

# PeopleSoft PeopleTools 8.63

## Data Distribution Framework



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# Contents

## Preface

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|                                                          |    |
|----------------------------------------------------------|----|
| Understanding the PeopleSoft Online Help and PeopleBooks | i  |
| Using and Managing the PeopleSoft Online Help            | iv |
| PeopleTools Related Links                                | iv |
| Contact Us                                               | iv |
| Follow Us                                                | v  |

## 1 Getting Started with Data Distribution Framework

---

|                                          |   |
|------------------------------------------|---|
| Data Distribution Framework Overview     | 1 |
| Data Distribution Framework Architecture | 1 |

## 2 Configuring Data Distribution Framework

---

|                                           |   |
|-------------------------------------------|---|
| Understanding Data Distribution Framework | 1 |
| Setting Up Data Source                    | 2 |
| Specifying OCI Data Science Server        | 3 |
| Building an Index                         | 4 |
| Registering a Model                       | 5 |

## 3 Configuring Data Science Setup

---

|                                      |   |
|--------------------------------------|---|
| Understanding Data Science Setup     | 1 |
| Configuring OCI Data Science Tenancy | 3 |
| Configuring Data Science             | 4 |
| Scheduling Data Science Jobs         | 5 |

# Preface

## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see *Configuring Context-Sensitive Help Using the Hosted Online Help*.

### Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment. The documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see *Understanding Locally Installed PeopleSoft Online Help*.

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The three main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| Typographical Convention | Description                                                                                                                                                                                                                                                      |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b><u>Key+Key</u></b>    | 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 <b><u>Alt+W</u></b> , hold down the <b><u>Alt</u></b> key while you press the <b><u>W</u></b> key. |
| . . . (ellipses)         | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.                                                                                                                                                             |
| { } (curly braces)       | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (   ).                                                                                                                                                               |
| [ ] (square brackets)    | Indicate optional items in PeopleCode syntax.                                                                                                                                                                                                                    |
| & (ampersand)            | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.                                                                              |

| Typographical Convention | Description                                                                                                                                                                                                                        |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ⇒                        | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region, Country, and Industry Identifiers

Information that applies only to a specific 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.

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following are examples of region identifiers that may appear in PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

### Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

## Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that may appear in the PeopleSoft Online Help:

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

## Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

## Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

## PeopleTools Related Links

[PeopleSoft 8.63 Home Page](#)

[PeopleSoft Search and Insights Home Page](#)

[PeopleSoft Online Help](#)

[PeopleSoft Information Portal](#)

[PeopleSoft Spotlight Series](#)

[PeopleSoft Training and Certification | Oracle University](#)

[My Oracle Support](#)

[Oracle Help Center](#)

## Contact Us

Send your suggestions to [psoft-infodev\\_us@oracle.com](mailto:psoft-infodev_us@oracle.com).

Please include the applications update image or PeopleTools release that you're using.

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| Icon                                                                              | Link                                                |
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|  | <a href="#">Read PeopleSoft Blogs</a>               |
|  | <a href="#">Connect with PeopleSoft on LinkedIn</a> |

# 1

## Getting Started with Data Distribution Framework

### Data Distribution Framework Overview

PeopleTools Data Distribution Framework provides a mechanism to extract and flatten PeopleSoft data. This data can be used for the purpose of machine learning. The data is hosted on the search engine. The machine learning server pulls the data from the search engine for training the machine learning model.

PeopleTools Data Distribution Framework is built using the technology from PeopleSoft Search Framework, such as mappings used to create search index definitions, search instance for defining search server, and DirectTransfer technology used to index data from PeopleSoft to the search engine. The data is made available in search engine in JSON format.

The search indexes built for search can be re-used for machine learning or other activities. The data available from this framework can be used by Oracle Cloud Infrastructure (OCI) Data Science service to create models that are used for prediction. The OCI Data Science platform is an Oracle Cloud Infrastructure service. You can use an on-premise PeopleSoft instance or a PeopleSoft instance on OCI.

For more information on OCI Data Science service, see the Data Science documentation on the Oracle Cloud Infrastructure Documentation website.

