

Type Select the default destination type for this process:

None: Uses the user run control values.

Any: User can specify any valid option.

Default: Applicable to PS/nVision only.

Depending on the type of process, other selections include *Email, File, Printer, Window,* and *Web.*

The value that is specified here overrides the value that is specified in the System Settings-Process Output Type page. If the value that is specified here is deactivated, the value that is designated as the default will be used.

Format Select the format for this process.

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The value that is specified here overrides the value that is specified in the System Settings-Process Output Format page. If the value that is specified here is deactivated, the value that is designated as the default will be used.

Destination Source Specify the output destination source for this process:

None: Use for processes that do not create output or for processes for which you do not want to produce an output file or report.

Process Definition: This request uses the output destination that is specified by the process definition.

Process Type Definition: This request uses the output destination that is specified by the process type definition.

User Specified: This is the default. The output destination for this request is determined by the process run control designation.

For an SQR process, the destination source must be *User Specified.*

Folder Name Select the folder in which the report will be displayed in the Explorer and List tables of the Report Manager.

Output Destination Use to hard-code the output destination into the process definition. This is enabled only when the source value is Process Definition.

Setting Page Transfer Options

Access the Page Transfer page.

The Page Transfer or Log Transfer feature enables a user to go directly from the Process Monitor to a designated page in the PeopleSoft application to view the results from a successfully completed process.

To enable users to go directly from the Process Monitor to a page, specify the navigational route that an end user must follow through the PeopleSoft menu interface.

Note. If the search keys are not in the level 0 buffer of the current component, the Search page will be displayed.

Page Transfer Code Select the type of transfer for this process:

None: Disables this feature for this process. The remaining fields become unavailable when this value is selected.

Msg Log (Message Log): Enables the Log Transfer feature for this process.

Next Page: Enables the Page Transfer feature for this process.

Menu Name, Menu Bar Name, Menu Item, and **Page Name** Select the navigation path that the user follows through the PeopleSoft menu interface.

Menu Action Select one of the following menu actions that the user can perform when the page is selected: *Add, Correction, Update,* or *Update All.*

Setting Notification Options

Access the Notification page.

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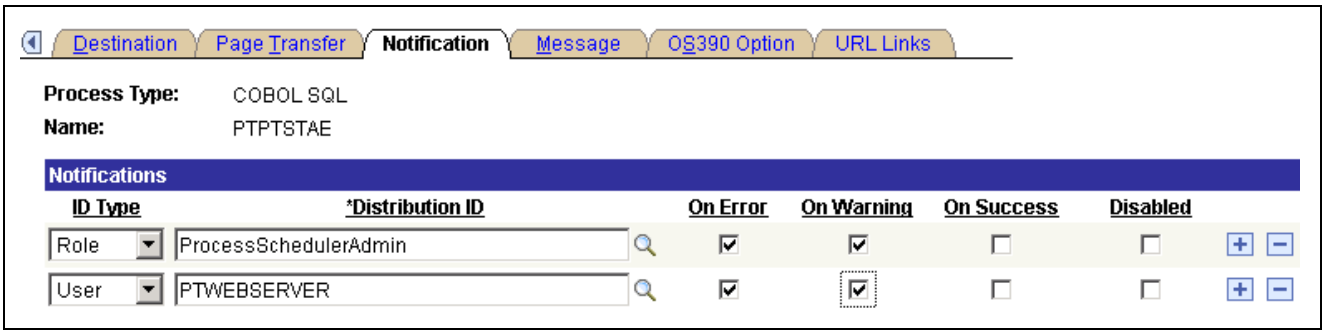

Notification page

Use the Notification page to send messages to a group (using a role ID) or individuals (using a user ID) when a specific activity occurs with the process, such as an error, warning, or successful completion of the process.

ID Type Select *User* or *Role*.

Distribution ID Select the user ID of the user or group.

On Error Select to notify the user or group when an error occurs in the process. If this option is enabled the notifications at the process and PSJob level for success and warning will not be delivered, only the notifications of error.

On Warning Select to notify the user or group when a warning occurs for the process.

On Success Select to notify the user or group when the process successfully finishes.

Disabled Select if you do not want to send notifications to the user or group.

Setting Notification Messages

Access the Message page.

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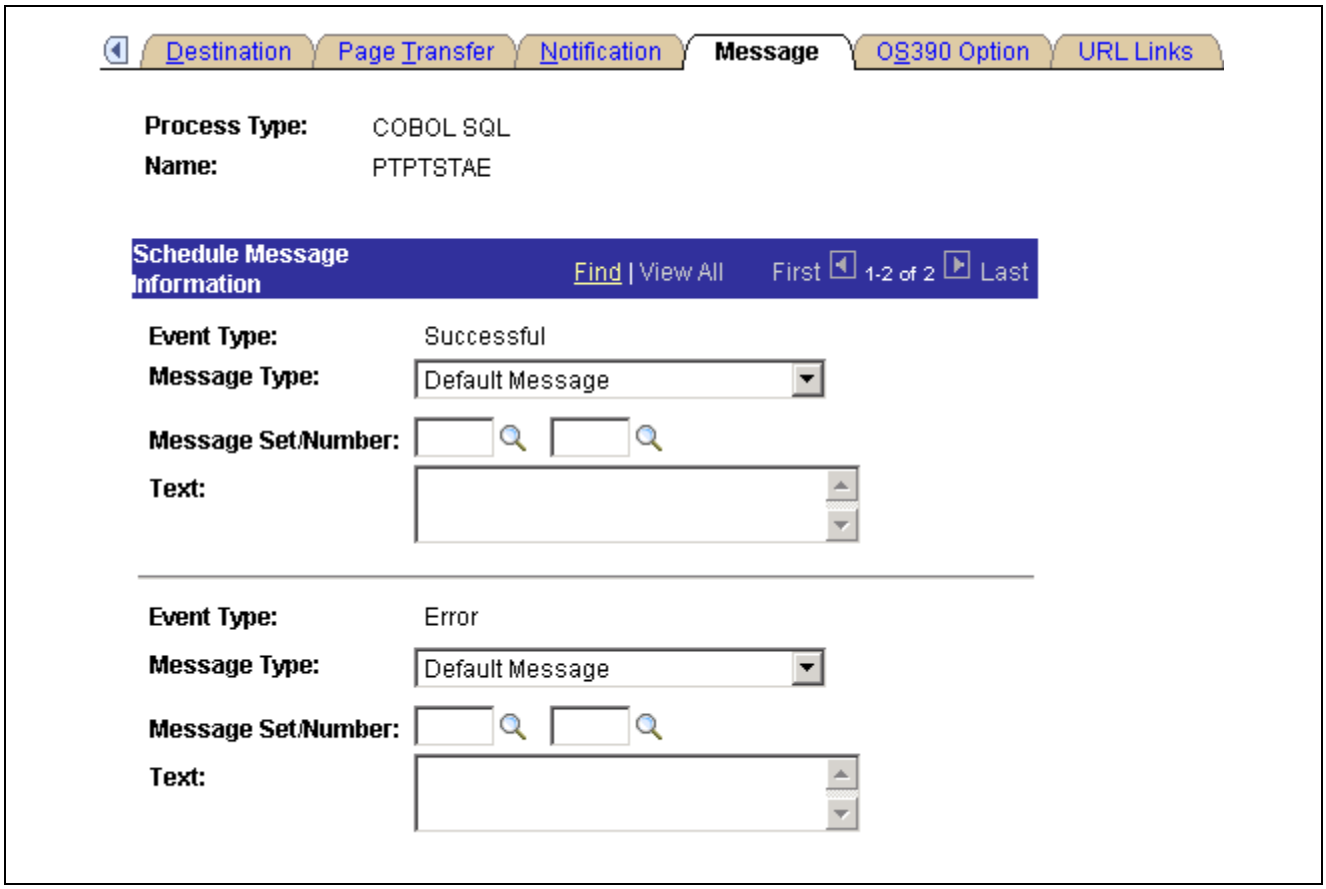

Message page

Use the Message page to specify the messages that are sent when the Notification feature is used. You can specify messages for successful completion and errors.

Message Type Select the message type:

Default Message: Use the basic default message.

Customized Message: Create your own message.

Message Catalog: Select a message from the Message Catalog.

Message Set/Number Select the Message Catalog set and number of the message. Complete these fields when the message type is *Message Catalog.*

Text Enter the message text when the message type is *Customized Message.*

Setting OS390 Options

Access the OS390 Option page.

The JCL shell and meta-string parameters that are used for constructing JCL that relates the process type to the JCL shell containing the replaceable parameters for the process have already been determined. Use this page to enter additional meta-string parameters for this process definition.

Note. This page is necessary only if you are using an OS390 operating system for the database.

Meta Parameter Enter the Meta-string parameter that is contained in the Job Shell.

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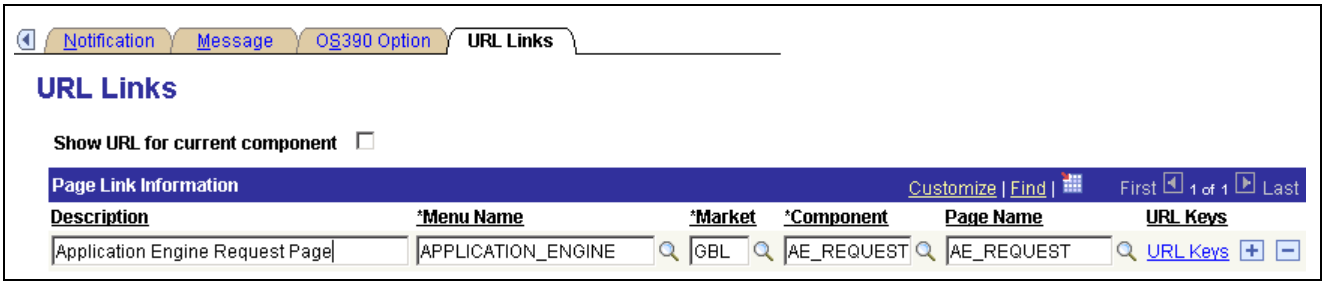
Meta Parm Value (Meta Parameter Value) Enter the value that replaces the meta-string parameter.

Associating URLs

Access the URL Links page.



URL Links page

Use this page to associate multiple URLs with a process definition. The links appear on the report Detail page, which is accessible from the Process Monitor and the Report Manager.

Show URL for current component Select to create a link to the current component.

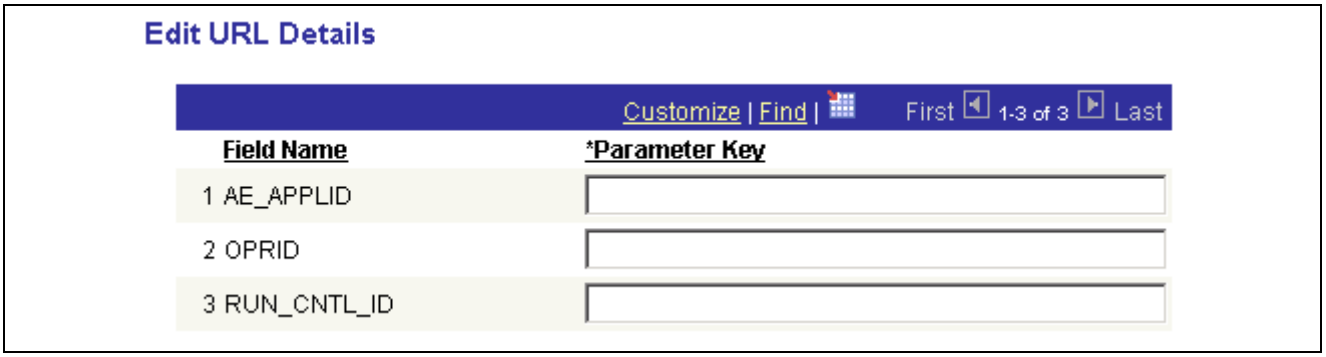
Description Enter a description for the link.

Menu Name, Market, Component, and **Page Name** Select to create the URL path and destination.

URL Keys Click to access the Edit URL Detail page.

Editing URL Key Fields

Access the Edit URL Details page.



Edit URL Details page

Use this page to view or edit the key fields of the selected URL.

Defining Recurrence Definitions

This section provides an overview of recurrence definitions and discusses how to:

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- Set up recurrence definitions.
- Set recurrence exceptions.

Understanding Recurrence Definitions

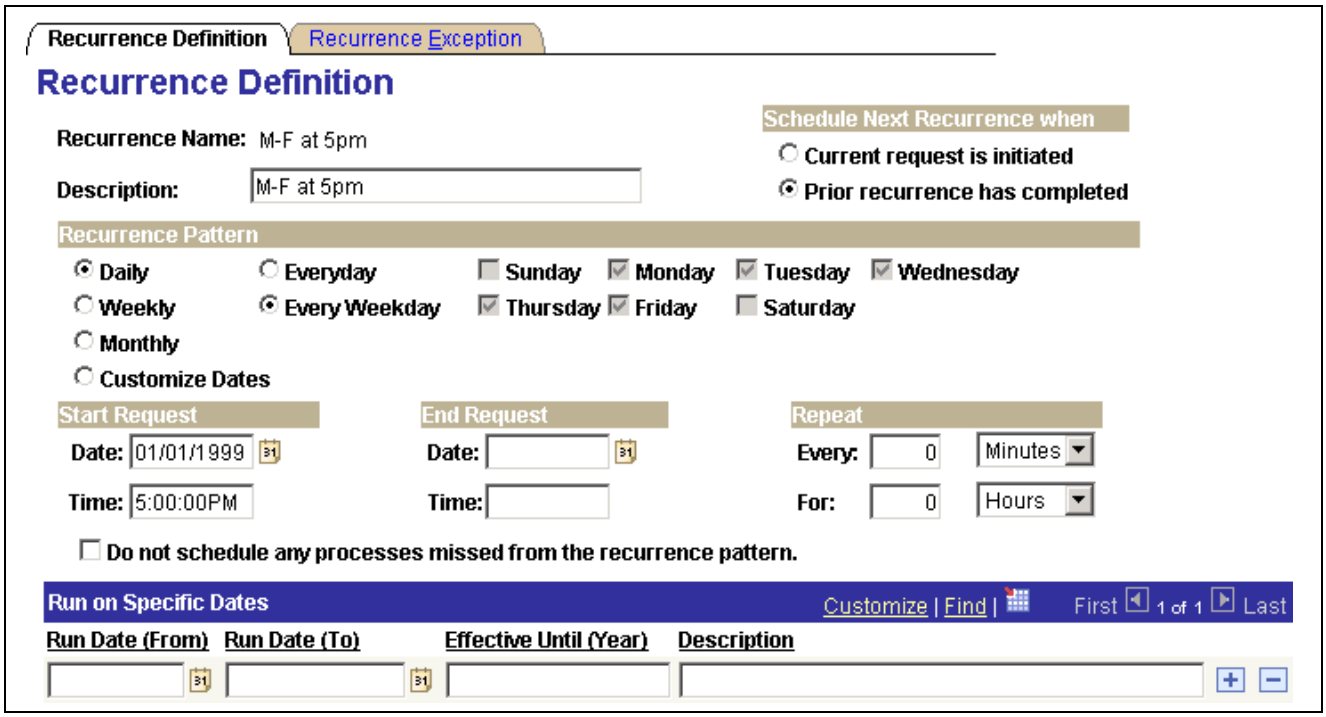
Recurrence definitions enable you to make sure that important process requests and jobs that you must run on a regular basis always run automatically in the background. This eliminates the possibility of anyone forgetting to submit a process request or submitting one incorrectly. When you specify a recurrence definition, the process request continues the cycle until you stop it manually.

Pages Used to Define Recurrence Definitions

Page Name	Object Name	Navigation	Usage
Recurrence Definition	PRCSRECURDEFN	PeopleTools, Process Scheduler, Recurrences, Recurrence Definition	Specify recurrence definitions.
Recurrence Exception	PRCSRECUREXEMPT	PeopleTools, Process Scheduler, Recurrences, Recurrence Exception	Enter specific dates to ignore during recurrence definition schedule.

Setting Up Recurrence Definitions

Access the Recurrence Definition page.



Recurrence Definition page

Recurrence Name This value appears in process and job definitions, so it should be readily identifiable.

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Description Enter a description for this recurrence definition. The default is the recurrence name.

Schedule Next Recurrence when

Current request is initiated and **Prior recurrence has completed** Specify when the next recurrence should start.

Note. When Prior recurrence has completed is selected, the definition is set to recur on success of the last instance. When the last instance runs to *Warning,* the scheduler treats the instance the same as *Success.*

Recurrence Pattern

The contents of this group box change, depending on the recurrence pattern that you select.

Note. When validating the next recurrence date on which a recurrence definition is set to run multiple times in a day, the system determines whether the calculated time for the day exceeds the maximum recurrence period for that day. For example, the definition is set up to run every hour for eight hours, beginning at 8:00 a.m. You select the definition for a process at 5:00 p.m. Due to the lateness of the day, the process cannot run every hour, eight times, so the process does not run until 8:00 a.m the following day.

Daily When you select this option, also select either *Everyday* or *Every Weekday.* The system automatically selects check boxes for the days Sunday through Saturday (every day) or Monday through Friday (every weekday). The check boxes are not available for entry to prevent changes.

Weekly Select check boxes for the days on which the process should run. For example, every *Friday* or every *Monday, Wednesday,* and *Friday.*

Monthly When you select this option, also select either *Day of Month* to enter a numeric date or *The* to enter a day of the month.

For example, select *Day of Month* and enter *15* to define the process to run on the 15th day of every month. Enter *31* to have the process run on the last day of every month. The system automatically adjusts for the varying number of days in each month.

Note. Typically, the value for the Day of Month field should match that of the Start Request Date field. For example, if you select *August 27, 2004* as the start request date, you must ensure that the value for the Day of Month field is *27* to define the process to run on the 27th day of every month. Otherwise, more than one recurrence run may occur.

If you select *The,* select either *1st, 2nd, 3rd, 4th,* or *Last.* Then select a specific day. For example, select *1st* and *Thursday* to have the process run on the first Thursday of every month.

Customized Dates Use this option when processes must run automatically on:

- A schedule that is not daily, weekly, or monthly (for example, quarterly).
- Specific dates.

When you select this option, add the specific run dates in the Run on Specific Dates group box.

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Start Request

Date and **Time**

Enter the effective date and time at which the recurrence definition should become active.

Do not schedule any processes missed from the recurrence pattern

Select to run recurring process only at the times specified. Leave blank to run recurring process in catch up mode.

Note. This option is used in situations such as when processes have been scheduled after the runtime, or when servers are down when the processes should have run.

Example 1: A process is scheduled to run daily at 10:00 a.m. but the recurrence isn't set up until 2:00 p.m. If this option is selected, the process will not run until 10:00 a.m. the following day. If this option is not selected, the process will run immediately to catch up for the missed 10:00 a.m. run.

Example 2: A process is scheduled to run hourly every day from 9:00 a.m.–3:00 p.m. The process runs successfully at 9:00 a.m., and then the server goes down. It is not recovered until 5:00 p.m. If this option is selected, the process will not run again until 9:00 a.m. the following day. If this option is not selected, the process will run six times to catch up for the missed runs scheduled for 10:00 a.m., 11:00 a.m., 12 noon, 1:00 p.m., 2:00 p.m., and 3:00 p.m.

End Request

Date and **Time**

Enter the date and time at which the recurrence definition should become inactive. Leave blank to keep the recurrence definition active indefinitely.

Repeat

Every and **For**

Indicate how many times the process repeats. For example, you might specify that the process runs every 10 minutes for an hour.

Run on Specific Dates

Use this group box when the recurrence pattern is *Customized Dates.*

Run Date (From)

Select the date on which you want this process to run.

Run Date (To)

To run the process every day for a specific period, select the last date of the period. Leave blank if the process is to run for only one day.

Effective Until (Year)

To end the schedule after a specific number of years, enter the four-digit year. Leave blank for the schedule to continue indefinitely.

Bi-Weekly (Every 14 Days) Recurrence Definitions

Use the following procedure to schedule a process to run biweekly (every 14 days) through a recurrence:

To set a recurrence definition for every 14 days (bi-weekly):

1. Select PeopleTools, Process Scheduler, Recurrences.
2. Select Add New Value and enter a recurrence name.

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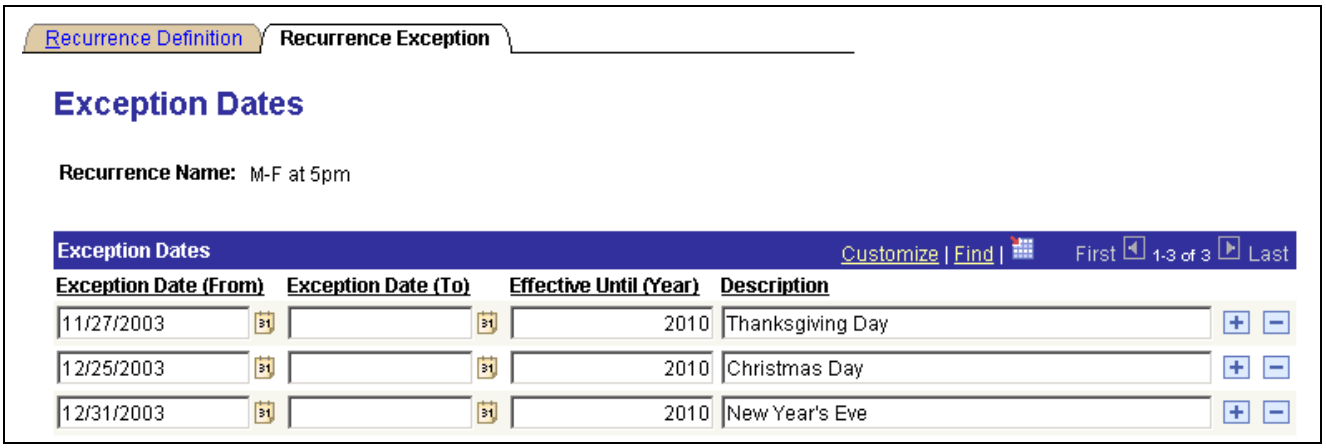
The Recurrence Definition page appears.

3. Select *Daily* as the recurrence pattern.
4. Go to the Repeat group box and set the Every value as *335 Hours* and the For value as *335 Hours* (number of hours in 14 days).

Setting Recurrence Exceptions

Access the Recurrence Exception page.



Recurrence Exception page

Use the Recurrence Exception page to enter specific days to ignore. For example, your schedule is set up to run every Monday. However, you don't want the report to run on holidays. When you enter the date as an exception, the system bypasses running the report on that day.

Exception Date (From) Select the date that you want this process to bypass.

Run Date (To) If you want the process to bypass every day for a specific period, select the last date of the period. Leave blank to bypass only one day.

Effective Until (Year) To end the exception after a specific number of years, enter the four-digit year. Leave blank for the schedule to continue indefinitely.

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CHAPTER 7

Setting Server Definitions

This chapter provides an overview of server definitions and discusses how to:

- Create server definitions.
- Define report nodes.
- Define daemon groups.
- Define batch timings.

Understanding Server Definitions

Server definitions are created to help balance your workload on the system by identifying certain servers to perform processes. You determine which processes you want to schedule through PeopleSoft Process Scheduler and identify servers that you want slated to run specific types of processes. For example, you might want to have one server called RPTSRV to manage all reports and another to manage all journal posting.

To ensure that jobs continue processing without interruption and that they run on time after a hardware or software failure hosting a PeopleSoft Process Scheduler Server Agent, you can automatically reassign requests to an available agent based on the value that is selected for the Redistribute Workload option.

Creating Server Definitions

This section discusses how to:

- Define servers.
- Set distribution options.
- Set operation times.
- Set notification options.
- Set daemon process options.
- Monitor a daemon process.

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Pages Used to Create Server Definitions

Page Name	Object Name	Navigation	Usage
Server Definition	SERVERDEFN	PeopleTools, Process Scheduler, Servers, Server Definition	Define server agent options.
Distribution	SERVERCONTENT	PeopleTools, Process Scheduler, Servers, Distribution	Set distribution options.
Operation	SERVEROPRTN	PeopleTools, Process Scheduler, Servers, Operation	Set operation times.
Notification	SERVERNOTIFY	PeopleTools, Process Scheduler, Servers, Notification	Set notification options.
Daemon	SERVERDAEMON	PeopleTools, Process Scheduler, Servers, Daemon	Set daemon process options.

Defining Servers

Access the Server Definition page.

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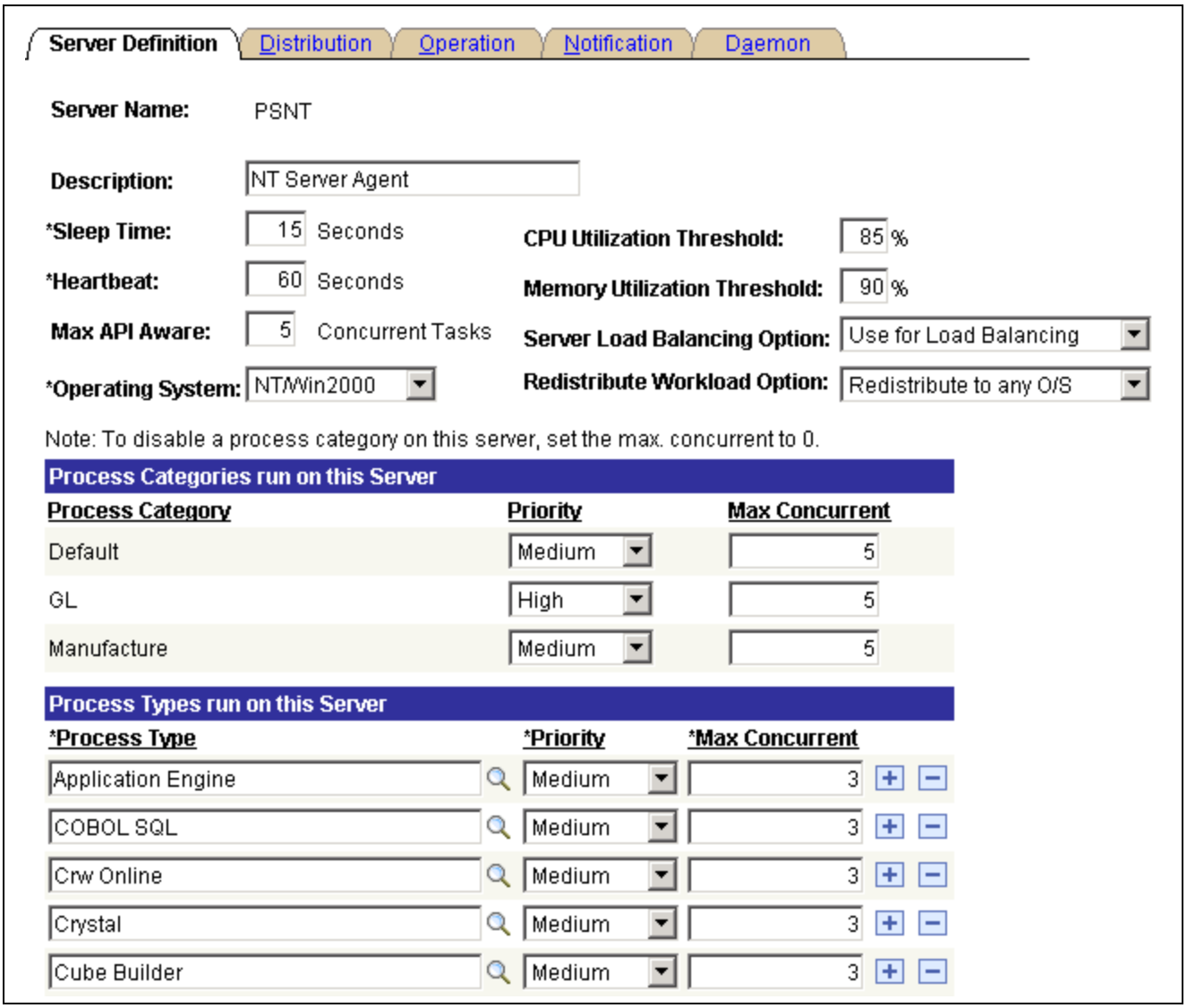

Server Definition page

Sleep Time

Enter a sleep time, in seconds, for this server.

The PeopleSoft Process Scheduler Server Agent should not run continuously. To control its activity, you can schedule a sleep time. This refers to the number of seconds that you want the agent to or wait, “sleep,” before it checks for queued process requests in the Process Request table. When it "wakes," it checks to see whether any processes have been queued in the Process Request table and need to be run on this process server.

For example, if you set the sleep time to *15* seconds and no process is queued, it wakes every 15 seconds and checks for queued processes. If it finds some, it processes as much as possible in 15 seconds and then goes back to sleep. If the work isn’t completed, it continues from the point at which it stopped for the next 15 seconds, and then goes back to sleep. The sleeping and polling process continues until a database or server administrator manually shuts down the agent.

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Note. Depending on the server platform, you typically don't set the sleep time at any lower than ten seconds. Between 15 and 30 seconds is generally recommended for most PeopleSoft applications. The maximum sleep time is 9,999 seconds (about two hours and twenty-six minutes).

Heartbeat

Enter a time interval, in seconds, for issuing a "heartbeat" message.

The PeopleSoft Process Scheduler Server Agent uses this value to track server status—running, down, or suspended. Each time the server issues a heartbeat message, it updates the last date and time stamp in the Server Status table with the current date and time. This prevents the database from accepting more than one PeopleSoft Process Scheduler Server Agent with the same name.

