PEOPLESOFT

PeopleSoft 9.2: Enterprise Components

July 2013

PeopleSoft 9.2: Enterprise Components
CDSKU fscm92pbr1_r03_hosted-doc

Trademark Notice

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

License Restrictions Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Hazardous Applications Notice

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Third Party Content, Products, and Services Disclaimer

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Alpha and Beta Draft Documentation Notice

If this document is in preproduction status:

This documentation is in preproduction status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

Contents

Preface......ix

Understanding the PeopleSoft Online Help and PeopleBooks...... ix

PeopleSoft Hosted Documentation...... ix

Locally Installed Help...... ix

Downloadable PeopleBook PDF Files......ix

Common Help Documentation......ix

Field and Control Definitions...... x

Typographical Conventions...... x

ISO Country and Currency Codes...... xi

Region and Industry Identifiers...... xi

Access to Oracle Support......xii

Documentation Accessibility......xii

Using and Managing the PeopleSoft Online Help......xii

PeopleSoft Enterprise Components Related Links...... xii

Contact Us......xii

Follow Us......xiii

Chapter 1: Setting Up Pagelets for WorkCenters and Dashboards as a System Administrator......15

Setting Up Pagelets for WorkCenters and Dashboards as a System Administrator...... 15

Pages Used to Define Configuration IDs for WorkCenters and Dashboards......15

Configure Pagelets – WorkCenter/Dashboard Page......15

Setting Up Pagelets for My Work as a System Administrator......16

Pages Used to Set Up My Work Pagelets as a System Administrator......16

Configure Pagelets – My Work Page...... 17

Define My Work Link Page......20

Import My Work Link Page......22

Configure Filter Definition Page......23

Configure Filter Values Page...... 25

Validate Filters Page......26

Setting Up the Links Pagelet as a System Administrator...... 27

Pages Used to Set up the Links Pagelet as a System Administrator...... 27

Configure Pagelets – Links Page......28

Define Link/Security Page...... 30

Setting Up Pagelets for Queries as a System Administrator......32

Pages Used to Set up Pagelets for Queries as a System Administrator......32

Configure Pagelets – Queries Page......32

Define Link Page......35

Setting Up Pagelets for Reports and Processes as a System Administrator......36

Pages Used to Set up Pagelets for Reports and Processes as a System Administrator...... 37

Configure Pagelets – Reports/Processes Page...... 37

Chapter 2: Using Datasets......41

Understanding Datasets......41

Defining Dataset Rules...... 41

Page Used to Define Dataset Rules...... 41

Understanding Dataset Rules...... 41

Dataset Rules Page......42

Defining Dataset Roles...... 44

Page Used to Define Dataset Roles...... 44

        Dataset Roles Page..44
    Defining Mobile Data Distribution..45
        Pages Used to Define Mobile Data Distribution...45
        Understanding Mobile Data Distribution..45
        Mobile Data Distribution Page...46
        Mobile User Rules Page...47
Chapter 3: Formatting Addresses...49
    Understanding Address Formats...49
    Specifying Address Formats..49
        Pages Used to Specify Address Formats..49
        Country Description Page..50
        Address Format Page...51
        Valid Address Page...53
        State/Province Page..54
Chapter 4: Using the Find Object Navigation Utility...57
    Understanding the Find Object Navigation Utility...57
    Specifying Navigation Path Search Criteria..57
        Page Used to Specify Navigation Path Search Criteria...................................57
        Understanding Navigation Path Search Criteria..58
        File Object Navigation Page..58
Chapter 5: Working With Currencies and Market Rates...63
    Understanding Currencies and Market Rates..63
        Understanding Currency and Market Rate Tables..63
        Understanding Triangulation...63
        Understanding Conversion Factor Fields and the Visual Rate........................65
        Understanding Application-Specific Requirements for Currency Conversion..66
    Defining Currencies...66
        Page Used to Define Currency Codes...66
        Currency Code Page...66
    Defining Currency Quotation Methods..68
        Page Used to Define Currency Quotation Methods...68
        Currency Quotation Method Page..68
    Defining Market Rates...71
        Pages Used to Define Market Rates...72
        Market Rate Index Page...72
        Market Rate Type Page..73
        Market Rate Definition Page..74
        Market Rate Page...77
        Rate Definition Page..79
        Exchange Rate Detail Page..79
    Calculating Cross, Triangulated, and Reciprocal Rates...82
        Page Used to Run the EOP_RATECALC Process..82
        Understanding the EOP_RATECALC Process...82
        Calculate Cross/Reciprocal Rate - Parameters Page.......................................83
    Using the Currency Exchange Calculator...85
        Page Used to Convert Amounts Using the Currency Exchange Calculator.....85
        Currency Exchange Calculator Page...86
Chapter 6: Working With PeopleSoft Forms and Approval Builder...........................89
    Understanding PeopleSoft Forms and Approval Builder..89
    Designing Forms..92
        Pages Used to Design Forms..92

- Design Form - Step 1: Basic Information Page....93
- Design Form - Step 2: Instructions Page....94
- Design Form - Step 3: Form Fields Page....95
- Form Field Edits Page....97
- Design Form - Step 4: Attachment Templates Page....100
- Design Form - Step 5: Publish to Menu Page....101
- Design Form - Step 6: Approval Process Page....103
- Design Form: Complete Page....104

Defining Prompt Records....105
- Page Used to Specify Prompt Records....105
- Define Prompt Records Page....105

Managing Forms....105
- Page Used to Manage Forms....106
- Understanding Form Management....106
- Manage Forms Page....106

Working with Forms....108
- Pages Used to Work with Forms....108
- Search/Fill a Form Page....109
- Form Page....111
- <Portal label (approval preview)> Page....114
- Form Approval Page....115

Integrating Forms with PeopleSoft Applications....115
- Pages Used to Integrate Forms with PeopleSoft Applications....115
- Understanding Form Integration....116
- Form to CI Collection Mapping Page....118
- Document Form References Page....121

Chapter 7: Configuring Toolbars....123

Understanding Toolbars....123
- Toolbar Elements....123
- Delivered Toolbars....124
- Delivered Toolbar Buttons....124

Defining Toolbar Buttons....125
- Page Used to Define Toolbar Buttons....125
- Toolbar Button Definition Page....125

Configuring Toolbars....127
- Pages Used to Configure Toolbars....127
- Toolbar Definition - Description Page....128
- Toolbar Definition - Button Page....131
- Toolbar Definition - Content Page....133
- Toolbar Definition - Focus Fields Page....134
- Viewing the Toolbar at Runtime....136

Personalizing Toolbars....136
- Page Used to Personalize Toolbars....136
- Personalize Toolbar Page....137

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.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation 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, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. 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 two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines 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 line. 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 help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft 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.

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***
Bold	Highlights 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	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. Italics also highlight references to words or letters, as in the following example: 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`	Highlights a PeopleCode program or other code example.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

Typographical Convention	***Description***
{ } (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.
⇒	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 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.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

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

- 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 the PeopleSoft Online Help:

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

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What’s new in the PeopleSoft Online Help.
- PeopleSoft Online Help acessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft Enterprise Components Related Links

PeopleSoft Information Portal on Oracle.com

My Oracle Support

PeopleSoft Training from Oracle University

Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

Follow Us

Get the latest PeopleSoft updates on Facebook.

Follow PeopleSoft on Twitter@PeopleSoft_Info.

Chapter 1

Setting Up Pagelets for WorkCenters and Dashboards as a System Administrator

---

Setting Up Pagelets for WorkCenters and Dashboards as a System Administrator

This topic discusses how to define configuration IDs for WorkCenters and Dashboards.

Pages Used to Define Configuration IDs for WorkCenters and Dashboards

Page Name	***Definition Name***	***Navigation***	***Usage***
Configure Pagelets – WorkCenter/Dashboard	FSPC_ADMIN_MAIN	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets	Define configuration IDs for WorkCenters and Dashboards.

Configure Pagelets – WorkCenter/Dashboard Page

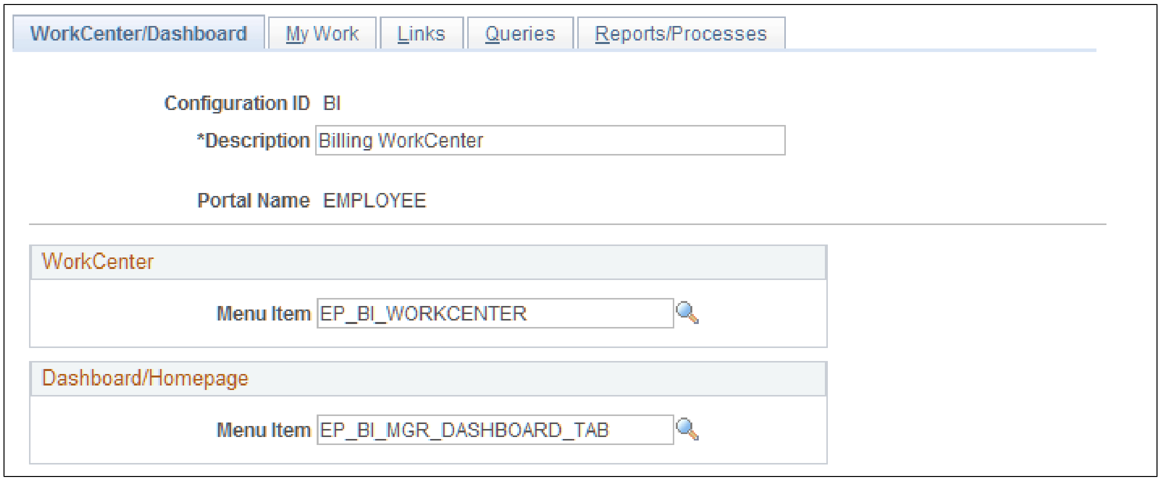
Use the Configure Pagelets – WorkCenter/Dashboard page to (FSPC_ADMIN_MAIN) define configuration IDs for WorkCenters and Dashboards.

Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Image: Configure Pagelets – WorkCenter/Dashboard page

This example illustrates the fields and controls on the Configure Pagelets – WorkCenter/Dashboard page.



Configuration ID BI

*Description Billing WorkCenter

Portal Name EMPLOYEE

Menu Item EP_BI_WORKCENTER

Menu Item EP_BI_MGR_DASHBOARD_TAB

Use this page to add or maintain the configuration of a pagelet. You can determine if the pagelet configuration is to be used in a WorkCenter, Dashboard, or both by entering the menu item in which the WorkCenter or Dashboard should appear.

Create one configuration ID for each combination of WorkCenter and Dashboard for your organization.

The menu item for a WorkCenter or Dashboard cannot be associated with more than one configuration ID. WorkCenter menu items are defined in the Manager WorkCenter Pages component. Dashboard menu items are defined in the Portal as Homepage tabs.

Setting Up Pagelets for My Work as a System Administrator

This topic discusses how to:

- Set up My Work pagelets as a system administrator.
- Define link types and security for My Work pagelets as a system administrator.
- Import system defined links for My Work links as a system administrator.
- Set up filter definitions as a system administrator.
- Set up filter values as a system administrator.
- Validate filters as a system administrator.

Pages Used to Set Up My Work Pagelets as a System Administrator

Page Name	***Definition Name***	***Navigation***	***Usage***
Configure Pagelets – My Work	FSPC_ADMIN_MYWORK	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Click the My Work tab.	Set up My Work links for end users.
Define My Work Link	FSPC_ADM_WRK_SEC	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Click the My Work tab and then click the Define link in the Define Link/Security column.	Define the type of link that appears on the My Work pagelet.
Import My Work Link	FSPC_MYWORK_PROMPT	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Click the My Work tab and then click the Define link in the Define Link/Security column. Click the Import Link button.	Import system defined My Work links.

Page Name	***Definition Name***	***Navigation***	***Usage***
Configure Filter Definition	FSFB_FILTER_FIELDS	Enterprise Components, WorkCenter/Dashboards, Configure Filter Definitions	Set up filter definitions.
Configure Filter Values	FSFB_FILTER_VALUES	Enterprise Components, WorkCenter/Dashboards, Configure Filter Values	Set up filter values.
Validate Filters	RUN_FSFB_VALCLN	Enterprise Components, WorkCenter/Dashboards, Validate Filters	Validate filters.

Configure Pagelets – My Work Page

Use the Configure Pagelets – My Work page (FSPC_ADMIN_MYWORK) to set up My Work links for end users.

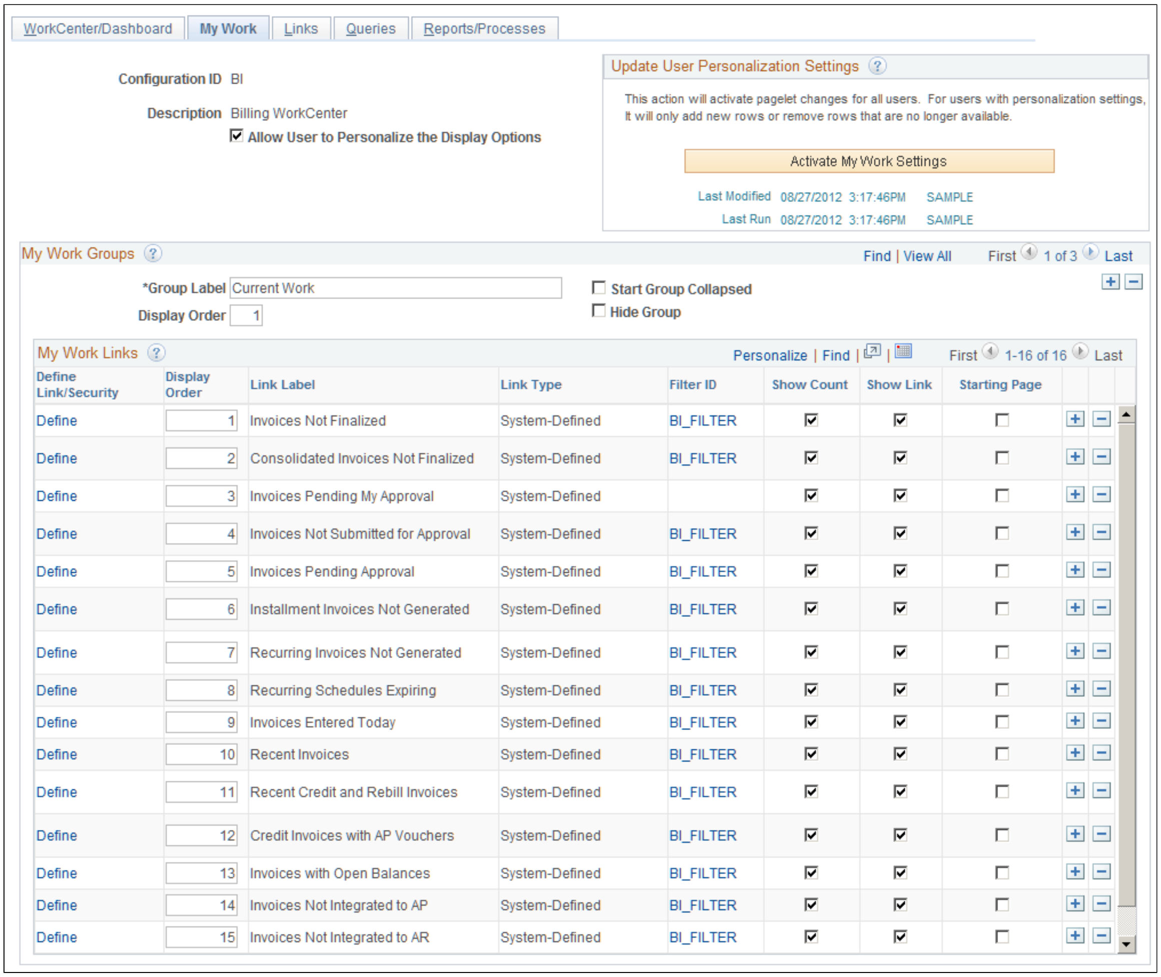
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the My Work tab.