### Data Distribution Framework Architecture

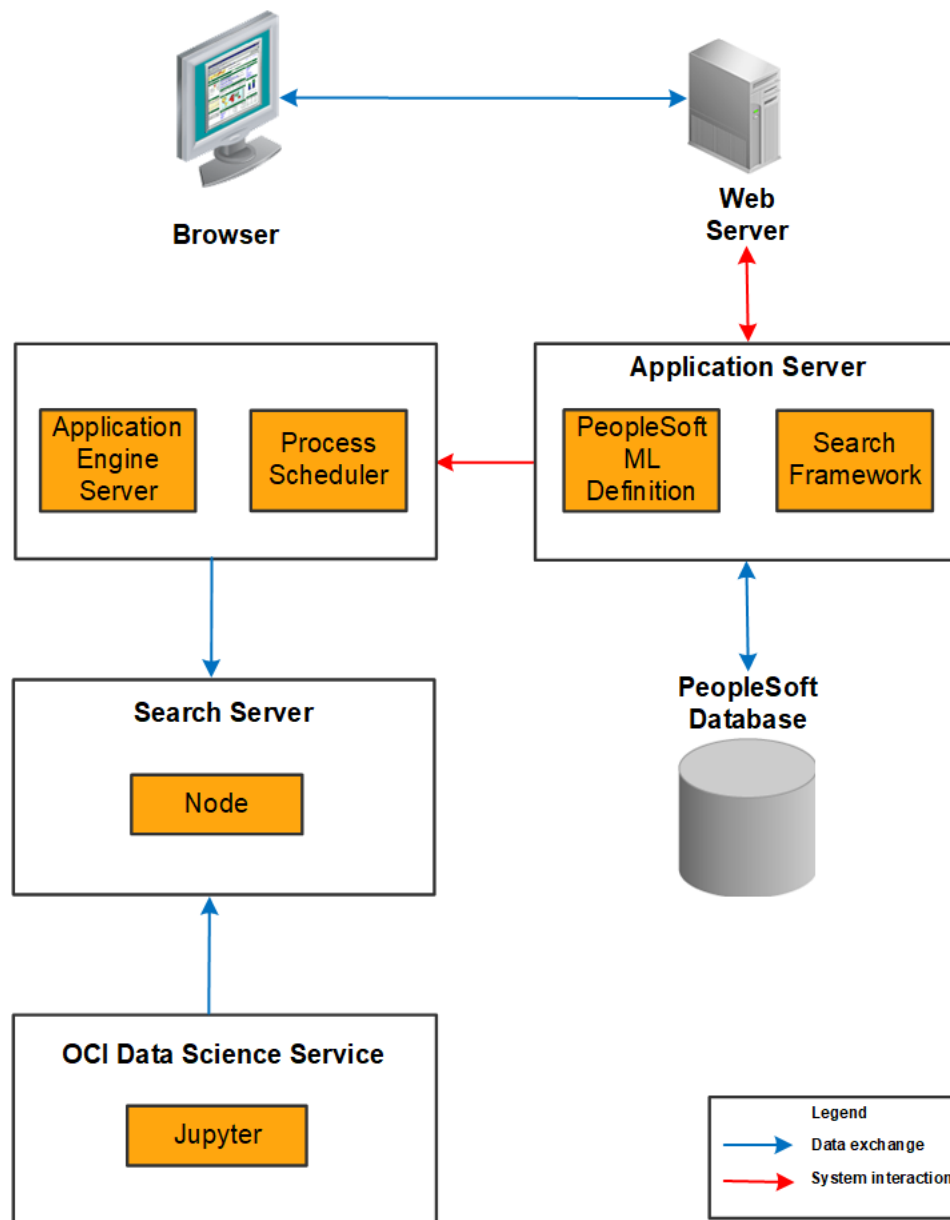
The application consists of the following:

- Data Source Definition - This is the data layer, which uses existing PeopleSoft data sources and contains the definitions required to send data to the search engine from PeopleSoft.
- Search Instance - Data is sent to this search instance. Search instance is defined in PeopleSoft Search Framework.
- Machine Learning Server configuration - This is the server, which uses the data in Data Distribution framework and creates models.

Search engine stores the deployed search definitions, builds indexes, and maintains indexes. The OCI Data Science platform pulls the data from search indexes and trains and builds a model.

The server topology includes the essential elements of a PeopleSoft system, and includes a search server and an OCI Data Science service.

The following diagram describes the interaction of the PeopleSoft system elements, search server, and the OCI Data Science service.



The web server and application server (the PeopleSoft Internet Architecture) provide the interface for the design, administration, and end user access. The PeopleSoft database stores the PeopleSoft queries that define the search definition metadata.