Max API Aware (maximum application programming interface aware tasks)

Enter the maximum number of API-aware tasks that can run concurrently on this server. An API-aware task is a process that properly updates its process status through the type-specific API that is provided, such as SQR, COBOL, and Crystal. It is the responsibility of the application process to update the Process Request table with status information.

Operating System

An error message appears if you attempt to start the server agent on an operating system that is different from the operating system specified here.

CPU Utilization Threshold (%)

Enter a percentage threshold. If the amount of CPU utilization exceeds this threshold, the scheduler's status will change to *Overload* and it will wait to launch any new processes.

The Process Monitor - Server List page displays the current CPU utilization and the threshold value that is entered here.

Memory Utilization Threshold (%)

Enter a percentage threshold. If the amount of memory utilization exceeds this threshold, the scheduler's status will change to *Overload* and it will wait to launch any new processes.

The Process Monitor - Server List page displays the current memory utilization and the threshold value that is entered here.

Server Load Balancing Option

Select *Use Option* or *Do Not Use Option.* When you select *Do Not Use Option,* the server takes a request only when the name of the server has been specified on the Process Request page or in any of the definition tables.

The distributor does not assign a request to this server when the server name in the request is blank.

Redistribute Workload Option

Select *Do Not Redistribute, Redistribute to any O/S,* or *Redistribute to Same O/S.* When you select the option to redistribute, another active agent can take a request that is originally assigned to this server.

When this agent detects that one of the other active agents is no longer active and the server is set up to allow work to be distributed, it takes any queued request that was assigned to the inactive agent and redistributes it, based on the available active agents.

Note. After creating the server definition, you must configure the PeopleSoft Process Scheduler Server using PSADMIN.

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Process Categories run on this Server

Priority Select *High, Medium* or *Low* to prioritize all processes belonging to the corresponding process category that are queued to run on a server.

Max Concurrent Enter the maximum number of the processes belonging to the corresponding process category that can run concurrently on this server. Max Concurrent is similar to Max API Aware, except that it controls how many processes of a process class can run concurrently on the server.

Warning! The processes that are contained in the categories must be of a type that are listed to run on the server. If the process type of a process is not listed, the process will not run.

Note. To disable a process category on this server, set the Max Concurrent value to *0*.

See Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining Process Categories, page 65.

Process Types run on this Server

Process Types Select the process types that the server should process. This enables server load balancing because you can direct particular processes to a specific server.

Priority Select *High, Medium,* or *Low* to prioritize all processes that are queued to run on a server.

Max Concurrent Enter the maximum number of the corresponding process class that can run concurrently on this server. Max Concurrent is similar to Max API Aware, except that it controls how many processes of a process class can run concurrently on the server.

Note. Each *Winword* instance that is initiated shares the common Winword template NORMAL.DOT. This may cause some instances to encounter an error message when multiple *Winword* instances are initiated. The Max Concurrent value for the process type *Winword* should be set to *1* as a precautionary step to prevent this problem.

Important! Do not use the Max Concurrent field on the Server Definition page to specify the maximum number of concurrent processes for a *PSJOB*. To configure the maximum concurrent parameter for any given job, use the Max Concurrent field on the Job Definition page.

See Also

Appendix A, "Using Process Request APIs," page 143

PeopleTools 8.49 Installation Guide for your database platform.

Setting Distribution Options

Access the Distribution page.

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Use the Distribution page to change the settings that the server uses to transfer output to Report Manager.

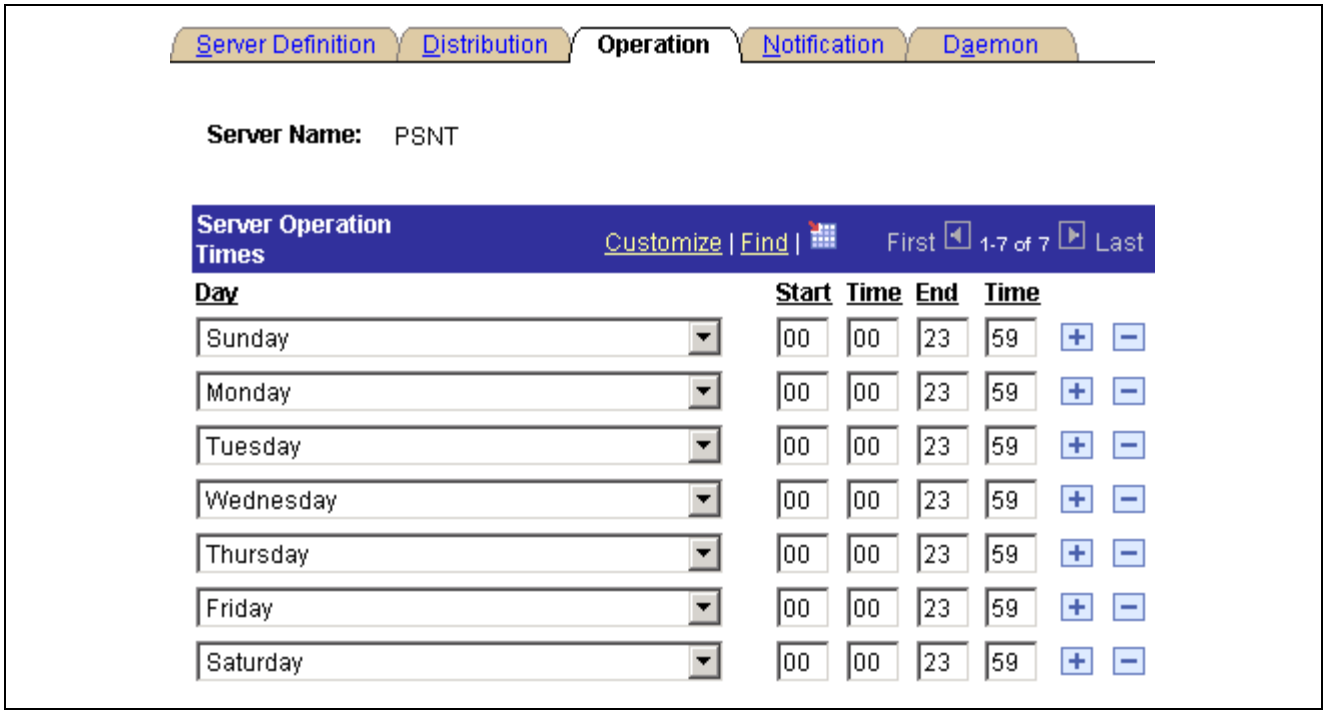
Distribution Node Name	Select the name of the report node.
Maximum Transfer Retries	Enter the number of times that the server can try to send a report to Report Manager before it quits.
Interval for Transfer Attempt	Enter the number of seconds that must pass before the server tries to transfer the report again.
Transfer System Files to Report Repository	Select to transfer system files to the Report Repository. For non-web output type, if this checkbox is cleared, the link to system files on the report list page will be disabled.

See Also

Chapter 2, "Understanding PeopleSoft Process Scheduler," PeopleSoft Process Scheduler Architecture, page 5

Setting Operation Times

Access the Operation page.



Operation page

Specify the days and times during which the server is operational. The preceding sample page shows a server that is operational 24 hours a day and seven days a week.

Setting Notification Options

Access the Notification page.

Use the Notification page to send messages to a group (role ID) or individuals (user ID) when an activity occurs with the server, such as an error or shutdown.

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Limit overload notification to every n **minutes**	Enter the schedule for sending notification email when the server is overloaded.
ID Type	Select *User* or *Role.*
Distribution ID	Select the actual user ID or the group of users.
Server Errors	Select to notify the user or group when an error occurs.
Down	Select to notify the user or group when the server shuts down.
Started	Select to notify the user or group when the server is started.
Suspended/Overloaded	Select to notify the user or group when activity on this server is suspended or overloaded.
Disabled	Select if you do not want to send notifications to the user or group.

Setting Daemon Process Options

Access the Daemon page.

A daemon process is an Application Engine process that runs continuously when PeopleSoft Process Scheduler is operational. It triggers other application engine processes based on the daemon group that is entered.

Daemon Sleep Time	Schedule a sleep time to control the activity of the process. Because the daemon is a process that runs in the background, it should not run continuously. A sleep time is the number of minutes for which the daemon process sleeps, or waits, before it checks for work. When it "wakes," it checks for processes that have been and need to be run on this process server.
Recycle Count	A cycle is the sequence of sleeping and working. The system automatically counts the number of times that it sleeps and works. When it reaches the recycle count value, the daemon process reboots itself.

Monitoring a Daemon Process

Use the Process Monitor to monitor messages that are issued directly by the daemon and messages that are issued by the application engine programs that the daemon initiates.

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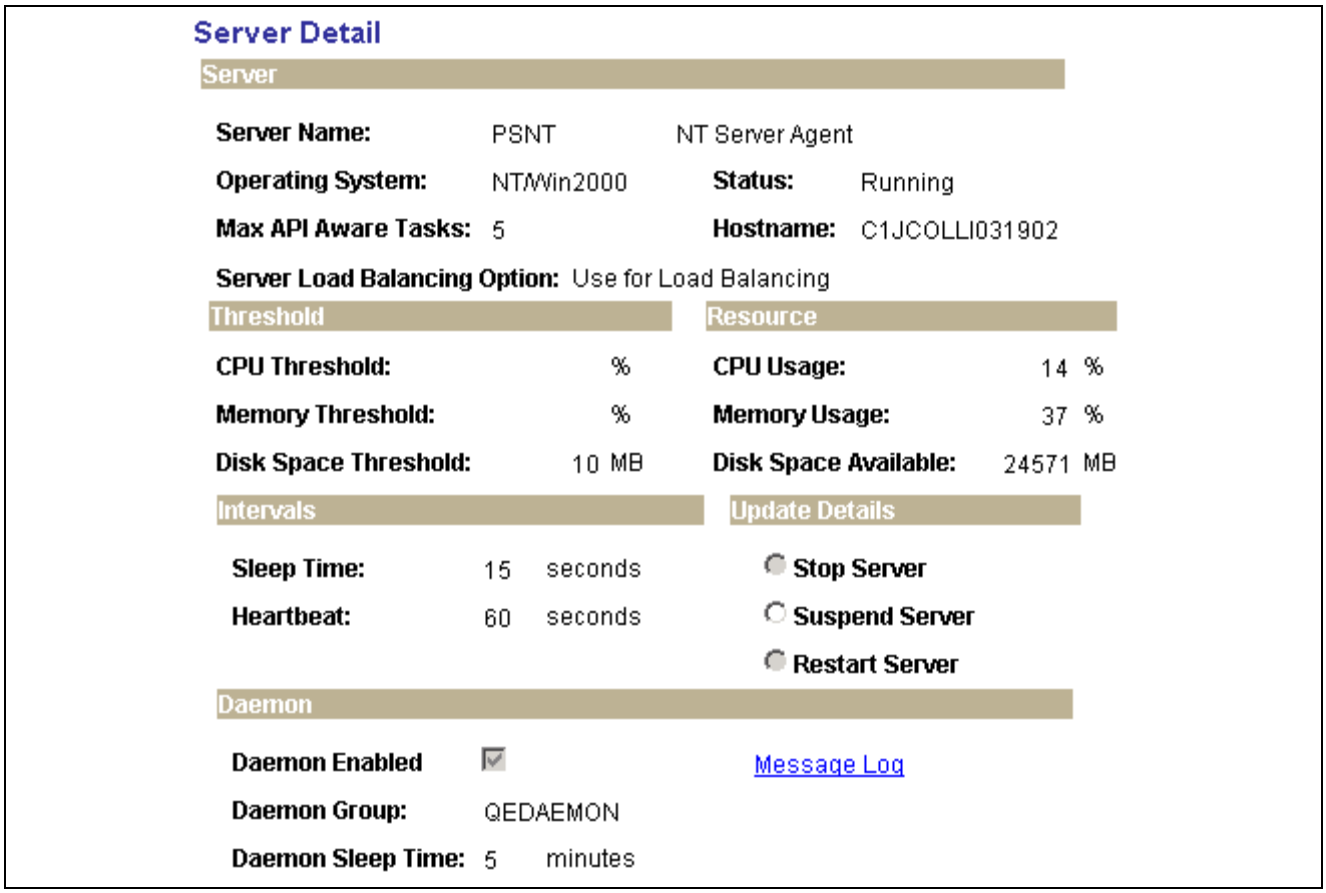

Server Detail page

To monitor a daemon process:

1. Select PeopleTools, Process Scheduler, Process Monitor.
2. Select the Server List page.
3. Click the Details link that is associated with the required process.

   The Server Detail page appears, displaying information about the server and daemon group.
4. Click the Message Log link, located in the Daemon group box.

   The Message Log page appears. A Delete button is located on this page, but it remains hidden when the daemon is running. When the Delete button appears, click it to delete all of the messages in the log.
5. Click the Return button to return to the Server Detail page.
6. Click the Cancel button to return to the Server List page.

   Click the OK button if you have stopped, suspended, or restarted the server.

See Also

Chapter 4, “Using Process Monitor,” Viewing Server Details, page 36

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Defining Report Nodes

This section provides an overview of report distribution nodes, lists common elements, and discusses how to:

- Define HTTP distribution nodes.
- Define File Transfer Protocol (FTP) distribution nodes.
- Define XCOPY distribution nodes.

Understanding Report Distribution Nodes

The report distribution node defines how your reports are moved to the Report Repository, where you can view them from Report Manager. Reports are moved using XCOPY, FTP, or HTTP and HTTPS, depending on the type of server that you are using.

Before transferring the files to the Report Repository, determine which transfer protocol to use.

Setup	Transfer Protocol
Both PeopleSoft Process Scheduler and web server on Microsoft Windows 2000.	Use XCOPY, FTP, or HTTP/HTTPS. If FTP information is not specified, PeopleSoft Process Scheduler performs an XCOPY. **Note.** For XCOPY, the Report Repository directory must be a shared drive on the network.
PeopleSoft Process Scheduler on Microsoft Windows 2000 and a UNIX web server.	Use FTP or HTTP and HTTPS.
PeopleSoft Process Scheduler on OS390.	Use FTP or HTTP and HTTPS.

Note. If you're using FTP, the FTP daemon must have been set up on the web server.

Behavior of Shared Fields

The following fields are shared between the Http Distribution Node page and the FTP/XCopy Distribution Node page:

- URL
- Description
- Operating System
- Login ID
- Password
- Confirm Password

When you enter information on one page, the information also appears in the shared fields on the other page, but the fields are unavailable.

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If you complete the information for one protocol and then change your selection to another protocol, the shared fields become active on the other page and become unavailable on the original page. Upon saving, the system automatically clears fields that are not shared.

Common Element Used in This Section

URL Enter the URL of the web server with this format:

http://<machine name>:<port number>/psreports/<PeopleSoft site name>

Replace <machine name> with the name of the machine.

Pages Used to Define Report Nodes

Page Name	Object Name	Navigation	Usage
Http Distribution Node	PRCSDISTNODE2	PeopleTools, Process Scheduler, Report Nodes, Http Distribution Node	Enter report node information to transfer reports to the Report Repository using http transfer protocol.
FTP/XCopy Distribution Node	PRCSDISTNODE	PeopleTools, Process Scheduler, Report Nodes, FTP/XCopy Distribution Node	Enter report node information to transfer reports to the Report Repository using FTP/XCopy transfer protocol.

Defining HTTP Distribution Nodes

Access the Http Distribution Node page.

Note. PeopleSoft strongly recommends the use of web server basic authentication when you are configuring the SchedulerTransfer servlet that is used by the report distribution system. Please see the install guide for more details.

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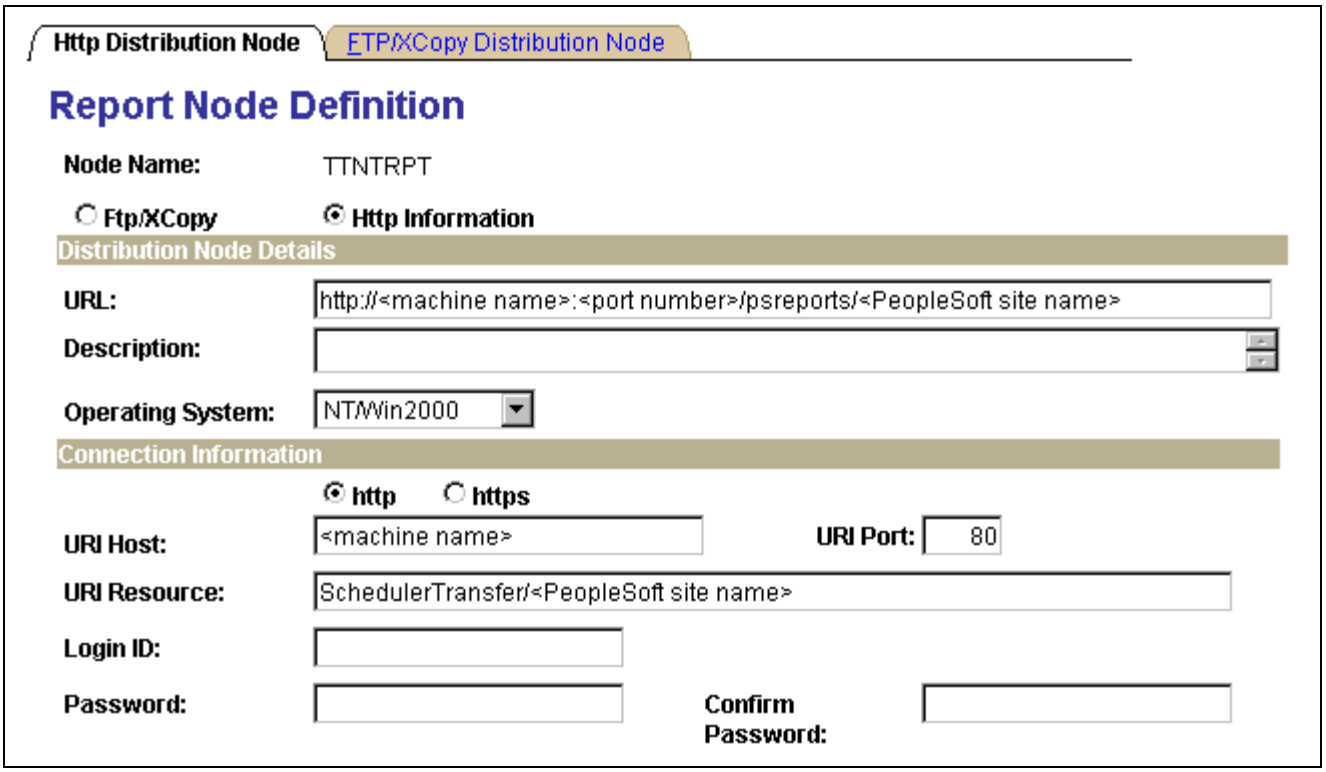

Http Distribution Node page

http and https Select the type of node connection. The default is http.

URI Host Enter the machine name. If you are using PeopleSoft Process Scheduler for UNIX or OS390, you must enter either the fully qualified name (for example, *ADHP04.peoplesoft.com* or the IP address.

Warning! If you specify the Auth Token Domain name during the PeopleSoft Pure Internet Architecture installation, you must include a fully qualified domain name on the URL Host instead of the IP address. Otherwise, the Distribution Agent will not pass authentication.

URI Port Enter the port number. This must match the port number of the web server. The defaults are *80* for HTTP and *443* for HTTPS.

Note. If you change a port number, you lose the default values for both protocols.

URI Resource Enter *SchedulerTransfer/<PeopleSoft site name>*.

Login ID, Password, and **Confirm Password** These are required only when the web administrator has set up basic authentication on the web server.

Save Click to save your entries. To add additional distribution nodes, click the Add button to return to the search page.

File Chunking

The Distribution Agent automatically breaks up a large file and sends it in multiple HTTP posts. For example, a 150 MB file can be sent in 10 × 15 MB, 15 × 10MB, and so on.

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To accommodate different hardware configurations (memory) and dissimilar Java Virtual Machine (JVM) tuning, two new parameters have been added to the PeopleSoft Process Scheduler section of the configuration file (prcs.cfg):

- Chunking Threshold.
- File Chunk Size.

These parameters enable clients to determine the most favorable configuration for their systems by trading off between the number of hits to the web server when sending small chunks and memory usage due to sending large chunks.

See Also

Chapter 9, "Managing PeopleSoft Process Scheduler," page 125

Defining FTP Distribution Nodes

Access the FTP/XCopy Distribution Node page.

Home Directory Enter the directory that is specified during the installation of PeopleSoft Pure Internet Architecture as the Report Repository.

Note. The FTP user ID must have write access to this directory.

FTP Address Enter the machine name or TCP/IP information for the Report Repository.

FTP ID, and **Password** Enter the FTP user ID and password.

Defining XCopy Distribution Nodes

Access the FTP/XCopy Distribution Node page.

Home Directory, FTP Address, Password, FTP ID, and **Confirm Password** Leave blank.

Network Path Enter the universal naming convention (UNC) path that points to the Report Repository, for example:

\\<*machine name*>*psreports*

Defining Daemon Groups

Use the Daemon Group page to enable a daemon process for the selected server.

To define a daemon group:

1. Select PeopleTools, Process Scheduler, Daemon Group.
2. Select the Add New Value page.
3. Enter a new daemon procedure group name.
4. Click the Add button.

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The Daemon Group page appears.

5. Click the Load All Programs button to load all available application engine programs, or select a program to add.

   Programs must be marked as daemon in their properties to be available.

6. Click the Save button.

Defining Batch Timings

This section provides an overview of batch timings and discusses how to define batch timings.

Understanding Batch Timings

Batch Timings reports are provided so that you can monitor the performance of your application engine programs. The Process Scheduler - Batch Timings page applies to the Statement Timings data that is stored in the (table) option.

For the Batch Timings feature to record data, you must enable it using the Configuration Manager Trace tab. In the Application Engine group, select the Statement Timings (table) option.

Note. Whenever you run an application engine program and the Statement Timings trace options are enabled, you can always view the batch timings results using the Process Monitor.

See Also

Appendix D, “Using the PSADMIN Utility,” page 171

Page Used to Define Batch Timings

Page Name	Object Name	Navigation	Usage
Batch Timings	BANRUNCNTL	PeopleTools, Process scheduler, Batch Timings	Monitor the performance of application engine programs.

Defining Batch Timings

Access the Batch Timings page.

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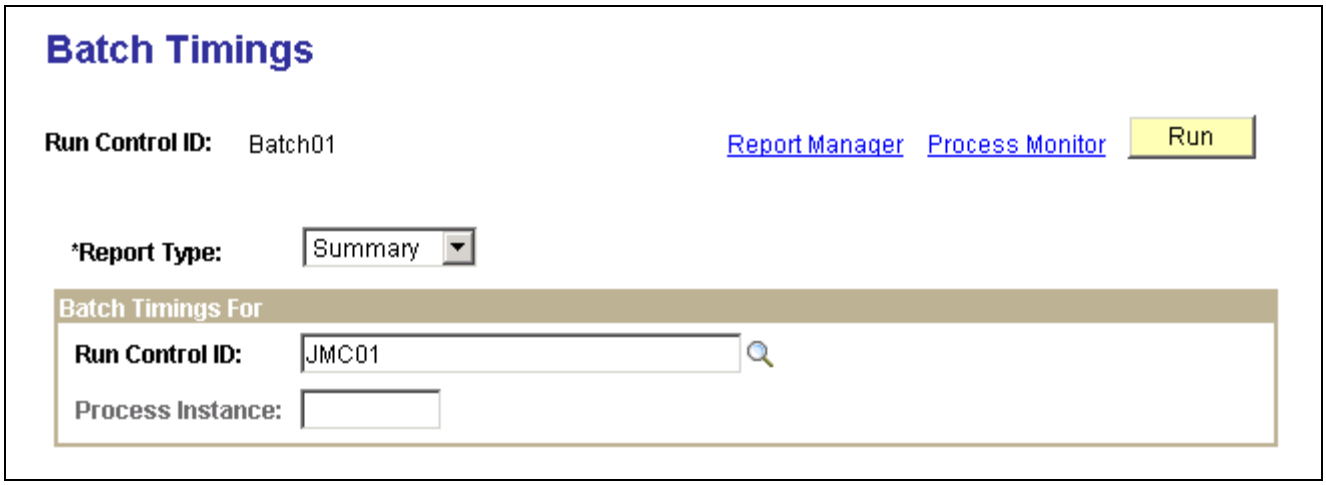

Batch Timings page

Run Control ID Displays the run control ID that is used to run the Batch Timings report.

Report Type Select the type of report that you want to generate, based on the data that is stored in the batch timings table.

Summary: Provides a report of all of the runs that are initiated by a run control ID. The Process Instance field is unavailable when this option is selected.

Detail: Provides a report of a specific run or process instance of an application engine program. The Run Control ID field is unavailable when this option is selected.

Batch Timings For

Based on the report type that you selected, enter the run control ID or process instance.

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CHAPTER 8

Defining Jobs and JobSets

This chapter provides an overview of jobs and JobSets, and discusses how to:

- Create job definitions.
- Define schedule JobSets.
- Monitor jobs.

Understanding Jobs and JobSets

This section lists common elements and discusses jobs and JobSets.

Common Elements Used in This Chapter

Schedule Name	Displays the name of the JobSet definition schedule that is assigned when adding a new value.
Job Name	Displays the name of the job definition to be scheduled. The Job Name can have a maximum length of 8 characters.
	Note. Although you can create a job with a job name that exceeds 8 characters, you will encounter an error message when you attempt to run the job.
JobSet Report	Click to display a hierarchical view of the processes within the JobSet.
Report Manager	Click to access the Report Manager module to view report results.
Process Monitor	Click to access the Process Monitor to view the status of job requests.

Jobs and JobSets

PeopleSoft Process Scheduler enables you to schedule one or more processes as a group. In this context, *job* describes this type of process group.

A process is a single task, program, or routine, such as a Structured Query Report (SQR) report or COBOL program that runs either on the client or on a server. A job consists of one or more processes of the same or different types that are submitted as a unit and can run either in series or parallel. They require the scheduling support that only a server environment can offer and all processes must be API-aware.

Scheduled *JobSets* enable you to schedule a recurring job using a schedule JobSet definition. Each process within a job can be altered to set up its own output destination options or set the operating system where the process is to be scheduled.

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Features that are available when scheduling JobSets that are not available with recurring jobs are:

- You can have different run control ID for each process within a job.
- Job items can be run from different operating systems or servers.
- Job items can run at specific times.
- You can change attributes to any job items.

See Also

Chapter 8, “Defining Jobs and JobSets,” Defining Scheduled JobSets, page 116

Appendix A, “Using Process Request APIs,” page 143

Creating Job Definitions

This section lists common elements and discusses how to:

- Define jobs.
- Set job definition options.
- Define distribution lists.
- Define notifications.

Common Elements Used in This Section

ID Type	Select a role or user ID.
Distribution ID	Enter the actual user ID or the name of the role.

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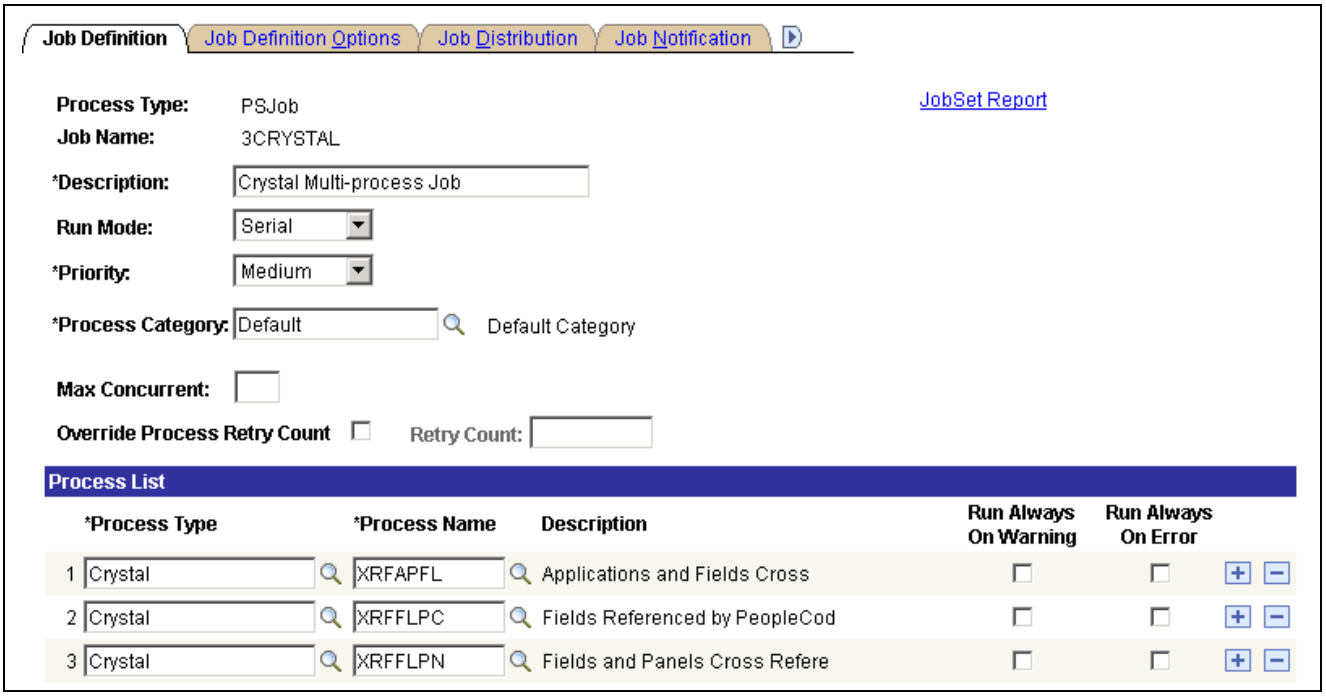
Pages Used to Create Job Definitions

Page Name	Object Name	Navigation	Usage
Job Definition	PRCSJOBDEFN	PeopleTools, Process Scheduler, Jobs, Job Definition.	Define a job definition.
Job Definition Options	PRCSJOBDEFN2	PeopleTools, Process Scheduler, Jobs, Job Definition Options.	Define options for jobs that you run on a regular basis.
Job Distribution	PRCSJOBNTDIST	PeopleTools, Process Scheduler, Jobs, Job Distribution.	Set up a distribution list for jobs, based on role or user ID.
Job Notification	PRCSJOBNOTIFY	PeopleTools, Process Scheduler, Jobs, Job Notification.	Set up a list of users to be notified if a process encounters an error, warning, successfully completes, or is disabled.
Job Messages	PRCSJOBMESSAGE	PeopleTools, Process Scheduler, Jobs, Job Messages.	Specify the messages that are sent when the Job Notification feature is used.