Image: Configure Pagelets – My Work page

This example illustrates the fields and controls on the Configure Pagelets – My Work page.



Configuration ID BI

Description Billing WorkCenter

☑ Allow User to Personalize the Display Options

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

Last Modified 08/27/2012 3:17:46PM SAMPLE

Last Run 08/27/2012 3:17:46PM SAMPLE

*Group Label Current Work

Display Order 1

☐ Start Group Collapsed

☐ Hide Group

Define Link/Security	Display Order	Link Label	Link Type	Filter ID	Show Count	Show Link	Starting Page
Define	1	Invoices Not Finalized	System-Defined	BI_FILTER	☑	☑	☐
Define	2	Consolidated Invoices Not Finalized	System-Defined	BI_FILTER	☑	☑	☐
Define	3	Invoices Pending My Approval	System-Defined		☑	☑	☐
Define	4	Invoices Not Submitted for Approval	System-Defined	BI_FILTER	☑	☑	☐
Define	5	Invoices Pending Approval	System-Defined	BI_FILTER	☑	☑	☐
Define	6	Installment Invoices Not Generated	System-Defined	BI_FILTER	☑	☑	☐
Define	7	Recurring Invoices Not Generated	System-Defined	BI_FILTER	☑	☑	☐
Define	8	Recurring Schedules Expiring	System-Defined	BI_FILTER	☑	☑	☐
Define	9	Invoices Entered Today	System-Defined	BI_FILTER	☑	☑	☐
Define	10	Recent Invoices	System-Defined	BI_FILTER	☑	☑	☐
Define	11	Recent Credit and Rebill Invoices	System-Defined	BI_FILTER	☑	☑	☐
Define	12	Credit Invoices with AP Vouchers	System-Defined	BI_FILTER	☑	☑	☐
Define	13	Invoices with Open Balances	System-Defined	BI_FILTER	☑	☑	☐
Define	14	Invoices Not Integrated to AP	System-Defined	BI_FILTER	☑	☑	☐
Define	15	Invoices Not Integrated to AR	System-Defined	BI_FILTER	☑	☑	☐

A system administrator can determine whether an end user can personalize their display options.

Allow User to Personalize the Display Options	Select to indicate that end users who have access to this pagelet can personalize their display options. If this option is selected, an end user has access to the Personalize page for the pagelet. If this option is not selected, an end user does not have access to the Personalize page for the pagelet. If an end user tries to access the Personalize page, they receive a message that the user personalization is not enabled for the pagelet.

Update User Personalization Settings

Activate My Work Settings	Click to run the Application Engine process that adds and deletes changes to the user personalization records. This process moves the new configuration to the master record. The last modified and the last run dates and times are displayed so that you know that the process has run after changes have been made.

My Work Groups

Group Label	Enter a label heading for the group of links that appear in the <pagelet> Links grid. Multiple group labels can be added to organize <pagelet> links into logical groups. This is not a required field, but should be used if more than five links are listed, and the links can be grouped.
Start Group Collapsed	Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Display Order	Enter an order in which this group of links should display within the <pagelet> section. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Hide Group	Select to indicate that this group label, and associated links, should not display for an end user. If selected, the end user does not have access to the group label, and associated links, even if they have authorization to personalize their display options.

My Work Links

Display Order	Enter the order in which you want the links to appear within the group. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Show Count	Select to display a number in parenthesis at the end of the link. The value of the number indicates how many transactions apply to the link in which the user needs to act upon.

	Administrators should use caution when selecting this option because it could slow system performance. You should evaluate the show count option on a link by link basis. If you find that one link encounters a performance problem, then you should consider deselecting the Show Count check box for that link. You do not have to be consistent with the Show Count check box from link to link. If you deselect the Show Count check box for a link, then the link remains active if there are transactions to review. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Show Link	Select to indicate that the link is displayed on the pagelet. PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Starting Page	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Define My Work Link Page

Use the Define My Work Link page (FSPC_ADM_WRK_SEC) to define link types and security for My Work Pagelets as a system administrator.

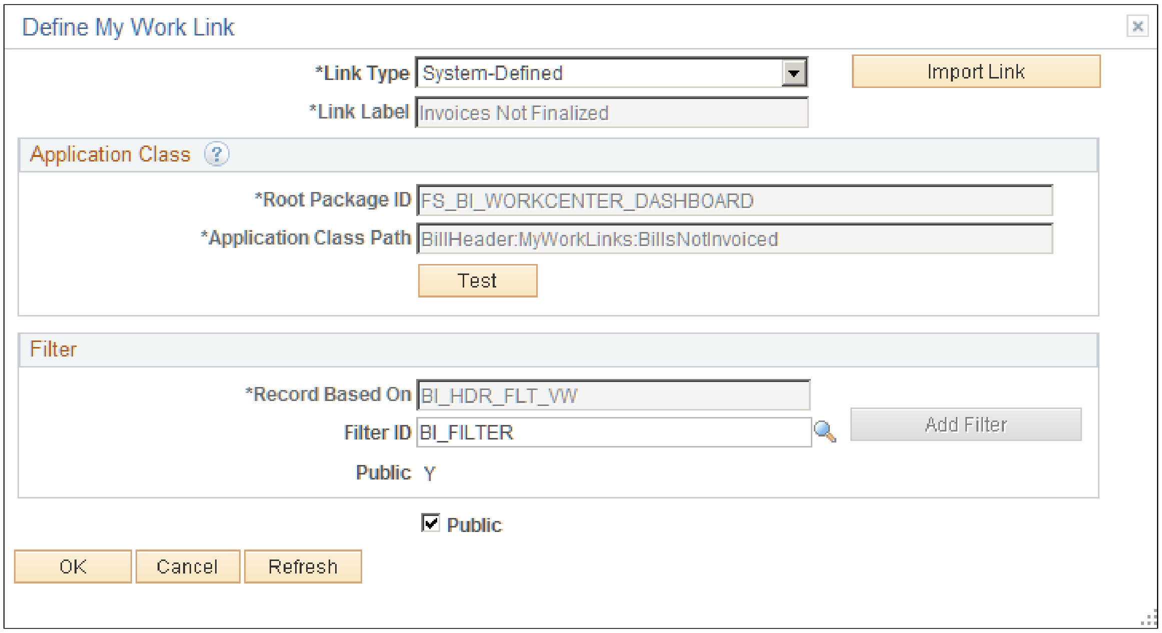
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the My Work tab and then click the Define link in the Define Link/Security column.

Image: Define My Work Link page

This example illustrates the fields and controls on the Define My Work Link page.



*Link Type System-Defined

*Link Label Invoices Not Finalized

*Root Package ID FS_BI_WORKCENTER_DASHBOARD

*Application Class Path BillHeader:MyWorkLinks:BillsNotInvoiced

*Record Based On BI_HDR_FLT_VW

Filter ID BI_FILTER

Public Y

☑ Public

Use this page to define the type of link that appears on the My Work pagelet.

Link Type	Select the type of link. The fields in this window change depending on the option selected in this field. Options include: • Events and Notifications Alert • System-Defined • User-Defined • Worklist

Link Type is Events and Notifications Alert

Process Name	Select a process name that the system must run to display the results of an event or notification alert.
Process Category	Select a process category within the process name selected in the previous field.
Link Label	Displays from the alert and cannot be changed.
Public	Select to indicate that this is a public link.

Link Type is System-Defined

Import Link	Click to access the Import My Work Link page where you can import system-defined links. This button is displayed only when System-Defined is selected in the Link Type field.
Filter ID	Select the Filter ID that will be used to filter the data for this link.
Add Filter	Select to add filters if you don't want to use what is already defined.
Public	Displays whether the filter is public. This option is display only.
Public	Select to indicate that this is a public link.

Link Type is User-Defined

Import Link	Click to access the Import My Work Link page where you can import system-defined links. This button is displayed only when System-Defined is selected in the Link Type field.
Link Label	Enter a label for the link, which appears on the My Work pagelet. (User defined only)
Record Based On	Enter the view name that will be used for defining filter fields for this link.
Filter ID	Select the Filter ID that will be used to filter the data for this link.
Add Filter	Select to add filters if you don't want to use what is already defined.
Public	Displays whether the filter is public. This option is display only.
Public	Select to indicate that this is a public link.

Link Type is Workllist

Worklist Name	Select the Worklist to be displayed when the link is selected.
Link Label	Enter a label for the link, which appears on the My Work pagelet.
Public	Select to indicate that this is a public link.

Import My Work Link Page

Use the Import My Work Link page (FSPC_MYWORK_PROMPT) to import system defined My Work links as a system administrator.

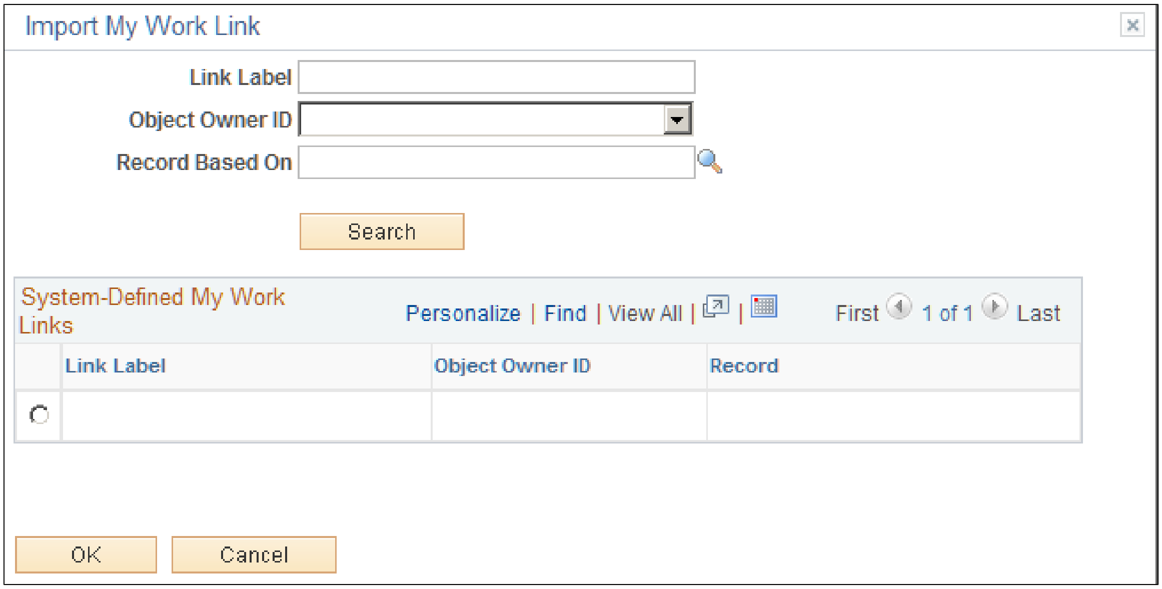
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the My Work tab and then click the Define link in the Define Link/Security column. Click the Import Link button.

Image: Import My Work Link page

This example illustrates the fields and controls on the Import My Work Link page.


Import My Work Link
Link Label
Object Owner ID
Record Based On
Search
System-Defined My Work Links
Personalize | Find | View All
First 1 of 1 Last
Link Label
Object Owner ID
Record
OK
Cancel

Use this page to select an Appclass link that is predefined by a source product (object owner ID).

When the user is importing a link, they can narrow their search by entering a part of the link label name, the Object Owner ID, and the record based on field, or all. Or, they don’t have to enter any search criteria.

Link Label	Enter a label for the link, which appears on the My Work pagelet.
Object Owner ID	Select the application owner of the object. For example: Billling, Contracts, General Ledger, and so on.
Record Based On	Select a table that is used for the link.
Search	Click to search the PeopleSoft database for results based on your selection criteria.
(radio button)	Select one radio button to indicate that you want the system to use that record for the My Work link.

Configure Filter Definition Page

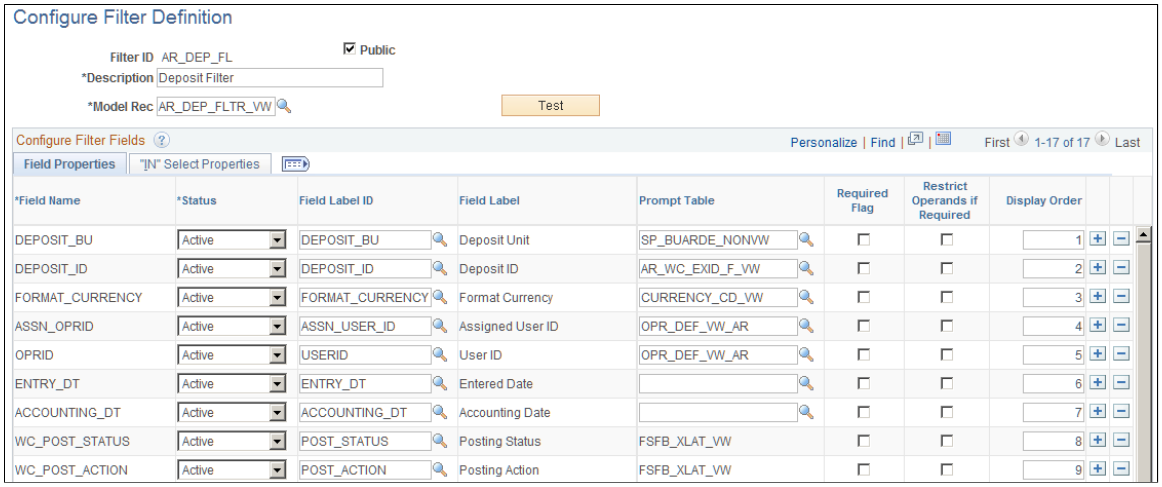
Use the Configure Filter Definition page (FSFB_FILTER_FIELDS) to set up filter definitions as a system administrator.

Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Filter Definitions

Image: Configure Filter Definition page

This example illustrates the fields and controls on the Configure Filter Definition page.