# 2

## Configuring Data Distribution Framework

### Understanding Data Distribution Framework

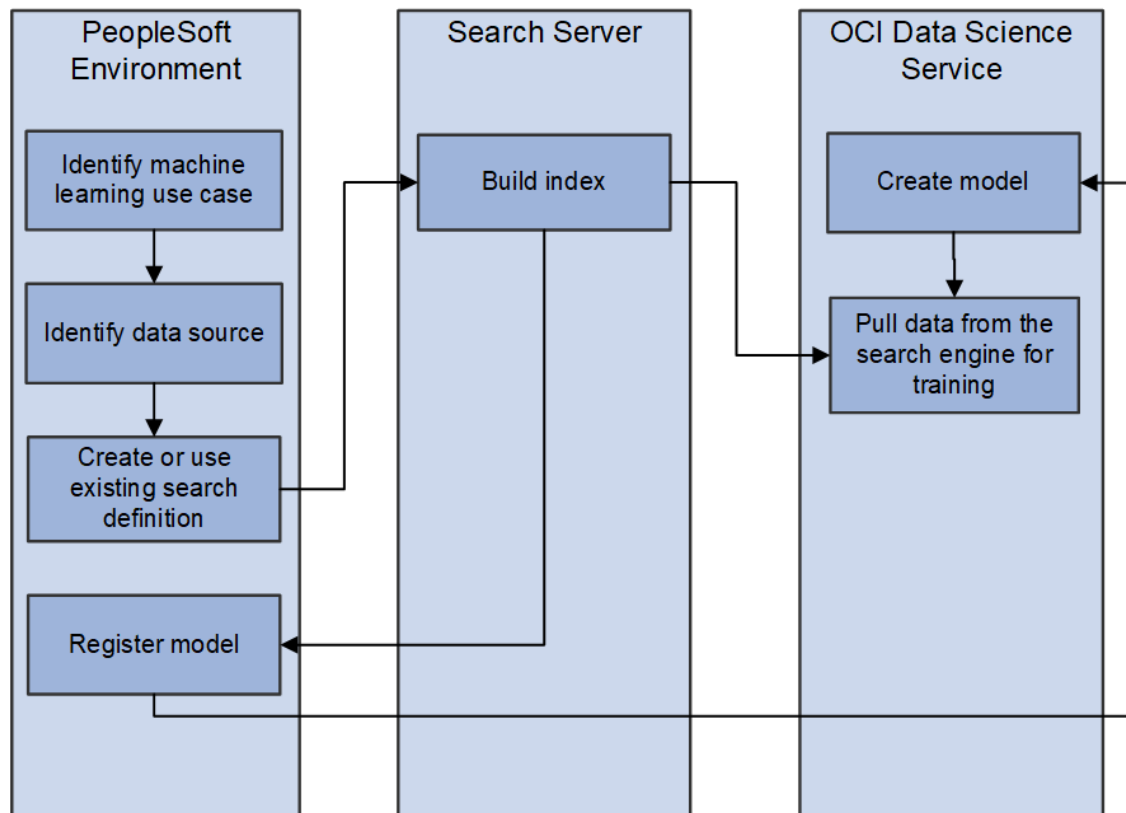
The data distribution framework enables PeopleSoft users to build index and register a model. In PeopleSoft, a search definition is the primary data definition, which mines data using PSQuery or connected query as a data source. Search engine then builds an index and maintains indexes. PeopleSoft enables you to register a model created in OCI Data Science service.

The process flow involves the following steps:

1. PeopleSoft sends data to the search engine using Direct Transfer.
2. OCI Data Science service pulls data from the search engine.
3. The data is used to train the machine learning model in the Jupyter notebook on the OCI Data Science service.
4. When the model is created, it can be saved in the OCI object storage.
5. The saved model can be deployed as a REST service using OCI Functions and OCI API Gateway.
6. PeopleSoft registers the REST endpoint.

The following diagram illustrates the process flow among PeopleSoft, search server, and OCI Data Science service.

### Implementation Process Flow



This documentation covers the tasks that are performed in PeopleSoft. For tasks that should be performed on the OCI Data Science service, such as creating a model, deploying model as REST service and so on, refer to the OCI Data Science documentation on Oracle Cloud Infrastructure Documentation website.