Defining Jobs

Access the Job Definition page.



Job Definition page

Before creating a job definition, define the individual processes that are included in the job.

Run Mode *Serial:* Select to run each process in the job sequentially.

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Parallel: Select if you don't have a requirement for the processes to run in a certain order. If you select this option, Run Always check boxes for *all* of the processes are selected.

Priority Select *High, Medium,* or *Low.* PeopleSoft Process Scheduler initiates the job with the highest priority first.

Process Category Select a process category for this job.

Note. The process category *Default* is delivered with your system. If this is the only category available, all job definitions are automatically assigned to this category. If additional process categories are created, this field value is blank.

Max Concurrent Enter the maximum number of occurrences of this job that can be active at one time across all process schedulers. The default value is unlimited (blank).

Jobs exceeding the maximum will appear on the Process Monitor with a run status of *Blocked.* As active occurrences complete, blocked jobs are released and scheduled.

Override Process Retry Count Select to override the process definition retry count for the individual processes contained in this job.

Selecting the check box activates the Retry Count field.

Retry Count Enter the number of times the system should attempt to restart this job.

JobSet Report Click to go to the JobSet Report page.

See Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining Process Categories, page 65 and Chapter 8, "Defining Jobs and JobSets," Displaying a Hierarchical View of Processes in a JobSet, page 119.

Process List

This group box lists all processes and jobs that are associated with this job. To add additional rows or processes, click the Insert Row button that precedes the location where you want the new row.

Process Type Select the processes that you want in the order that you want them to run.

Run Always on Warning Select to enable the next process in the queue to run, regardless of whether the process situated immediately before this process ran to warning.

Run Always on Error Select to enable the next process in the queue to run, regardless of whether the process situated immediately before this process ran to error.

The Run Always feature only works if the process that is selected to run is always the next process in the queue after the process that ran to error or warning. For example:

A serial job contains three processes. The third process in the queue is selected to Run Always on Error. If the first process in the queue runs to error, the third process will not run because the system looks only to see if the next process in the queue is selected. Process #2 is not selected so the job runs to *No Success.*

Note. After completing this page, select a server name and recurrence name on the Job Definition Options page.

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Procedure for Run Always Settings

This table shows the procedure for the Run Always on Warning and Run Always on Error settings:

Run Always on Warning	Run Always on Error	Process Status	Job Status	Next Process Scheduled
0	0	Warning	Warning	No
0	0	Error	Error	No
1	0	Warning	Warning	Yes
1	0	Error	Error	No
1	1	Warning	Warning	Yes
1	1	Error	Error	Yes

Run Always - Functionality Rules

Process Scheduler uses the following rules when either of the Run Always check boxes are selected for a PSJob contained within another PSJob.

Note. The Run Always check box must be selected for individual items within a PSJob. The items do not automatically inherit the selection if the check box is selected for the PSJob.

If a serial job (JOB A) contains another job as an item (JOB B), the Run Always check box is selected for JOB B, and the item that precedes JOB B receives a status of either *Error* or *No Success.* Process Scheduler proceeds using the following rules:

- If JOB B is also a serial job, then the first item in this job is changed to *Queued.*

  If this first item encountered an error or warning during processing and received a status of either *Error, Warning,* or *No Success,* the next item in the list is changed from *Pending* to *Queued* if the Run Always check box is selected for that item. If no item in JOB B has the Run Always check box selected, then JOB B will receive an *Error* or *Warning* status when the first item did not run successfully.
- If JOB B is a parallel job, then the status for all items in JOB B is changed to *Queued* and will be run by Process Scheduler.
- If the status of JOB B is *Error* or *Warning,* the JOB A item listed after JOB B is only released by Process Scheduler if its Run Always check box is selected.

  If the check box is not selected, Process Scheduler will consider JOB A complete and no other items in JOB A will be run. Process Scheduler will update the status of JOB A to *Error* or *Warning.*

Setting Job Definition Options

Access the Job Definition Options page.

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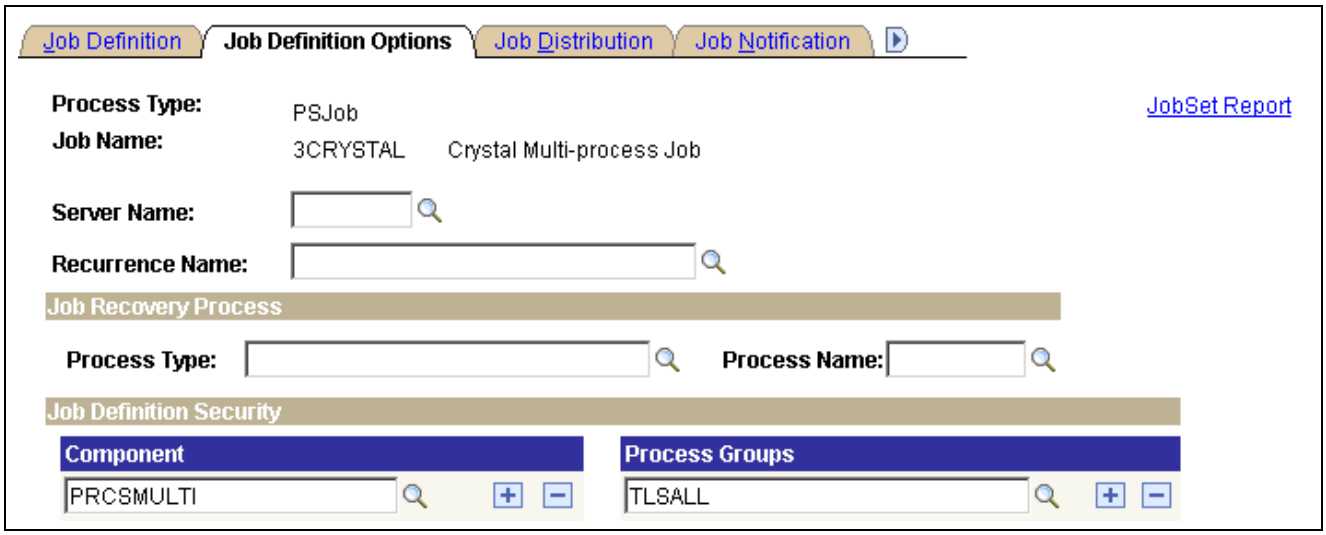

Job Definition Options page

Use the Job Definition Options page to define options for jobs that you run on a regular basis.

Server Name Enter a server name if you want to require this job to run on a specific server only. If you leave this field blank, the job finds an available server on which to run, based on the process class.

Recurrence Name (Optional) Select a recurrence name for running at previously defined intervals.

Job Recovery Process

Process Type and **Process Name** Enter the type and name of an optional process that can be run in case this job runs to an error. The job will not restart until the system recovery optional process entered here has run.

Job Definition Security

Component To add new rows, click the Add button. This makes the job definition a member of that component. Adding a component to a job definition causes that job definition to appear on the Process Scheduler Request page when you select File, Run within that component group, if you have security to run the process.

Process Groups Select an existing group, or add a new class by entering a unique process group. To add new rows, click the Add button. A job definition may be a member of multiple process groups. Process Groups are assigned in PeopleSoft Security Administrator. This enables you to specify the process requests that classes of users can run.

Defining Distribution Lists

Access the Job Distribution page.

Use the Job Distribution page to set up a distribution list for jobs, based on role or user ID.

Note. You must specify an output type of *Web, Window,* or *Email* for the distribution list to be accepted when the PSJob is created

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Override Distribution List from Processes in Job

Select to use the distribution IDs from the job definition. If the check box is cleared distribution IDs from both the job and process definitions are used.

Job Within Job: The Override option for the main job is ignored. Process Scheduler uses the distribution IDs from the PSJob definition. If the check box is cleared, distribution IDs from both the PSJob and process definitions are used.

Note. When the Override option is selected for the main job, Process Scheduler uses the distribution IDs from the main job definition and ignores only the distribution IDs from the individual process definitions within the main job.

Defining Notifications

Access the Job Notification page.

Use the Job Notification page to set up a list of users to be notified if a process encounters an error, warning, successfully completes, or is disabled. Set up the list based on role or user ID.

Override Notification List from Processes in Job List

Select to notify only users that are specified in the job definition. If cleared, users specified in the job *and* process definitions are notified.

Job Within Job: Select to notify only users that are specified in the main job definition. If cleared, users specified in the main job, jobs within, and process definitions are notified.

Important! The Override option is ignored for any job listed within the main job.

On Error

Send notification to the Distribution ID if there is an error in the process.

On Warning

Send notification to the Distribution ID if there is warning in the process.

On Success

Send notification to the Distribution ID when the process successfully completes.

Disabled

Select if you do not want to send notifications to users specified on this line.

Setting Job Notification Messages

Access the Job Messages page.

Use the Job Messages page to configure the messages that are sent when the Job Notification feature is used. You can specify messages for successful completion, errors, and warning.

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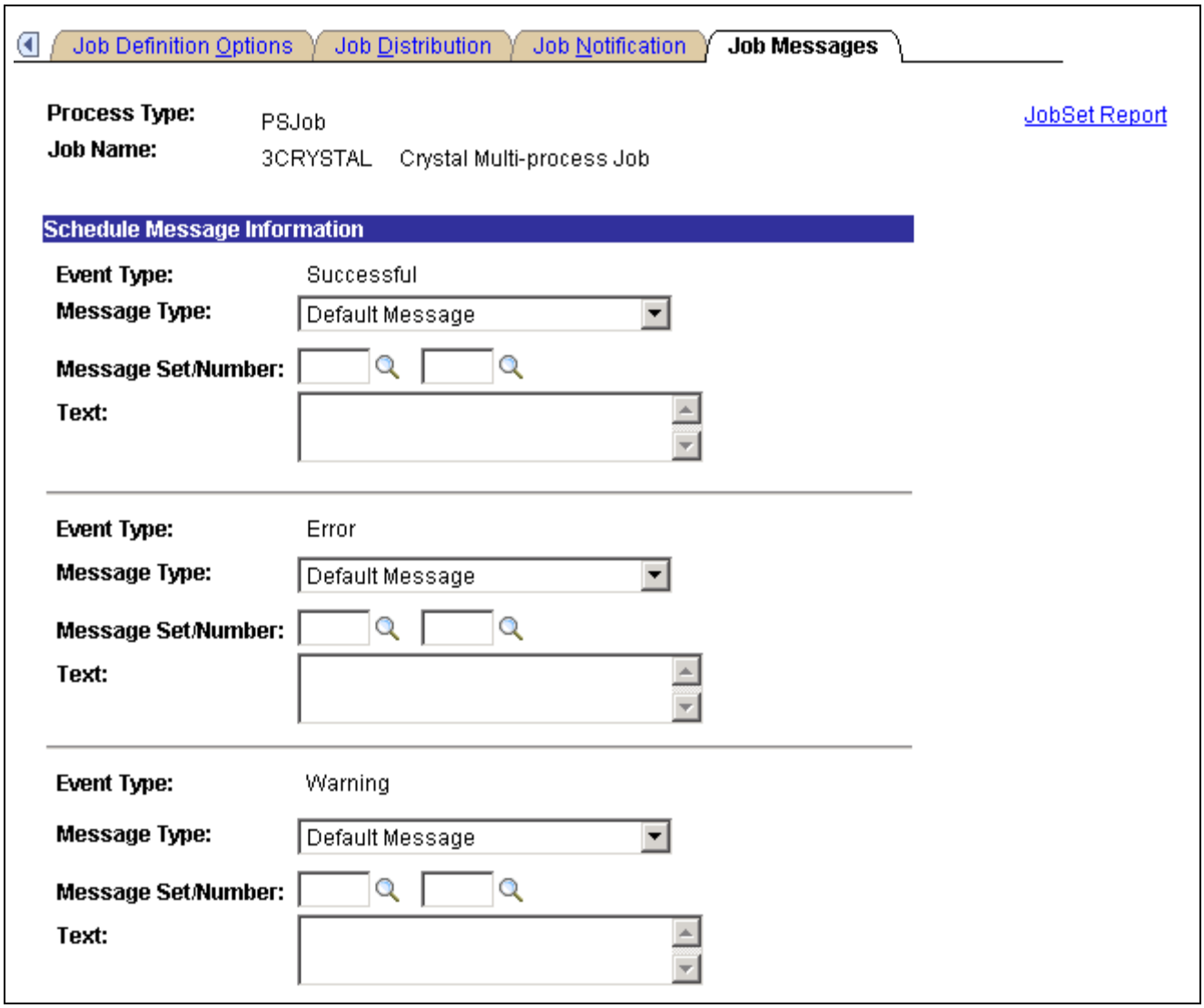

Job Messages page

Message Type Select the message type:

Default Message: Use the basic default message.

Customized Message: Create your own message.

Message Catalog: Select a message from the Message Catalog.

Message Set/Number Select the Message Catalog set and number of the message. Complete these fields when the message type is *Message Catalog.*

Text Enter the message text when the message type is *Customized Message.*

Defining Scheduled JobSets

This section provides an overview of schedule JobSets and discusses how to:

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- Create scheduled JobSet definitions.
- Display a hierarchical view of processes in a JobSet.
- Set options for JobSet items.
- View scheduled JobSet requests.

Understanding Scheduled JobSets

PeopleSoft Process Scheduler provides the ability to define and set up interdependencies among application jobs and processes. This enables the user to schedule jobs in accordance with the logical business model. For example, in PeopleSoft HRMS, all employees' time cards can be tabulated in PeopleSoft Time and Labor before releasing the human resources (HR) payroll jobs.

Pages Used to Define Scheduled JobSets

Page Name	Object Name	Navigation	Usage
Schedule JobSet Definition	SCHDLDEFN	PeopleTools, Process Scheduler, Schedule JobSet Definitions, Schedule JobSet Definition	Set JobSet scheduling options.
JobSet Report	SCHDL_RPTOPT	Click the JobSet Report link on the Schedule JobSet Definition, Schedule Job Items, or Schedule JobSet Requests page.	Display a hierarchal view of processes in a JobSet.
Schedule JobSet Items	SCHDLITEM	PeopleTools, Process Scheduler, Schedule JobSet Definitions, Schedule JobSet Items	Specify options for individual jobs and processes.
Schedule JobSet Requests	SCHDL_RQST_LIST	PeopleTools, Process Scheduler, Schedule JobSet Definitions, Schedule JobSet Requests	View the status of each process request contained in the selected JobSet without using Process Monitor.

Creating Scheduled JobSet Definitions

Access the Schedule JobSet Definition page.

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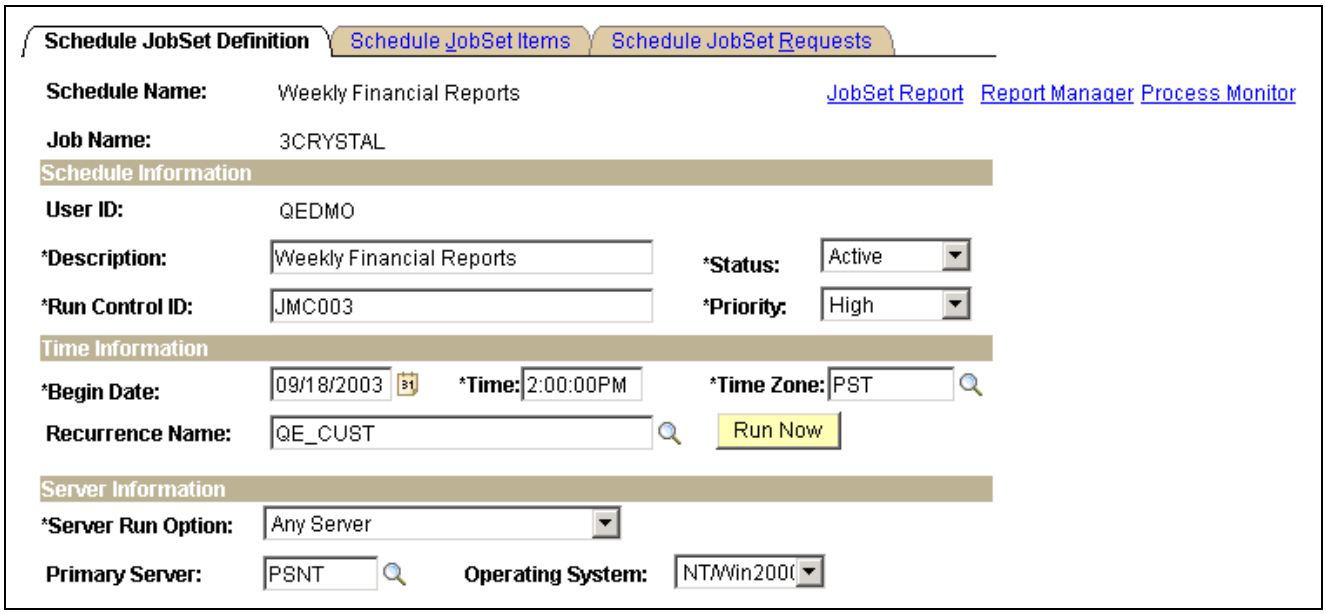

Schedule JobSet Definition page

Use the Schedule JobSet Definitions page to set JobSet scheduling options. It is recommended that you use this page rather than the Process Scheduler Request page.

User ID Displays the user ID of the person entering the information.

Description (Required) Enter a description for the JobSet schedule. The default is the schedule name.

Status Select *Active, Completed,* or *Inactive* (default).

To schedule the JobSet, you must enter and save changes, change the status to *Active,* and then save. Once scheduled, the status is *Completed.*

Run Control ID (Required) Enter the run control ID.

Priority (Required) Select *High, Medium* (default), or *Low.*

Begin Date (Required) Enter the date on which the JobSet should begin to run. The default is today's date.

Time (Required) Enter the time at which the JobSet should run. The default is the current time.

Time Zone (Required) Select the time zone in which the job will run. For instance, you might be in Eastern Standard Time (EST) and schedule the job to run in Pacific Standard Time (PST). The default is the user's time zone.

Recurrence Name Select a recurrence name for running at previously defined intervals.

Note. This name does not display on the Process Monitor - Process Detail page. Use the Schedule JobSet Requests page to view the next scheduled start date and time based on the recurrence definition.

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Important! To eliminate the possibility of duplicating JobSets, you must configure the system with a master scheduler. The task of scheduling JobSets has been removed from a standalone PSPRCSRV, and is strictly the responsibility of the master scheduler. If a master scheduler is not configured, the recurrence setting will be ignored.

Run Now Select this button to run the process immediately.

Important! The Begin Date and Time fields are populated by default with the current date and time. To run the JobSet immediately, leave the default values in these fields, activate the JobSet, and select Save. Do not click the Run Now button, as this will also trigger a process request. The Run Now button should only be used if the Begin Date and Time values are changed to a future date and time and you also want the process to run immediately.

Server Run Option (Required) Select the server on which this job should run. Select *Any Server* (default), *Primary Server, Specific OS,* or *Specific Server.*

Primary Server Select the required server if the Server Run Option value is *Primary Server* or *Specific Server.*

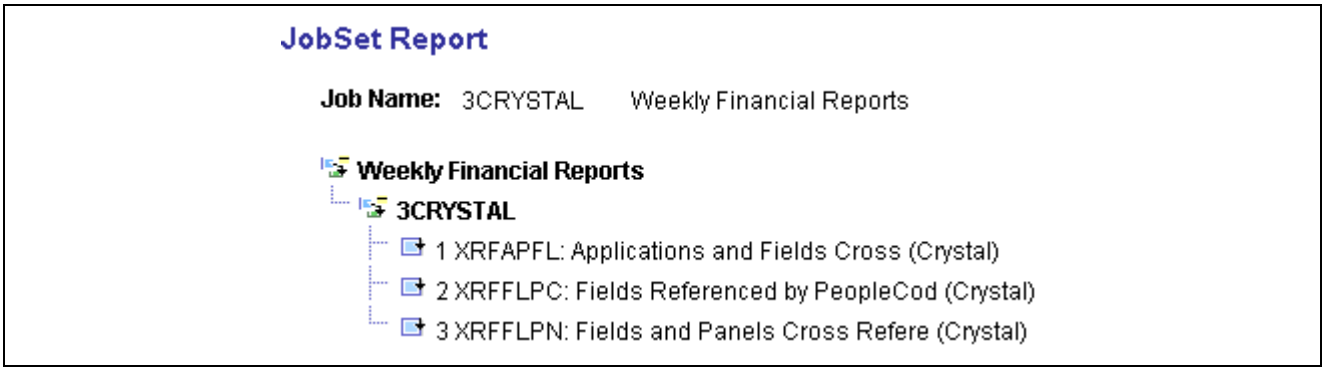
Operating System Select the required operating system if the Server Run Option value is *Any Server* or *Specific OS.* The default is *Any Server.*

Displaying a Hierarchical View of Processes in a JobSet

Select the JobSet Report link to access the JobSet Report page.

Select the check boxes for the items you want to display. Select from:

- Show Job Tree.
- Show Distribution List.
- Show Notification List.
- Show Message List.
- Show Parameters List.



JobSet Report - Show Job Tree page (1 of 3)

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Job Name: 3CRYSTAL - Crystal Multi-process Job

Mode: Serial

Seq.	Process Name	Description	Process Type	Run Control ID	Type	Output Format	Destination	Server Option	Run Time
1	XRFAPFL	Applications and Fields Cross	Crystal	JMC003	Web	HTML Documents (*.htm)	Distribution List	Any Server	
		Parameter: -CTMICROSFT -CDQ844112B -COQEDMO -CP%OPRPSWD% -I%INSTANCE% -RP"XRFAPFL" -OT2 -OP%OUTDEST% -LG -OF1 -ORIENTL **Distribution List:** **Type** **Name** User QEDMO							
2	XRFFLPC	Fields Referenced by PeopleCod	Crystal	JMC003	Web	HTML Documents (*.htm)	Distribution List	Any Server	
		Parameter: -CTMICROSFT -CDQ844112B -COQEDMO -CP%OPRPSWD% -I%INSTANCE% -RP"XRFFLPC" -OT2 -OP%OUTDEST% -LG -OF1 -ORIENTL **Distribution List:** **Type** **Name** User QEDMO							

JobSet Report - Show Job Tree page (2 of 3)

3	XRFFLPN	Fields and Panels Cross Refere	Crystal	JMC003	Web	HTML Documents (*.htm)	Distribution List	Any Server	
		Parameter: -CTMICROSFT -CDQ844112B -COQEDMO -CP%OPRPSWD% -I%INSTANCE% -RP"XRFFLPN" -OT2 -OP%OUTDEST% -LG -OF1 -ORIENTL **Distribution List:** **Type** **Name** User QEDMO							

JobSet Report - Show Job Tree page (3 of 3)

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Setting Options for JobSet Items

Access the Schedule JobSet Items page.

Schedule JobSet Items page

If the output options were specified at the main JobSet level, these options apply to all items of that job. You can specify options for individual jobs and processes on this page. These options override the output options that are specified for the parent job.

This page lists each individual process that is contained in the jobs and JobSet and displays a hierarchical view of the processes.

This section discusses how to specify:

- General settings.
- Output settings.
- Server settings.
- Time settings.
- Other settings.

Specifying General Settings

To specify individual general settings:

1. Select the General Settings tab.
2. Enter run control IDs for the required jobs and processes.

Specifying Output Settings

To specify individual output settings:

1. Select the Output Settings tab.
2. Select the output type and format for the required jobs and processes.
3. Click the Distribution link for required processes to enter distribution detail information.

   You must specify an output type of *Web, Window,* or *Email* for the distribution list to be accepted when the PSJob is created

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Important! The distribution list is based solely on the information specified for individual processes within the JobSet. Do not enter distribution information in the job header. If the JobSet has no distribution lists, the requester will be the only recipient of the reports.

Specifying Server Settings

To specify individual server settings:

1. Select the Server Settings tab.
2. Select the server option for the required jobs and processes:
   - *Any Server*
   - *Primary Server*
   - *Specific OS*
   - *Specific Server*
3. Select the required server if the server option is *Primary Server* or *Specific Server.*
4. Select the required operating system if the server option is *Any Server* or *Specific OS.*

Note. A Master Scheduler is required to be up and running if you want to distribute the workload across multiple Process Schedulers.

See Chapter 10, "Managing PeopleSoft Master Scheduler Servers," How to Use Multiple Master Schedulers, page 137.

Specifying Time Settings

To specify individual time settings:

1. Select the Time Settings tab.
2. Select the runtime option for the required jobs and processes:
   - *Job Rule Time.*
   - *Specific Time.*
3. Enter the run time and estimated CPU time if the runtime option is *Specific Time.*

Specifying Other Settings

To specify individual other settings:

1. Select the Other Settings tab.
2. Click the Notification link for required jobs and processes to enter notification detail information.

   Note. Only notification information entered in the JobSet will be in effect. Once Process Scheduler detects there are notifications in any of the items of the JobSet, it will ignore any notification information found in the Job Definition and Process Definition.

3. Click the Messages link for required jobs and processes to enter message detail information.

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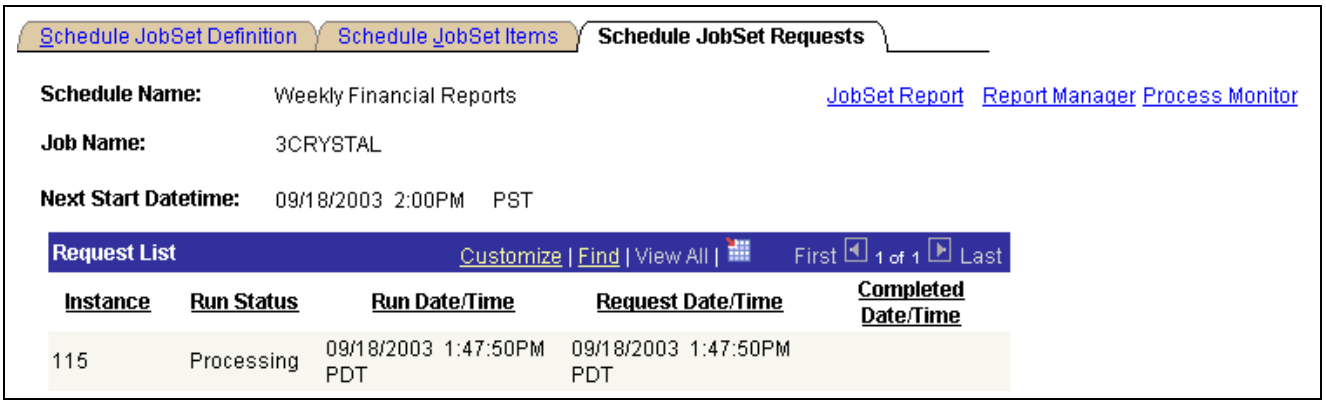
Note. Only message information entered in the JobSet will be in effect. Once Process Scheduler detects there are messages in any of the items of the JobSet, it will ignore any message information found in the Job Definition and Process Definition.

4. Click the Parameters link for required jobs and processes to enter parameter detail information.

Viewing Scheduled JobSet Requests

Access the Schedule JobSet Requests page.



Schedule JobSet Requests page

Use the Schedule JobSet Requests page to view the status of each process request contained in the selected JobSet without using Process Monitor.

Next Start Datetime Displays the date and time at which the JobSet is scheduled to run.

Request List

This group box lists each individual process contained in the jobs and JobSet.

Monitoring Jobs and JobSets

Select PeopleTools, Process Scheduler, Process Monitor to access the Process Monitor - Process List page.

Note. You can also access this page by clicking the Process Monitor link on either the Schedule JobSet Definition page or the Process Request Dialog page.