Filter ID AR_DEP_FL

☑ Public

*Description Deposit Filter

*Model Rec AR_DEP_FLTR_VW

*Field Name	*Status	Field Label ID	Field Label	Prompt Table	Required Flag	Restrict Operands if Required	Display Order
DEPOSIT_BU	Active	DEPOSIT_BU	Deposit Unit	SP_BUARDE_NONVW	☐	☐	1
DEPOSIT_ID	Active	DEPOSIT_ID	Deposit ID	AR_WC_EXID_F_VW	☐	☐	2
FORMAT_CURRENCY	Active	FORMAT_CURRENCY	Format Currency	CURRENCY_CD_VW	☐	☐	3
ASSN_OPRID	Active	ASSN_USER_ID	Assigned User ID	OPR_DEF_VW_AR	☐	☐	4
OPRID	Active	USERID	User ID	OPR_DEF_VW_AR	☐	☐	5
ENTRY_DT	Active	ENTRY_DT	Entered Date		☐	☐	6
ACCOUNTING_DT	Active	ACCOUNTING_DT	Accounting Date		☐	☐	7
WC_POST_STATUS	Active	POST_STATUS	Posting Status	FSFB_XLAT_VW	☐	☐	8
WC_POST_ACTION	Active	POST_ACTION	Posting Action	FSFB_XLAT_VW	☐	☐	9

Use this page to define the filter data that is displayed in the My Work pagelet. Filters are used to specify the data that a user views when accessing a My Work pagelet.

Model Rec (model record)	Select a record name that provides the fields to which you will use to filter data.
Public	Select to indicate that the criteria for the filter can be added or modified by end users
Test	Click to view the Test Filter Criteria window. This window displays how the filter option appears to the end user.

Configure Filter Fields

When you select a value in the Model Rec field, the record fields are displayed in this grid.

Status	Select a status for the field. Options are Active and Inactive. Active fields are available for editing on the Configure Filter Values page and are available to end users when filtering data.
Field Label ID	Select an option that corresponds the field label.
Prompt Table	Displays the prompt table that controls the valid values that can be entered on the Configure Filter Values page. For translate and yes or no *fields*, this value defaults from the prompt table that is defined on the record. You can choose to keep the default value or change it.

	For translate *tables*, this field is not available and can't be changes.
Required Flag	Select to indicate that this field must have a value on the Configure Filter Values page.
Restrict Operands if Required	Select to indicate that you want to restrict the operands to "=" (equals) and "in", on the Configure Filter Values page.
Display Order	Enter a value that indicates the order in which the filter fields are displayed on the Configure Filter Values page.

Filter Security

This section displays only when the Public check box is not selected.

Permission Type	Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the filter criteria.
User/Role/Permission List	Depending on the option selected in the Permission Type field, select user IDs, role names, or permission lists. Individual users that are associated to the option selected have access to edit the filter criteria.

IN Select Properties Tab

The "IN" Select Properties tab enables you to select search field names and search field descriptions.

Search Field Name	Select a field that determines the name of the field that the system uses to retrieve field values.
Search Field Description	Select the name of the field that the system uses to retrieve the value descriptions.

Configure Filter Values Page

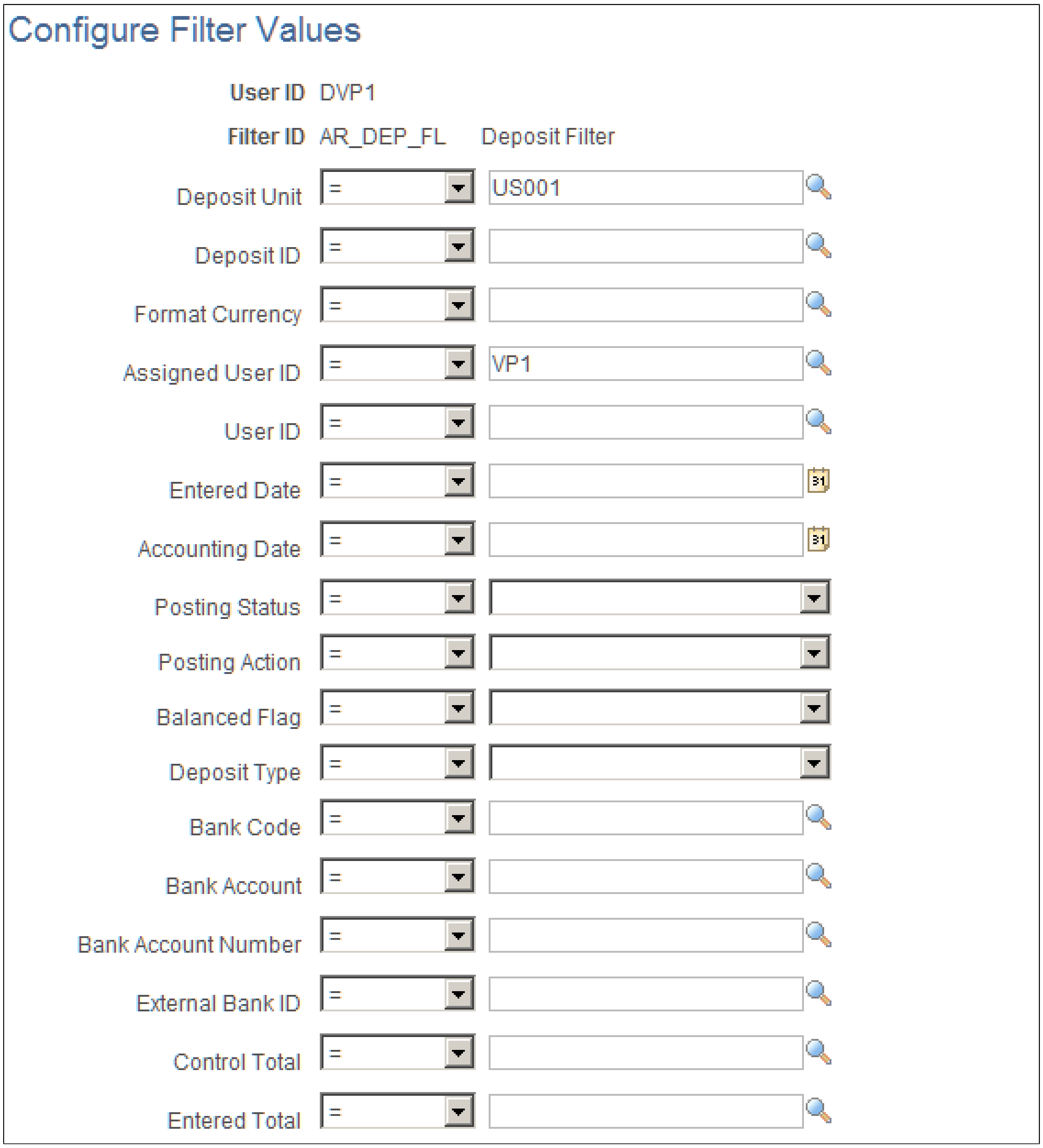
Use the Configure Filter Values page (FSFB_FILTER_VALUES) to set up filter values as a system administrator.

Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Filter Values

Image: Configure Filter Values page

This example illustrates the fields and controls on the Configure Filter Values page.



Configure Filter Values

User ID DVP1

Filter ID AR_DEP_FL Deposit Filter

Deposit Unit	=	US001
Deposit ID	=	
Format Currency	=	
Assigned User ID	=	VP1
User ID	=	
Entered Date	=	
Accounting Date	=	
Posting Status	=	
Posting Action	=	
Balanced Flag	=	
Deposit Type	=	
Bank Code	=	
Bank Account	=	
Bank Account Number	=	
External Bank ID	=	
Control Total	=	
Entered Total	=	

Use this page to select specific values that the system uses when displaying the My Work pagelet. The fields that appear on this page are the fields that have an active status on the Configure Filter Definition page.

Validate Filters Page

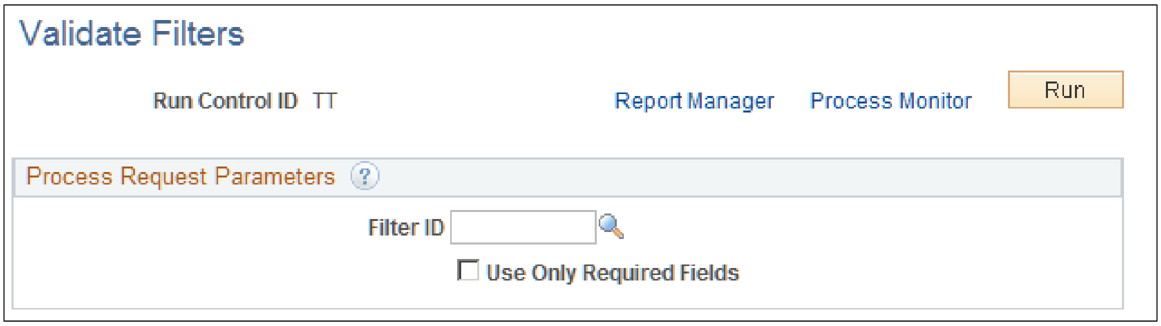
Use the Validate Filters page (RUN_FSFB_VALCLN) to validate filters as a system administrator

Navigation

Enterprise Components, WorkCenter/Dashboards, Validate Filters

Image: Validate Filters page

This example illustrates the fields and controls on the Validate Filters page.


Validate Filters

Run Control ID TT

Filter ID

☐ Use Only Required Fields

Use this page to validate specific filters. If the Filter ID field is blank, then the system tests all filters.

Filter ID	Select a filter ID to test. If you leave this field blank, the system tests all filters.
Use Only Required Fields	Select to indicate that only the fields that are defined as required on the Configure Filter Definition page, are validated by the system. If this check box is not selected, then the system validates all applicable fields.

Setting Up the Links Pagelet as a System Administrator

This topic discusses how to:

- Determine how links appear on the links pagelet as a system administrator.
- Define links and security as a system administrator.

Pages Used to Set up the Links Pagelet as a System Administrator

Page Name	***Definition Name***	***Navigation***	***Usage***
Configure Pagelets – Links	FSPC_ADMIN_LINK	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Click the Links tab.	Determine how links appear on pagelet.

Page Name	***Definition Name***	***Navigation***	***Usage***
Define Link/Security	FSPC_ADMIN_LINK_SEC	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Click the Links tab. Click the Define link.	Define links and security.
Select a Content Reference	FSPC_CRFURL_SELECT	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Click the Links tab. Click the Define link. Select Menu as the link type and then click on the Select Menu Item link.	Select a menu item from a tree structure view.

Configure Pagelets – Links Page

Use the Configure Pagelets – Links page (FSPC_ADMIN_LINK) to determine how links appear on the Links Pagelets as a system administrator.

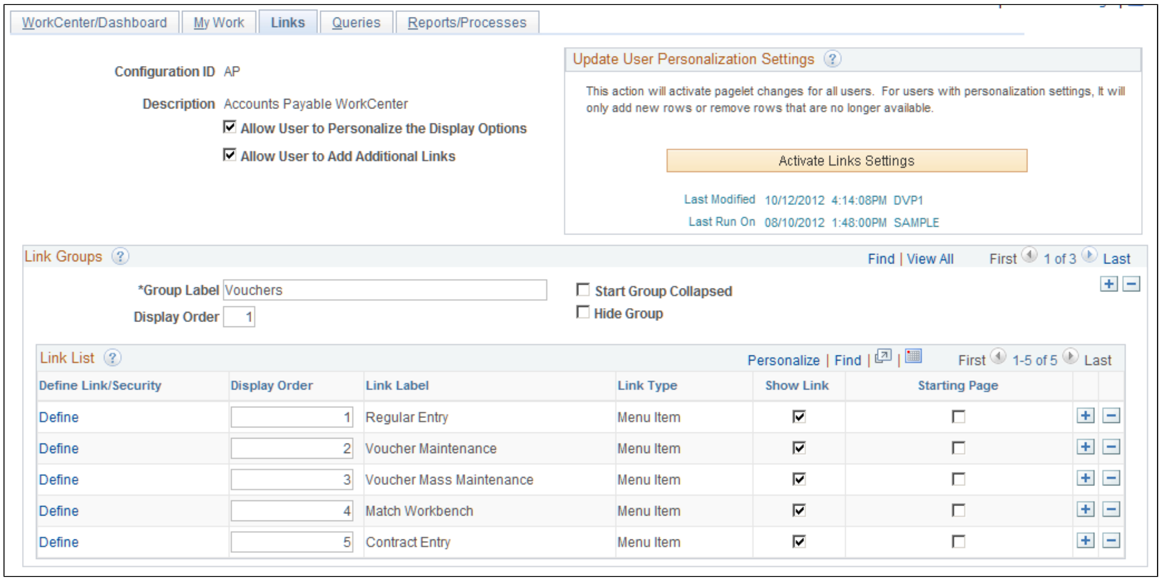
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the Links tab.

Image: Configure Pagelets – Links page

This example illustrates the fields and controls on the Configure Pagelets – Links page.



Configuration ID AP

Description Accounts Payable WorkCenter

☑ Allow User to Personalize the Display Options

☑ Allow User to Add Additional Links

Update User Personalization Settings

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

Last Modified 10/12/2012 4:14:08PM DVP1

Last Run On 08/10/2012 1:48:00PM SAMPLE

Link Groups

*Group Label Vouchers

Display Order 1

☐ Start Group Collapsed

☐ Hide Group

Link List

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page
Define	1	Regular Entry	Menu Item	☑	☐
Define	2	Voucher Maintenance	Menu Item	☑	☐
Define	3	Voucher Mass Maintenance	Menu Item	☑	☐
Define	4	Match Workbench	Menu Item	☑	☐
Define	5	Contract Entry	Menu Item	☑	☐

Use this page to set up links for end users. A system administrator can determine whether an end user can personalize their display options, as well as define group labels and links.

Allow User to Personalize the Display Options	Select to indicate that end users who have access to this pagelet can personalize their display options. If this option is selected, an end user has access to the Personalize page for the pagelet. If this option is not selected, an end user does not have access to the Personalize page for the pagelet. If an end user tries to access the Personalize page, they receive a message that the user personalization is not enabled for the pagelet.
Allow User to Add Additional Links	Select to indicate that an end user can add groups and links to the pagelet.

Update User Personalization Settings

Activate Links Settings	Click to run the Application Engine process that adds and deletes changes to the user personalization records. This process moves the new configuration to the master record. The last modified and the last run dates and times are displayed so that you know that the process has run after changes have been made.

Link Groups

Group Label	Enter a label heading for the group of links that appear in the <pagelet> Links grid. Multiple group labels can be added to organize <pagelet> links into logical groups. This is not a required field, but should be used if more than five links are listed, and the links can be grouped.
Start Group Collapsed	Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Display Order	Enter an order in which this group of links should display within the <pagelet> section. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Hide Group	Select to indicate that this group label, and associated links, should not display for an end user.

If selected, the end user does not have access to the group label, and associated links, even if they have authorization to personalize their display options.