PeopleSoft provides a navigation collection – Data Distribution Setup – that enables you to perform the following tasks:

- Set up data source.
- Specify OCI Data Science server.
- Build an index in the search engine.
- Register a model.

## Setting Up Data Source

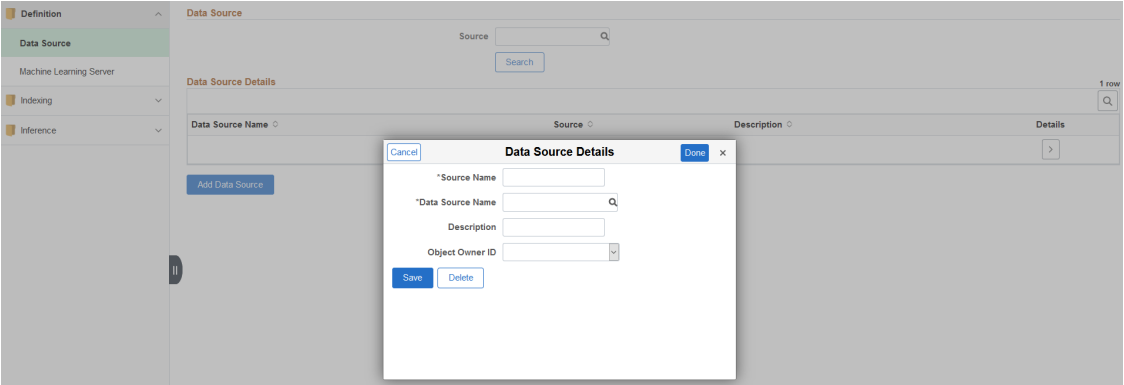
Before you can set up the data source, you should identify the data that you require for analytics. For this purpose, you create a search definition in PeopleSoft Search Framework.

For information on creating a search definition, see [Search Technology: Creating Search Definitions](#).

Access the Data Source Definition page by navigating to **PeopleTools**, and then **Machine Learning**, and then **Data Distribution Framework**, and then **Data Distribution Setup** and select Data Source (under the Definition folder in the left panel). Alternatively, you can navigate

to **PeopleTools**, and then **Machine Learning**, and then **Data Distribution Framework**, and then **Define Data Sources**.

This example illustrates the fields and controls on the Data Source Definition page. You can find definitions for the fields and controls later on this page.



The Data Source Definition page displays a list of data sources that you have set up. Use the Source drop-down list to identify the data source that you require.

To add a new data source, select the Add Data Source button. Use the Data Source Details page to enter details of a new data source.

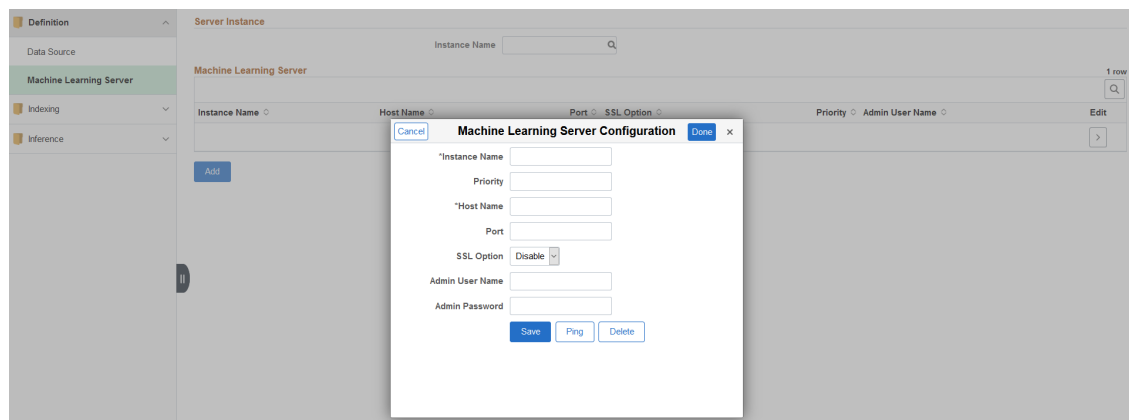
| Field or Control | Description                                                                                                     |
|------------------|-----------------------------------------------------------------------------------------------------------------|
| Source Name      | Enter a name for the data source.                                                                               |
| Data Source Name | Select a search definition. The drop-down list displays all the search definitions created in Search Framework. |
| Description      | Enter a description for the data source.                                                                        |
| Object Owner ID  | Select an object owner ID.                                                                                      |

## Specifying OCI Data Science Server

You use the Server Definition page to register the OCI Data Science servers.