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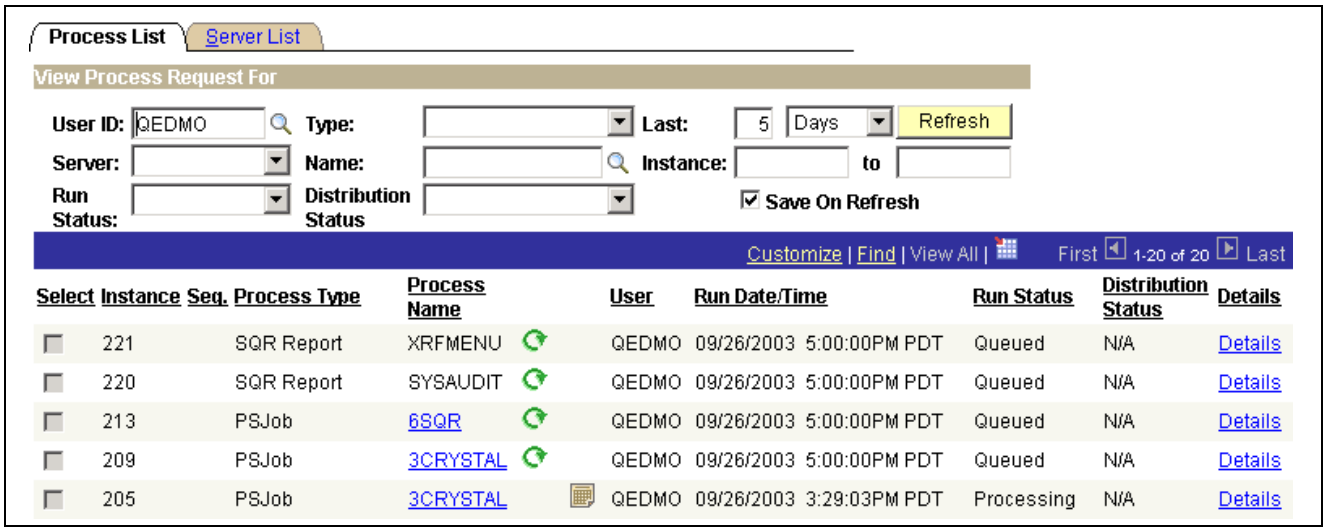
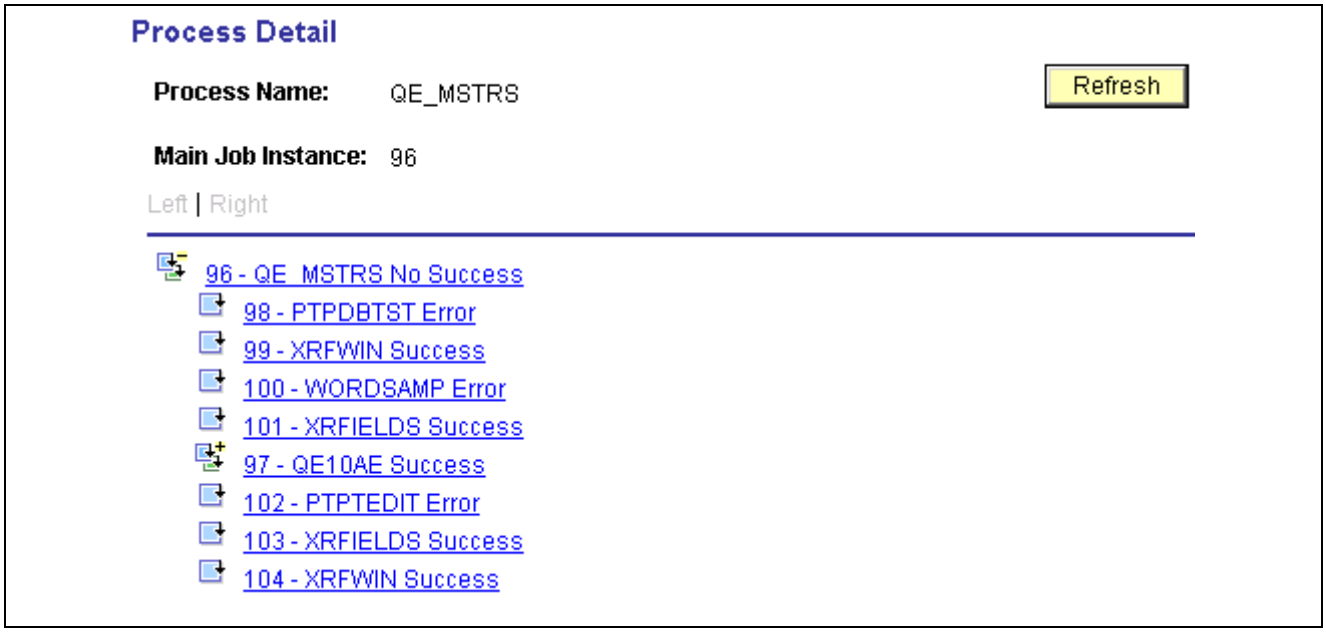


Process Monitor - Process List page

After a job has been submitted using the Process Scheduler Request page or your scheduled job has been triggered, use Process Monitor to review the status of scheduled or running processes.

When a job or JobSet is listed, only the main job appears on the Process Monitor - Process List page. To see the status of all jobs and processes that are attached to the main job, click the Job link to display the Process Monitor - Process Detail page. This page consists of a collapsible tree whenever a job is referenced. Select the Refresh button to update the status of each process.



Process Monitor - Process Detail page

See Also

Chapter 4, “Using Process Monitor,” page 23

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CHAPTER 9

Managing PeopleSoft Process Scheduler

This chapter provides an overview of managing PeopleSoft Process Scheduler and discusses how to:

- Use BEA Tuxedo software.
- Use the PSADMIN utility to configure PeopleSoft Process Scheduler Tuxedo servers.
- Configure the Analytic Calculation Engine (ACE) and Analytic Engine in the Process Scheduler domain.
- Grant PeopleSoft Process Scheduler administrative rights.
- Use PSADMIN with PeopleSoft Process Scheduler.

Understanding the Management of PeopleSoft Process Scheduler

PeopleSoft Process Scheduler with Microsoft Windows 2000 or UNIX operating system is always started by means of BEA Tuxedo software.

The following table lists BEA Tuxedo servers that are available with PeopleSoft Process Scheduler. Some servers are optional. Ones that are required are started using the PSADMIN utility's Quick-configure menu.

Server Name	Description	Optional	Number of Instances
PSPRCSRV	PeopleSoft Process Scheduler Server Agent.	No	1
PSDSTSRV	Distribution Agent.	No	1
PSAESRV	Application Engine Server.	Yes	3
PSANALYTICSRV	Analytic Server	Yes	1
PSMSTPRC	Master Scheduler Server.	Yes	1
PSMONITORSRV	Performance Monitor.	No	1

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Note. OS390 is the only platform on which PeopleSoft Process Scheduler servers are initiated outside of BEA Tuxedo.

See Appendix D, "Using the PSADMIN Utility," page 171.

Servers in OS390

The servers that are listed as optional in the preceding table are not available in the OS390 UNIX System Services (USS). These servers require specific functionality in the BEA Tuxedo software, which is not ported in USS. For this operating system, the PeopleSoft Process Scheduler Server (PSPRCSRV) and Distribution Agent (PSDSTSRV) are the only servers that are booted when you start PeopleSoft Process Scheduler.

When the PeopleSoft Process Scheduler Server initiates an Application Engine program in OS390, it initiates the program using the executable $PS_HOME/bin/psae.

Note. PSAE is the same executable that is used in PeopleSoft releases before 8.4.

Server Logging System

Each of the Process Scheduler Tuxedo servers generates a separate log file.

See Appendix D, "Using the PSADMIN Utility," page 171.

Using BEA Tuxedo Software

This section discusses how to:

- Change a local system account to a network account.
- Create a Tuxedo configuration file (PSTUXCFG).

Changing a Local System Account to a Network Account

When BEA Tuxedo software is installed, the BEA ProcMGR NT service is set up by default to be started by a local system account—a user account that does not have access to the Windows network. The service must be started by a network account if PeopleSoft Process Scheduler (or processes initiated through Process Scheduler):

- Uses a network printer.
- Accesses files from a network drive.
- Uses Microsoft Windows utilities, such as XCOPY, that may access universal naming convention (UNC) paths.

To change an account to a network account:

1. Select Start, Settings, Control Panel.
2. Double-click Services.

   The Services dialog box appears.
3. Select *BEA ProcMGR* service.

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4. Select *Stop* to stop the current BEA ProcMGR process.
5. Select *Yes* to change of status message.
6. Select Startup to modify settings.

   The BEA ProcMGR Service dialog box appears.
7. Select the Log On As This Account option.
8. Enter the domain and machine name in the This Account field.

   Note. When configuring the TUXEDO server, the user ID that is designated to be the Application Server Administrator must have read and write permissions to the PeopleSoft file directory and read permission to the %TUXDIR% directory, such as c:\tuxedo.
9. Enter the machine password in the Password and Confirm Password fields.
10. Click OK.
11. Click Start.

    A message in the Services dialog box indicates the Started status.
12. Click Close to return to the Control Panel.

See Also

PeopleTools 8.49 Installation Guide for your database platform.

Creating the Tuxedo Configuration File (PSTUXCFG)

The Tuxedo configuration file (PSTUXCFG) is created in the $PS_HOME\appserv\prcs\<Database Name> directory when you use the PSADMIN utility to:

- Perform a quick-configure and load the configuration by selecting option 4 in the Quick-Configure menu.
- Select the Configure Process Scheduler Server option from the Process Scheduler Administration menu of the PSADMIN utility.

You can detect a new PSTUXCFG file when you see the message: *Configuration file successfully created. Loading new configuration....*

If changes were made to any of the following parameters in the PeopleSoft Process Scheduler configuration file, BEA Tuxedo does not recognize the changes until a new Tuxedo configuration file is rebuilt. You can rebuild the PSTUXCFG file by selecting the Configure Process Scheduler Server option. The last task of this option is to rebuild the PSTUXCFG file.

- StartUp
- Process Scheduler
- Tuxedo Settings
- PSTools
- PSAESRV
- PSDSTSRV
- CacheSettings

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To go directly to the last task after selecting the Configure Process Scheduler server option, enter *n* at the Do you want to change any config values (y/n) prompt. The following prompts appear to rebuild the PSTUXCFG file:

- Do you want to change any config values (y/n)? [n]:
- Do you want the Application Engines configured (y/n)? [y]:
- Do you want the Master Scheduler configured (y/n)? [n]:
- Do you want the Analytic Engines configured (y/n)? [n]:
- Configuration file successfully created.

Add To Path

The Add To Path parameter in the Tuxedo Settings section of the PeopleSoft Process Scheduler configuration file is set with all of the libraries that are needed to run the executables that are delivered with PeopleSoft. If you plan to run processes using software that is not supplied by PeopleSoft, include all of the directory paths that are needed to run the process through PeopleSoft Process Scheduler successfully. Re-create the Tuxedo configuration as noted previously.

You can verify the current library path that is included in the appropriate environment variable by browsing the contents of the PSPRCSRV.ENV file.

Note. If you experience any printing problem in the UNIX environment, be sure to enter a full path in the Add To Path parameter in the Process Scheduler configuration file. For example, you may enter `/bin:/usr/bin`

Using the PSADMIN Utility to Configure Process Scheduler Tuxedo Servers

All of the PeopleSoft Process Scheduler server configuration information for a specific database is contained in the PSPRCS.CFG configuration file, and the PSADMIN utility provides an interface for editing the PSPRCS.CFG file.

This section discusses how to set parameters for the:

- Distribution Agent (PSDSTSRV).
- Application Engine Server (PSAESRV).
- Master Scheduler Server (PSMSTPRCS).

The PeopleSoft system automatically archives the Process Scheduler configuration file whenever it is changed. The older version is archived as PSPRCS_<Time Stamp>.CFG and the current version becomes psprcs.cfg. The archive directory path is *<PS_Home>\Appserv\prcs\<database>\Archive*, for example, *c:\pt848\Appserv\prcs\fin848\Archive*

Setting Parameters for the Distribution Agent

The Distribution Agent posts reports and system log files to the Report Repository. When the PSPRCSRV server detects that a process has finished, it sends the PostReport BEA Tuxedo service request to the Distribution Agent to initiate the transfer of the report.

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Parameter	Description
Max Instances (maximum instances)	Indicates the maximum number of Distribution Agents (PSDSTSRV) that can be started within BEA Tuxedo. The default value is *2*.
Min Instances (minimum instances)	Indicates the minimum number of Distribution Agents (PSDSTSRV) that can be started within BEA Tuxedo. The default value is *1*.
Recycle Count	Indicates the number of services after which PSDSTSRV automatically restarts. If this is set to *0* (default), PSDSTSRV is never recycled.
Allowed Consec Service Failures (allowed consecutive service failures)	Indicates the number of consecutive service failures after which PSDSTSRV automatically restarts. If this is set to *0* (default), PSDSTSRV is never recycled.

Setting Parameters for the Application Engine Server

This server is responsible for running requests with a process type of Application Engine.

Parameter	Description
Max Instances	Indicates the maximum concurrency set for process types with a generic process type of Application Engine, as defined on the Server Definition page in Process Scheduler Manager.
Recycle Count	Indicates the number of services after which PSAESRV automatically restarts. If this is set to *0* (default), PSAESRV is never recycled.
Allowed Consec Service Failures	Indicates the number of consecutive service failures after which PSAESRV automatically restarts. If this is set to *0* (default), PSAESRV is never recycled.
ScheduledQuery-DirtyRead	Indicates if dirty reads are enabled. Setting this to *1* enables the application server to read uncommitted data from a table. If this is set to *0* (default), dirty reads are disabled.

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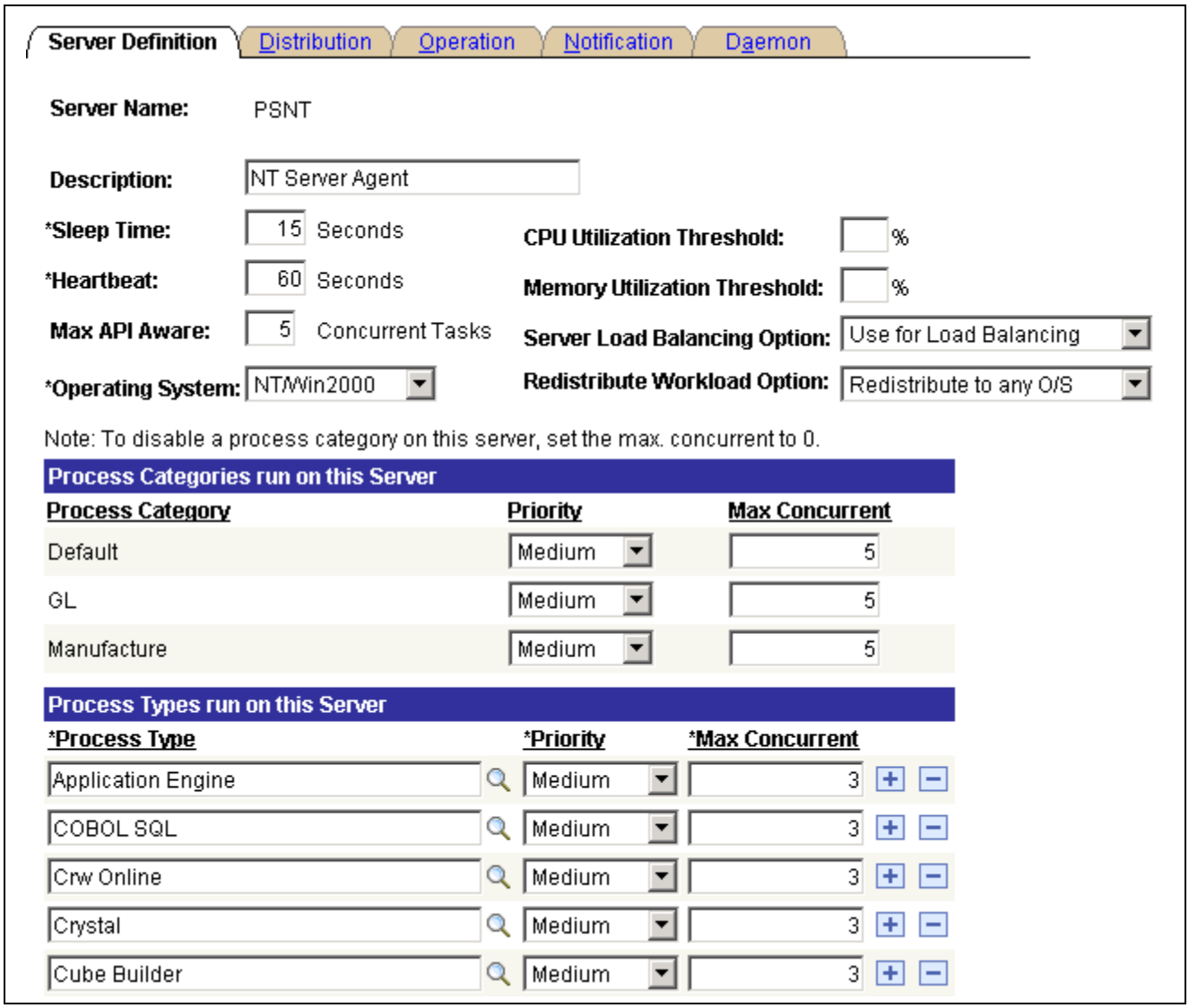
PSAESRV Max Instance and Application Engine Max Concurrent

By default, three instances of the PSAESRV are booted in PeopleSoft Process Scheduler to allow the maximum concurrent processes, as specified in the server definition. If this server is intended to increase or decrease the maximum concurrent for PeopleSoft Application Engine, you must change Max Instances in the PSAESRV section of the process configuration file to match the Max Concurrent value for PeopleSoft Application Engine. PeopleSoft Process Scheduler schedules the maximum concurrent processes for PeopleSoft Application Engine based only on the minimum number from both values.

Note. Because PSAESRV runs both of the Application Engine and Optimization Engine processes, you must include the Max Concurrent for the Application Engine and Analytic Engine process type when you configure the number of PSAESRV tuxedo processes in the domain.

Select PeopleTools, Process Scheduler, Servers to access the Server Definition page.



Server Definition page

PSAE vs. PSAESRV

You should use PSAESRV because it delivers better system performance.

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If PeopleSoft Process Scheduler was set to not start any instance of PSAESRV in Microsoft Windows 2000 or UNIX, but the server definition corresponding to this server allows you to run PeopleSoft Application Engine, then Process Scheduler initiates an Application Engine program using the $PS_HOME\bin\psae executable.

Note. This is similar to how PeopleSoft Process Scheduler initiates PeopleSoft Application Engine in OS390.

Setting Parameters for the Master Scheduler Server

Master Scheduler is an optional server that enables you to distribute workload across multiple Process Schedulers. However, in certain conditions, a Master Scheduler is required.

Note. You should always use a Master Scheduler.

See Also

Chapter 10, "Managing PeopleSoft Master Scheduler Servers," page 135

Configuring the Analytic Calculation Engine (ACE) and Analytic Engine in the Process Scheduler Domain

Unlike the Application Server domain that requires you to configure the Analytic Server, you do not need to configure the Analytic Server in the Process Scheduler domain. Because the Analytic Calculation Engine (ACE) and the Analytic Engine are built in the Analytic Server, all Application Engine jobs that are launched by Process Scheduler are run in PSAESRV or on the command line: psae. Consequently, PSAESRV and psae load the analytic instances directly into their own process rather than sending the analytic instances to the Analytic Engine.

See Also

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration, "Managing Analytic Servers"

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Analytic Calculation Engine

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Optimization Framework

Granting PeopleSoft Process Scheduler Administrative Rights

Personnel who are responsible for administering a PeopleSoft Process Scheduler Server require administrative rights that are granted through PeopleSoft Security.

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Administrative Rights	Description
Update all PeopleSoft Process Scheduler definition tables and monitor all process requests on the Process Monitor page.	Grant the *ProcessSchedulerAdmin* role. See Appendix C, "Setting Up PeopleSoft Process Scheduler Security," Granting a PeopleSoft Process Scheduler System Administration Role, page 169.
Authorize users to view reports in the Report Manager.	Grant either the *ReportDistAdmin* or *ReportSuperUser* role. See Chapter 5, "Using Report Manager," Granting Report Manager Administrative Roles, page 40.
Start the PeopleSoft Process Scheduler Server.	Authorize to have the *Can Start Application Server* rights in the permission list and grant the *ProcessSchedulerAdmin* role. See *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*, "Setting Up Permission Lists," Setting General Permissions. See Appendix C, "Setting Up PeopleSoft Process Scheduler Security," Granting a PeopleSoft Process Scheduler System Administration Role, page 169.

Using PSADMIN with PeopleSoft Process Scheduler

This section discusses how to use PSADMIN from the command line.

Note. This section doesn't discuss how to configure, start, and stop PeopleSoft Process Scheduler.

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

In addition to the instructions in the Installation and Administration manual about how to administer PeopleSoft Process Scheduler through PSADMIN in interactive mode, this table lists the options PSADMIN provides to:

Task	PSADMIN Parameter
Start a PeopleSoft Process Scheduler.	-p start -d <database name>
Stop a PeopleSoft Process Scheduler.	-p stop −d <database name>
Configure a PeopleSoft Process Scheduler.	-p configure −d <database name>

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Task	PSADMIN Parameter
Show the status of a PeopleSoft Process Scheduler.	-p status −d <database name>
Create a new PeopleSoft Process Scheduler.	-p create −d database −t <template> -ps <ps set>

<ps_set> specifies startup settings having the following format:

DBNAME/DBTYPE/PRCSSERVER/OPR_ID/OPR_PSWD/CNCT_ID/CNCT_PSWD/SERV_NAME /LOGOUT DIR/SQRBIN/ADD_TO_PATH/DBBIN

Show Status of a Process Scheduler Server

The Show Status of a Process Scheduler Server option includes the following Distribution Agent queue information:

Column Name	Description
Program Name	Name of the distribution agent program. (PSDSTSRV.EXE)
Queue Name	The queue name. (DSTQ)
# Serve	Number of server instances.
# Queued	Number of report requests queued.
Ave Len	Average length of the queue.
Machine Name	Name of the machine where the Distribution Agent is located.

See Also

Appendix D, “Using the PSADMIN Utility,” page 171

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CHAPTER 10

Managing PeopleSoft Master Scheduler Servers

This chapter provides an overview of PeopleSoft Master Scheduler functions and describes:

- Circumstances in which a Master Scheduler is required.
- How to use multiple Master Schedulers.
- Master Scheduler request prioritization.
- How to manage workload across servers.

Understanding PeopleSoft Master Scheduler Functions

A Master Scheduler enables load balancing of workload by automatically routing requests to available Process Scheduler servers, which ensures that you maintain optimal processing at all times. This feature also offers fault tolerance in your batch environment. In the event of a server failure, a Master Scheduler can redistribute queued requests among the remaining active Process Scheduler servers. In addition, an active Master Scheduler manages and controls all Process Scheduler server domains that are on the same PeopleSoft database. It enforces all of the rules that are specified in either the process or job definitions, and monitors the running of all processes. It becomes the centralized control as it checks the Process Request table looking for any queued requests to run, and then dispatches them to an appropriate available Process Scheduler server.

A Master Scheduler can be activated in any of the Process Scheduler servers in Microsoft Windows 2000 and UNIX. This option is enabled by default when you are configuring a new Process Scheduler server in NT and UNIX. However, this option is not available in the IBM UNIX System Services (USS). For DB2/OS390 customers who intend to start a Process Scheduler in USS and want to take advantage of this feature, a Process Scheduler server domain must be set up in either a Microsoft Windows 2000 or supported UNIX operating system other than USS.

Disadvantages of Using Multiple Process Schedulers with No Master Scheduler

When a Master Scheduler is not used, each Process Scheduler server that is brought up is responsible for managing its own workload by querying the Process Request table. This can be problematic when multiple Process Scheduler servers are booted for the same database. Each server attempts to schedule requests that are specified to run either on this specific server or any server. If any request is set to run on any server, more than one server may attempt to schedule the same request. To resolve this, specify a specific server through the Process Request page. However, this becomes disadvantageous if the specified server goes down because the request remains queued until the Process Scheduler server is brought up again.

One other disadvantage of bringing up multiple Process Scheduler servers without using a Master Scheduler is the uneven balance of workload across all servers. PeopleSoft Process Scheduler is constrained to have new requests scheduled with no server name to be picked up only by servers that are running in the operating system that is specified as the *Primary Operating System* in the System Settings page. This is illustrated in the following diagram:

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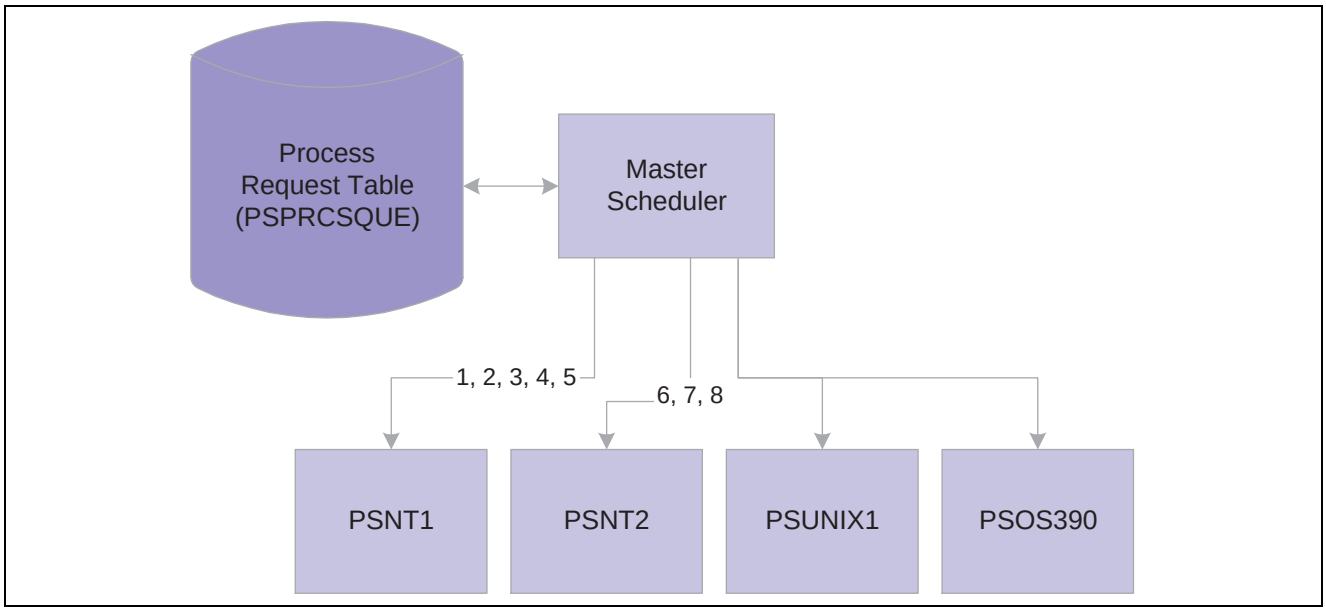

Example Master Scheduler setup using the Primary Operating System option

In this specific setup, multiple servers are brought up in Microsoft Windows 2000 (PSNT1 and PSNT2), UNIX(PSUNX), and OS390 (PSOS390), where Windows is the designated primary operating system. Assuming that all new requests were scheduled with a blank server name, then only PSNT1 and PSNT2 are qualified to pick up these requests. The PSUNX or PSOS390 will be used only when requests are scheduled with the intended Process Scheduler server's name. Also, you can see a scenario in which PSNT1 will pick up most of the requests leaving PSNT2 underutilized.

The Master Scheduler resolves this problem by becoming the central point for querying the Process Request table. When a Master Scheduler is available, all active PeopleSoft Process Scheduler Servers switch into a remote server mode. Master Scheduler registers and monitors any active remote servers. After the active Master Scheduler prioritizes all new queued requests, it checks all available servers to decide which remote server is the most appropriate for running a particular request at run time. It attempts to evenly load balance workload across all available servers, enabling the most effective use of overall computing resources.

Circumstances in Which a Master Scheduler Is Required

The Master Scheduler is an optional server that enables you to distribute workload across multiple Process Schedulers. However, this table shows specific circumstances that mandate having an active Master Scheduler available:

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Condition	Reason
Schedule PSJobs containing processes that need to run in different operating systems.	This instance is particular to database platforms that allow having Process Scheduler servers booted in multiple operating systems. When the Primary Operating System is set to UNIX or OS390, Process Scheduler will attempt to assign all processes within a PSJob to Process Schedulers with this operating system. However, certain processes can run exclusively from Windows 2000 for example, any Crystal or PS/nVision processes. Master Scheduler is required to redirect the PSJob item to PeopleSoft Process Scheduler on Windows 2000.
Active Schedule JobSets are defined.	Only a Master Scheduler can schedule any active Schedule JobSets. The Master Scheduler is also responsible for scheduling any recurring Schedule JobSets.
Impose *system constraints,* as defined in process or job definitions.	A process or job can now be defined with either Mutually Exclusive Processes or Max Concurrent values. These system constraints will be imposed only if a Master Scheduler is active.
The System Load Balancing Option is set to *Assign To Server In Any O/S.*	When a machine goes down, Master Scheduler can transfer queued requests that are assigned to the PeopleSoft Process Scheduler Server on a non-functioning machine to a PeopleSoft Process Scheduler Server that is started on another machine.

See Also

Chapter 8, “Defining Jobs and JobSets,” Creating Scheduled JobSet Definitions, page 117

Chapter 8, “Defining Jobs and JobSets,” Defining Jobs, page 111

Chapter 6, “Defining PeopleSoft Process Scheduler Support Information,” Setting Process Definition Options, page 83

How to Use Multiple Master Schedulers

Each Process Scheduler domain on Windows 2000 or UNIX (except for USS) can be set up to have a Master Scheduler started. However, only one Master Scheduler is active to control the workload at any time. The other Master Schedulers remain in a state of idle. If the active Master Scheduler goes down, then one of the idle Master Scheduler servers take control. If a Master Scheduler is not available, then the PSPRCSRV servers, currently in remove server mode, switch back to standalone mode and query the Process Request table to find work.

The Process Monitor component identifies the Process Scheduler server where the Master Scheduler is active. From the Server List tab, where the list of active Process Scheduler servers are displayed, the Master column indicates whether a Master Scheduler is active in any of the servers.