Link List

Define Link/Security	Click to access the Define Link/Security window where you can define the type of link as well as additional information related to the link type.
Display Order	Enter the order in which you want the links to appear within the group. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Show Link	Select to indicate that the link is displayed on the pagelet. PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Starting Page	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Define Link/Security Page

Use the Define Link/Security page (FSPC_ADMIN_LINK_SEC) to define links and external link security as a system administrator.

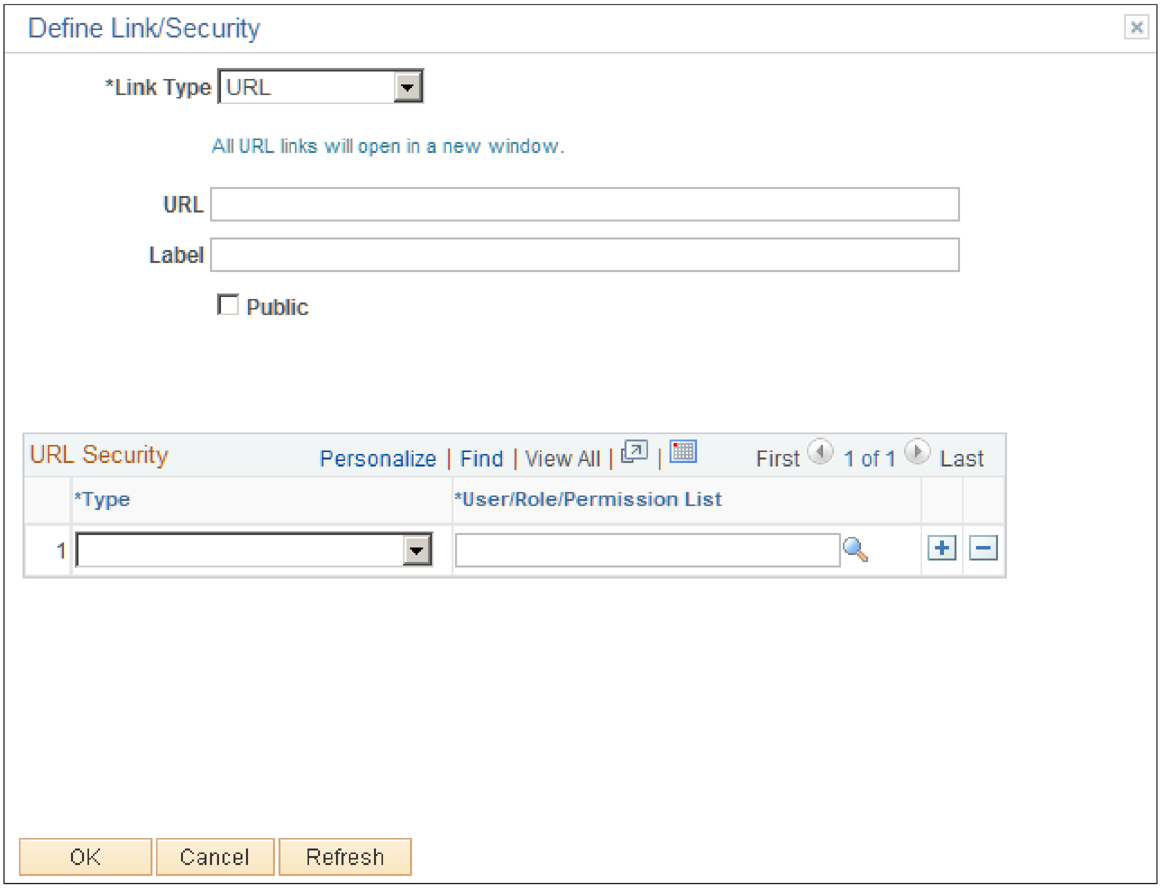
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the Links tab. Click the Define link.

Image: Define Link/Security page

This example illustrates the fields and controls on the Define Link/Security page.


Define Link/Security

*Link Type: URL

All URL links will open in a new window.

URL:

Label:

☐ Public

URL Security

	*Type	*User/Role/Permission List
1		

Use this page to define a link, whether the link is public, and if the link is not public to set up security for the link. The fields on this page change depending on the option selected in the Link Type field.

Link Type	Select *Menu Item* or *URL.*
Select Menu Item	Click to access the Select a Content Reference window where administrators can select menu items from a tree structure to use as a link. Only links to which the end user has permission are displayed. This option appears when *Menu Item* is selected in the Link Type field.
URL and Label	Enter the URL address and label description. This option appears when *URL* is selected in the Link Type field.

Public	Select to indicate that end users, who have access to this pagelet in the WorkCenter, have access to this URL. Deselect to define specific users, roles, and permission lists that have access to this URL. The URL Security section displays when this check box is not selected. This option appears when *URL* is selected in the Link Type field.

URL Security

Permission Type	Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the link.
User/Role/Permission List	Depending on the option selected in the Permission Type field, select user IDs, role names, or permission lists. Individual users that are associated to the option selected have access to the link.

Setting Up Pagelets for Queries as a System Administrator

This topic discusses how to:

- Determine how queries appear on pagelets as a system administrator.
- Define query access as a system administrator.

Pages Used to Set up Pagelets for Queries as a System Administrator

Page Name	***Definition Name***	***Navigation***	***Usage***
Configure Pagelets – Queries	FSPC_ADMIN_QUERY	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Click the Queries tab.	Determine how queries appear on pagelets.
Define Link	FSPC_ADM_QRY_SEC	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Click the Queries tab. Click the Access link.	Define query access.

Configure Pagelets – Queries Page

Use the Configure Pagelets – Queries page (FSPC_ADMIN_QUERY) to determine how queries appear on pagelets.

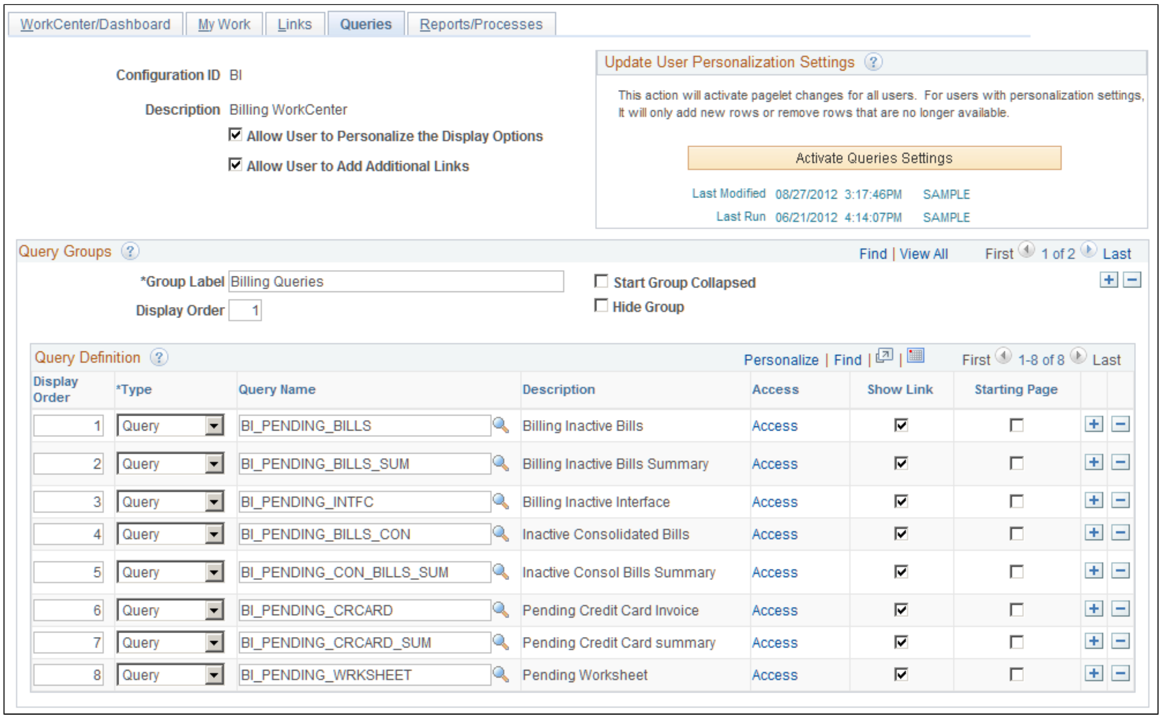
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the Queries tab.

Image: Configure Pagelets – Queries page

This example illustrates the fields and controls on the Configure Pagelets – Queries page.



Configuration ID BI

Description Billing WorkCenter

☑ Allow User to Personalize the Display Options

☑ Allow User to Add Additional Links

Update User Personalization Settings

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

Last Modified 08/27/2012 3:17:46PM SAMPLE

Last Run 06/21/2012 4:14:07PM SAMPLE

Query Groups

*Group Label Billing Queries

Display Order 1

☐ Start Group Collapsed

☐ Hide Group

Query Definition

Display Order	*Type	Query Name	Description	Access	Show Link	Starting Page
1	Query	BI_PENDING_BILLS	Billing Inactive Bills	Access	☑	☐
2	Query	BI_PENDING_BILLS_SUM	Billing Inactive Bills Summary	Access	☑	☐
3	Query	BI_PENDING_INTFC	Billing Inactive Interface	Access	☑	☐
4	Query	BI_PENDING_BILLS_CON	Inactive Consolidated Bills	Access	☑	☐
5	Query	BI_PENDING_CON_BILLS_SUM	Inactive Consol Bills Summary	Access	☑	☐
6	Query	BI_PENDING_CRCARD	Pending Credit Card Invoice	Access	☑	☐
7	Query	BI_PENDING_CRCARD_SUM	Pending Credit Card summary	Access	☑	☐
8	Query	BI_PENDING_WRKSHEET	Pending Worksheet	Access	☑	☐

Use this page to set up query links for end users. A system administrator can determine whether an end user can personalize their display options, add additional links to queries, as well as define group labels and links.

Allow User to Personalize the Display Options	Select to indicate that end users who have access to this pagelet can personalize their display options. If this option is selected, an end user has access to the Personalize page for the pagelet. If this option is not selected, an end user does not have access to the Personalize page for the pagelet. If an end user tries to access the Personalize page, they receive a message that the user personalization is not enabled for the pagelet.
Allow User to Add Additional Links	Select to indicate that an end user can add groups and links to the pagelet.

Update User Personalization Settings

Activate Query Settings	Click to run the Application Engine process that adds and deletes changes to the user personalization records. This process

moves the new configuration to the master record. The last modified and the last run dates and times are displayed so that you know that the process has run after changes have been made.

Query Groups

Group Label	Enter a label heading for the group of links that appear in the <pagelet> Links grid. Multiple group labels can be added to organize <pagelet> links into logical groups. This is not a required field, but should be used if more than five links are listed, and the links can be grouped.
Start Group Collapsed	Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Display Order	Enter an order in which this group of links should display within the <pagelet> section. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Hide Group	Select to indicate that this group label, and associated links, should not display for an end user. If selected, the end user does not have access to the group label, and associated links, even if they have authorization to personalize their display options.

Query Definition

Display Order	Enter the order in which you want the links to appear within the group. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Type	Select and option that includes: *Query* and *Pivot Grid*. Depending on the option selected in this field, the other fields in this section vary.
Pivot Grid Name	Select the name of a pivot grid. Queries can optionally be displayed as a pivot grid.

	These columns display only when *Pivot Grid* is selected in the Type field. For more information about setting up Pivot Grids, see *PeopleTools: PeopleSoft Pivot Grid*
Query Name	Select from a list of public queries. System administrators can only add public queries.
Access	Click the Access link to access the Define Link window where you can define security access to the query or pivot grid.
Show Link	Select to indicate that the link is displayed on the pagelet. PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Starting Page	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Define Link Page

Use the Define Link page (FSPC_ADM_QRY_SEC) to define query access as a system administrator.

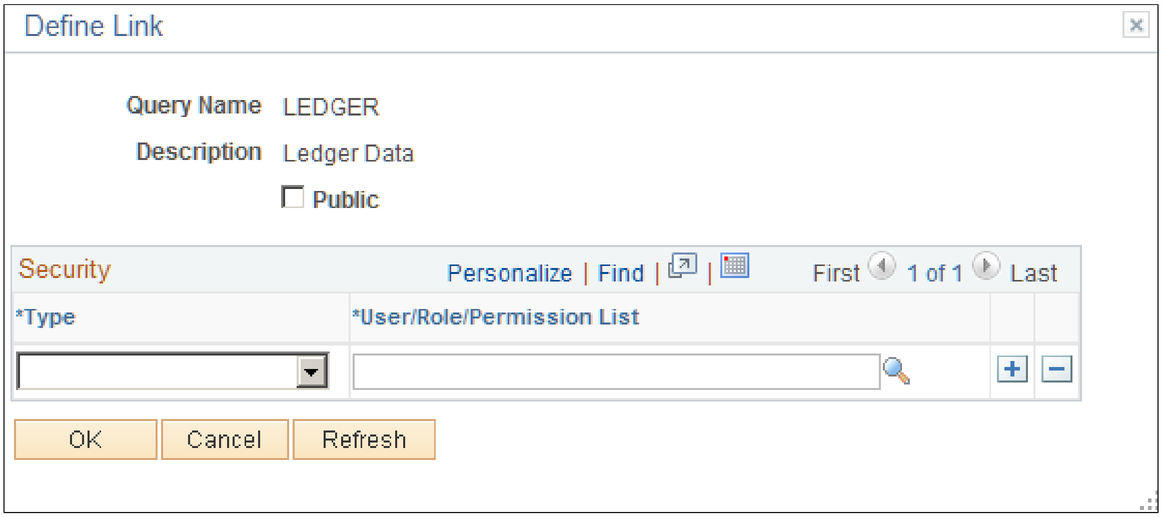
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the Queries tab. Click the Access link.

Image: Define Link page

This example illustrates the fields and controls on the Define Link page.



Define Link

Query Name LEDGER

Description Ledger Data

☐ Public

Security
Personalize | Find | | First 1 of 1 Last
*Type
*User/Role/Permission List
OK
Cancel
Refresh

Use this page to define access to query links on the Query pagelet.

Public	Select to indicate that end users, who have access to this pagelet in the WorkCenter, have access to this query or pivot grid. Deselect to define specific users, roles, and permission lists that have access to this link. The Security section displays when this check box is not selected.

Security

Type	Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the link.
User/Role/Permission List	Depending on the option selected in the Permission Type field, select user IDs, role names, or permission lists. Individual users that are associated to the option selected have access to the link.

Setting Up Pagelets for Reports and Processes as a System Administrator

This section discusses how to determine how reports and processes appear on pagelets as a system administrator.

Pages Used to Set up Pagelets for Reports and Processes as a System Administrator

Page Name	***Definition Name***	***Navigation***	***Usage***
Configure Pagelets – Reports/ Processes	FSPC_ADMIN_REPORT	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Select the Reports/Processes tab.	Determine how reports and process links appear on pagelets.
Define Link/Security	FSPC_ADM_RPT_SEC	Enterprise Components, WorkCenter/Dashboards, Configure Pagelets Select the Reports/Processes tab. Click the Define link.	Define links and security. See the Define Link/Security Page topic.