Access the Server Definition page by navigating to **PeopleTools**, and then **Machine Learning**, and then **Data Distribution Framework**, and then **Data Distribution Setup**, and select Machine Learning Server (under the Definition folder in the left panel). Alternatively, you can navigate to **PeopleTools**, and then **Machine Learning**, and then **Data Distribution Framework**, and then **Machine Learning Server**.

This example illustrates the fields and controls on the Server Definition page. You can find definitions for the fields and controls later on this page.



The Server Definition page displays a list of servers that you have set up. Use the Instance Name drop-down to identify the server that you require. You may set up as many servers as you require.

To add a new instance of a server, select the Add button. Use the Machine Learning Server Configuration page to specify the details of the new server.

| Field or Control       | Description                                                                                                                                                                                                                                                                                                   |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Instance Name</b>   | Enter a name for the server.                                                                                                                                                                                                                                                                                  |
| <b>Priority</b>        | Enables administrators to set the sequence in which the available servers are to be used. The lowest number is 1 and it has the highest priority.<br><b>Note:</b> The search instance with the priority set at the lowest number has the highest priority, and it will be set as the default server instance. |
| <b>Host Name</b>       | Enter the server name of the host where the OCI Data Science platform server is running, including the domain. The host name value can be a DNS name or an IP address.                                                                                                                                        |
| <b>Port</b>            | Enter the port on which the server listens for requests.                                                                                                                                                                                                                                                      |
| <b>SSL Option</b>      | Select one of the options for SSL.<br>If the REST URL created for the machine learning model is SSL enabled, then this option should be enabled.                                                                                                                                                              |
| <b>Admin User Name</b> | Enter the user name to connect to the server.                                                                                                                                                                                                                                                                 |
| <b>Admin Password</b>  | Enter the password associated with the user name.                                                                                                                                                                                                                                                             |
| <b>Ping</b>            | Select to make sure your host name and port are correct and that the server is available. A positive result displays a success message.                                                                                                                                                                       |

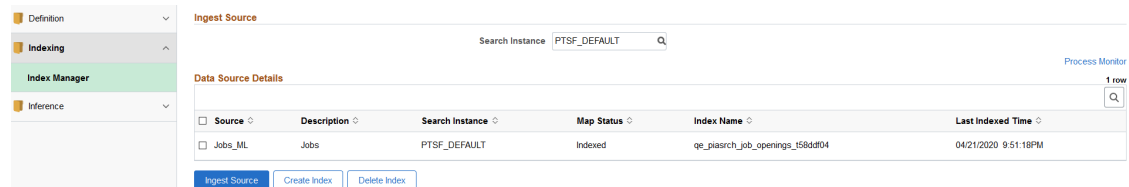
## Building an Index

After you have defined a data source, you should create an index in the search engine. The OCI Data Science service pulls data from the search index to build and train the machine learning model.

You use the Index Manager page to create an index for a data source and to update an index.

Access the Index Manager page by navigating to **PeopleTools**, and then **Data Distribution Framework**, and then **Data Distribution Setup**, and select Manage Data Source Indexes (from the Indexing folder in the left panel). Alternatively, you can navigate to **PeopleTools**, and then **Data Distribution Framework**, and then **Manage Data Source Indexes**.

This example illustrates the fields and controls on the Index Manager page. You can find definitions for the fields and controls later on this page.



The Index Manager page displays a list of data sources.