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See Also

Chapter 4, "Using Process Monitor," Viewing the Server List, page 34

Master Scheduler Request Prioritization

When Master Scheduler tallies all new queued requests, it attempts to prioritize all incoming requests before checking all registered active servers to find the appropriate server. A set of rules were implemented to help the Master Scheduler prioritize the accumulated queued requests that are found in the Process Request table. All requests are sorted based on these conditions:

1. Restartable or recovery process.

   Any process that is set in the process definition as restartable with a non-zero retry count that failed in previous attempts and currently has a run status of *Restart* is given a higher priority and will be on top of the priority list. Similarly, a process that is automatically scheduled by PeopleSoft Process Scheduler as a recovery process for a failed request is also placed on top of the priority list.

2. Processes contained in active PSJobs.

   The Master Scheduler monitors all active PSJobs that have processes that are currently initiated in one or more Process Scheduler (remote) servers. When the Master Scheduler detects that available slots are available to assign requests to a remote server and prepares to evaluate all queued requests, it initiates processes within these active PSJobs prior to querying the Process Request table for new queued requests.

3. Accumulated priority value.

   Each request is given an overall priority value based on the different priority options that are available in the system. Master Scheduler calculates the overall priority based on the order of importance of this priority, and ranks the request accordingly. However, each server definition may be configured with different priority options, and therefore may result in the same request ranking high in one server while it is positioned at the bottom of the list in another.

   For example, an SQR report has a process category of Financials. This category has a priority of *High* in the PSNT server definition, while the same category has a priority of *Low* in the PSNT2 server definition. In this situation, the SQR report will likely be assigned to the PSNT server.

   The overall priority will be calculated based on this order of importance of all these priority options that can be assigned to a request:

   a. *Process Category Priority:* The system will assign the priority value of the process category that is specified in the server definition to the request. If a process belongs in a PSJob, then all processes in this PSJob will be assigned the process category of the PSJob. In the case of a complex PSJob in which a PSJob is embedded within another PSJob, then all the processes will be assigned the process category of the main PSJob.

   b. *Process/Job Priority:* This is the priority as defined in either the process or job definition. Similar to the process category, all processes within a PSJob will have the priority of the main PSJob.

   c. *Process Type Priority:* This is the priority that is specified in the server definition for each process type it can process. In the case of PSJob, the process within a PSJob will have the priority based on its own process type.

4. Run date and time.

   In the event of two or more requests having the same calculated priority based on all the criteria noted above, the request with an earlier run date and time will be scheduled first by the Master Scheduler.

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How to Manage Workload Across Available Servers

This section lists the parameters that are used to control how workload is managed across available servers:

Parameter	Modified In	Options
Primary Operating System	System Settings	Windows 2000 (default). UNIX. OS390.
Load Balancing Option	System Settings	Assign to Primary O/S Only (default). Assign to Server in Any O/S.
Server Load Balancing Option	Server Definition	Use for Load Balancing (default). Do Not Use for Load Balancing.
Redistribute Option	Server Definition	Redistribute to any O/S (default). Redistribute with same O/S. Do Not Redistribute.
Max API Aware	Server Definition	Numeric value (default = 5).
Process Category Max Concurrent	Server Definition	Numeric value not exceeding the Max API Aware.
Process Type Max Concurrent	Server Definition	Numeric value not exceeding the Max API Aware.
Server Status	NA	NA

Primary Operating System Option

The operating system that is specified in the Primary Operating System field in the System Settings component is the default operating system that is assigned to all new queued requests with a blank server name specified. If the system detects that the process in the request cannot be run in the default operating system based on the process type definition, then the system assigns the request with the operating system that is found in the process type definition.

Load Balancing Options

The Load Balancing Option affects how Master Scheduler performs the round-robin assignment for all available remote servers in attempting to load balance the workload. When the option *Assign to Primary O/S Only* is selected, Master Scheduler performs a round robin only to all remote servers that are booted in the primary O/S.

The pattern for how Master Scheduler assigns requests to available servers with this option is illustrated in this diagram.

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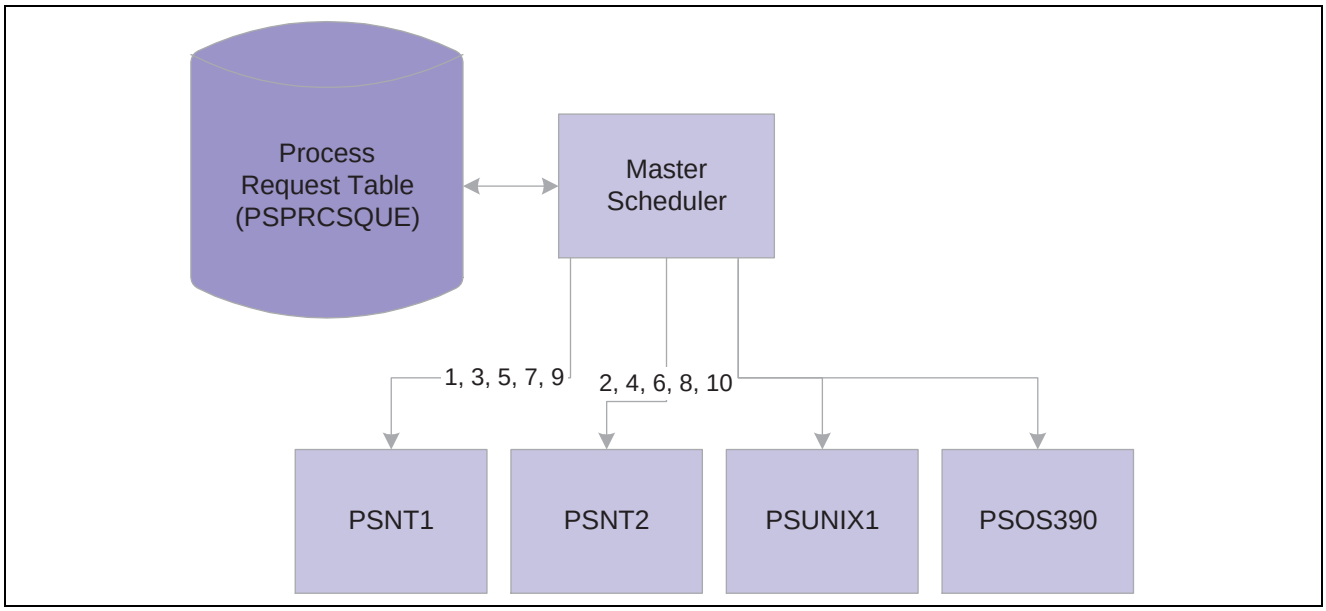
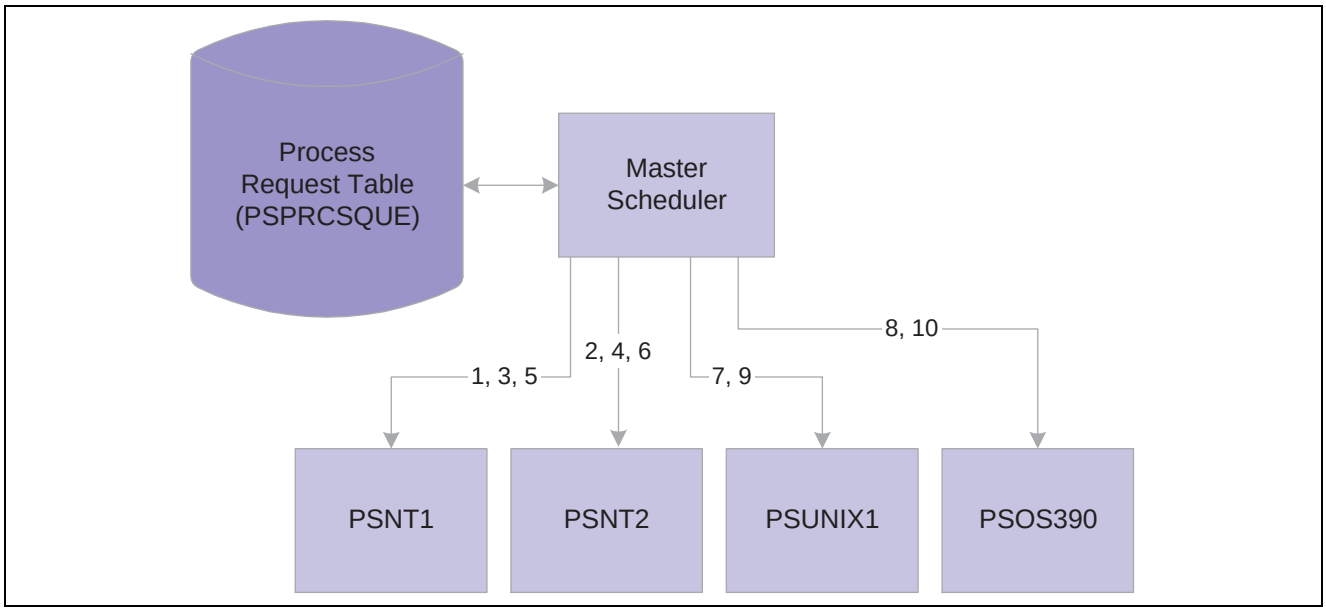


Example Master Scheduler setup using the Load Balancing - Assign to Primary O/S Only option

In this case, the Primary Operating System is Microsoft Windows 2000. This is the operating system in which both PSNT1 and PSNT2 are initiated. When Master Scheduler finds new queued requests with blank server names, the workload is evenly distributed between the two NT Process Scheduler servers only. Although PSUNIX1 and PSOS390 are available, no requests are assigned to these servers. The remote servers PSUNIX1 and PSOS390 are assigned only with new requests that are scheduled with this specific server name.

If the option is set to *Assign To Server In Any O/S,* Master Scheduler attempts to load balance workload to all active servers. At first, it tries to distribute work to servers residing in the primary operating systems. When it has reached the server definition limitations, it attempts to route work to the remaining active servers. For example, Master Scheduler will round robin the prioritized lists to both PSNT1 and PSNT2, as these servers are booted in the primary operating system. Assuming the Max API Aware for both PSNT1 and PSNT2 is three, then the first six process requests will be distributed between PSNT1 and PSNT2, and the reaming requests will be distributed to PSUNIX1 and PSOS390.



Example Master Scheduler setup using the Load Balancing - Assign To Server In Any O/S option

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Server Load Balancing Options

The server definition's Server Load Balancing Options field indicates whether the server can be used for routing new requests with blank server names. Select the *Use For Load Balancing* option if this server can be assigned requests with no specific server name specified. If this server is intended to be used only if new process requests are scheduled with this server's name, set this server with the *Do Not Use For Load Balancing* option.

Redistribute Option

The server definition's Redistribute Option field directs the Master Scheduler to a course of action in the event that a server is shut down or encounters a software or hardware failure. If Master Scheduler finds new queued process requests with the server's name identifier and detects that the server is currently unable to process any requests, one of the following three options can be selected:

- *Redistribute to any O/S:* Master Scheduler attempts to redistribute requests with the server's name into any available active Process Scheduler server.
- *Redistribute with same O/S:* Master Scheduler attempts to reroute requests only to another Process Scheduler that is booted in the same operating system as this server.
- *Do Not Redistribute:* Master scheduler does not attempt to reroute any requests with the server's name identifier. In this case, requests remain queued until the server is booted up.

Max API Aware and Max Concurrent Options

Master Scheduler periodically monitors the current workload of all active Process Scheduler servers. It ensures that when you are performing a round robin assignment, it does not exceed any of the following limitations that are specified in the server definition:

- Max API Aware: Indicates the total number of tasks that a Process Scheduler can initiate concurrently.
- Process Category Max Concurrent: Indicates the upper limitation of how many processes with the same process category can be initiated concurrently.

Note. The number that is assigned to this field cannot exceed the value that is specified in the Max API Aware field.

- Process Type Max Concurrent: Similar to the Process Category Max Concurrent field, this indicates the limit based on the request's process type.

Server Status

Master Scheduler routes work only to Process Scheduler servers with a server status of *Running.* If a server has a status of *Suspended, Overload,* or *Down,* Master Scheduler defers routing work to the server until the status is changed back to *Running.* Master Scheduler evaluates the appropriate action for process requests that are assigned to the server based on the Redistribute Option setting.

See Also

Chapter 6, "Defining PeopleSoft Process Scheduler Support Information," Defining System Settings, page 54

Chapter 7, "Setting Server Definitions," page 95

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APPENDIX A

Using Process Request APIs

This appendix provides an overview of process request application programming interfaces (APIs) and discusses how to:

- Use the COBOL API (PTPUSTAT).
- Use the Structured Query Reports (SQR) API (PRCSAPI).
- Schedule processes from outside of the PeopleSoft system.
- Schedule requests from an Application Engine program.
- Use the PeopleCode ProcessRequest class.

Understanding Process Request APIs

PeopleSoft Process Scheduler requires that all API-aware process requests (such as COBOL programs, SQR reports, and Crystal reports) communicate with Process Scheduler and Process Monitor by properly integrating calls to the provided API modules. This informs Process Monitor about the current status of a request when the PeopleSoft Process Scheduler client or PeopleSoft Process Scheduler Server Agent initiates it.

This section discusses:

- Process request APIs.
- Run status updates.
- API-aware versus API-unaware tasks.

Process Request APIs

PeopleTools provides two standard APIs for PeopleSoft Process Scheduler:

- COBOL API to support COBOL processes.
- Structured Query Report (SQR) API to support SQR processes.

The API interfaces for COBOL and SQR enable the process request to update:

- Run status
- Completion code
- Message set
- Message number

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These API interfaces also enable you to pass up to five free-form parameters, which you can use with MsgGet (Message Get) and MsgGetText (Message Get Text) PeopleCode to display messages while the process is running.

To ensure that the request is physically updated, the API-aware process must perform the API call just before it commits processing.

Note. Because Application Engine, Crystal, and nVision requests are managed through an internal API, they are already API-aware and do not require API interface calls.

The following table shows the PeopleTools-based APIs that are provided, including the module name for referencing how to implement the API.

Generic Process Type	API module	Reference
COBOL	PTPUSTAT.CBL	PTPTEDIT.CBL
SQR	PRCSAPI.SQC	XRFWIN.SQR
Crystal	PSCRRUN.CPP	NA
Workflow	PSDBA.CPP	NA
Application Engine	PSAE.CPP	NA

Application development teams that are working with PeopleSoft applications should ensure that:

- The preceding APIs are properly included in the batch program code.
- Normal program exits are coded to manage API run status updates, for example, *Success*.
- Program exceptions are trapped and the run status is updated correctly before program termination, for example, *No Success* or *Error*.

Run Status Updates

If a process that updates the database reaches an exception that requires abnormal termination and rollback of prior updates, your code should:

1. Perform the rollback.
2. Use the API to update the run status to *No Success*.
3. Commit this update, and then terminate.

Note. Indicate that a process is API-aware when you create the process definition.

PeopleSoft Process Scheduler Server Agent updates all requested tasks that are selected from Queued status to Initiated status before submitting the request to run. If the requested task fails before loading successfully—as can be the case with SQR, which must compile successfully before running—the run status remains Initiated and must be reset to Cancel through Process Monitor.

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Tasks that terminate for any reason, leaving the run status of Initiated or Processing, automatically have their status reset by the PeopleSoft Process Scheduler Server Agent to Error. Because the PeopleSoft Process Scheduler Server Agent performs this function, it must be actively polling for requests.

API-Aware vs. API-Unaware Tasks

You need to understand the differences between API-aware and API-unaware processes.

API-Aware

An API-aware process is a process that properly updates its process status through the type-specific API that is provided, such as COBOL or Crystal. The application process has the responsibility of updating the Process Request table (PSPRCSRQST) with status information.

As the processes within a job must notify the server of the run status when they finish, the processes in the job definitions must be API-aware. This is how the system decides to continue with the next job process.

API-Unaware

API-unaware processes are programs that have no defined program interface to PeopleSoft Process Scheduler, such as CLOCK.EXE or WINWORD.EXE. Because API-unaware processes do not have the program interface to update the Process Request table in PeopleSoft Process Scheduler, the PeopleSoft system cannot determine whether the process finished successfully. Consequently, all API-unaware processes have a run status of Success to indicate that they were started successfully.

Note. A status of Success with an API-unaware process does not necessarily indicate that the process finished successfully.

API-unaware processes that are logged or monitored require manual clean up. That is, you must manually cancel or delete initiated requests that have failed.

If the API-aware option is selected for any process that is not API-aware, PeopleSoft Process Scheduler includes this process in the concurrent task count. This can result in improper server load balancing.

Setting this field for custom processes is not sufficient. You must include the code in your process to update the Process Request table to the appropriate run status.

Using the COBOL API (PTPUSTAT)

This section contains the information that you need in order to incorporate the COBOL API into your PeopleSoft Process Scheduler development.

This section discusses how to:

- Use COBOL requests.
- Use the Process Scheduler Update COBOL API (PTPUSTAT).

Using COBOL Requests

All variables in the copy member PTCUSTAT.CBL should be set (or to be supplied by default, if appropriate) by the application COBOL program before any call to PTPUSTAT. The only exception is PRUNSTATUS-RC, which is set by PTPUSTAT to reflect the success of your call.

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Set CONTINUE-JOB-YES to TRUE if a process is part of a job definition and you want the next process request to run despite the run status that is set by the current request. Normally, subsequent job requests are selected to run only if the prior request finishes with a status of Successful.

Note. All Crystal and Workflow processes have internal APIs that do not require specific hooks from application modules. See the PeopleTools-based source member PTPTEDIT.CBL for an example of how to enable COBOL-based members to interact with PTPUSTAT.

Using the Process Scheduler Update COBOL API (PTPUSTAT)

Application programs that are written in COBOL can update selected process request fields at runtime using an API that is provided by PeopleSoft. This API includes the following fields.

COBOL Field Name	COBOL Picture	Description
PROCESS-INSTANCE	9(8) COMP	Key of the process request record to update.
RUN-STATUS	X(1)	Values are: *7:* Processing. *9:* Successful. *10:* Unsuccessful.
RUN-STATUS-MSGSET	9(4) COMP	Message set number.
RUN-STATUS-MSGID	9(4) COMP	Message number.
RC	9(4) COMP	Application level return code.
MESSAGE-PARM1	X(30)	First message log parameter that can be used with the PeopleCode MsgGet and MsgText functions.
MESSAGE-PARM2	X(30)	Second parameter that can be used with the PeopleCode MsgGet and MsgText functions.
MESSAGE-PARM3	X(30)	Third parameter that can be used with the PeopleCode MsgGet and MsgText functions.
MESSAGE-PARM4	X(30)	Fourth parameter that can be used with the PeopleCode MsgGet and MsgText functions.

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COBOL Field Name	COBOL Picture	Description
MESSAGE-PARM5	X(30)	Fifth parameter that can be used with the PeopleCode MsgGet and MsgText functions.
CONTINUE-JOB	9(4) COMP	*1:* Continue job. *0:* Terminate job.

The name of the copy member that contains the COBOL API table description is PTCUSTAT.CBL. The API call to use to call the PTPUSTAT subroutine is similar to this code:

```
IF  PROCESS-INSTANCE OF SQLRT  > ZERO
    IF  STATUS-OK OF SQLRT
        SET  RUN-STATUS-SUCCESSFUL OF PRUNSTATUS  TO  TRUE
    ELSE
        SET  RUN-STATUS-UNSUCCESSFUL OF PRUNSTATUS  TO  TRUE
    END-IF
    IF  PROCESS-INSTANCE OF PRUNSTATUS  > ZERO
        CALL  'PTPUSTAT'  USING  SQLRT
                                 PRUNSTATUS
    END-IF
    PERFORM  ZC000-COMMIT-WORK
END-IF
```

An API-aware COBOL program in PeopleSoft Process Scheduler must update the run status of a request to:

- Processing upon a successful connect.
- Successful or Error upon completion.

If this process runs as part of a multiprocess job, then the CONTINUE-JOB field can be set to *0* to prevent the next process from being initiated or *1* to initiate the next job process, regardless of the status of this request. If one process fails, you don't jeopardize the entire job. If you set CONTINUE-JOB to *1,* make sure that none of the jobs rely on a previous job's successful completion.

To determine whether a process is running as defined within a job, use:

IF JOB-INSTANCE OF SQLRT > 0

A value that is greater than zero is part of a multiprocess job. You must do a COMMIT immediately following this call so that you are not holding locks.

All PeopleSoft COBOL application programs that use SQL should be defined in the Process Definition table with the following parameters:

DbType/%%DBNAME%%/%%OPRID%%/%%OPRPSWD%%/%%RUNCNTLID%%/%%INSTANCE%%

Note. A forward slash (/) is between each of the preceding parameters. The slash is easy to overlook between the pairs of percent signs. The batch run control ID is the only data item that must be supplied by the application. A field that is named PROCESS—INSTANCE in the SQLRT data structure contains the current process instance (key to the Process Request table).

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Each API-aware COBOL process must include copy member PTCUSTAT, and all variables that are used to initialize column data in the update to table PSPRCSRQST must be properly set before this update request.

Using the SQR API (PRCSAPI)

This section contains the information that you need to incorporate the SQR API into your PeopleSoft Process Scheduler development.

This section discusses how to:

- Use SQR requests.
- Use Process Scheduler SQR API (PRCSAPI).

Using SQR Requests

All variables that are defined in PRCSDEF.SQC should be set (or left as the default) by the application SQR program before you call Update-Process-Status (PRCSAPI.SQC).

Set #prcs_continuejob to *1* if this process is part of a job definition and you want the next process request to run despite the run status that is set by the current request. Normally, subsequent job requests are selected to run only if the prior request finishes with a status of Successful.

Note. All Crystal and Workflow processes have internal APIs that do not require specific hooks from application modules. For SQR-based members, see XRFWIN.SQR.

Each API-aware SQR must include member PRCSDEF.SQC, and all PSPRCSRQST column-based variables must be properly set by application SQR code. Failure to manage these variables properly in the API can result in SQL update errors based on invalid data for the definition type.

Using the Process Scheduler SQR API

Application programs that are written in SQR can update selected process request fields at runtime using a PeopleSoft-provided API. This is to be used for SQR reports.

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Include Files

Include File	Description
PRCSDEF.SQC	Contains the procedure Define-Prcs-Vars. Initializes the fields that are used in the API.
PRCSAPI.SQC	Contains the procedure Get-Run-Control-Parms: • Retrieves the three parameters that are described in the following table. • Updates the run status of the process request to Processing. Contains the procedure Prsc-Run-Status. Performs the process request table update.

SQRs should be defined to accept the following parameters from the command line.

Parameter	Description
Process Instance	Required so that the SQR knows which process request to update.
User ID	Indicates the user ID key to the Run Control table.
Run Control ID	Indicates run control ID key to the Run Control table.

All SQRs use the procedure Get-Run-Control-Parms, which is defined in PRCSAPI.SQC. For example:

```
Begin-Procedure Get-Run-Control-Parms
    input $prcs_process_instance
      'Please press ENTER (Do not input a value)'
    if not isnull($prcs_process_instance)
        let #prcs_process_instance = to_number
    ($prcs_process_instance)
        input $prcs_oprid
       'Please press ENTER (Do not input a value)'
        let $prcs_oprid = upper($prcs_oprid)
        input $prcs_run_cntl_id
       'Please press ENTER (Do not input a value)'
    else
        let #prcs_process_instance = 0
    end-if
    if #prcs_process_instance > 0
        let #prcs_run_status = #prcs_run_status_processing
        do Update-Prcs-Run-Status
        let #prcs_run_status = #prcs_run_status_successful
```

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```
    end-if
end-procedure
```

The three input commands correspond to the three values in the command line:

%%INSTANCE%% %%OPRID%% %%RUNCNTLID%%

When you run the SQR through SQR Windows (SQRW) and don't enter any input values, the SQR interprets this as having been run outside PeopleSoft Process Scheduler. Therefore, it prompts for other input parameters that otherwise come from Run Control tables.

An API-aware SQR program in PeopleSoft Process Scheduler must update the run status of the request to:

- *Processing* upon receiving control.
- *Success* or *No Success* upon completion.

Note. All other SQR runtime parameters should reside in a run control record that is keyed by user ID and run control ID.

Scheduling Processes from Outside the PeopleSoft System

The PROCESSREQUEST component interface provides an API to create or update a process request from outside the PeopleSoft system. It returns the process instance of the process request that is created.

Successfully developing the functionality to schedule a process or job to run from outside PeopleSoft requires expertise in:

- PeopleSoft Process Scheduler definitions.
- PeopleCode.
- Component interfaces.

This section provides an overview of the component interface details and discusses how to schedule a process using a component interface in Visual Basic.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleCode Developer's Guide, "Accessing PeopleCode and Events"

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Component Interfaces, "Introducing Component Interfaces," Component Interface Architecture

Appendix C, "Setting Up PeopleSoft Process Scheduler Security," Securing Passwords When Scheduling from Outside PeopleSoft, page 170

Understanding Component Interface Details

The following topics provide the properties and methods that are associated with the component interface that is used to schedule processes from outside of PeopleSoft.

Component Interface Name

ProcessRequest

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Properties

The following properties are associated with the component interface:

- RUNCONTROLID
- PROCESSTYPE
- PROCESSNAME
- JOBNAME
- RUNLOCATION
- RUNDATE
- RUNTIME
- RUNRECURRANCE
- OUTDESTTYPE
- OUTDESTFORMAT
- OUTDEST
- RUNSTATUS
- PROCESSINSTANCE
- REQUESTTYPE

Methods

The following methods are associated with the component interface:

- Standard:
  - Cancel
  - Find
  - Get
  - Save
  - Update
  - GetPropertyByName
  - SetPropertyByName
  - GetPropertyInfoByName
- User-Defined:
  - Create
  - Update

Scheduling a Process Using a Component Interface in Visual Basic

The following example shows how you might schedule a process from outside of PeopleSoft using Visual Basic.

Initializing the component interface:

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```
Dim oSession As New PeopleSoft_PeopleSoft.Session
Dim oBC As ProcessRequest
oSession.Connect(1, "TCHURY072198:7000", "PTDMO", "PTDMO", 0)
'get component from server
Set oBC = oSession.GetComponent("PROCESSREQUEST")
Status = oBC.Get()
```

Creating a process request:

- Properties:

```
oBC.REQUESTTYPE = "Create"
oBC.RUNCONTROLID = "Test"
oBC.PROCESSTYPE = "SQR Report"
oBC.PROCESSNAME = "XRFWIN"
oBC.RUNLOCATION = "PSNT"
oBC.RUNDATE = "01/01/2000"
oBC.RUNTIME = "09:00:00"
oBC.OUTDESTTYPE = "FILE"
oBC.OUTDESTFORMAT = "SPF"
oBC.OUTDEST = "C:\temp\"
```

- Method:

```
ProcessInstance = oBC.Create
```

Updating a process request:

- Properties:

```
oBC.REQUESTTYPE = "Update"
oBC.PROCESSINSTANCE = 10
oBC.RUNSTATUS = "2"
```

- Method:

```
oBC.Update
```

Scheduling Requests from an Application Engine Program

A known limitation exists when you schedule requests from an Application Engine program in which the process that is associated with the request contains in-line bind variables in the parameter list. An in-line bind variable is a field that is characterized in a parameter field like this:

```
:<Record>.<Field>
```

For example:

```
-ORIENTP :PYCYCL_STAT_VW2.PAY_CYCLE :PYCYCL_RPT_VW.BANK_CD
```

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The ProcessRequest PeopleCode class resolves in-line variables in a parameter list by searching the values for these fields in the component buffer of a PeopleSoft Pure Internet Architecture page. However, this becomes a problem when ProcessRequest class is used within an Application Engine program. In an Application Engine program, concept of component buffer doesn't exist. As a repercussion, the ProcessRequest class cannot resolve any in-line bind variables that are found in a parameter list.

Using a Component Interface to Schedule a Request

The instructions in this section describe how you can code a component interface in an Application Engine program to schedule a request using the ProcessRequest class.

Creating Definitions to Submit Requests That Contain In-line Bind Variables

To create the Component Interface to submit requests with in-line bind variables, you need to copy or reference the following Process Scheduler definitions:

Definition Name	Type	Description
PROCESSREQUEST	Component Interface	The Component Interface that is used to schedule a request using the ProcessRequest class.
PRCSRQSTBC	Page	The page that is associated with the component interface PROCESSREQUEST, including all the fields that are used for scheduling a request.
PRCSRQSTBC	Component	The component that is associated with the PRCSRQSTBC page.
PRCSMULTI	Component	The component that contains the sample PeopleCode that is used to schedule a request using the PROCESSREQUEST component interface.

The following steps use the definitions that are delivered with PeopleTools. Any definitions requiring modification are copied into a new definition to eliminate any problems with future PeopleTools upgrades.

1. Create a new page based on the PRCSRQSTBC page.
   a. Copy the page PRCSRQSTBC into a new definition.

      When Application Designer prompts you to copy the associated PeopleCode, reply *yes*.

   b. Insert a new edit box for the field that is referenced in the Parameter List.

      Select Insert, Edit box. When the cursor icon changes, click the mouse where you want to position the new field in the page. Double-click the new field to open the box to select the field for this new box. Perform this step for each field that is found in the parameter list.

   c. Save the new definition.
2. Create a new component based on the PRCSRQSTBC component.
   a. Make a copy of the component PRCSRQSTBC.

      When Application Designer prompts you to copy the associated PeopleCode, reply *Yes*.

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b. Insert the new page that you created from the previous step by selecting Insert, Page Into Component from the menu.

c. Remove the page PRCSRQSTBC from the component so that the only page that is referenced in this component is the new page.

d. Save the component.

3. Create a new Component Interface from the Application Designer by selecting File, New.

   When prompted for the new component, provide the component that was created from the previous step. Save the new component interface.

   Do not close the definition of the new component interface because additional edits will be done in subsequent steps.