Configure Pagelets – Reports/Processes Page

Use the Configure Pagelets – Reports/Processes page (FSPC_ADMIN_REPORT) to determine how reports and process links appear on pagelets as a system administrator.

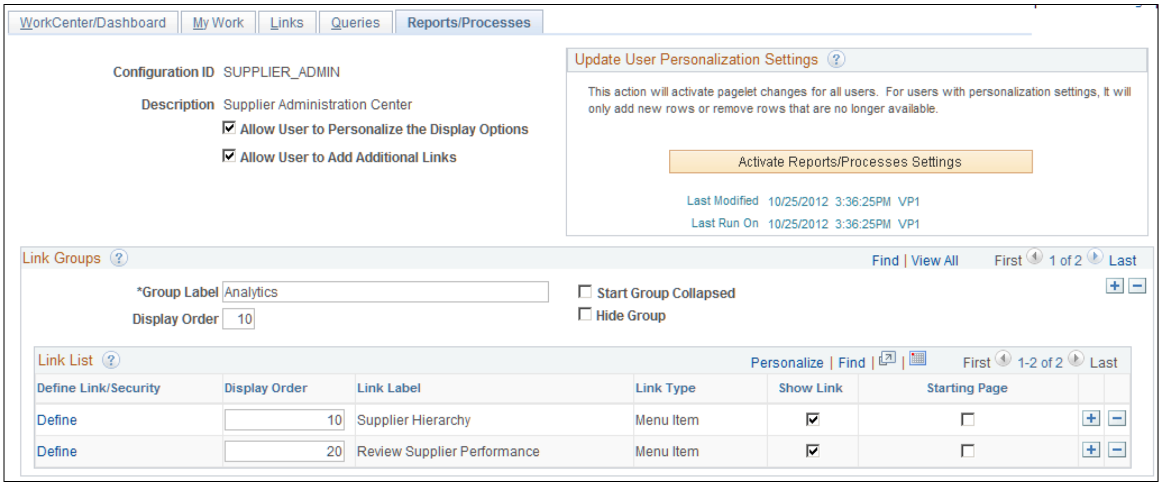
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Select the Reports/Processes tab.

Image: Configure Pagelets – Reports/Processes page

This example illustrates the fields and controls on the Configure Pagelets – Reports/Processes page.



Configuration ID SUPPLIER_ADMIN

Description Supplier Administration Center

☑ Allow User to Personalize the Display Options

☑ Allow User to Add Additional Links

This action will activate pagelet changes for all users. For users with personalization settings, It will only add new rows or remove rows that are no longer available.

Last Modified 10/25/2012 3:36:25PM VP1

Last Run On 10/25/2012 3:36:25PM VP1

*Group Label Analytics

Display Order 10

☐ Start Group Collapsed

☐ Hide Group

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page
Define	10	Supplier Hierarchy	Menu Item	☑	☐
Define	20	Review Supplier Performance	Menu Item	☑	☐

Use this page to set up reports and process links for end users. A system administrator can determine whether an end user can personalize their display options, add additional links to reports and processes, as well as define group labels and links.

Allow User to Personalize the Display Options	Select to indicate that end users who have access to this pagelet can personalize their display options. If this option is selected, an end user has access to the Personalize page for the pagelet. If this option is not selected, an end user does not have access to the Personalize page for the pagelet. If an end user tries to access the Personalize page, they receive a message that the user personalization is not enabled for the pagelet.
Allow User to Add Additional Links	Select to indicate that an end user can add groups and links to the pagelet.

Update User Personalization Settings

Activate Reports/Processes Settings	Click to run the Application Engine process that adds and deletes changes to the user personalization records. This process moves the new configuration to the master record. The last modified and the last run dates and times are displayed so that you know that the process has run after changes have been made.

Link Groups

Group Label	Enter a label heading for the group of links that appear in the <pagelet> Links grid. Multiple group labels can be added to organize <pagelet> links into logical groups. This is not a required field, but should be used if more than five links are listed, and the links can be grouped.
Start Group Collapsed	Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Display Order	Enter an order in which this group of links should display within the <pagelet> section. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Hide Group	Select to indicate that this group label, and associated links, should not display for an end user.

If selected, the end user does not have access to the group label, and associated links, even if they have authorization to personalize their display options.

Link List

Define Link/Security	Click to access the Define Link/Security window where you can define the type of link as well as additional information related to the link type. See Setting Up the Links Pagelet as a System Administrator.
Display Order	Enter the order in which you want the links to appear within the group. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Show Link	Select to indicate that the link is displayed on the pagelet. PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Starting Page	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Chapter 2

Using Datasets

Understanding Datasets

Datasets enable role-based filtering and distribution of data. You can limit the range and quantity of data displayed for a user by associating dataset rules with a user's dataset roles. The resulting dataset rules are a set of data appropriate to the user’s dataset roles.

You can also limit the range and quantity of data passed to a mobile device by defining data distribution rules based on datasets. Data distribution rules define the selection of data downloaded to a mobile device. The dataset may differ depending on the mobile device.

Note: If you are using PeopleCode to control data distribution, consider using datasets instead.

Defining Dataset Rules

This section provides an overview of dataset rules and discusses how to create dataset rules.

Page Used to Define Dataset Rules

Page Name	***Definition Name***	***Navigation***	***Usage***
Dataset Rules	EOEC_DATASET	Enterprise Components, Component Configurations, Datasets, Dataset Rules	Define the rules that make up a dataset.

Understanding Dataset Rules

Dataset rules define datasets for use in conjunction with each dataset role’s security rules. Defining dataset rules creates Structured Query Language (SQL) statements that select the dataset displayed for each rule.

To use dataset rules and roles:

1. Define dataset rules, which are based on a synchronized record.

   You define a dataset rule to return a subset of rows from the selected synchronized record based on the dataset role to which you will link the rule.

   These dataset rules are based on views that can join to any record in your PeopleSoft system.

   For each rule condition, the user specifies a field that comes from the search record name defined in the dataset rule. When the specified field has neither a prompt or translate table edit, the following system variables, which are delivered as system data to all applications, can be used to filter the condition:

- %Blank
- %Date
- %EmployeeID
- %PersonID
- %Time
- %UserID

2. Assign the dataset rules to dataset roles, according to role security and data requirements.

   Each dataset role can have multiple dataset rules. You can use existing dataset roles, or create new dataset roles by selecting from existing PeopleTools security-based user roles.

   See *PeopleTools: Security Administration*, “Understanding Roles”.

3. Ensure that the original user roles on which dataset roles were based are associated with appropriate user IDs.

   Each user ID can have multiple user roles.

   See *PeopleTools: Security Administration*, “User Profiles - Roles Page”

Dataset Rules Page

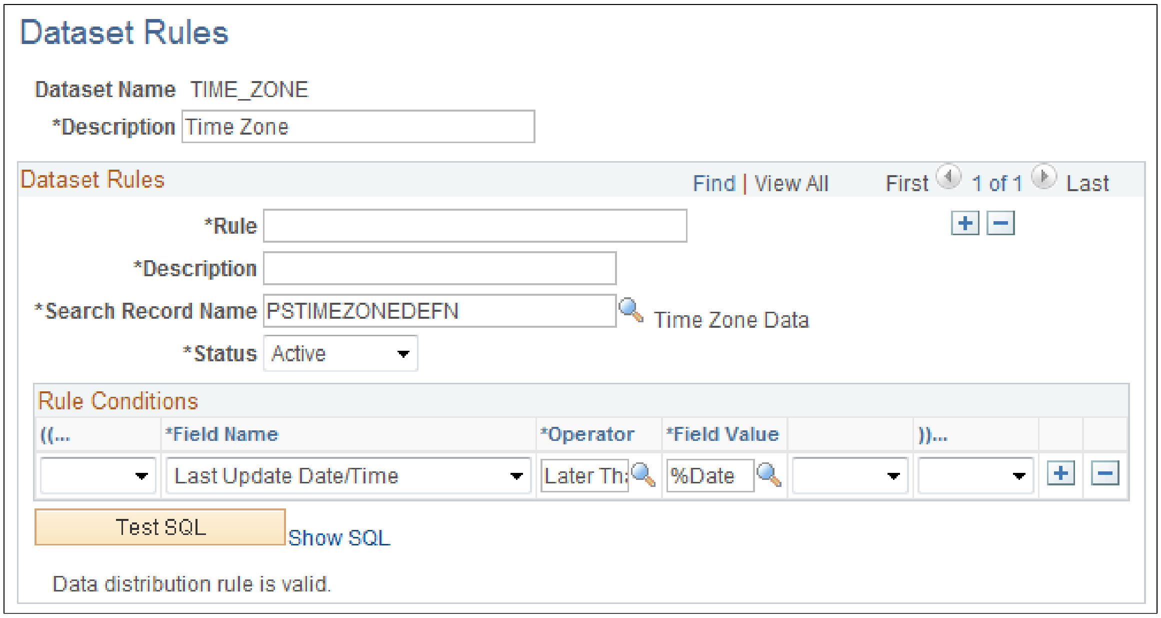
Use the Dataset Rules page (EOEC_DATASET) to define the rules that make up a dataset.

Navigation

Enterprise Components, Component Configurations, Datasets, Dataset Rules

Image: Dataset Rules page

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



Dataset Rules

Dataset Name TIME_ZONE
*Description Time Zone

Dataset Rules

*Rule
*Description
*Search Record Name PSTIMEZONEDEFN Time Zone Data
*Status Active

Rule Conditions

((...	*Field Name	*Operator	*Field Value		))...
	Last Update Date/Time	Later Th:	%Date		

Data distribution rule is valid.

The number of rule conditions in a dataset rule is limited only by your performance requirements. You can set a series of rule conditions that can navigate through as many records as necessary.

Dataset Rules

Search Record Name	Select the name of the search record for this rule. You can create a view specifically for use in the rule.
Status	Select *Active* or *Inactive.*

Rule Conditions

...((and))...	If the AND or OR field is left blank, specify the nesting level for this condition. Be sure to match opening and closing parentheses.
Field Name	Select the field name on which this rule operates.
Operator	Specify the operation with which to compare the specified field value. Select from standard conditional operators.
Field Value	Specify the value of the specified field against which to compare.
AND or OR	For second and subsequent rule conditions, specify *AND* or *OR,* or leave blank if the rule statements are nested.

Test SQL	Click to test the validity of the rule conditions. The result is returned below the button.
Show SQL	Click to view the SQL statement generated by the rule.

Defining Dataset Roles

This section discusses how to define dataset roles.

Set up user roles by associating dataset rules with user roles.

Page Used to Define Dataset Roles

Page Name	***Definition Name***	***Navigation***	***Usage***
Dataset Roles	EOEC_MP_ROLE	Enterprise Components, Component Configurations, Datasets, Dataset Roles	Define dataset roles that associate existing PeopleTools user roles with dataset rules.

Dataset Roles Page

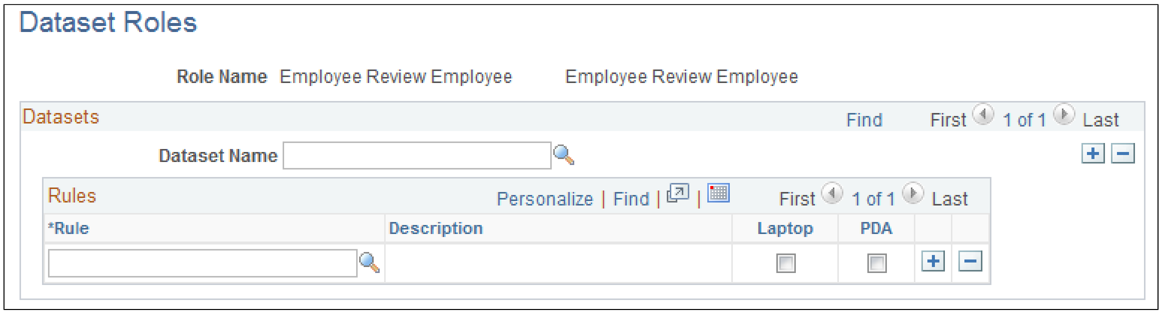
Use the Dataset Roles page (EOEC_MP_ROLE) to define dataset roles that associate existing PeopleTools user roles with dataset rules.

Navigation

Enterprise Components, Component Configurations, Datasets, Dataset Roles

Image: Dataset Roles page

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



Dataset Roles

Role Name Employee Review Employee Employee Review Employee

Select an existing dataset role for editing, or create a new dataset role by selecting from existing PeopleTools security-based user roles.

See *PeopleTools: Security Administration*, “Setting Up Roles”

Dataset Name	Select the dataset with which the component rule is associated.

Rule	Select the component rule.
Laptop and PDA	Select to display the resulting data on a laptop computer or PDA. **Note:** If you do not select Laptop or PDA, no data from this rule is displayed.

Defining Mobile Data Distribution

Use datasets to define the data distributed to mobile devices running the PeopleTools Mobile Agent.

Important! PeopleSoft Mobile Agent is a deprecated product. The information in this section exists for backward compatibility only.

This section provides an overview of mobile data distribution and discusses how to:

- Define mobile data distribution rules.
- Use mobile user rules.

Pages Used to Define Mobile Data Distribution

Page Name	***Definition Name***	***Navigation***	***Usage***
Mobile Data Distribution	EOEC_MP_RULE	Enterprise Components, Component Configurations, Mobile, Mobile Data Distribution	Define data distribution rules for mobile devices based on datasets.
Mobile User Rules	EOEC_MP_USRRULE	Enterprise Components, Component Configurations, Mobile, Mobile User Rules	Preview the effect of mobile data distribution.

Understanding Mobile Data Distribution

Mobile devices can have limited processing power, storage capacity, and display space. You can limit the range and quantity of data passed to the mobile device by associating dataset rules with synchronizable component interfaces. Mobile data distribution rules define the selection of data from network servers for download to a mobile device. The result of data distribution rules is a set of data appropriate to the user's roles. The set of data may differ depending on the mobile device.

Data distribution for mobile applications implements security and filters the data downloaded to the mobile device. You define data distribution for mobile devices based on datasets by selecting dataset rules assigned to the mobile device user's dataset roles.

Implementing Mobile Data Distribution

To filter data defined by dataset rules to mobile devices, developers must include the function DistributeDataByRules() in the synchronizable component interface's OnSelect PeopleCode method.