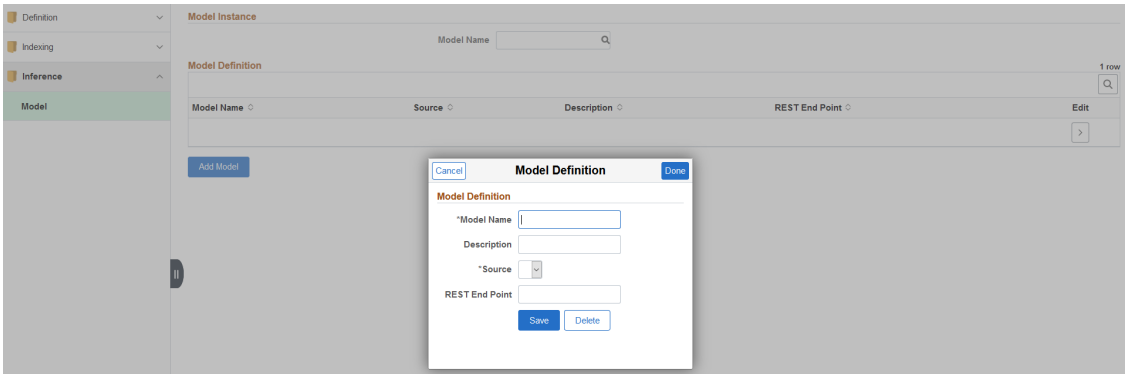
| Field or Control       | Description                                                                                                                                                                                                                 |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Search Instance</b> | A search definition in Search Framework is associated with a search instance. The Data Source Details section displays the data sources associated with the selected search instance.                                       |
| <b>Map Status</b>      | The statuses are: <ul style="list-style-type: none"> <li>• Mapped – this is the initial status of a data source.</li> <li>• Indexed – the status changes to Indexed when you successfully index the data source.</li> </ul> |
| <b>Index Name</b>      | The system appends an index with the database to differentiate it from indexes with the same name in other databases.                                                                                                       |
| <b>Create Index</b>    | Creates an empty index.                                                                                                                                                                                                     |
| <b>Ingest Source</b>   | Initiates the PTML_GENFEED Application Engine program to build an index.                                                                                                                                                    |

## Registering a Model

The machine learning model can be deployed as a REST endpoint after it has been trained and built. Use the Model page to register the REST endpoint. PeopleSoft applications and users use the REST endpoint using the delivered IB\_Generic service in Integration Broker.

Access the Model Definition page by navigating to **PeopleTools**, and then **Data Distribution Framework**, and then **Data Distribution Setup**, and select Model (under the Inference folder in the left panel). Alternatively, you can navigate to **PeopleTools**, and then **Data Distribution Framework**, and then **Machine Learning Models**.

This example illustrates the fields and controls on the Model Definition page. You can find definitions for the fields and controls later on this page.



The Model Definition page displays a list of existing model definitions. The Model Name drop-down enables you to identify the model that you require.

To add a new model, select the Add Model button. Use the Model Definition page to specify details of a new model.

| Field or Control | Description                                                                                                                                                  |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Model Name       | Enter a name for the model.                                                                                                                                  |
| Description      | Enter a description.                                                                                                                                         |
| Source           | Select a data source from the list. The data sources are listed here.                                                                                        |
| REST End Point   | Enter a value to indicate the model.<br><b>Note:</b> The system appends the value entered here to the server host to create a fully qualified REST endpoint. |