4. Copy the existing PeopleCode that is found in the component interface PROCESSREQUEST.

   a. From the Application Designer, open the definition for the component interface PROCESSREQUEST.

   b. In the METHODS section of the component interface, move your mouse cursor to the Create method and right-click to select the View PeopleCode option.

   c. Highlight the PeopleCode, and then right-click to select the Copy option.

   d. In the new component interface, highlight the method Create and right-click your mouse to select the View PeopleCode.

   e. Paste the PeopleCode by right-clicking your mouse and select the Paste option.

   f. Save the component interface.

      After saving, you should see two additional methods, Schedule() and Update(), inserted in the METHODS section.

5. In the new component interface, add the new fields that were added in the new page from step 1.

   a. Click the Scroll – Level 0 folder to display all the records.

   b. Expand the record folder for the field that was added in the new page.

      Highlight the field with your mouse and drag the field to the PROPERTIES section of the component interface.

   c. Perform this step for any additional fields that were added to the page.

   d. Save the component interface definition.

6. Modify the Application Engine program to include the PeopleCode to schedule the request using the new component interface.

   The PeopleCode will be copied from the sample PRCSMULTI component.

   a. Open the Component PRCSMULTI from Application Designer.

   b. View the PeopleCode that is found in RUNCNTLCOMPINTF.FieldChange.

   c. Copy the entire PeopleCode that is found in FieldChange by highlighting the PeopleCode and right-clicking your mouse to select Copy.

   d. Open the Application Engine program where the request will be scheduled.

      In the step where the request will be copied, paste the PeopleCode that was copied from the PRCSMULTI component.

   e. In the pasted PeopleCode, perform the following edits:

      1. Remove the DoSave() function.

      This function is not allowed within an Application Engine program.

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2. In the function GetCompIntfc(), replace the component interface PROCESSREQUEST with the new component interface that was created in step 2.

3. In all attributes of ProcessRequest class, modify these fields for the process request that you will schedule.

For additional information pertaining to these attributes, please refer to the discussion of ProcessRequest class found in the PeopleCode manual.

4. For the new fields that were added to the Properties of the component interface, modify the code to assign values to these fields.

This is the value that will be assigned to the parameter list.

5. Save your changes.

Using the PeopleCode ProcessRequest Class

The ProcessRequest class is the primary PeopleCode construct that you use for invoking processes through PeopleSoft Process Scheduler using PeopleCode. The ProcessRequest PeopleCode can be called from a:

- Push button.
- Save page.
- Field change event.

The ProcessRequest class provides properties and a method for scheduling a process or job that you have already defined using Process Scheduler Manager.

The properties of this class contain the same values as those that appear in Process Scheduler Manager for scheduling a process or job. Values that you provide for these properties may override the equivalent values set in Process Scheduler Manager, depending on the override settings that you make in PeopleSoft Process Scheduler pages.

Developers of PeopleSoft applications can simplify certain tasks for users by scheduling processes using PeopleCode. How you use the ProcessRequest construct depends on the nature of the task. You might want to segregate processes into specific categories, for example:

- Processes that are initiated by an action, such as calculations.

  Selecting a check box or clicking a button might call this PeopleCode.
- Reports that are associated with a function or set of tasks.

  A Print button might call this PeopleCode.

The ProcessRequest PeopleCode validates user input and writes a row to the Process Request table, providing the system with the information to run the process automatically, without user interaction. The Process Request table acts as the queue that the PeopleSoft Process Scheduler Server Agent uses to determine what jobs must be run and when.

Note. The PeopleSoft-delivered ProcessRequest PeopleCode can be used only for processes that do not pass in extra parameters. This means that reports that require extra parameters can be run only from the Run Control page.

You can schedule processes or jobs (groups of one or more processes) to run immediately or in the future. Recurring processes and jobs can be scheduled to run automatically at specific, user-defined intervals.

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Note. The *Window* output type is not available if the user does not have REN server *Report Window* permission or if no active REN server cluster is available for reporting. The process would run using the *Web* output type and the following message would appear:

You do not have the permission required to run window option.

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APPENDIX B

Understanding Logging Systems

This appendix discusses:

- Log and output directory.
- Logging system for PeopleSoft Process Scheduler Server.
- Logging system for Distribution Agent.

Log and Output Directory

Specify the Log/Output Directory variable in the configuration file to set a common log and output directory. The default is:

Log/Output Directory=%PS_SERVDIR%\log_output

For each process request, a subdirectory is created in the log and output directory. The naming convention that is used for the subdirectory is:

<Process ID>_<Program Name>_<Process Instance>

The assigned process ID is based on the process request's process type.

Process Type	Process ID
COBOL	CBL
Application Engine	AE
SQR	SQR
nVision	NVS
Crystal	CRW
Cube Manager	CUBE
WinWord	WRD

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Process Type	Process ID
XML Publisher	AE
Other	OTH

For example:

- In psprcs.cfg, set Log/Output Directory=%PS_SERVDIR%\log_output.
- Set PS_SERVDIR=c:\pt800\appserv\prcs\ptdmo.

  c: represents the drive on the PeopleSoft Process Scheduler server, *not* the client workstation.
- User runs the SQR report XRFWIN.SQR.
- Process instance is *23*.

Using the preceding information, the system writes the output to the following location:

c:\pt800\appserv\prcs\ptdmo\log_output\SQR_XRFWIN_23

Usually, the log files and reports are written to the subdirectory in the log and output directory. Reports and log files are not written to this directory when:

- A user specifies a directory on the Process Request Dialog page.

  This option is available only for the output destination type of File.
- The process definition is set for a process to restrict the output destination type of File, and a specific directory is specified, other than the meta-string *%%OutputDirectory%%*.
- A process profile that is assigned for the user who submitted the request indicates an output directory other than *%%OutputDirectory%%*.
- A program hard-codes the directory to which the log or report should be written.

To control this location and prevent users from sending output to another location, use the process profile for a permission list in PeopleSoft Security Administrator by:

- Specifying a file and printer destination in the Server Destinations group box.
- Disabling the Override Output Destination parameter in the Allow Requester To group box.

Deleting the Log and Output Subdirectory

The subdirectory, which is created by the Process Scheduler server to store all the logs and reports that are generated by the initiated process, will be deleted when the output destination type is *Web* and the files are successfully posted to the report repository.

For output destination types of anything other than *Web,* the subdirectory will be deleted during the purging process when the process request that is associated with the subdirectory is deleted from the process request table.

See Also

Appendix C, “Setting Up PeopleSoft Process Scheduler Security,” page 167

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Log Space Threshold

If the Process Scheduler Server detects that the space capacity of the log/output directory is below the threshold, it will stop processing any queued requests. This threshold is the bottom line minimum before the Process Scheduler considers the log to be full. By default, the threshold is set to 10 MB.

During the maintenance check, based on the HeartBeat, if the space capacity threshold drops below the threshold:

- A *disk full* message gets logged in SCHDLR.LOG.
- The status of Process Scheduler server in the Process Monitor will reflect LOG DISK FULL.
- An email notification is sent to the administrator.

Logging System for PeopleSoft Process Scheduler Server

This section discusses:

- Logging system.
- Logging levels.

Logging System

The log directory stores the PeopleSoft Process Scheduler server logs and SQL trace files. Each server that is started in the PeopleSoft Process Scheduler server has its own set of log and trace files. The user does not normally need to review these files unless a problem occurs while running a process or some reason exists to verify that a process ran as expected.

Location of the Log and SQL Trace Files

The location and name of the PeopleSoft Process Scheduler log files depend on the operating system on which the PeopleSoft Process Scheduler Server is started.

Operating System	Log Directory
Windows 2000	$PS_HOME\appserv\prcs\<Database Name>\LOGS
UNIX	$PS_HOME/appserv/prcs/<Database Name>/LOGS
OS390 UNIX System Services	PeopleSoft Process Scheduler Server: $PS_HOME/appserv/prcs/<Database Name>/<Log Directory>/_PSPRCSRVLOG Distribution Agent Server: $PS_HOME/appserv/prcs/<Database Name>/<Log Directory>/_PSDSTSRVLOG

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The <Log Directory> corresponds to the directory that is specified in the Log/Output Directory variable in the PeopleSoft Process Scheduler configuration file (psprcs.cfg).

For each server that is started, two files are generated in the log directory:

- The server log contains messages that are written by the server to the log file.

  These messages are translated to the languages that are supported by the PeopleSoft system. The language of the messages is based on the language that is designated in the user profile.

  The LogFence parameter, which is set in the PeopleSoft Process Scheduler configuration file, controls the detail of the message that is written to this log file.

- The SQL trace file contains the traces of all SQL that is issued by the server.

  This file is generated when the TraceSQL parameter in the PeopleSoft Process Scheduler configuration file has a value other than zero.

  If a PeopleSoft Application Engine or Analytic Engine request is initiated by PSAESRV or PSAEOSRV respectively, the SQL traces that are generated from that process are stored in the process subdirectory that is located in the log and output directory.

Log and SQL Trace File Name in Windows 2000 and UNIX

The following table lists all the server names, log files, and SQL trace files in Windows 2000 and UNIX.

Server Name	Description	Log File	SQL Trace File
PSPRCSRV	PeopleSoft Process Scheduler Server	SCHDLR_<mmdd>.LOG	<User ID>_ PSPRCSRV.tracesql
PSDSTSRV	Distribution Agent	DSTAGNT_ <mmdd>.LOG	<User ID>_ PSDSTSRV.tracesql
PSAESRV	PeopleSoft Application Engine Server	APPSRV_<mmdd>.LOG	<User ID>_ PSAESRV.tracesql
PSAEOSRV	PeopleSoft Application Engine Server to run Analytic Engine	APPSRV_<mmdd>.LOG	<User_ID>_ PSAEOSRV.tracesql
PSANALYTICSRV	Analytic Engine Server	OPTENGS<server number>.LOG	<User_ID>_ PSANALYTICSRV<server number>.tracesql
PSMSTPRCS	Master Scheduler Server	MSTRSCHDLR_ <mmdd>.LOG	<User ID>_ PSMSTPRC.tracesql

<User_ID> is the user ID that is specified in the PeopleSoft Process Scheduler configuration file that is set to boot PeopleSoft Process Scheduler.

Log and SQL Trace File Name in OS390 USS

The following table lists all the server names, log files, and SQL trace files in OS390 USS

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Server Name	Description	Log File	SQL Trace File
PSPRCSRV	PeopleSoft Process Scheduler Server	PSPRCSRV_<Process Scheduler Server>_ <mmdd>.log	psprcsrv.trc
PSDSTSRV	Distribution Agent	PSDSTSRV_<Process Scheduler Server>_ <mmdd>.log	psdstsrv.trc

<Process Scheduler Server> is the name of the server that is defined in the server definition (that is, PSOS390).

At midnight, a new log file is created to contain information for the current MMDD value.

SQL Trace File

The SQL trace file is created when the TraceSQL variable in the PeopleSoft Process Scheduler configuration file has a value other than zero. This file contains the SQL traces that are issued by the Distribution Agent program PSDSTSRV.

Use the TraceSQL variable to set the level of SQL trace by selecting the numerical value representing each degree of tracing as described. The list of trace levels from which you can choose appears in the configuration file as shown:

```
1=SQL Statements
2=SQL statment variables
4=SQL connect, disconnect, commit and rollback
8=Row Fetch (indicates that it occurred, not data)
16=All other API calls except ssb
32=Set Select Buffers (identifies that attributes of columns
  to be selected)
64=Database API specific calls
128=COBOL statement timings
256=Sybase Bind information
512=Sybase Fetch information
1024=SQL Informational Trace
4096=Manager information
8192=Mapcore information
```

If you want SQL Statements, SQL statement variables, and SQL connect, disconnect, commit, and rollback information, specify TraceSql=7 (1+ 2 + 4).

Note. The SQL trace file doesn't delete existing traces that are written from prior runs of the PSPRCSRV program, and it appends new SQL activity to the end of the file. Because the file can grow quite large and might fill up your file server, you should reset the TraceSQL to zero after you finish debugging the PeopleSoft Process Scheduler Server Agent.

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Logging Levels

The logging system enables you to change the level of detail that is written to the log files. The mechanism that is chosen here uses the concept of a detail level and a fence. Messages are assigned a numeric detail-level value that reflects the importance of the event that triggers the message in the operation of the program. This ranges from simple progress messages (very detailed) to error messages when the program is about to terminate (not detailed).

The fence is used to filter out messages that reflect more detail than necessary in a particular installation. For example, a message must be able to *leap the fence* to be shown (with a lower number indicating a higher fence). With the fence set to *2,* only messages with a detail level that is less than 2 (that is, 0 or 1) appear. The only exception to this is that level 0 messages and messages that are unable to be displayed in the standard message format cannot be filtered out.

The meaning of a level is completely arbitrary, although a consistent convention should be followed. The server uses the following convention:

Fence Level	Description
0	Errors, critical messages, and connection header only.
1	Critical events. For PeopleSoft Process Scheduler, this includes process start attempts.
2	Warnings.
3	Informational. This is the default fence value.
4	Trace level 1 detail.
5	Trace level 2 detail. This shows all messages that are available.

The fence is determined by an entry in the server configuration file in the [Process Scheduler] section named LOGFENCE. Normal values are in the range of *0–5,* with the default being *3* (informational). A setting of *5* is recommended for installation and troubleshooting. A setting of *0* is good for an installed system that is working smoothly.

The log fence of a message can be seen in the PeopleSoft Process Scheduler log file. In the following example, you can see the numeric values enclosed in parentheses following the date and time.

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```
[08/04/00 14:28:27](0)    Server: PSNT sleeping for 15 seconds
[08/04/00 14:28:41](0)    Server: PSNT looking for work
[08/04/00 14:28:41](5)    Server: PSNT checking status...
[08/04/00 14:28:41](5)    Server action mode: Ok (looking for requests)
[08/04/00 14:28:41](5)    Checking Process cancels...
[08/04/00 14:28:41](4)    Checking status of active processes...
[08/04/00 14:28:41](5)    Process 9836 is still running as Session ID 711
[08/04/00 14:28:41](5)    Process 9837 is still running as Session ID 634
[08/04/00 14:28:41](5)    Process 9838 is still running as Session ID 703
[08/04/00 14:28:41](5)    Info for array of Request(s) associated with a Job slated to be submitted
[08/04/00 14:28:41](5)       Size of array: 1
[08/04/00 14:28:41](5)    Info for array of Active Processes
[08/04/00 14:28:41](5)       Size of array: 3
[08/04/00 14:28:41](5)       Crystal                  :  Active: 3   Max: 3
[08/04/00 14:28:41](5)    Server: PSNT checking status...
[08/04/00 14:28:41](5)    Server action mode: Submitting request
[08/04/00 14:28:41](5)    Number of New Process Request(s) To Start: 1
[08/04/00 14:28:41](1)    Process Instance: 9843 started (PID: 645)
[08/04/00 14:28:41](4)    Starting process:: 9843
[08/04/00 14:28:41](4)        Command Line: Y:\BIN\CLIENT\WINX86\PSSQR.EXE
[08/04/00 14:28:41](4)        Parm List: -CT ORACLE -CS  -CD E800R21B -CA %ACCESSID% -CAP %ACCESSPSWD%
[08/04/00 14:28:41](4)        Working Dir: c:\apps\db\oracle8i\bin
[08/04/00 14:28:41](4)         Session Id: 645
[08/04/00 14:28:41](0)    Server: PSNT sleeping for 14 seconds
[08/04/00 14:28:55](0)    Server: PSNT looking for work
[08/04/00 14:28:55](5)    Server: PSNT checking status...
[08/04/00 14:28:55](5)    Server action mode: Ok (looking for requests)
[08/04/00 14:28:55](5)    Checking Process cancels...
[08/04/00 14:28:55](4)    Checking status of active processes...
[08/04/00 14:28:55](5)    Process 9836 is still running as Session ID 711
[08/04/00 14:28:55](5)    Process 9837 is still running as Session ID 634
[08/04/00 14:28:55](5)    Process 9838 is still running as Session ID 703
[08/04/00 14:28:55](5)    Info for array of Request(s) associated with a Job slated to be submitted
[08/04/00 14:28:55](5)       Size of array: 0
[08/04/00 14:28:55](5)    Info for array of Active Processes
[08/04/00 14:28:55](5)       Size of array: 3
[08/04/00 14:28:55](5)       Crystal                  :  Active: 3   Max: 3
[08/04/00 14:28:55](5)    Info for array of Queued Request(s) found in Process Request table
[08/04/00 14:28:55](5)       Size of array: 16
```

Example of log file

If you receive error messages, complete the following tasks to enable debugging and tracing:

1. Set LOGFENCE=5 in the psprcs.cfg file.
2. Set TraceSQL to the appropriate value to generate the SQL trace.

See Also

Appendix D, “Using the PSADMIN Utility,” Editing the PeopleSoft Process Scheduler Configuration File, page 174

Logging System for Distribution Agent

The Distribution Agent detects that files are ready to transfer by querying the Report List table (PS_CDM_LIST).

Transfer Log for FTP and XCOPY

When the Distribution Agent transfers files using the File Transfer Protocol (FTP) or XCOPY protocol, it tables the information for all of the process requests and assigns a transfer log to this transfer attempt. Any activity from transferring the files for these process requests is recorded in a log file with the following format:

<Log Directory>_PSDSTSRVLOG\transfer_<Transfer Instance Number>.log

The following examples illustrate the of transfer log files for FTP and XCOPY transfer protocols:

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```
user ftpuser
verbose on

mkdir /data6/psreports/080913335408BAB393ED0F47F64A78BAC3ADB6867D14CFF6FB4871E9847296
257 MKD command successful.
cd /data6/psreports/080913335408BAB393ED0F47F64A78BAC3ADB6867D14CFF6FB4871E98472966EF
250 CWD command successful.
ascii
200 Type set to A.
put "d:\21A\SQR_INS9051_6028\index.html" "index.html"
200 PORT command successful.
150 ASCII data connection for index.html (216.131.201.168,2324).
226 Transfer complete.
4610 bytes sent in 0.00 seconds (4610000.00 Kbytes/sec)

bin
200 Type set to I.
put "d:\21A\SQR_INS9051_6028\INS9051_6028.PDF" "INS9051_6028.PDF"
200 PORT command successful.
150 Binary data connection for INS9051_6028.PDF (216.131.201.168,2326).
226 Transfer complete.
1730 bytes sent in 0.00 seconds (1730000.00 Kbytes/sec)

ascii
200 Type set to A.
put "d:\21A\SQR_INS9051_6028\SQR_INS9051_6028.log" "SQR_INS9051_6028.log"
200 PORT command successful.
150 ASCII data connection for SQR_INS9051_6028.log (216.131.201.168,2327).
226 Transfer complete.
1080 bytes sent in 0.00 seconds (1080000.00 Kbytes/sec)

quit
221 Goodbye.
```

Example of transfer log using the FTP command

```
Copying d:\PTDMO\output\SQR_XRFWIN2_24 into the repository...
d:\PTDMO\output\SQR_XRFWIN2_24\SQR_XRFWIN2_24.log -> \\RALCANTA020100\psreports\08121410
d:\PTDMO\output\SQR_XRFWIN2_24\XRFWIN2_24.out -> \\RALCANTA020100\psreports\081214105445
d:\PTDMO\output\SQR_XRFWIN2_24\XRFWIN2_24_1.PDF -> \\RALCANTA020100\psreports\08121410
d:\PTDMO\output\SQR_XRFWIN2_24\XRFWIN2_24_2.PDF -> \\RALCANTA020100\psreports\08121410
d:\PTDMO\output\SQR_XRFWIN2_24\index.html -> \\RALCANTA020100\psreports\081214105445DE9
5 File(s) copied
Successful copy of d:\PTDMO\output\SQR_XRFWIN2_24 to Repository
End of Transfer script
```

Example of transfer log using the XCOPY command

Transfer Log for HTTP

When HTTP is used to transfer files to the Report Repository, it doesn't generate a transfer log like FTP and XCOPY. All logs relating to the HTTP activities are logged in the Process Message Log table and you can view them by clicking the Message Log link on the Process Monitor Detail page in PeopleSoft Process Scheduler.

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10	1:21:10PM	Report Repository URL is: http ://rt-ibm08.peoplesoft.com:700 1/SchedulerTransfer/e840r20bnt (63,68)	Explain
10	1:21:10PM	Unable to open file to be tran sfered. /ds1/ps/dssgrp/easb/ou tput/E840R20B/AE_AP_PSTVCHR_16 36/AE_AP_PSTVCHR_1636.stdout (63,62)	Explain
	1:21:10PM	PSUNX failed to post files to the report respository. Server scheduled to try again on 2002-01-15-14.24.09.854000. See log %	Explain

Example of HTTP messages displayed on the Message Log page

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APPENDIX C

Setting Up PeopleSoft Process Scheduler Security

This appendix discusses how to:

- Set up PeopleSoft Process Scheduler privileges and profiles.
- Grant a PeopleSoft Process Scheduler system administration role.
- Secure passwords when scheduling from outside the PeopleSoft system.

Setting Up PeopleSoft Process Scheduler Privileges and Profiles

For a user to submit process requests, his or her user ID must have a process profile, which defines the user's privileges in PeopleSoft Process Scheduler. For example, a user can override an output destination for a request and be limited to what can be viewed on the Process Monitor page.

This section discusses how to:

- Update a process profile.
- Assign a process profile to a user ID.

Updating a Process Profile

To set up the user's access in PeopleSoft Process Scheduler, define a process profile with the proper authorizations and default settings.

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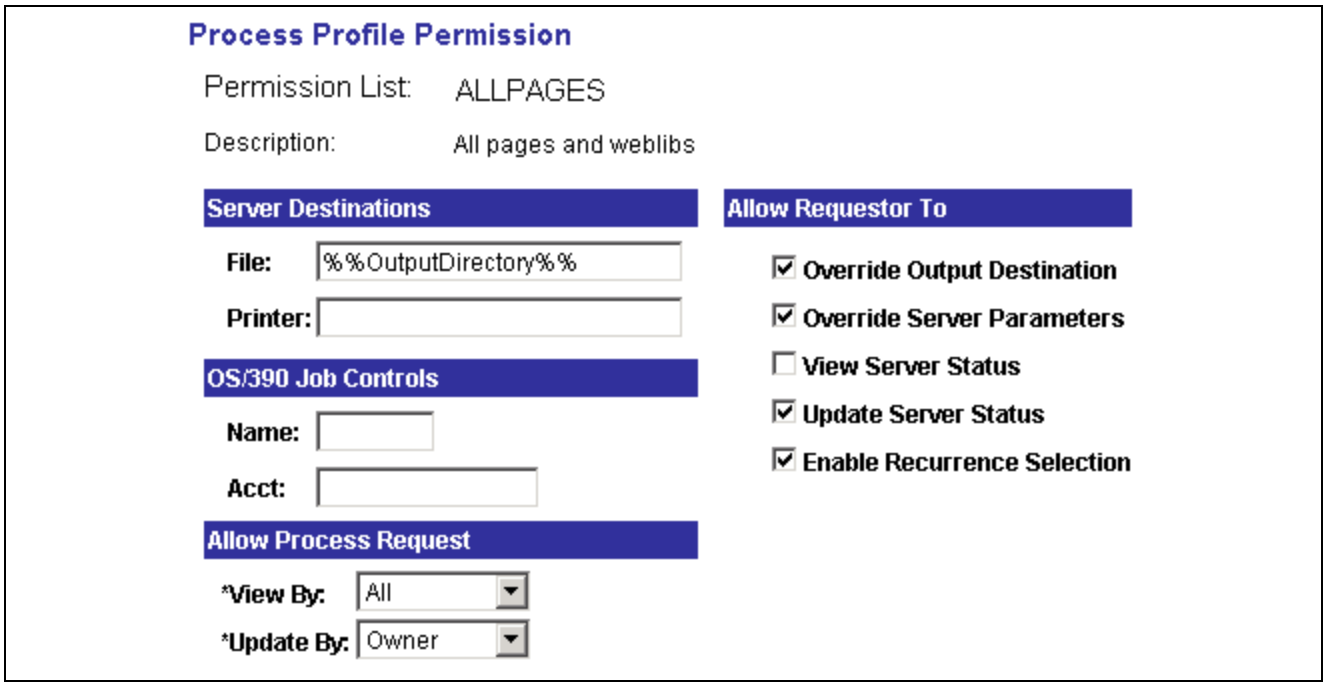

Security - Process Profile Permission page

To update a process profile:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists to open the permission list definition.
2. Select the Process page.
3. Click the Process Profile Permissions link.
4. In the Workstation Destinations and Server Destinations group boxes, enter a default file and printer destination for the client and server.

   The following list shows sample values for the server destination file.

Operating System	Sample Server Destination Value
Windows 2000	%%OutputDirectory%%
UNIX	%%OutputDirectory%%
OS390	HLQ.PSVV

5. Select the appropriate options in the Allow Process Request group box.

   This section enables you to adjust the level of access rights that all other users have for viewing and updating process requests that are initiated by the users under a particular profile. Both view and update rights can be changed to *Owner, All,* or *None.* The default enables the process request to be viewed by all and updated only by the owner. If you view by owner, no one else can view the status of the process in Process Monitor. Make any necessary adjustments to the user rights.

   Override Output Destination Select to allow the user to override the output destination from the Process Scheduler Request dialog box. If this option is cleared, the

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	File/Printer field in the Process Scheduler Request page becomes unavailable and the user cannot modify it. Use this setting to restrict users to redirecting their output to the default destinations only.
Override Server Parameters	Select to allow the user to override the server name and run date and time.
View Server Status	Select to allow a user to access the server view in the Process Monitor.
Update Server Status	Select to allow a user to suspend, restart, or shut down a server if needed through the Process Monitor. This also allows a user to refresh the Process Monitor - Server List page with the Refresh button.
Enable Recurrence Selection	Select to allow a user to select a run recurrence definition in the Process Scheduler Request dialog box. If this is cleared, the user cannot select a process to recur.

6. Click the OK button to save your changes.

Assigning a Process Profile to a User ID

The user profile must be updated to assign the process profile.

To assign a process profile to a user ID:

1. Select PeopleTools, Security, User Profiles, User Profiles to open the profile for a user ID.
2. Select the user ID.
3. Select the General page.
4. Enter the process profile for this user ID.
5. Click the Save button to save your changes.

Granting a PeopleSoft Process Scheduler System Administration Role

You can set up a user ID in PeopleSoft Security as a PeopleSoft Process Scheduler system administrator. A user with this privilege can update definitions in Process Scheduler Manager and view all process requests in Process Monitor. This role is equivalent to granting all of the privileges in the Allow Requestor To group box on the Process Profile Permission page.

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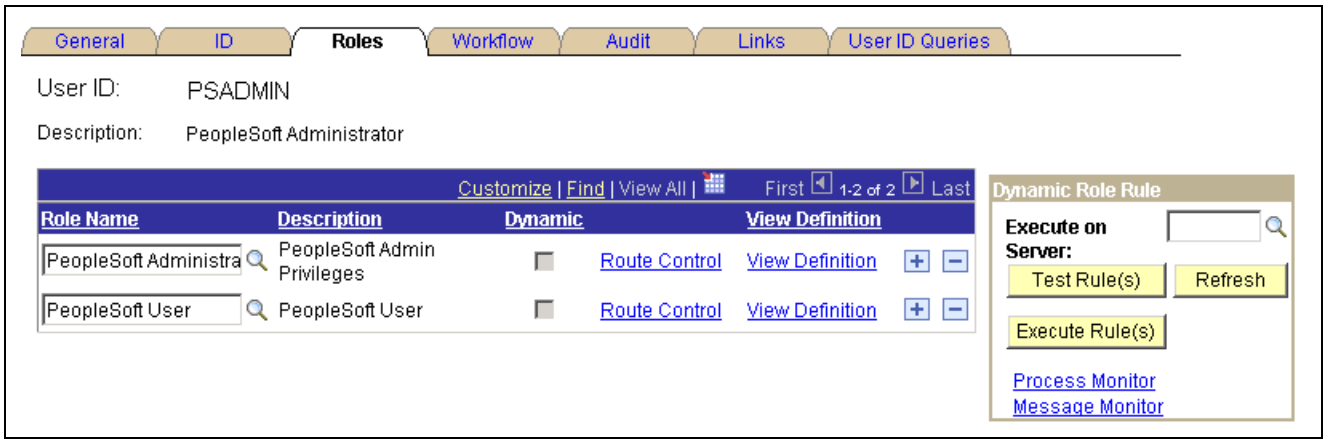

Security - User Profiles - Roles page

To assign a PeopleSoft Process Scheduler system administration role to a user ID:

1. Select PeopleTools, Security, User Profiles, User Profiles to open the profile for a user ID.
2. Select the Roles page.
3. Select the role name *ProcessSchedulerAdmin.*
4. Click Save to save your changes.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Security Administration, "Understanding PeopleSoft Security"

Securing Passwords When Scheduling from Outside PeopleSoft

As a PeopleSoft customer, you can create an interface to insert entries into the Process Request table to be scheduled by the Process Scheduler. However, keep in mind that the values that you insert into the PARMLIST (Parameter List) field in the PRCSPARMS table are displayed in the Process Monitor Detail page. These values can also be seen in the notifications that are sent out by Process Scheduler.

To ensure that any user passwords or access IDs and passwords are not displayed in any pages, notifications, or logs, you can replace the actual values with the following metastrings:

User password: *%%OPRPSWD%%*

Access ID: *%%ACCESSID%%*

Access password: *%%ACCESSPSWD%%*

Note. Process Scheduler has a mechanism to replace the metastrings with the actual values when initiating these requests and to ensure that the actual values are not displayed in any pages or log files.

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APPENDIX D

Using the PSADMIN Utility

This appendix provides an overview of the PeopleSoft Process Scheduler configuration file and discusses how to edit the configuration file.