For example:

```
Declare Function DistributeDataByRules PeopleCode
FUNCLIB_ECMOBIL.EOEC_ONSELECT FieldFormula;
DistributeDataByRules();
```

See Also

Enterprise PeopleTools 8.49 PeopleBook: Mobile Agent

PeopleTools: PeopleCode Language Reference

Mobile Data Distribution Page

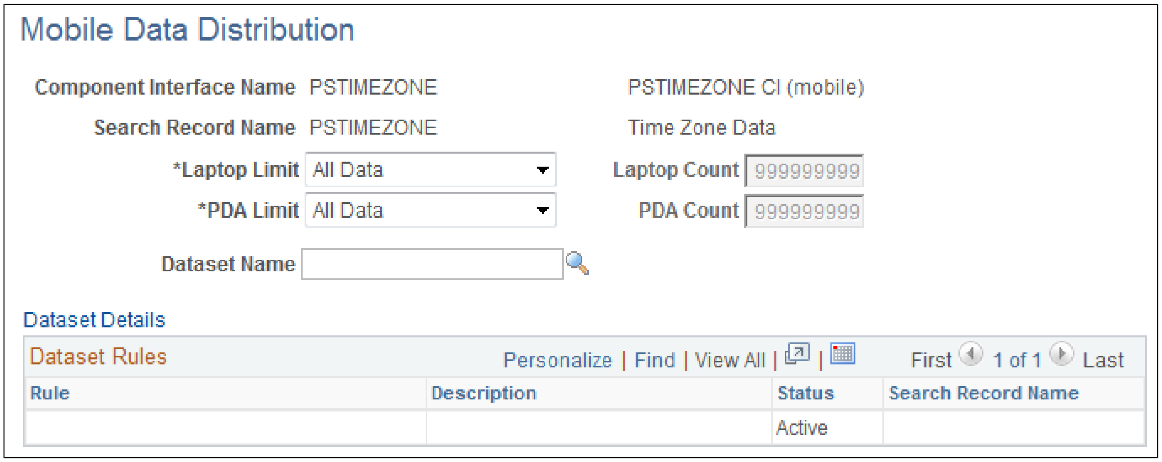
Use the Mobile Data Distribution page (EOEC_MP_RULE) to define data distribution rules for mobile devices based on datasets.

Navigation

Enterprise Components, Component Configurations, Mobile, Mobile Data Distribution

Image: Mobile Data Distribution page

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



Mobile Data Distribution

Component Interface Name PSTIMEZONE PSTIMEZONE CI (mobile)

Search Record Name PSTIMEZONE Time Zone Data

*Laptop Limit All Data Laptop Count 999999999

*PDA Limit All Data PDA Count 999999999

Dataset Name

Dataset Details

Dataset Rules

Rule	Description	Status	Search Record Name
		Active	

Note: Component interfaces selected for mobile data distribution must be synchronizable; only synchronizable component interfaces are available from the prompt.

Laptop Limit	Select the limiting factor for data instances to be downloaded to a laptop computer during synchronization. Select from: *All Data:* Select to download all data matching the rule’s conditions.

	Limit By Count: Select to download only data matching the rule's conditions up to the specified count. The count is based on the number of rows returned. Referenced data is also included. *Referenced Data Only:* Select to download only data only if it is referenced by another component. You would be more likely to select this option for setup data than for transaction data. For example, if you have 50,000 products, but the leads you download are related to only 2,000 of the products, select *Referenced Data Only* so that you only download the 2,000 products, instead of the entire set. If *Reference Data Only* is selected for products, downloads do not include products unless other objects such as leads and opportunities that reference products are downloaded.
PDA Limit	Select the limiting factor for data instances to be downloaded to a PDA during synchronization. Select from: *All Data:* All data matching the rule's conditions is downloaded. *Limit By Count:* Only data matching the rule's conditions up to the specified count is downloaded. Referenced data is also included. *Referenced Data Only:* Only data referenced by the component interface is downloaded.
Laptop Count and PDA Count	If you select *Limit By Count* in the Laptop Limit field or the PDA Limit field, specify the maximum number of data instances to be downloaded.
Dataset Name	Select the dataset to apply to this mobile data distribution rule.
Dataset Details	Click to access the Dataset Rules page, where you can view and modify the selected dataset definition. See Dataset Rules Page.

The Dataset Rules grid lists rules for the specified dataset.

Mobile User Rules Page

Use the Mobile User Rules page (EOEC_MP_USRRULE) to preview the effect of mobile data distribution.

Navigation

Enterprise Components, Component Configurations, Mobile, Mobile User Rules

A mobile user can specify whether a selected data distribution rule returns data to a selected mobile device. The user must be signed in with a user ID, not as an administrator, to define mobile user rules.

Show Rule Count	Click to view the number of results the mobile data distribution rule returns.
Show Laptop Count and Show PDA Count	Click to view the number of results the mobile data distribution rule returns to a laptop computer or PDA based on any limits set for the mobile device on the Mobile Data Distribution page.
Laptop and PDA	Select to display the results of this mobile data distribution rule on a laptop computer or on a PDA, or both. **Note:** If neither Laptop nor PDA is selected, no data from this mobile data distribution rule is displayed.
Preview Laptop Results and Preview PDA Results	Click to preview the data that will be downloaded to a laptop or PDA as a result of this mobile data distribution rule and any limits set for the mobile device on the Mobile Data Distribution page.

Chapter 3

Formatting Addresses

Understanding Address Formats

You can use addresses throughout PeopleSoft applications for customer, vendor, and student locations. The address format pages are used to specify the details and defaults for the way address fields display and how they prompt users.

You can format addresses for any country in the world. You can create country and state descriptions and street, suite, building, and postal zone formats to meet the needs of any country format. For example, the state description can be changed to county, province, district, or other geopolitical designation in use by the country in question. In addition, PeopleSoft applications contain fully populated country code and state code tables that Oracle updates for each major release, according to current changes in national boundaries and designations.

Specifying Address Formats

This section discusses how to:

- Describe countries.
- Format addresses.
- Validate addresses.
- Specify state information.

Important! This task, Specifying Address Formats, does not apply to the PeopleSoft Customer Relationship Management application nor the PeopleSoft Financials/Supply Change Management application, because these applications do not use the common address objects.

Pages Used to Specify Address Formats

Page Name	***Definition Name***	***Navigation***	***Usage***
Country Description	COUNTRY_DEFN	• Set Up <Product Line>, Install, Country Table • Enterprise Components, Component Configurations, Address - Hidden, Country - Hidden	Define countries to be used throughout the system. This is used mainly for currencies and addresses.

Page Name	***Definition Name***	***Navigation***	***Usage***
Address Format	ADDR_FORMAT_TABLE	• Set Up <Product Line>, Install, Country Table, Address Format • Enterprise Components, Component Configurations, Address - Hidden, Country - Hidden	Customize fields and field descriptions, so addresses conform to the customary address format of the specified country. Once set, the format appears everywhere the system uses the address subrecord.
Valid Address	EO_ADDR_VALIDAT	• Set Up <Product Line>, Install, Country Table, Valid Address • Enterprise Components, Component Configurations, Address - Hidden, Country - Hidden	Add valid combinations of address fields.
State/Province	STATE_DEFN	• Set Up <Product Line>, Install, State/Province • Enterprise Components, Component Configurations, Address - Hidden, State - Hidden	Add or review a state, province, county, or other geopolitical region within a country.

Country Description Page

Use the Country Description page (COUNTRY_DEFN) to define countries to be used throughout the system.

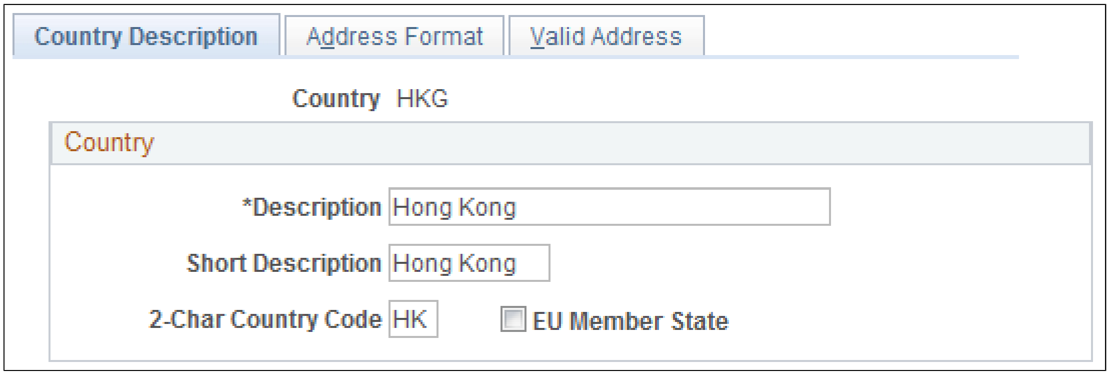
This is used mainly for currencies and addresses.

Navigation

- Set Up <Product Line>, Install, Country Table
- Enterprise Components, Component Configurations, Address - Hidden, Country - Hidden

Image: Country Description page

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



Country HKG

*Description Hong Kong

Short Description Hong Kong

2-Char Country Code HK

☐ EU Member State

Use this page to define the prompts and fields that display throughout the system.

2-Char Country Code (two-character country code)	Enter the Value Added Tax (VAT) registration ID for the country.
EU Member State (European Union member state)	Select if the country is a member of the European Union. Select to include the country in prompts for intrastate reporting.

Address Format Page

Use the Address Format page (ADDR_FORMAT_TABLE) to customize fields and field descriptions, so addresses conform to the customary address format of the specified country.

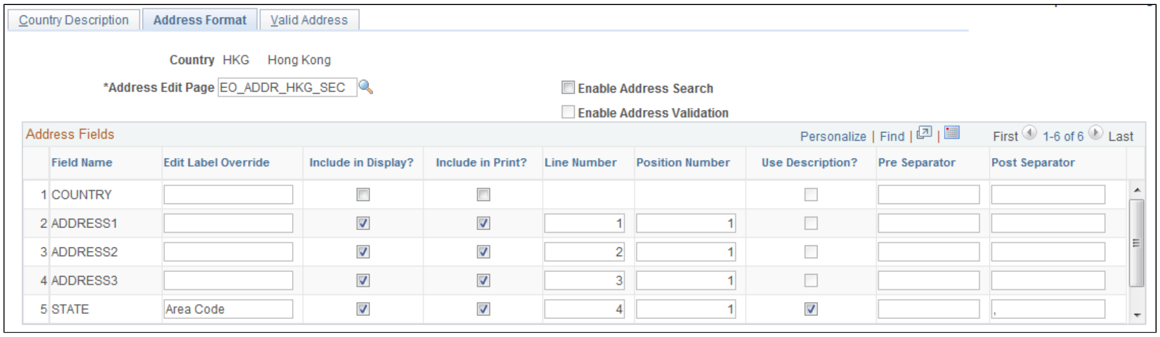
Once set, the format appears everywhere the system uses the address subrecord.

Navigation

- Set Up <Product Line>, Install, Country Table, Address Format
- Enterprise Components, Component Configurations, Address - Hidden, Country - Hidden

Image: Address Format page

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



Country HKG Hong Kong

*Address Edit Page EO_ADDR_HKG_SEC

☐ Enable Address Search

☐ Enable Address Validation

Address Fields

	Field Name	Edit Label Override	Include in Display?	Include in Print?	Line Number	Position Number	Use Description?	Pre Separator	Post Separator
1	COUNTRY		☐	☐			☐		
2	ADDRESS1		☑	☑	1	1	☐		
3	ADDRESS2		☑	☑	2	1	☐		
4	ADDRESS3		☑	☑	3	1	☐		
5	STATE	Area Code	☑	☑	4	1	☑		,

Use this page to set up the three main aspects of the address: editing, displaying, and printing.

Address Edit Page	Displays the secondary page used for editing the address. You can create a new secondary page using Application Designer. On the new address secondary page you create, use page fields from the DERIVED_ADDRESS record definition. You then need to add a secondary page control to ADDRESS_SBP pointing to your new secondary page. Once you complete these steps, the secondary page is accessible in this field.
Enable Address Search	Select to enable users to search for a valid value. Selecting this check box enables the Used in Search column and the Valid Address page. The system default is to leave this check box clear.
Enable Address Validation	Available only when Enable Address Search is selected. Select to ensure validation of all values selected. When selected, users must select a value from the search list. If this check box is clear, users can select from the search list or enter a new value. The system default is to leave this check box clear.
Search Limit	Enter a numeric value to limit the number of search results. This option enables you to limit the search results retrieved during Address Search.
Field Name	Displays the field options available for the address page.
Edit Label Override	(Optional) Enter an alternative label for the field. The new label is used when prompting for the field. You can customize address formats so that they conform to the address requirements of

	each location. For instance, for a U.S. address, you would change the Postal field to read ZIP Code. Keep in mind the distinctions between county and state: • *County:* The tertiary geopolitical region within a state; the level after country and state. In the UK, the level of state is called a county; you would enter such counties in the State field. • *State:* The secondary geopolitical region within a country; a state in the U.S., a province in Canada, a county in the UK, and a department in France.
Used in Search	Available only when you select the Enable Address Search check box. Select the fields you want users to be able to search on.
Include in Display	Select to have the PeopleSoft system include this field when an address appears in read-only mode. Clear this check box for specific fields if your organization wants to display addresses in a format that is different than the appearance of the address during data entry.
Include in Print	Select to print the field when printing.
Line Number and Position Number	Enter the physical location of the fields for displaying and printing. The line number and position number control the field order in the Address Edit page. The Line Number field specifies the line in which the address field should appear on the page. If there are more than two fields on the same line, then the Position Number field is used to resolve the conflict.
Use Description	Select to display the description for the field value. For example, for addresses in Japan, select this option to display the description of the state rather than the state code, since the code is numeric.
Pre Separator and Post Separator	Enter characters to be used surrounding the address field. For example, in the United States, a comma generally follows the city name, such as in *San Francisco, CA.* In India, there are parentheses around the postal code, for example *(123).*

Valid Address Page

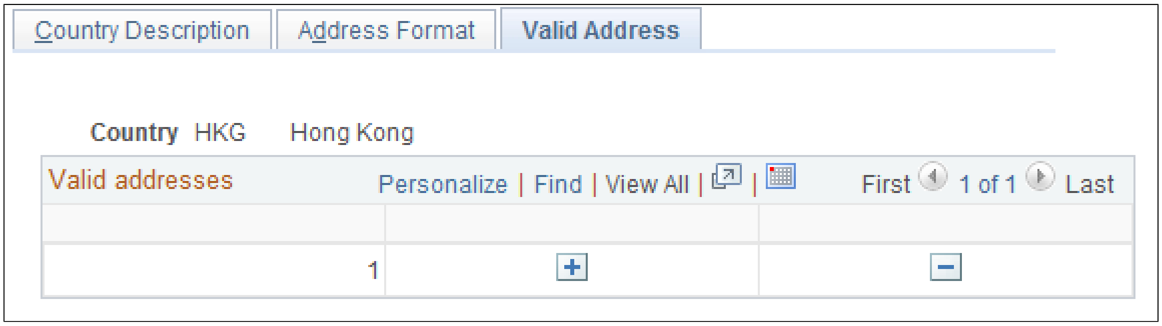
Use the Valid Address page (EO_ADDR_VALIDAT) to add valid combinations of address fields.