# 3

## Configuring Data Science Setup

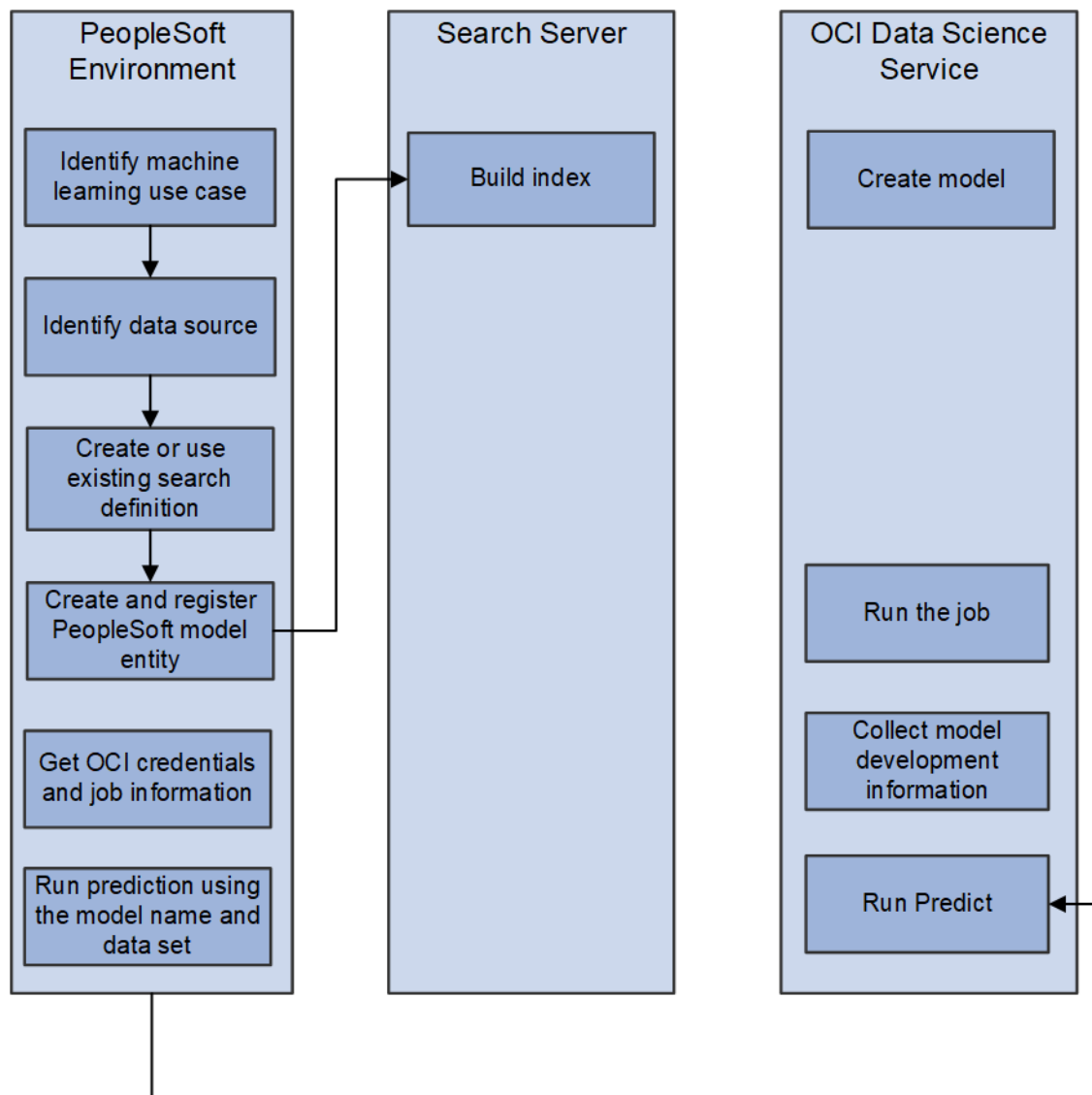
### Understanding Data Science Setup

The Data Science Setup for PeopleSoft applications automates the process of creating and running data science jobs, so that you can schedule the jobs to run periodically. PeopleTools also automates the fetching of data science prediction endpoints, enabling you to adapt to the new features delivered by OCI data science.

The process flow involves the following steps:

1. PeopleSoft sends data to the search engine using Direct Transfer.
2. OCI Data Science service pulls data from the search engine.
3. The data is used to train the machine learning model using the Python file artifact on the OCI Data Science service.
4. When the model is created, it can be saved in the OCI object storage.
5. The saved model can be deployed using PeopleSoft Data Science Setup.
6. OCI Data Science service pulls credentials and job information from PeopleSoft to automatically run jobs.
7. OCI Data Science runs prediction endpoint using the model name and data set.

The following diagram illustrates the process flow among PeopleSoft, search server, and OCI Data Science service.

**Data Science Process Flow**

PeopleSoft provides a navigation collection – Data Science Setup – that enables you to perform the following tasks:

- Set up data source.
- Specify OCI Data Science server.
- Build an index in the search engine.
- Register a model.
- Get OCI credentials and job information.
- Schedule the Application engine program.

# Configuring OCI Data Science Tenancy

You can use the Common Configuration page to configure the OCI tenancy to use the data science setup. This is a one-time configuration that exists in the system-level.

Access the Common Configuration page by navigating to **PeopleTools**, and then **Machine Learning** , and then **Data Science Setup**.

**Note**

The fields on this page must be filled using the information collected from the OCI data science system.

This example illustrates the fields and controls on the Common Configuration page. You can find definitions for the fields and controls later on this page.