Note. This appendix does not discuss how to install and configure a PeopleSoft Process Scheduler Server.

See Also

PeopleTools 8.49 Installation Guide for your database platform.

Understanding the PeopleSoft Process Scheduler Configuration File

Use the PSADMIN utility to configure and administer the PeopleSoft Process Scheduler Server Agent. PSADMIN is supported on only Windows 2000 and UNIX. However, in some cases, you can run the PSADMIN utility on operating systems that are not supported application servers.

Configuring a PeopleSoft Process Scheduler server is similar to configuring application servers and web servers. From the PeopleSoft Process Scheduler Administration menu, you invoke a text-driven interface that prompts you for parameter values. All of the PeopleSoft Process Scheduler server configuration information for a specific database is contained in the PSPRCS.CFG configuration file, and the PSADMIN provides an interface to edit this file.

PeopleSoft automatically archives the Process Scheduler configuration file whenever it is changed. The older version is archived as PSPRCS_<Time Stamp>.CFG, and the current version becomes psprcs.cfg. The archive directory path is *<PS_Home>\Appserv\prcs\<database>\Archive*. (for example, *c:\pt844\Appserv\prcs\fin844\Archive*).

Note. The PSPRCS.CFG file supports environment variables. For example, the TEMP setting in the [Process Scheduler] section can look like this: TEMP=%TEMP%.

Editing the PeopleSoft Process Scheduler Configuration File

This section discusses how to:

- Create a PeopleSoft Process Scheduler configuration file through PSADMIN.
- Use the PSADMIN Quick-configure menu.
- Edit the PeopleSoft Process Scheduler configuration file.

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- Edit the PeopleSoft Process Scheduler configuration file for UNIX and OS390.

Creating a PeopleSoft Process Scheduler Configuration File Through PSADMIN

Although you edit PSPRCS.CFG through the PSADMIN utility, in Windows 2000 the PSPRCS.CFG file is in the following batch server directory:

<PS_HOME>\appserv\prcs\<DBNAME>

To create a PeopleSoft Process Scheduler configuration:

1. Select Start, Command Prompt.
2. Change the directory to <PS_HOME>\appserv\.
3. Enter *psadmin.*
4. Press ENTER.

   The PeopleSoft Server Administration menu appears.
5. Select option 2 (Process Scheduler).
6. Press ENTER.

   The PeopleSoft Process Scheduler Administration menu appears.
7. Select option 4 (Create a Process Scheduler Configuration) from the Process Scheduler Administration menu.
8. Enter the name of the desired database.
9. Press ENTER.

   The Quick-configure menu appears.

Note. To edit a PeopleSoft Process Scheduler configuration file, select option 6 (Edit a Process Scheduler Configuration file) from the Process Scheduler Administration menu. Enter the number that corresponds to the appropriate database from the database list.

Using the PSADMIN Quick-Configure Menu

The Quick-configure menu enables you to create a process scheduler configuration by entering basic information. If you must change a parameter that does not appear, select Custom configuration.

The menu is divided into the following three sections:

- *Features:* Each item in this list is a feature that uses one or more server processes.

  If set to *Yes,* the feature becomes active for users of the server. Select the number that corresponds to the desired option to toggle Yes/No.
- *Settings:* Commonly changed parameters are listed in this section.

  Select the number that corresponds to the desired parameter to change its setting.
- *Actions:* Select to load the scheduler with the server and settings displayed, run a complete custom scheduler configuration, display help information, or return to the previous menu.

The Quick-configure menu consists of the following features:

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Master Schdlr (master scheduler)	Flag to enable the Master Scheduler Server (PSMSTPRC). The default is to disable the server.
App Eng Server (application engine server)	Flag to initiate Application Engine programs through the AE Tuxedo Server (PSAESRV). The default is set to run PeopleSoft Application Engine using PSAESRV.
Opt Eng Server (optimization engine server)	Flag to enable Analytic Engine processing in this server. The default is to disable the server. Enable this flag if the application is packaged with Analytic Engine programs.

The Quick-configure menu consists of the following settings:

DBNAME (database name)	Enter the database name that is associated with a PeopleSoft Process Scheduler Server Agent, such as HRDMO, FSDMO, SADMO, and so on.
DBTYPE (database type)	Enter the database type: DB2UNIX, DB2ODBC (for DB2/OS390), INFORMIX, MICROSFT, ORACLE, or SYBASE.
PrcsServer (process server)	Enter the process server name. This must match the name defined in the Server Definition table (for example, PSNT).
UserID	Enter the user ID. For Enterprise Resource Planning, this is typically *VP1,* and for Human Resources, it's *PS.*
UserPswd (user password)	Enter the user password. For Enterprise Resource Planning, this is typically *VP1,* and for Human Resources, its *PS.*
ConnectID	Enter the connect ID. This value is required for all platforms.
ConnectPswd (connect password)	Enter the connect password. This value is required for all platforms.
ServerName	This value is required for Informix and Sybase users.
Log/Output Dir (log/output directory)	Enter the directory in which files that are generated by the program are written. When PeopleSoft Process Scheduler initiates a process request, it creates a subdirectory in the format <Process Type ID>_<Program Name>_<Process Instance> that contains the generated files. For instance, the SQR program has all reports, trace, and log files in the subdirectory SQR_XRFWIN_20. It is also the optional directory used with the Output Destination field when scheduling a request. You can use this variable (%%OutputDirectory%%) in the File/Printer field of the Process Scheduler Request dialog box. **Note.** The output directory has an extra slash attached at the end.
SQRBIN	Enter the path to the SQR executables.
AddToPATH	(Optional for Tuxedo) Enter an additional directory that is appended to the PATH environment variable.
DBBIN	Enter the path to the database drivers (that is, your connectivity software).

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See Also

Chapter 10, “Managing PeopleSoft Master Scheduler Servers,” Understanding PeopleSoft Master Scheduler Functions, page 135

Chapter 9, “Managing PeopleSoft Process Scheduler,” Setting Parameters for the Application Engine Server, page 129

Chapter 9, “Managing PeopleSoft Process Scheduler,” Setting Parameters for the Application Engine Server, page 129

Editing the PeopleSoft Process Scheduler Configuration File

The sections in the PeopleSoft Process Scheduler configuration file vary, depending on the operating system from which the PeopleSoft Process Scheduler Server is started. For instance, servers that run only in BEA Tuxedo (that is, PSAESRV, PSANALYTICSRV) are not available in OS390. However, the OS390 section applies when the PeopleSoft Process Scheduler Server is started in the OS390 UNIX System Services (USS).

The following table lists which sections can be found in the PeopleSoft Process Scheduler configuration file based on the operating system:

Section	Windows 2000	UNIX	OS390
Startup	X	X	X
Database Options	X	X	
Trace	X	X	X
OS390			X
Process Scheduler	*	*	*
Tuxedo Settings	X	X	
Interface Driver	X	X	X
PSTools	*	*	*
PSAESRV	X	X	
PSAEOSRV	X	X	
PSDSTSRV	X	X	
PSANALYTICSRV	X	X	

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Section	Windows 2000	UNIX	OS390
Application Engine			X
SQR	*	*	*
Remote Call	X	X	X
nVision	X		
Crystal	X		
SMTP Settings	X	X	X
Cache Settings	X	X	X
Integration Broker	X	X	

* Denotes where parameters found in this section differ, based on the operating system in which the PeopleSoft Process Scheduler configuration file is located.

The *PeopleTools 8.49 Installation Guide* provides the procedure for configuring a PeopleSoft Process Scheduler Server using the basic default values. This section discusses each value that is available in each section.

Startup Section

This is the first section that you encounter when using PSADMIN to configure a PeopleSoft Process Scheduler Server Agent:

Parameter	Description
DBName	Specify the database name that is associated with a PeopleSoft Process Scheduler Server Agent, such as *HRDMO, FSDMO, SADMO,* and so on.
DBType	Specify the database type: *DB2UNIX, INFORMIX, MICROSFT, ORACLE,* or *SYBASE.*
UserId	Enter the user ID. For Enterprise Resource Planning, this is typically *VP1,* and for Human Resources, it's *PS.*
UserPswd	Enter the user password. For Enterprise Resource Planning, this is typically *VP1,* and for Human Resources, it's *PS.*

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Parameter	Description
ConnectId	Enter the connect ID. This value is required for all platforms.
ConnectPswd	Enter the connect password. This value is required for all platforms.
ServerName	This value is required for Informix and Sybase users.

When you change the UserPswd or ConnectPswd field, you are prompted for an option to encrypt the value entered for the password field. The default is to encrypt the password.

Database Options Section

Use this section for database-specific configuration options:

Parameter	Description
SybasePacketSize	Specify the Sybase packet size. The default is *512*. See *PeopleTools 8.49 Installation Guide* for your database platform.
UseLocalOracleDB	Indicate whether the PeopleSoft database to which you are connecting is in a local Oracle System Identifier (SID). The default is *0*. This means that the PS database to which you are connecting is remote. See *PeopleTools 8.49 Installation Guide* for your database platform.

Trace Section

Use this section to set trace values for performance monitoring and troubleshooting:

Parameter	Description
TraceFile	This applies to Windows only and indicates the file to which SQL traces are written when TraceSQL has a value greater than zero. SQL traces for the following programs are written to this file: Crystal, nVision, and Cube Manager. Other processes—such as Application Engine, SQR, and COBOL—have the SQL traces written to a separate subdirectory under the directory specified for the Log/Output Directory parameter. See the Log/Output Directory parameter.

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Parameter	Description
TraceSQL	Specify a SQL trace value for troubleshooting. It is implemented as a bit field. Possible values for TraceSQL are listed later in this section.
TracePC	Specify a trace value for troubleshooting PeopleCode. This is used by PeopleSoft Application Engine when it runs PeopleCode. Possible values for TracePC are listed later in this section.
TraceAE	Specify the trace options that are specific to PeopleSoft Application Engine. Trace information based on this option is written to a file with the following format: <Application Engine program name>_<Process Instance>.AET Possible values for TraceAE are listed later in this section.

The following table lists the possible values for TraceSQL:

Bit	Constant	Type of Tracing
0	%TraceSQL_None	No output.
1	%TraceSQL_Statements	SQL statements.
2	%TraceSQL_Variables	SQL statement variables.
4	%TraceSQL_Connect	SQL connect, disconnect, commit, and rollback.
8	%TraceSQL_Fetch	Row fetch (indicates that it occurred and the return code, not data).
16	%TraceSQL_MostOthers	All other application-programming interface (API) calls, except Set Select Buffers (ssb).
32	%TraceSQL_SSB	Set Select Buffers (identifies the attributes of columns to be selected).
64	%TraceSQL_DBSpecific	Database API-specific calls.

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Bit	Constant	Type of Tracing
128	%TraceSQL_Cobol	COBOL statement timings.
256	%TraceSQL_SybBind	Sybase bind information.
512	%TraceSQL_SybFetch	Sybase fetch information.
1024	%TraceSQL_DB2390Server	Turn on the tracing of diagnostic messages returned by the DB2/390 %UpdateStats() command.

The following table lists the possible values for TracePC. Use these by adding the numbers together, or by specifying more than one constant:

Bit	Constant	Type of Tracing
1	%TracePC_Functions	Provide a trace of the program as it is run. This implies options 64, 128, and 256.
2	%TracePC_List	Provide a listing of the entire program.
4	%TracePC_Assigns	Show the results of all assignments made to variables.
8	%TracePC_Fetches	Show the values fetched for all variables.
16	%TracePC_Stack	Show the contents of the internal machine stack. This option is normally used for debugging the PeopleCode language, not PeopleCode programs.
64	%TracePC_Starts	Provide a trace showing when each program starts.
128	%TracePC_ExtFuncs	Provide a trace showing the calls made to each external PeopleCode routine.

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Bit	Constant	Type of Tracing
256	%TracePC_IntFuncs	Provide a trace showing the calls made to each internal PeopleCode routine.
512	%TracePC_ParamsIn	Show the values of the parameters to a function.
1024	%TracePC_ParamsOut	Show the values of the parameters as they exist at the return from a function.

The following table lists the possible values for TraceAE:

Bit	Type of Tracing
1	Trace STEP execution sequence to AET file.
2	Trace Application SQL statements to AET file.
128	Timings report to AET file.
256	Method/BuiltIn detail, instead of summary in AET Timings report.
1024	Timings report to tables.
2048	DB optimizer trace to file.
4096	DB optimizer trace to tables.
8192	Trace Integration Broker transform programs.

Process Scheduler Section

After you set trace values, use the Process Scheduler section to set the environment variables that are associated with PeopleSoft Process Scheduler.

Warning! The default values for PS_HOME here and in future sections assume that you set up SQR, Crystal, and nVision locally on the batch server. You can point to those items on the file server, but if so, you must use a full path. You *cannot* use a PS_HOME environment variable because PSADMIN employs the PS_HOME environment variable to point to a local directory on the batch server.

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Parameter	Description
PrcsServerName	Specify the process server name. This must match the name defined in the Server Definition table, such as *PSNT*.
DBBIN	Enter the path to the database drivers (that is, your connectivity software).
Max Reconnect Attempt	Specify the maximum number of attempts that the PeopleSoft Process Scheduler Server Agent tries reconnecting to the database when the connection is lost. When the maximum number of attempts is reached, and the agent hasn't successfully connected to the database, the agent shuts down.
Reconnection Interval	Specify the interval, in seconds, between attempts to reconnect to the database when the connection is lost.
Authentication Timeout	Specify the duration, in minutes, allotted before PeopleTools security module times-out authenticating a process released by Process Scheduler. The timer starts from the time Process Scheduler initiates the request
Allow Dynamic Changes	Specify dynamic changes to certain settings without having to reboot the domain. The settings that can be dynamically changed are Recycle Count, Consecutive Service failures, Trace SQL, Trace Mask SQL, TracePC, TracePCMask, TracePpr, TracePprMask, Log Fence, Enable DB Monitoring, and Enable Debugging.
Log/Output Directory	Specify the directory in which files that are generated by the program are written. When PeopleSoft Process Scheduler initiates a process request, it creates a subdirectory in the format <Process Type ID>_<Program Name>_<Process Instance> that contains the generated files. For instance, the SQR program has all the reports, trace, and log files in the subdirectory SQR_XRFWIN_20. It is also the optional directory used with the Output Destination field when scheduling a request. This variable (%%OutputDirectory%%) can be used in the File/Printer field of the Process Scheduler Request dialog box. **Note.** The output directory has an extra slash attached at the end.

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Parameter	Description
LogFence	Enter the PeopleSoft Process Scheduler tracing levels, such as *3*. **Note.** The default value is *3*. If the value is set to *5*, the transfer files and the delete files will not deleted from the log_output directory.
Log Space Threshold	Specify the space threshold, in megabytes (MB), for the log/output directory. Once the space goes below this threshold, the PeopleSoft Process Scheduler stops processing until more disk space becomes available. The Server Monitor shows a status of *Suspended — Disk Low*.
File Chunk Size	Specify the size of memory in KB, allocated to store the value read from a file when transferring files to the Report Repository via HTTP. The default is *4096 KB (4 MB)*.
CBLBIN	Enter the path to COBOL executables, such as *%PS_HOME%\CBLBIN*.
CRWRPTPATH	Enter the path to Crystal Report files, such as *%PS_HOME%\CRW*. **Note.** Use semicolons to separate multiple directories.
TEMP	Enter the local temporary directory, such as *%TEMP%*.
TOOLBIN	Enter the location of the PeopleTools executables, such as *%PS_HOME%\bin\client\winx86*.
TOOLBINSRV	Enter the location of the server version of PeopleTools executables, such as *%PS_HOME%\bin\server\winx86*.
WINWORD	Enter the path to Microsoft Word executables, such as *c:\apps\office97\winword*. **Note.** If spaces exist in the path, you must modify the Process Type Definition and add quotes around the entry in the Command Line field, for example *"%%WINWORD%%\WINWORD.EXE"*. These must be in the batch server environment.

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Parameter	Description
DEFAULTPRINTER	Enter the universal naming convention (UNC) path of the printer where reports are printed when the *%DefaultPrinter%* was specified as the output destination.
Update Table Stats on Purge	Set to run statistics for the Process Request and Report Manager tables during the Process Scheduler server purge process. *0:* Disable. *1:* Enable. **Note.** This flag is ignored if the DBFlags bitfield parameter is disabled.

The following table lists the possible values for LogFence:

Level	Type of Tracing
0	Status information.
1	General errors.
2	Warnings.
3	Informational.
4	Tracing Level 1.
5	Tracing Level 2 (detail).

See Appendix B, “Understanding Logging Systems,” page 157.

BEA Tuxedo Settings Section

The following table describes each parameter in the Tuxedo Settings section:

Parameter	Description
Restartable	Specify *Y* or *N* to instruct Tuxedo to restart a PeopleSoft Process Scheduler Server Agent or Distribution Agent if it is terminated abruptly.

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Parameter	Description
Grace Period	Specify the period time in seconds in which Tuxedo will attempt to restart the Process Scheduler Server. For example, Grace Period =600, Max Restart Attempt = 5. Tuxedo attempts to restart the PeopleSoft Process Scheduler server five times within 30 minutes of when the server comes down.
Max Restart Attempt	Specify the maximum number of restarts in the grace period.
Add to PATH	(Optional) Specify an additional directory that is appended to the PATH environment variable.

Cognos/Cube Manager Installs: Make sure to specify the proper path for Cognos in the *Add to Path* parameter. By default, that path is `C:\Program Files\Cognos\cer2\bin;C:\ODI\OStore\bin.`

Note. The *Cognos* and *ODI* are the important top level directories and can change depending on the install.

Interface Driver Section

The following table describes the parameter in the Interface Driver section:

Parameter	Description
SCP_LOCALE	Defines the RPS_LOCALE string that is sent to the PeopleSoft Supply Chain Planning server.

PSTools Section

Use this section to specify a character set. The default value is *Latin1*.

Parameter	Description
JavaVM Shared Library	Indicate which Java Virtual Machine (JVM) library to use. **Note.** You must manually update the psprc.cfg file, as this option is not available using the PSADMIN utility.
Add to CLASSPATH	The CLASSPATH environment variable tells the JVM and other Java applications where to find the java class libraries, including user-defined class libraries. Because PeopleTools automatically generates CLASSPATH entries for core PeopleSoft-delivered class libraries, use this field to specify any custom or additional class libraries that must be accessed by PeopleSoft.

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Parameter	Description
JavaVM Options	Set options to the list of parameters required. Use a space to separate parameters (for example, -Xmx256m -Xms128m). Set option -Xrs if you have PeopleSoft Process Scheduler set up as a NT service on Windows. Options must be set if you are using HTTP transfer protocol and receiving Java exception thrown: java.lang.OutOfMemoryError. **Note.** You must manually update the psprc.cfg file, as this option is not available using the PSADMIN utility.
Character Set	Specify the default character set for non-Unicode processing performed by this process server. The default value is *latin1*. This is the character set that PeopleSoft supports for use with all Western European languages, including English. If the process server will be used only to process Western European data, accept the default. Otherwise, select one of the valid character set choices listed later in this section. **Note.** The character set selected for the process server should be the same as the character set specified for the application sever.
Proxy Host	This setting is used by the distribution agent if your architecture includes a firewall between the process scheduler server and the report repository (webserver). **Note.** If your architecture includes a firewall between the process scheduler server and the report repository (webserver), the distribution agent must tunnel through this firewall via a proxy server in order to transfer reports successfully. Set this value to the domain name of the proxy server only if your architecture includes a firewall between the process scheduler and the report repository (webserver). Configure the firewall to allow outgoing HTTP or TCP connections to originate only from the proxy server host. You can configure the proxy server to restrict access to only PeopleSoft and perform tasks, such as logging HTTP activity.
Proxy Port	If PeopleSoft Process Scheduler is behind a proxy server, set this value to the port of the proxy server.

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Parameter	Description
DbFlags	Enter *0* to issue the command to update table statistics to the database. Programs like PeopleSoft Application Engine and COBOL use the metaSQL %UpdateStats to run the command that runs statistics to a specific table. Otherwise, select one of the valid choices listed later in this section. **Note.** The Update Table Stats on Purge parameter is ignored if this parameter is disabled.
Suppress App Error Box	Use to suppress the console's Application Error dialog box after an application error occurs. *Y* suppresses the dialog box.
Process exit grace period	When a PeopleSoft Application Engine job completes, it has a specified number of seconds to exit. If the process has not exited when the grace period expires, it is terminated through a psreaper process. A grace period of *0* disables the psreaper process.

The following table lists valid character set choices:

Character Set	Description
latin1	(Default). Latin-1 - ISO 8859-P1 - Microsoft codepage 1252
sjis	Japanese Shift-JIS - Microsoft codepage 932
big5	Traditional Chinese - Microsoft codepage 950
gb	Simplified Chinese - Microsoft codepage 936
ks-c-5601-1987	Korean Wansung - Microsoft codepage 949
ks-c-5601-1992	Korean Johab - Microsoft codepage 1361

See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*.

The following table lists possible values for DBFlags bitfield:

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Bit	Description
0	(Default) Issue the command to update table statistics to the database.
1	Ignore metaSQL to update database statistics (shared with COBOL).
2	Not yet allocated.
4	Disable second database connection.
8	Disable persistent secondary database connection.
16	Not yet allocated.
32	Not yet allocated.
64	Not yet allocated.
128	Not yet allocated.
256	Not yet allocated.

PSAESRV Section

The following table describes each parameter in the PSAESRV (Application Engine Tuxedo Server) section:

Parameter	Description
Max Instances (maximum instances)	Specify the maximum concurrency set for process types with a generic process type of Application Engine, as defined on the Server Definition page in Process Scheduler Manager.
Recycle Count	Specify the number of services after which PSAESRV automatically restarts. If this is set to *0* (default), PSAESRV is never recycled.
Allowed Consec Service Failures (allowed consecutive failures)	Specify the number of consecutive service failures after which PSAESRV automatically restarts. If this is set to *0* (default), PSAESRV is never recycled.

PSAEOSRV Section

The following table describes each parameter in the PSAEOSRV (Analytic Engine Tuxedo Server) section:

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Parameter	Description
Max Instances	Specify the maximum concurrency set for process types with a generic process type of Analytic Engine, as defined on the Server Definition page in Process Scheduler Manager. This should equal the number of Analytic Engines if synchronous Tux service calls are used.
Recycle Count	Specify the number of services after which PSAEOSRV automatically restarts. If this is set to *0* (default), PSAEOSRV is never recycled.
Allowed Consec Service Failures	Specify the number of consecutive service failures after which PSAEOSRV automatically restarts. If this is set to *0* (default), PSAEOSRV is never recycled.
Max Fetch Size	Specify the maximum result set size, in KB, for a SELECT query. The default is 5000KB. Use *0* for no limit.

PSANALYTICSRV Section

The following table describes each parameter in the PSANALYTICSRV (Analytic Engine Tuxedo Server) section:

Parameter	Description
Max Instances	Specify the total number of OptEngines = number of single queues + number in the MSSQ (read by ubbgen.cpp to calculate MAXSERVERS and MAXSERVICES in psprcsrv.ubb). Only MSSQ allows spawning.
Service Timeout	Limit the period that PSANALYTICSRV might block PSPRCSRV.
Opt Max General Services	Specify the number of each service declared in the corresponding .ubx file.
Opt MSSQ Instances	Specify the number of OptEngines in the MSSQ.

PSDSTSRV Section

The following table describes each parameter in the PSDSTSRV (Distribution Agent Tuxedo Server) section:

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Parameter	Description
Max Instances	Specify the maximum number of PSDSTSRVs that can be started within BEA Tuxedo. Default is *1*.
Recycle Count	Specify the number of services after which PSDSTSRV automatically restarts. If this is set to *0* (default), PSDSTSRV is never recycled.
Allowed Consec Service Failures	Specify the number of consecutive service failures after which PSAEOSRV automatically restarts. If this is set to *0* (default), PSDSTSRV is never recycled.

SQR Section

The following table describes each parameter in the SQR section:

Parameter	Description
SQRBIN	Enter the path to the SQR executables.
PSSQRFLAGS	Specify the SQR report arguments required for launching SQR.
Print Log	Indicate whether the SQR log files are also be printed when the output destination is *Printer*.
Enhanced HTML	Indicate whether reports are in enhanced HTML format when the output destination is *HTM*.
PSSQR1	Enter the first SQR report file search path.
PSSQR2	Enter the second SQR report file search path.
PSSQR3	Enter the third SQR report file search path.
PSSQR4	Enter the fourth SQR report file search path.

Note. In some cases, Application Engine programs require Java Runtime Engine (JRE) to be installed on the batch server.

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

Data Mover Section

The following table describes each parameter in the Data Mover section.

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Note. The values entered here should be the same as the values specified in the Configuration Manager.

Parameter	Description
InputDir	Specify the path for the Data Mover input directory (for example, %PS_HOME%/data).
OutputDir	Specify the path for the Data Mover output directory (for example, %PS_HOME%/data).
LogDir	Specify the path for the Data Mover log directory (for example, %PS_SERVDIR%/log_output).

RemoteCall Section

The following table describes each parameter in the RemoteCall section:

Parameter	Description
RCCBL Timeout	Specify the maximum allotted time, in seconds, to run Remote Call with PeopleSoft Application Engine.
RCCBL Redirect	If this parameter is set to *0,* log files that are generated from Remote Call are not retained. If this parameter is set to *1,* log files are redirected to the directory specified in the Log/Output Directory parameter.
RCCBL PRDBIN	Specify the location of the COBOL executable. In Windows, the default location of the COBOL executable is `%PS_HOME%\cblbin%PS_COBOLTYPE%`. In UNIX, the default location is`$PS_HOME/cblbin`.

PS/nVision Section

If you plan to have PeopleSoft Process Scheduler invoke PS/nVision jobs, specify the appropriate parameters in this section.

Parameter	Description
DrillDownDir	Specify the location of PS/nVision DrillDown files, such as *%PS_HOME%\NVSION\LAYOUT\DRILLDN.*
ExcelDir	Leave blank.

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Parameter	Description
InstanceDir	Enter the location where PS/nVision places report instances, such as *%PS_HOME%\NVSION\INSTANCE.* **Note.** When thePS/nvision instance directory is set to a mapped network drive and the output format used is HTML, PS/nVision hangs. The workaround is to use the UNC path.
LayoutDir	Specify the location of the PS/nVision layout, such as *%PS_HOME%\NVISION\LAYOUT.*
MacroDir	Enter the directory containing macros for PS/ nVision and Query Link, such as *%PS_HOME%\EXCEL.*
StyleDir	Enter the default location where PS/nVision keeps nPlosion Styles (these are usually inherited by the layout that the user is designing).
TemplateDir	Enter the location of the QUERY.XLT file, which defines the Microsoft Excel styles for formatting output. The default is the \MacroDir, such as *%PS_HOME%\EXCEL.*
EnableDrillDownForFile	Use PS/nVision on the web. Indicate whether you want to enable drilldown on a report with the output type of *file.* *1* = Enable drilldown. *0* = Disable drilldown (default).
EnablePollDialogs	Use PS/nVision on the web. Indicate whether you want the system to poll and automatically kill unattended dialogs generated from PS/nVision in batch mode (for example, dialog messages from Excel displaying on the webserver). *1* = Enable poll dialogs. *0* = Disable poll dialogs (default).
PollDialogSeconds	Enter the time, in seconds, used to cycle polling for the dialog.

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Parameter	Description
TraceLevel	Use PS/nVision on the web. Indicate whether you want the system to generate independent trace/log files, and at what level, for each nVision process. Trace files can be viewed from the Process Monitor Details - View Log/Trace page. *0* = Disable trace files (default). *1* = Generate basic high level information. *2* = Generate level 1 tracing plus high level code flow. *3* = Generate level 2 tracing plus SQL statements. *4* = Generate level 3 tracing plus most function calls and output values. **Note.** Extensive tracing will impact performance.
SaveTempFile	Indicate whether you want PS/nVision to save or delete the temporary reports created when running them to email, printer, or web output. *0* = Temporary reports will be deleted. (Default). *1* = Temporary reports will be saved. **Note.** Reports that are run to email or printer will be saved to the folder specified in the Directory Name Template field of the report request. Reports that are run to web will be saved to the PS/nVision instance directory.

Crystal Section

If you plan to have PeopleSoft Process Scheduler invoke Crystal jobs, specify the appropriate parameters in this section:

Parameter	Description
Trace	Enter *YES* or *NO* to indicate whether you want tracing enabled.
TraceFile	Enter the name of the trace file, such as *%TEMP% \CRYSTAL.TRC*.

SMTP Section

If you plan to use Simple Mail Transfer Protocol (SMTP) mail server gateways, specify the appropriate parameters in this section.

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When changes are made to any of the parameters in the SMTP section of the process scheduler configuration file (psprcs.cfg), the effect is immediate (even before the updated configuration file has been loaded by PSADMIN).

Note. The Allow Dynamic Changes flag, located in the General Settings section of the configuration file, has no effect on the SMTP parameters. Changes to the SMTP parameters are always dynamic.

Parameter	Description
SMTPServer	Specify the name of the corporate mail server gateway machine. Leave blank for an initial installation.
SMTPPort	Specify the port used by SMTP mail server gateways.
SMTPServer1	Specify the failover corporate mail server gateway machine. Leave blank for an initial installation.
SMTPPort1	Specify the port used by failover SMTP mail server gateways.
SMTPSender	Specify the sender's internet address. This must be a valid internet address, such as USER1@XYZCORP.COM. Leave blank for an initial installation.
SMTPSourceMachine	Specify the sender's source machine name and internet address in the form of MACHINE.XYZCORP.COM. Leave blank for an initial installation.
SMTPCharacterSet	Specify the character set used on the sender's machine.
SMTPEncodingDLL	Specifies the name of a DLL used to translate the mail message to a non-Unicode character set. By default, all outgoing SMTP mail is sent in Unicode UTF-8.
SMTPTrace	Enter *1* to enable the tracing of all email details to the log file when LogFence is set to *5*. Enter *0* to disable it. With this option, you can reduce the log file size for high-volume email users.
SMTPSendtime	Enter *1* to have messages contain a send time that is populated by the application server. Enter *0* to leave the send time blank and have it populated by the receiving gateway (depending on the gateway).