Navigation

- Set Up <Product Line>, Install, Country Table, Valid Address
- Enterprise Components, Component Configurations, Address - Hidden, Country - Hidden

Image: Valid Address page

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



Country HKG Hong Kong

1	+	−

To enable this page, select the Enable Address Search check box on the Address Format page. This enables the Used in Search column. The fields that you select to be used in the search appear on the Valid Address page as columns. Enter the valid postal code and state combinations that the user can search for and select.

State/Province Page

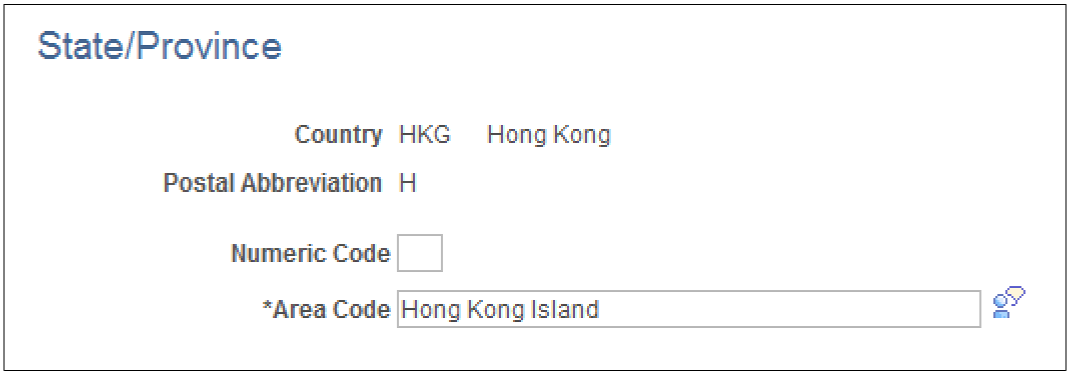
Use the State/Province page (STATE_DEFN) to add or review a state, province, county, or other geopolitical region within a country.

Navigation

- Set Up <Product Line>, Install, State/Province
- Enterprise Components, Component Configurations, Address - Hidden, State - Hidden

Image: State/ Province page

This example illustrates the fields and controls on the State/Province page. You can find definitions for the fields and controls later on this page.



Country HKG Hong Kong

Postal Abbreviation H

Numeric Code

*Area Code Hong Kong Island

This table provides states, provinces, and equivalent geopolitical entities for all supported countries, such as Dutch communities and French departments. The codes are based on standard postal codes.

Numeric Code	Enter a two digit numeric code for statistical and reporting purposes.
Province	The second enterable field, Province in the preceding example, changes depending on the country. This field has a maximum limitation of 30 characters. Other examples for this field include: • State—if the country is USA, the field label appears as State. • Department—if the country is France, the field label appears as Department. • Community—if the country is Holland, the field label appears as Community.

Chapter 4

Using the Find Object Navigation Utility

Understanding the Find Object Navigation Utility

You can use this utility with any PeopleSoft Pure Internet Architecture page to locate the navigation path for a component, page, content reference, or portal. Select your search criteria and click the Search button. The resulting navigation paths appear with links that enable you to navigate directly to the page that you specified in your search. Frequently, several ways are available to access a page. Reviewing all of the navigation paths may help you find the page in a more intuitive way.

For example, an administrator wants to apply security to all references to Monitor Approvals. This component resides in Enterprise Components, Approvals, Approvals. Some applications can choose to create static reference or links to a page. With this utility, the administrator can find both references and confirm that the appropriate security is applied.

Additionally, when used as an internal tool, this utility can be very helpful during PeopleTools and application upgrades.

Specifying Navigation Path Search Criteria

This section provides an overview of the navigation path search criteria and discusses how to:

- Specify search criteria by component name.
- Specify search criteria by page name.
- Specify search criteria by secondary page name.
- Specify search criteria by content reference (CREF) name and portal name.

Page Used to Specify Navigation Path Search Criteria

Page Name	***Definition Name***	***Navigation***	***Usage***
Find Object Navigation	EOEC_FIND_NAV	• Enterprise Components, Find Object Navigation • Set Up <Product Line>, System Administration, Utilities, Find Object Navigation	Specify navigation path search criteria.

Understanding Navigation Path Search Criteria

This utility uses the object ID and portal tables to locate the target objects, allowing you to enter a component name, page name, or content reference (CREF) name and portal name to locate all of the navigation paths. Select your search criteria to populate and display a grid with the navigation for your search parameters. The full navigation path is given along with URL links that take you to a new browser for the navigation that you specified.

File Object Navigation Page

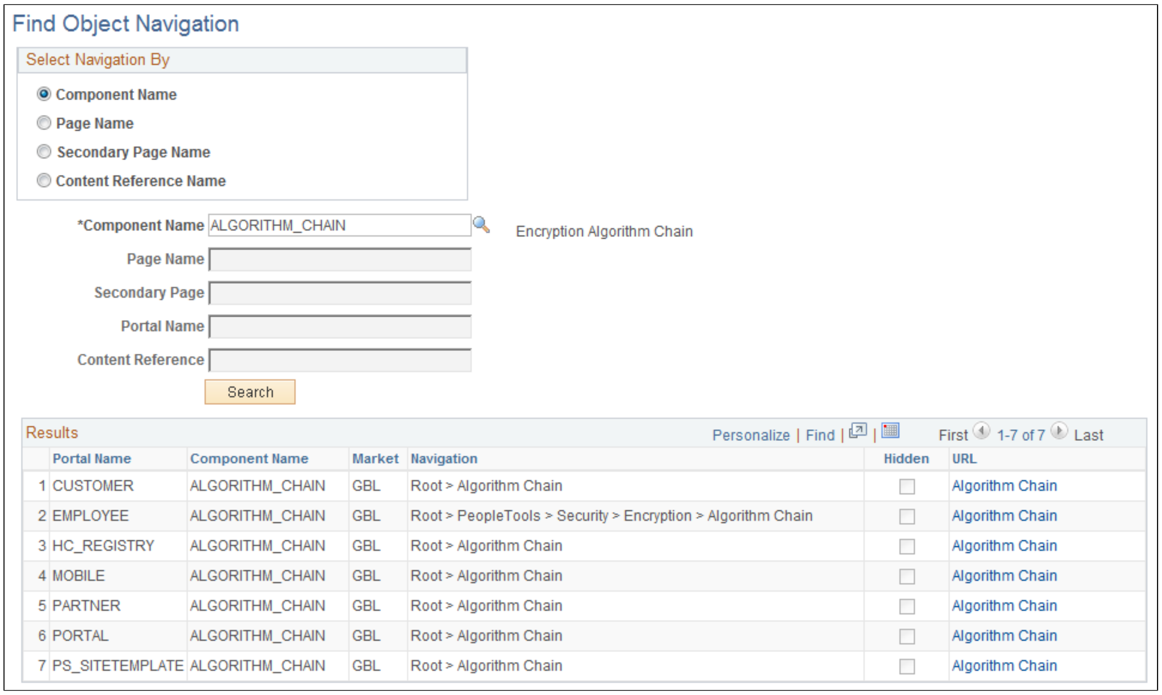
Use the Find Object Navigation page (EOEC_FIND_NAV) to specify navigation path search criteria.

Navigation

- Enterprise Components, Find Object Navigation
- Set Up <Product Line>, System Administration, Utilities, Find Object Navigation

Image: Find Object Navigation page showing search criteria of component name

This example illustrates the fields and controls on the Find Object Navigation page with the navigation grid displaying the path and URL for search parameters of component name. You can find definitions for the fields and controls later on this page.



● Component Name
○ Page Name
○ Secondary Page Name
○ Content Reference Name

*Component Name: ALGORITHM_CHAIN Encryption Algorithm Chain
Page Name:
Secondary Page:
Portal Name:
Content Reference:

	Portal Name	Component Name	Market	Navigation	Hidden	URL
1	CUSTOMER	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
2	EMPLOYEE	ALGORITHM_CHAIN	GBL	Root > PeopleTools > Security > Encryption > Algorithm Chain	☐	Algorithm Chain
3	HC_REGISTRY	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
4	MOBILE	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
5	PARTNER	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
6	PORTAL	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
7	PS_SITETEMPLATE	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain

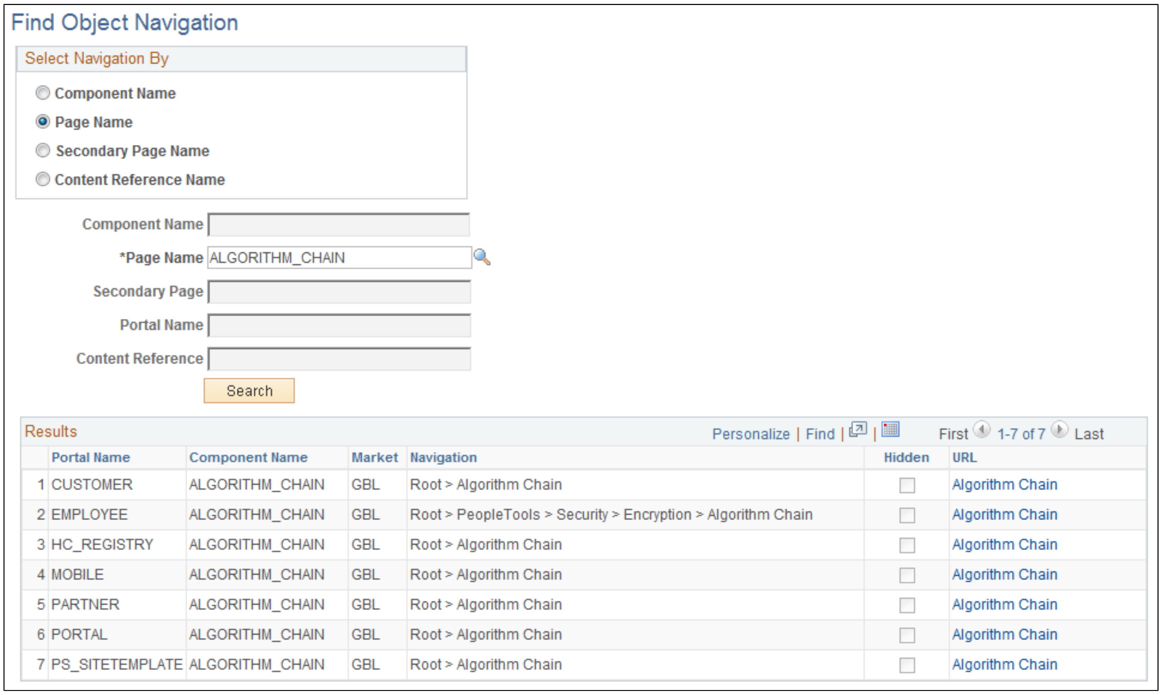
A component is a set of pages that are grouped for a business purpose. Component Interfaces expose components for synchronous access from another application, such as PeopleCode, Java, C/C++, or Component Object Model (COM).

Component Name	Select to search by component name. The system default is *Component Name.*

***Component Name**	This is a required field. Enter the name of the component for the search, or click the prompt to display available component names.
Search	Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.
URL	Click to open a browser window that directly accesses the navigation that you select in the grid.

Image: Find Object Navigation page showing search criteria of page name

This example illustrates the fields and controls on the Find Object Navigation page with the navigation grid displaying path and URL for search parameters of the page name. You can find definitions for the fields and controls later on this page.



Find Object Navigation

Select Navigation By

○ Component Name
● Page Name
○ Secondary Page Name
○ Content Reference Name

Component Name
*Page Name ALGORITHM_CHAIN
Secondary Page
Portal Name
Content Reference

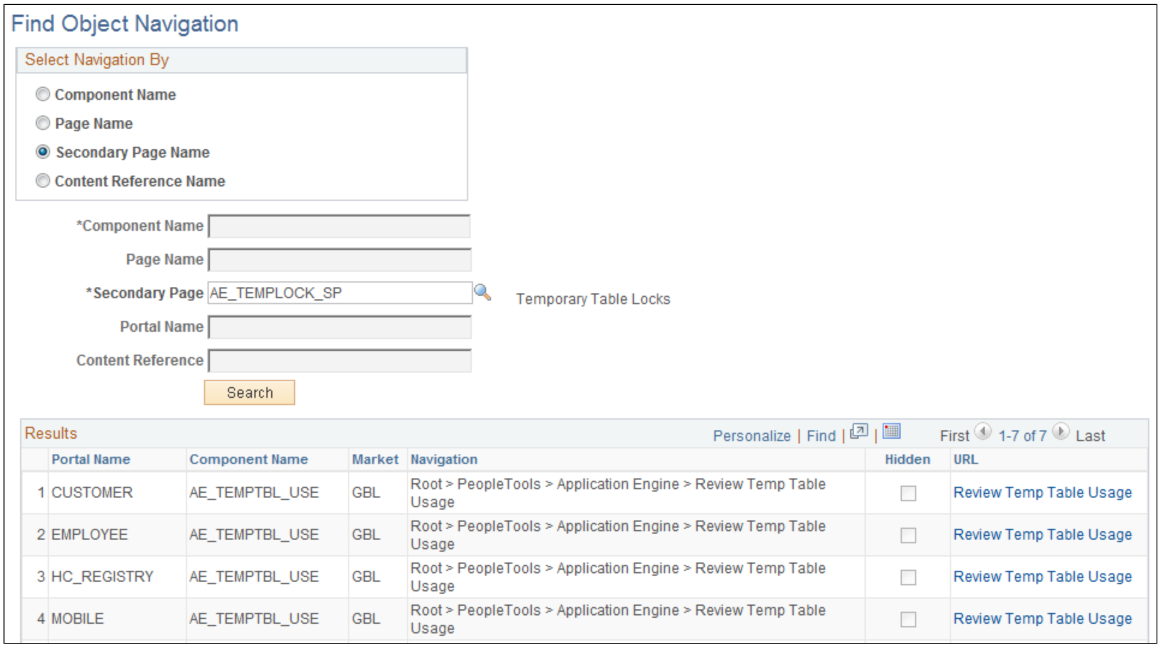
	Portal Name	Component Name	Market	Navigation	Hidden	URL
1	CUSTOMER	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
2	EMPLOYEE	ALGORITHM_CHAIN	GBL	Root > PeopleTools > Security > Encryption > Algorithm Chain	☐	Algorithm Chain
3	HC_REGISTRY	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
4	MOBILE	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
5	PARTNER	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
6	PORTAL	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain
7	PS_SITETEMPLATE	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	☐	Algorithm Chain

Page Name	Select to search by page name.
***Page Name**	This is a required field. Enter the name of the page for the search, or click the prompt to display available page names.
Search	Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL	Click to open a browser window that directly accesses the navigation that you select in the grid.

Image: Find Object Navigation page showing search criteria of secondary page name

This example illustrates the fields and controls on the Find Object Navigation page showing search criteria of the secondary page name. You can find definitions for the fields and controls later on this page.