Data Science Setup

Common Configuration

Data Science Configuration

Schedule Data Science Jobs

▼ Tenancy

Tenancy OCID

▼ User and Signing keys

User OCID

Fingerprint

Privatekey

PrivateKeyPassphrase

Region

Save

| Field        | Description                                                                                                                                                                           |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tenancy OCID | Enter the OCID of your tenancy. To get the value, see <a href="#">Required Keys and OCIDS</a> .<br>Example:<br>ocid1.tenancy.oc1.aaaaaaaaba3xxxxxxxxxxx<br>xxxxxxxxxxxx               |
| User OCID    | Enter OCID of the user calling the endpoint. To get the value, see <a href="#">Required Keys and OCIDS</a> .<br>Example:<br>ocid1.user.oc1.aaaaaaa3xxxxxxxxxxxxxxxxxxx<br>xxxxxxxxxxx |
| Fingerprint  | Enter the fingerprint for the key pair being used. To get the value, see <a href="#">Required Keys and OCIDS</a> .<br>Example:<br>20:3b:97:13:55:1c:5b:0d:d3:37:d8:50:4e:<br>c5:3a:34 |

| Field                       | Description                                                                                                                                                                                                   |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Privatekey</b>           | Enter the relative path of the private key file.<br><b>Note:</b> You must place the private key file in either application server or Process Scheduler, based on the location from where you execute the job. |
| <b>PrivatekeyPassphrase</b> | Enter the encrypted pass phrase for the signer's private key.                                                                                                                                                 |
| <b>Region</b>               | Enter the relevant OCI region for the endpoint.                                                                                                                                                               |

## Configuring Data Science

Use the Data Science Configuration page to capture the details of Python job and map it with the model you created in data distribution framework.

The values of Display Name, Model Deployment VM Shape, Model Deployment Number of Instance and Model Deployment Load Balancer Bandwidth defined on this page will override the corresponding values in the OCI system, if those values were provided during OCI artifact creation or job creation.

Access the Data Science Configuration page by navigating to **PeopleTools**, and then **Machine Learning**, and then **Data Science Setup**, and then **Data Science Configuration**.

This example illustrates the fields and controls on the Data Science Configuration page. You can find definitions for the fields and controls later on this page.

| Field               | Description                                                                                                                           |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| <b>Model Name</b>   | Select the deployed model name.                                                                                                       |
| <b>Create Model</b> | Click to create a new model from Model Definition page in Data Distribution Framework, if you do not want to use the existing models. |
| <b>Job ID</b>       | Mandatory parameter to run the data science job. Enter the OCID of the user-defined job.                                              |

| Field                                            | Description                                                                                                                       |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>Model Display Name</b>                        | Enter the display name of the model.                                                                                              |
| <b>Model Deployment VM Shape</b>                 | Enter the VM shape associated with the model deployment.                                                                          |
| <b>Model Deployment Number of Instance</b>       | Enter the number of instance associated with the model deployment.                                                                |
| <b>Model Deployment Load Balancer Band Width</b> | Enter the load balancer bandwidth associated with the model deployment.                                                           |
| <b>Compartment ID</b>                            | Mandatory parameter to run the data science job. Enter the OCID of the PeopleSoft data science compartment used for job creation. |
| <b>Data Science Project ID</b>                   | Mandatory parameter to run the data science job. Enter the OCID of the PeopleSoft data science project used for job creation.     |

## Scheduling Data Science Jobs

You can call the jobs in OCI data science service that function according to the Python artifact file used for model creation by triggering the corresponding application engine program from the Schedule Data Science Jobs page.

Provide the server name and recurrence corresponding to the Machine Learning model that is already deployed in Data Distribution Server to automatically execute the Python jobs in data science service.

Access the Data Science Configuration page by navigating to **PeopleTools**, and then **Machine Learning**, and then **Data Science Setup**, and then **Schedule Data Science Jobs**.

This example illustrates the fields and controls on the Schedule Data Science Jobs page. You can find definitions for the fields and controls later on this page.

| Field              | Description                                                |
|--------------------|------------------------------------------------------------|
| <b>Model Name</b>  | Enter the deployed model name.                             |
| <b>Server Name</b> | Select the Process Scheduler server where you run the job. |

| Field                  | Description                                                                |
|------------------------|----------------------------------------------------------------------------|
| <b>Recurrence Name</b> | Select the frequency of recurrence of the job run.<br>Example: Daily Purge |
| <b>Schedule Job</b>    | Click to schedule a job with the selected model, server, and recurrence.   |

The Schedule Data Science Jobs page displays a process list with details about the jobs that are run. Select the **Go to Process Monitor** link provided on the page to view more details of the scheduled jobs.