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Cache Settings Section

PeopleSoft Application Engine and Process Scheduler require a cache directory, which you specify in this section:

Parameter	Description
CacheBaseDir	Enter the location of the cache directory. Leave the default selected, unless you have a compelling reason to change it.
EnableServerCaching	Specify a bit flag instructing how file caching is set up. The default value is *2*. **Note.** This option is not included in the delivered psprcs.cfg file. However, if you must override the default setting, you can manually enter the option into the psprcs.cfg file.
ServerCacheMode	Set to *0* for one cache directory per process or *1* for a shared cache. The default value is *0*. **Note.** This option is not included in the delivered psprcs.cfg file. However, if you must override the default setting you can manually enter the option into the psprcs.cfg file.

The following table lists the possible values for EnableServerCaching.

Bit	Type of Caching
0	Server file caching disabled.
1	Server file caching is limited to most used classes.
2	Server file caching for all types.

Integration Broker Section

The following table describes each parameter in the Integration Broker section:

Parameter	Description
Min Message Size For Compression	Specify the minimum size of message data for synchronous handler to enable compression.

Note. If you decide to edit the configuration file directly, make sure that there are no spaces between the equal sign and the entries and no trailing spaces. After making the necessary changes, save this file.

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Search Indexes Section

The following table describes each parameter in the Search Indexes section:

Parameter	Description
Search Indexes	Use this option to specify the location of all the files pertaining to the search index. Index name is same as the location.

Editing the PeopleSoft Process Scheduler Configuration File for UNIX and OS390

This section discusses the differences in parameter descriptions for UNIX and OS390 operating system.

OS390-Config Section

This is an additional section located after the Trace section:

Parameter	Description
ODBC Initialization File	Specify the file containing the Open Database Connectivity (ODBC) setting to connect to the DB2 subsystem where the PS database is created.
Shell JCL Library	Specify the directory location where the JCL shell templates are stored.
High Level Qualifier for System Datasets	Specify the datasets to which PeopleSoft installation are copied during batch transfer (for example, *PT.PT840TA*).
High Level Qualifier for Log Datasets	Specify the datasets that represent the high-level qualifier for all logs and reports generated from processes submitted through PeopleSoft Process Scheduler.
Plan name for PTPSQLRT with CAF	Specify the DB2 plan used to run COBOL called within an Application Engine program through Remote Call.
Plan name for PTPSQLRT with TSO	Specify the DB2 plan used to run COBOL from TSO through JCL that is created from the COBOL shell JCL template (SHECBL.JCT).
DB2 Sub-System=	Specify the DB2 subsystem name where the database resides (for example, *DSND*).

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Parameter	Description
VIO eligible unit group	Specify the DASD volume group used by Remote COBOL when triggered from PeopleSoft Application Engine.
Enable Parallel Processing	Specify *Y* or *N* to set the Parallel processing parameter in the COBOL shell JCL template (SHECBL.JCT).
DECIMAL	This value should reflect the setting of the DECIMAL parameter found in the ZPARM of the DB2 subsystem where the database resides. The valid values are *PERIOD* (default) and *COMMA*.
TSO Character Set	Specifies the codepage for the TSO environment. The default value is *CP037* (IBM037: Latin1 code page). **Note.** For example, in Japanese setting, the recommended TSO Character Set is *CCSID930*. See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*, "Selecting and Configuring Character Sets and Language Input and Output," Character Sets in the PeopleSoft Pure Internet Architecture.

Process Scheduler Section

The following table lists the Process Scheduler section parameters for UNIX (rather than Windows 2000):

Parameter	Description
ProgramName	Specify the name of the PeopleSoft Process Scheduler program, *PSPRCSRV*.
PrcsServerName	Specify the process server name. This must match the name defined in the server definition, such as *PSUNX*.
Max Reconnect Attempt	Specify the maximum number of times that the PeopleSoft Process Scheduler Server Agent will try to reconnect to the database when the connection is lost. When the maximum number of attempts is reached and the agent hasn't successfully connected to the database, the agent shuts down.
Reconnection Interval	Specify the interval, in seconds, between attempts to reconnect to the database when a connection is lost.

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Parameter	Description
Log/Output Directory	Specify the directory in which files that are generated by the program are written. When PeopleSoft Process Scheduler initiates a process request, it creates a subdirectory in the format <Process Type ID>_<Program Name>_<Process Instance> that contains the generated files. For exaple, the SQR program has all reports, trace, and log files in the subdirectory SQR_XRFWIN_20. It is also the optional directory used with the Output Destination field when scheduling a request. This variable (%%OutputDirectory%%) can be used in the File/Printer field of the Process Scheduler Request dialog box. **Note.** The output directory has an extra slash attached at the end.
LogFence	Enter the PeopleSoft Process Scheduler tracing levels.
DEFAULTPRINTER	Specify the UNC path of the printer where reports are printed when the %DefaultPrinter% was specified as the output destination.

The following table lists the Process Scheduler section parameters for OS390 (rather than Windows 2000):

Parameter	Description
Prcs Job Name	Specify the job name that is assigned to the Process Scheduler program. This is set in USS using the __BPX_JOBNAME environment variable setting.
Prcs Job Account=	Specify the job account that is assigned to the Process Scheduler program. This is in USS using the __BPX_ACCT_DATA environment variable setting.
ProgramName	Specify the name of the Process Scheduler program, PSPRCSRV.
PrcsServerName	Specify the process server name. This must match the name defined in the database, such as *PSOS390.*
Max Reconnect Attempt	Specify the maximum number of times that the PeopleSoft Process Scheduler Server Agent will try to reconnect to the database when the connection is lost. When the maximum number of attempts is reached and the agent hasn't successfully connected to the database, the agent shuts down.

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Parameter	Description
Reconnection Interval	Specify the interval, in seconds, between attempts to reconnect to the database when the connection is lost.
TOOLBIN	Specify where executables reside (for example, *%PS_HOME%/bin*).
DEFAULTPRINTER	Specify the UNC path of the printer where reports are printed when the %DefaultPrinter% was specified as the output destination.
Log/Output Directory	Specify the directory in which files that are generated by the program are written. When PeopleSoft Process Scheduler initiates a process request, it creates a subdirectory in the format <Process Type ID>_<Program Name>_<Process Instance> that contains the generated files.
LogFence	Enter the PeopleSoft Process Scheduler tracing levels.

PSTools Section

For UNIX and OS390, the Character Set parameter is at the beginning of the table.

The first description is for OS390, and the second description is for UNIX.

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Parameter	Description
USS (UNIX System Services) Character Set	Specifies the character set based on the UNIX System Services locale's code page. The default value is *CCSID1047*(Latin1 code page). **Note.** For example, in Japanese setting, the recommended USS Character Set is *CCSID939*. See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*, "Selecting and Configuring Character Sets and Language Input and Output," Character Sets in the PeopleSoft Pure Internet Architecture.
Report Repository Character Set	Specifies the code page used by the Distribution Agent when migrating text files from USS into the Report Repository. The default value is *CP1252*. **Note.** For example, in Japanese setting, the recommended Report Repository Character Set is *Shift_JIS* See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*, "Selecting and Configuring Character Sets and Language Input and Output," Character Sets in the PeopleSoft Pure Internet Architecture.

Application Engine Section

This is an additional OS390 section located after the SQR section:

Parameter	Description
AE Job Name	Specify the job name assigned to an Application Engine program. This is set in USS using the __BPX_JOBNAME environment variable setting.
AE Job Account	Specify the account assigned to an Application Engine program. This is set in USS using the __BPX_ACCT_DATA environment variable setting.

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APPENDIX E

Using PSDAEMON to Post Files to the Report Repository

This appendix discusses how to:

- Post non-Process Scheduler reports to the report repository.
- Use the POSTRPT_DMN application engine Daemon program.
- Set up Process Scheduler to run POSTRPT_DMN.

Posting Non-Process Scheduler Reports to the Report Repository

The process of posting reports and files to the Report Repository is performed by the Distribution Agent server. When using PeopleSoft Process Scheduler, the transfer is triggered by the Process Scheduler server when it detects that a process request, such as SQR or Crystal, has generated a report and is ready to be posted.

Reports that were generated outside of the PeopleSoft Process Scheduler either by being run manually or by a third-party scheduler, can be posted to the Report Repository using the *PostReport* PeopleCode class object. The *PostReport* PeopleCode class updates the Report Manager with the information for the new report, including the list of users and roles authorized to view the report. The request is sent to the Distribution Agent that is identified by the ServerName of the process scheduler server specified in the request.

The following is an example of the code:

```
Local PostReport  &RPTINFO;
/*******************************************************
* Construct a PostReport Object.                       *
*******************************************************
&RPTINFO = SetPostReport();
&RPTINFO.ProcessInstance = 0;

/*******************************************************
* Information to be displayed in the Report Manager     *
*******************************************************
&RPTINFO.ProcessName = "XRFWIN"
&RPTINFO.ProcessType = "SQR Report"
&RPTINFO.SourceReportPath = "\\server9000\report\sqr_xrfwin"
&RPTINFO.OutDestFormat = "PDF"
&RPTINFO.ReportFolder = "SQR Reports"
```

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```
/*******************************************************
* Description to be displayed in the Report Manager     *
*******************************************************
&RPTINFO.ReportDescr = "New SQR Report"

/*******************************************************
* The server name of the Process Scheduler where the
* Distribution Agent assigned to post the request
* resides.*
*******************************************************
&RPTINFO.ServerName = "PSNT"

/*******************************************************
* List of users/roles authorized to view the report.    *
*******************************************************
&RPTINFO.AddDistributionOption("ROLE", "Managers");
&RPTINFO.AddDistributionOption("USER", "VP1");

&RPTINFO.Put();
&RPTINSTANCE =&RPTINFO.ReportId;
```

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleCode API Reference, “PostReport Class”

Using the POSTRPT_DMN Application Engine Daemon Program

Using the PostReport PeopleCode class object implies that a PeopleCode function has been written using this class and is invoked either from an Application Engine or an Application Server.

Sending a single request through an Application Engine can incur a large overhead; therefore, we recommend running the program from PSDAEMON using the POSTRPT_DMN Application Engine program.

The POSTRPT_DMN program monitors for any requests to post by searching for new XML files in a designated directory. The XML file contains all the parameters required by the PostReport PeopleCode class object to post the request to the Report Repository. The program reads the parameters using the POST_REPORT_XML file layout. The following table shows a listing of these parameters:

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XML Attribute Tag	Corresponding PostReport Attribute	Description	Data Type	Required	Notes
PRCSINSTANCE	ProcessInstance	Process Instance	Integer	No	If no process instance is specified, the system assigns a new instance.
CONTENTID	ReportId	Content ID	Integer	No	A unique content ID is assigned for each valid request.
PRCSNAME	PrcsName	Process Name	Character (12)	Yes	The process name must be defined in the Process Definition table.
PRCSTYPE	PrcsType	Process Type	Character (30)	Yes	The process type must be defined in the Process Type Definition table.
REPORTPATH	SourceReportPath	Report Directory	Character (254)	Yes	The full absolute path where files and reports are retrieved. **Note.** After the Distribution Agent has transferred the files to the Report Repository, this directory is deleted.
CONTENT_DESCR	ReportDescr	Report Description	Character (254)	Yes	The description that appears in Report Manager.

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XML Attribute Tag	Corresponding PostReport Attribute	Description	Data Type	Required	Notes
EXPIRATION_ DATE	ExpirationDate	Expiration Date	Date	No	In YYYYMMDD format. If not specified, the system uses the Retention Days value from System Settings.
FOLDER	ReportFolder	Folder Name	Character (18)	No	If not specified, the system uses the default from the Report Folder Administration.
SERVER	ServerName	Process Scheduler Server Name	Character (8)	Yes	You must define the server name specified in the Server Definition table.
OUTDESTFORMAT	OutDestFormat	Output Destination Format	Character (3)	No	See Table below for valid values.
DISTIDTYPE	Passed as the first parameter of the AddDistributionOption method of the PostReport class	Identifier specified if the value in the DISTID is either user or role.	Character (30)	Yes	The value is either USER, which indicates a user ID, or ROLE, which indicates a role ID.
DISTID	Passed as the second parameter of the AddDistributionOption method of the PostReport class	User or Role authorized to view the report.	Character (30)	Yes	

For the POSTRPT_DMN program to process a request using the PostReport PeopleCode class example above, you must create an XML file using the following content:

```
<?xml version="1.0"?>
<CONTENTINFO>
```

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```
    <PRCSNAME>XRFWIN</PRCSNAME>
    <PRCSTYPE>SQR REPORT</PRCSTYPE>
    <CONTENT_DESCR>New SQR Report</CONTENT_DESCR>
    <REPORTPATH>\\server9000\report\sqr_xrfwin</REPORTPATH>
    <OUTDESTFORMAT>PDF</OUTDESTFORMAT>
    <FOLDER>SQR Reports</FOLDER>
    <SERVER>PSNT</SERVER>
    <AUTHORIZED_LIST>
        <DISTID>VP1</DISTID>
        <DISTIDTYPE>USER</DISTIDTYPE>
   </AUTHORIZED_LIST>
   <AUTHORIZED_LIST>
        <DISTID>Managers</DISTID>
        <DISTIDTYPE>ROLE</DISTIDTYPE>
    </AUTHORIZED_LIST>
</CONTENTINFO>
```

Output Destination Format Values

The OUTDESTFORMAT attribute can contain either the value of the file's extension or the numeric value of the format as shown in the following table:

Format	Format Extension	Numeric Value
Acrobat PDF	PDF	2
Delimited Files	CSV	3
HP Format	HP	4
HTML	HTM	5
Line Printer	LP	6
MS Excel Spreadsheet	XLS	8
MS WinWord Document	DOC	9
PostScript	PS	10
Rich Text Format	RTF	12
SQR Format	SPF	13
Text	TXT	14

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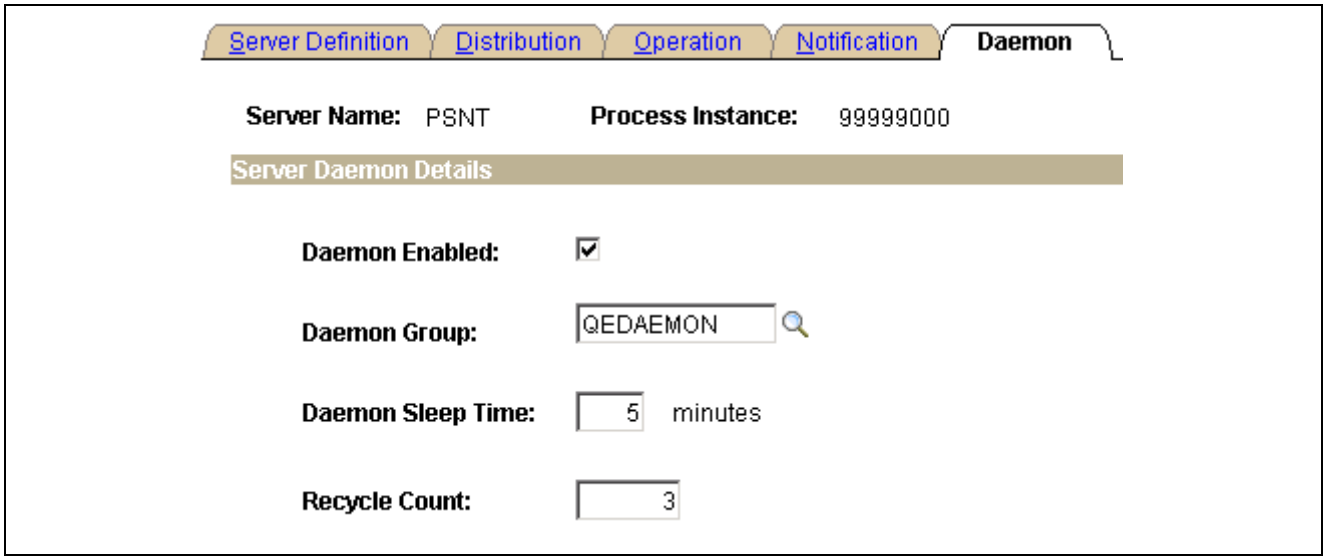
Format	Format Extension	Numeric Value
XML	XML	17
DataMover Data File	DAT	18
Other	OTHER	14

Setting Up Process Scheduler to Run the POSTRPT_DMN Program

This section discusses the steps required to activate the POSTRPT_DMN program from any Process Scheduler server. When a Process Scheduler server is activated to have the POSTRPT_DMN program run through PSDAEMON, the program checks for any new XML files in the *<PS_HOME>\appserv\prcs\<Database Name>\files\reports* directory.

Note. For the changes to take affect, you must reboot the Process Scheduler server.



Process Scheduler - Servers - Daemon page

To set up a Process Scheduler server to run the POSTRPT_DMN program in PSDAEMON:

1. Go to PeopleTools, Process Scheduler, Daemon Group.
2. Add a new Daemon Group.

   For example, add QEDAEMON. The Daemon Group page appears.
3. Use the drop-down list to add the *POSTRPT_DMN* program, and click *Save.*
4. Select PeopleTools, Process Scheduler, Servers.

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5. Select the server definition for the Process Scheduler server on which you intend to run the POSTRPT_DMN program.
6. Go to the Daemon page, and complete the information as shown in the example that precedes these instructions.
7. Click Save.

See Also

Chapter 7, “Setting Server Definitions,” page 95

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APPENDIX F

Editing JCL Templates in OS390 for COBOL and SQR

This appendix provides an overview of JCL templates and discusses how to:

- Customize the PeopleSoft Process Scheduler shell JCL template.
- Run PeopleSoft Process Scheduler or Application Engine from a JCL in OS390.
- Understand the limitations of Process Scheduler server running from USS (UNIX System Services).

Understanding JCL Templates

The PeopleSoft Server Transfer program creates a directory $PS_HOME/appserv/prcs/shelljcl in the OS390 UNIX Services to store a master copy of the shell JCL templates. When you create a PeopleSoft Process Scheduler Server configuration, it copies the shell JCL templates into the $PS_HOME/appserv/prcs/<database name>/shelljcl directory. This includes all of the JCLs used for running COBOL and SQR through PeopleSoft Process Scheduler.

The following table lists the shell JCL templates used in PeopleSoft Process Scheduler:

JCL	Description
SHELCBL.JCT	Invoked by PeopleSoft Process Scheduler when a user requests to run a COBOL program.
SHELSQRF.JCT	Invoked by PeopleSoft Process Scheduler when a user requests to run an SQR program and indicates on the Process Scheduler page to route the output to a file, the web, or an email message.
SHELSQRP.JCT	Invoked by PeopleSoft Process Scheduler when a user requests to run an SQR program and indicates on the Process Scheduler page to route the output to a printer.

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JCL	Description
SHELSQROUTP.JCT	Used in conjunction with SHELSQRP.JCT or SHELSQRF.JCT. This template contains the file definition for creating a partitioned dataset for SQR report files. PeopleSoft Process Scheduler uses this template when the SQR output format is: • Acrobat Reader (PDF). • PostScript (PS). • Line Printer (LP). • HP format.
SHELSQROUTS.JCT	Used in conjunction with SHELSQRP.JCT or SHELSQRF.JCT. This template contains the file definition for creating a sequential dataset for SQR report files. PeopleSoft Process Scheduler uses this template when the SQR output format is HTM or SPF.

You must modify these shell JCL templates to comply with your site standards.

PSADMIN has an Edit a Shell JCL template to enable you to edit a JCL using the VI editor. If you are not familiar with the VI editor and prefer to edit the JCLs using the ISPF editor, you can use the TSO oedit command in the TSO session. The IBM TSO oedit command enables you to modify any files residing in USS from a TSO session. You can edit any of the shell JCL templates found in $PS_HOME/appserv/prcs/<database name>/shelljcl directory as shown in the following example. Please consult your OS390 system administrator for using the oedit command at your site.

Example of editing shell JCL templates

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Customizing the PeopleSoft Process Scheduler Shell JCL Template

All of the PeopleSoft Process Scheduler shell JCLs use meta-strings to pass data stored in the database or PeopleSoft Process Scheduler configuration files. PeopleSoft Process Scheduler uses meta-strings to generate the JCL based on one of these sources:

- The profile of the user who initiated the request.
- Parameters defined in the PeopleSoft Process Scheduler configuration file.
- Parameters defined on the Process Type Definition page or the Process Definition page.

A good example of data that can be passed includes job account and job name. Enter the values of some of these variables by selecting PeopleTools, Security, Permissions & Roles, Permission Lists.

The shell JCL templates are tunable and should be changed according to your site-specific standards. The following table identifies the meta-strings that you can use in a shell JCL template.

If you create a new JCL template, be aware that:

- The Shell ID is restricted to three characters.
- The Shell ID is associated with the process type definition.

Meta-String	Description
%JOBNAME%	Specifies the value entered in the OS390 Job Controls Name field on the Process Profile Permission page for the permission lists specified as the user ID's process profile. The process profile for a user ID can be set using the User Profiles page in the Security component.
%JOBACCT%	Specifies the value entered in the OS390 Job Controls Account field on the Process Profile Permission page.
%OUTDEST%	Specifies the output destination based on the value entered in the Server Destinations File or Printer field on the Process Profile Permission page.
%SFX%	Identifies a one-character code issued by PeopleSoft Process Scheduler. The system randomly assigns a value from *A* to *Z*.
%OPRID%	Identifies the user ID used to submit the request from PeopleSoft Process Scheduler.
%PRCSLOGFILE%	Identifies the name of the log file that PeopleSoft Process Scheduler used to redirect all data written to output for PeopleSoft Application Engine or SYSOUT in COBOL or SQR

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Meta-String	Description
%PRCSLOGDIR%	Identifies the directory to which all log files or reports are written in USS for a process.
%ACCESSID%	Identifies the access ID that is assigned for a user ID defined in PSOPRDEFN.
%INSTANCE%	Identifies the process instance number that is assigned to a process request.
%RUNID%	Identifies the run control ID used to submit the process request.
%OWNERID%	Identifies the owner ID for the PeopleSoft database.
%PRCSNAME%	Identifies the program name, as defined on the Process Definition page.
%DB2SUB%	Identifies the name of the DB2 subsystem specified in the DB2 Sub-System parameter in the OS390 section in the PeopleSoft Process Scheduler configuration file.
%PERFSTAT%	Sets the Performance Statistic option in the COBOL shell JCL. This is set to *Y* when the bit value of 128 is assigned to the TraceSQL parameter in the Trace section in the PeopleSoft Process Scheduler configuration file.
%DYNEXPLN%	Sets the Dynamic Explain option in the COBOL shell JCL. This is set to *Y* when the bit value of 256 is assigned to the TraceSQL parameter in the Trace section in the PeopleSoft Process Scheduler configuration file.
%PARALLEL%	Sets the Dynamic Explain option in the COBOL shell JCL. This is based on the Enable Parallel Processing parameter in the OS390 section in the PeopleSoft Process Scheduler configuration file.
"%TSOPLAN%	Indicates the DB2 plan name subsystem specified in the Plan name for PTPSQLRT with TSO parameter in the OS390 section in the PeopleSoft Process Scheduler configuration file.

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Meta-String	Description
%PSHLQ%	Indicates the high-level qualifier of the PeopleSoft dataset specified in the High Level Qualifier for Datasets parameter in the OS390 section of the PeopleSoft Process Scheduler configuration file.
%SQRINI%	Identifies the initialization file used by the SQR process. This meta-string is used exclusively for SQR.

Following is a sample job control card in one of the shell JCLs:

```
//%JOBNAME%%SFX% JOB %JOBACCT%,'PS-PRCS ',CLASS=E,MSGCLASS=X,
// NOTIFY=%OPRID%
```

If you do not use meta-strings, you can also update the job cards to remove these variables and replace them with actual values.

In the SHELL JCL for SQR, OUTNODE denotes either an OS390 partitioned dataset (PDS) or a sequential dataset. The PDS is a requirement for SQR output. If the SQR report XRFPANEL is directed to file output, the following substitution occurs:

In SHELSQRF.JCT, change// OUTNODE='%OUTDEST%' to // OUTNODE='HR.H800RAB', .

If an SQR process is directed to print, the following substitutions occur:

```
// OUTNODE='DEST=U3', OPTIONAL:USER-DEF OUTPUT . .
//*******************************************************************
//* Main portion of JCL Shell *
//*******************************************************************
..
//SQROUTP DD SYSOUT=*,DEST=U3
```

OS390 Job Controls

OS390 job controls specify the OS390 job name to assign to each process that is submitted. This value can be up to seven characters. Do not use lowercase letters or quotation marks. If you included the %SFX% meta-string as part of the job name, PeopleSoft Process Scheduler appends a one-character alphabetical suffix to this name (*A* through *Z,* chosen randomly) before the job submission.

For example, if you entered USRMVS1, the assigned job name becomes USRMVS1A through USRMVS1Z. After you enter the OS390 job name, enter the job account number that you used in the installation. Specify an account code to be inserted as the JCL accounting code.

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Running PeopleSoft Process Scheduler or Application Engine From a JCL in OS390

Where PeopleSoft Process Scheduler is customarily started and stopped from a JCL sample. JCLs are provided to accomplish this task. An Application Engine program must also be run from a JCL in some business cases. Any PeopleSoft executable residing in the USS can be invoked from a JCL using the IBM BPXBATCH utility.

In the high-level qualifier where PeopleSoft is installed in OS390, there is a partitioned dataset (HLQ.JCLLIB) that contains the following JCL:

- PRCSSTRT,JCL: JCL to start PeopleSoft Process Scheduler.
- PRCSSTOP.JCL: JCL to stop PeopleSoft Process Scheduler.
- AESAMP.JCL: Sample JCL to run an Application Engine program.

The following table identifies the meta-strings to use, in the order specified in a shell JCL template, for USS scheduler to pass COBOL parameters so that it can, in turn, call Application Engine:

Meta-String	Description
%PS_HOME%	Path of PeopleSoft home directory
%PS_SERVDIR%	Full path of the server directory, for example, *$PS_HOME/appserv/prcs/PT840GA*.
%PS_SERVERCFG%	Full path of the psprcs configuration file, for example, *$PS_SERVDIR/psprcs.cfg*.
%PS_CONFIG%	Full path of the psprcs.sh file, for example, *$PS_HOME/psconfig.sh*.
%HFS_USERID%	Login ID (userID). Same authorities as the userID used for installation, or the userID that started Process Scheduler.
%JOBNAME%	Specifies the value entered in the OS390 Job Controls Name field on the Process Profile Permission page for the permission lists specified as the user ID's process profile. The process profile for a user ID can be set using the User Profiles page in the Security component.
%REGION_SIZE%	Region size. The Default is −1.
%CPU_TIME%	Maximum CPU time this Application Engine process is allowed to use. The default is 1000. This matches the default value for MAXCPUTIME variable of BPXPRMxx member of the SYS1.PARMLIB.

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Understanding Limitations of Process Scheduler Server Running from USS (UNIX System Services)

In the USS (UNIX System Services) environment, Process Scheduler submits COBOL and SQR by means of a JCL. Although Process Scheduler can capture the job name of a JCL, it is incapable of capturing the job ID assigned by TSO. Consequently, Process Scheduler doesn't have the ability to query or manage a JCL that has been submitted to the TSO environment.

As a repercussion, Process Scheduler doesn't have the ability to cancel a JCL job when a user requests to cancel an SQR or COBOL process using the Process Monitor page. While Process Scheduler doesn't kill the JCL associated with the process, it only makes the slot available for any other queued SQR or COBOL processes. Therefore, you must manually cancel the JCL from a TSO session.

Note. This limitation doesn't apply to Application Engine requests initiated from z/OS. The executable of an Application Engine is terminated when a user cancels the submitted request from the Process Monitor page.

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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

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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

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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 *receivables specialist.* 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."

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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 *detailed business process.*

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.

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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 *course.*

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

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft 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 *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

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

See also *population* and *division*.

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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 *communication key.*

communication key

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

compensation object

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

compensation structure

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

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

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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 *class.*

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

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

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

data 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.

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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 *drop ship*).

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 *population* and *cohort.*

document sequencing

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

dynamic detail tree

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

edit table

A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft 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 *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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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.

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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 *donor pyramid* 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 *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit

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

See also *business unit.*

GL entry template

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

GL Interface process

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

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.

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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 *update access.*

institution

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

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 ADVANCED_SHIPPING_ORDER 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 *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

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.

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

KVI Abbreviation for *Known Value Item.* 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 *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* 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 *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

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

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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linked section

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

linked variable

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

LMS

Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft 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 *1*—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 *3C engine.*

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

merchandising activity

In PeopleSoft 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.

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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 *Non-Discountable Products.* 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 *need analysis.*

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 *compensation object.*

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.

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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 *event.*

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

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Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort.*

portal registry In PeopleSoft 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.

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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 *giveaways*).

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.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft 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 *record output value-added tax flag.*

See *record input VAT flag.*

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.

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REN server Abbreviation for *real-time event notification server* 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 *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* 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.

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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.

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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 *communication key.*

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

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

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

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

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft 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.

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summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft 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.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices 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 *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

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

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 *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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

universal navigation header Every PeopleSoft 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.

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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 *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* 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 *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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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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