Find Object Navigation

Select Navigation By

○ Component Name
○ Page Name
● Secondary Page Name
○ Content Reference Name

*Component Name
Page Name
*Secondary Page: AE_TEMPLOCK_SP Temporary Table Locks
Portal Name
Content Reference

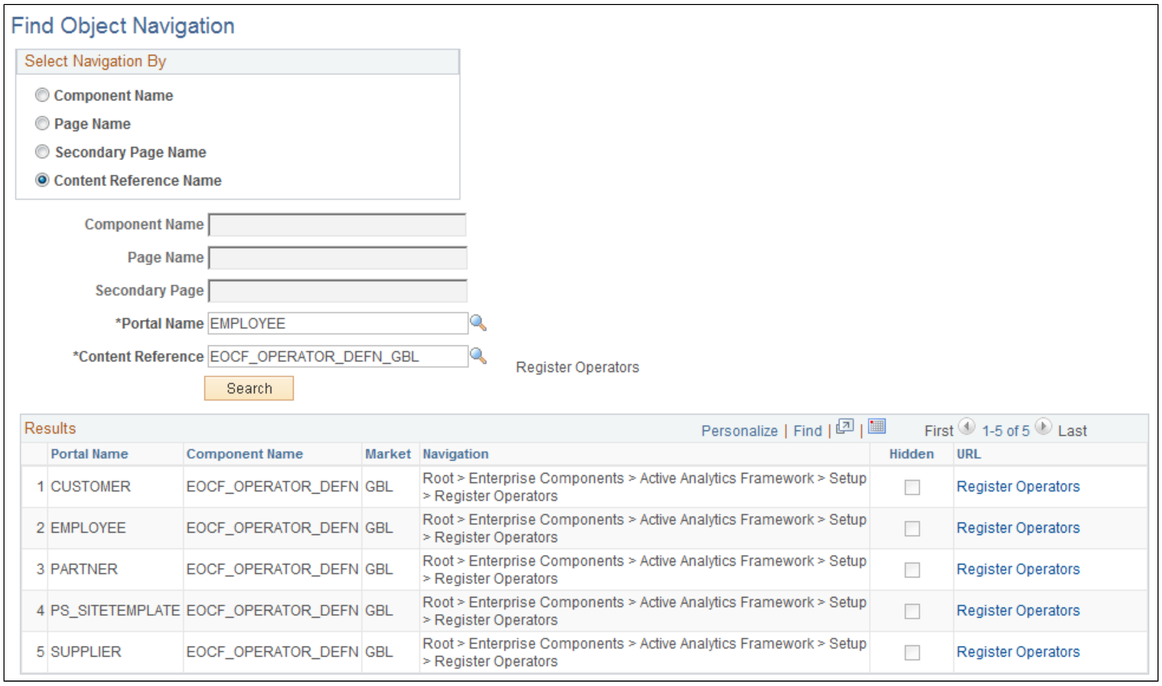
	Portal Name	Component Name	Market	Navigation	Hidden	URL
1	CUSTOMER	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage	☐	Review Temp Table Usage
2	EMPLOYEE	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage	☐	Review Temp Table Usage
3	HC_REGISTRY	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage	☐	Review Temp Table Usage
4	MOBILE	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage	☐	Review Temp Table Usage

Secondary Page Name	Select to search by secondary page name.
***Secondary Page Name**	This is a required field. Enter the name of the secondary page for the search, or click the prompt to display available secondary page names.
Search	Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL	Click to open a browser window that directly accesses the navigation that you select in the grid.

Image: Find Object Navigation page showing search criteria of CREF name and portal name

This example illustrates the fields and controls on the Find Object Navigation page showing search criteria of content reference name and portal name. You can find definitions for the fields and controls later on this page.



Component Name

Page Name

Secondary Page

*Portal Name EMPLOYEE

*Content Reference EOCF_OPERATOR_DEFN_GBL Register Operators

Results

	Portal Name	Component Name	Market	Navigation	Hidden	URL
1	CUSTOMER	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	☐	Register Operators
2	EMPLOYEE	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	☐	Register Operators
3	PARTNER	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	☐	Register Operators
4	PS_SITETEMPLATE	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	☐	Register Operators
5	SUPPLIER	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	☐	Register Operators

CREFs are pointers to content that is registered in the portal registry. These are typically URLs or iScripts. CREFs fall into three categories: target content, templates, and template pagelets.

Content Reference Name	Select to search by CREF name for the portal that you specify. When you select Content Reference Name, the Portal Name field becomes available to search for CREF names within a specific portal.
***Portal Name**	This is a required field. Enter the name of the portal for the search, or click the prompt to display available portal names. The default for this field is *Employee.*
***Content Reference**	This is a required field. Enter the name of the CREF for the search, or click the prompt to display available CREF names.
Search	Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.
URL	Click to open a browser window that directly accesses the navigation that you select in the grid.

Chapter 5

Working With Currencies and Market Rates

Understanding Currencies and Market Rates

PeopleSoft applications offer a core set of objects (fields, tables, work records, pages, and PeopleCode functions), as well as a recommended set of standard techniques and formulas to support a common approach to converting currency throughout PeopleSoft applications and to define and store market rates. Market rate is a generic term for a currency exchange rate, an interest rate, or a future rate.

This section provides overviews of:

- Currency and market rate tables.
- Triangulation.
- Conversion factor fields and the visual rate.
- Application-specific requirements for currency conversion.

Understanding Currency and Market Rate Tables

The following tables store currency and market rate data:

- CURRENCY_CD_TBL

  Stores currency code data.

- CURR_QUOTE_PNL

  Stores currency quotation method data.

- RT_INDEX_TBL

  Stores market rate index data.

- RT_TYPE_TBL

  Stores rate type data.

- RT_RATE_TBL

  Stores market rate data.

Understanding Triangulation

Triangulation is the process by which a conversion between two currencies takes place by way of a third reference currency. This process may be used in hyperinflationary environments, where all conversions to the local currency are done by way of a stronger, more stable currency. This process may also be used when a country is undergoing a currency revaluation.

To support triangulation, the PeopleSoft system provides a means to define that you want a currency pair to triangulate through a fixed reference currency. The actual conversion process is done in a two-step procedure in which the from-currency amount is first converted to the reference currency and then to the destination currency, using the appropriate exchange rates. Supporting triangulation also affects the user interface, as there are now two or possibly three exchange rates that are relevant to the conversion. When viewing a triangulated conversion at a detailed level, users access three visual rates:

- A rate for converting the from-currency to the reference currency.
- A rate for converting the reference currency to the to-currency.
- A cross rate indicating the rate that would be required to convert the from-currency directly into the to-currency.

The cross rate in a triangulated conversion is not typically maintained directly. The system enables you to maintain those non-triangulated rates that are components of the triangulated rate, then run a process to generate the triangulated exchange rate. However, you can override the cross rate, which causes one of the other exchange rate values to be recalculated to synchronize it with the overridden cross rate.

For example, suppose an implementation was using triangulation to convert from USD to FRF. You would directly maintain the visual rate from the USD to euros (1.25 in the example table) and rate from euros to FRF (6.8 in the example table). You could then run the EOP_RATECALC application engine process to derive the triangulated rate for converting from USD to FRF. The results are shown in the following table:

Currency Pair	***Quote Method***	***Quote Units***	***Primary Visual Rate***	***RATE_MULT***	***RATE_DIV***
USD to Euro	Indirect	1	1.25	1	1.25
Euro to FRF	Direct	1	6.8	6.8	1
USD to FRF	Direct/Triangulate/ Euro	1	5.44	6.8	1.25

When performing the actual conversion, applications interpret the visual rates into RATE_MULT and RATE_DIV values based on the quotation method for the exchange, then use the RATE_MULT and RATE_DIV values stored in the Market Rates Data table in the currency conversion formula, either by accessing the values directly or by calling the ConvertCurrency PeopleCode function.

Note: For information on how a specific application supports maintenance of triangulated exchange rates, see the documentation for that application.

Related Links

Calculating Cross, Triangulated, and Reciprocal Rates

Understanding Conversion Factor Fields and the Visual Rate

Support for both direct and indirect currency quotations creates a potential for complex currency conversion formulas in applications. To avoid excess conditional logic in the conversion formula, the PeopleSoft system provides two fields to store the conversion factor, RATE_MULT and RATE_DIV. The rate that you enter is called the *visual rate.* This visual rate is generally stored in either RATE_MULT or RATE_DIV, based on the quote method. The quote units are stored in whichever field does not contain the visual rate. As a result, the formula for currency conversion remains consistent:

(from-currency / RATE_DIV) × RATE_MULT = to-currency

This formula is also used for currency conversion in PeopleCode programs for online processing, as well as in SQR and COBOL processes.

The following table shows a few basic examples of how visual rates are transformed into RATE_MULT and RATE_DIV, according to the quote method and quote units for the currency pair:

Currency Pair	***Quote Method***	***Quote Units***	***Primary Visual Rate***	***RATE_MULT***	***RATE_DIV***
USD to GBP	Indirect	1	1.6	1	1.6
GBP to USD	Direct	1	1.6	1.6	1
DEM to CHF	Indirect	100	119.335	100	119.335
CHF to DEM	Direct	100	119.335	119.335	100
USD to Euro	Indirect	1	1.25	1	1.25
Euro to FRF	Direct	1	6.8	6.8	1
USD to FRF	Direct/Triangulate/Euro	1	5.44	6.8	1.25
FRF to Euro	Indirect	1	6.8	1	6.8
Euro to USD	Direct	1	1.25	1.25	1
FRF to USD	Indirect/Triangulate/Euro	1	5.44	1.25	6.8

In all cases, the visual rate for a currency pair remains the same, regardless of the direction. This is consistent with business standards. For a direct quoted rate, you multiply by the visual rate; therefore the visual rate goes into RATE_MULT and 1 (or the quote units) goes into RATE_DIV. For an indirect quoted rate, you divide by the visual rate; therefore the visual rate goes into RATE_DIV and 1 (or the quote units) goes into RATE_MULT.

The following examples show indirect quotation, direct quotation with quote units, and triangulation:

100 USD to GBP (indirect) = (100 USD / 1.6) × 1 = 62.50 GBP

1000 CHF to DEM (direct with units) = (1000 CHF / 100) × 119.335 = 1193.35 DEM

100 USD to FRF (triangulate) = (100 USD / 1.25) × 6.8 = 544 FRF

Related Links

Defining Currency Quotation Methods

Understanding Application-Specific Requirements for Currency Conversion

Each application that shows a visual rate on a page must have an application-specific work record to hold the visual rate and the associated PeopleCode; this can be an existing work record. The suggested name for the field is VISUAL_RATE. The work record should also have a field to store the original rate for purposes of tolerance checking.

The application also typically provides an application-specific table to store RATE_MULT and RATE_DIV values that are stored on the database.

Application-specific PeopleCode needs to format work record fields and call the common functions in various circumstances, such as RowInit or FieldChange on the currency or visual rate.

See Also

PeopleTools: Global Technology

PeopleTools: PeopleCode Developer's Guide

Defining Currencies

This section discusses how to define currency codes.

Page Used to Define Currency Codes

Page Name	***Definition Name***	***Navigation***	***Usage***
Currency Code	CURRENCY_CD_TABLE	• Set Up <Product Line>, Common Definitions, Currency, Currency Code • Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Code • Portal Objects, Navigation Collections, General Ledger Center, Definition and Administration, Currency	Define currency codes.

Currency Code Page

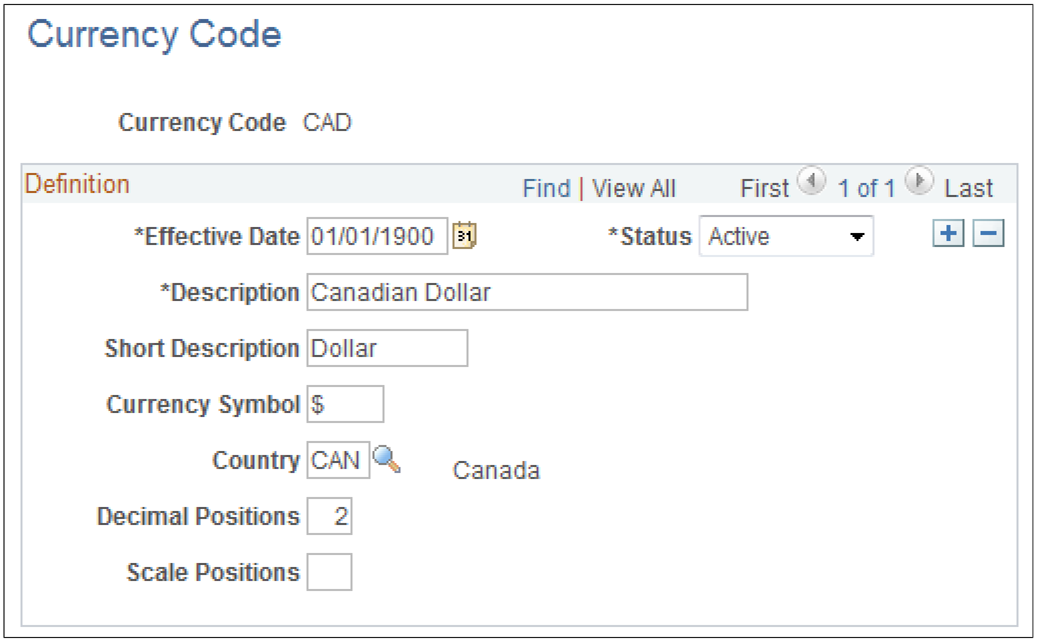
Use the Currency Code page (CURRENCY_CD_TABLE) to define currency codes.

Navigation

- Set Up <Product Line>, Common Definitions, Currency, Currency Code
- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Code
- Portal Objects, Navigation Collections, General Ledger Center, Definition and Administration, Currency

Image: Currency Code page

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



Currency Code CAD

*Effective Date 01/01/1900

*Status Active

*Description Canadian Dollar

Short Description Dollar

Currency Symbol $

Country CAN Canada

Decimal Positions 2

Scale Positions

Note: PeopleTools provides the system data in the currency table, CURRENCY_CD_TBL, and Oracle updates this data during major releases. You are also expected to update or adjust the system data in the currency table for your own needs. Enterprise Components maintains the system data in the country table and defines a default currency for each country definition. The currency table has a default country code, but that does not apply in the case of a multi-country currency like the Euro.

Use this page to add and maintain currency codes. These currency codes are used to designate currencies throughout your PeopleSoft system.

Status	Indicate whether the currency code is active or inactive. If you inactivate a currency code that is in use, existing transactions are unaffected. However, the currency code is unavailable for future selections. Some PeopleSoft applications do not allow you to inactivate a currency code that is in use.
Currency Symbol	PeopleSoft applications deliver many currencies with a currency symbol such as $ for Australian dollar (AUD) or £ for British

pound (GBP). You can enter new symbols for delivered currencies or for currencies that you might add.

Country

Select the code for the country from which the currency originates.

Note: PeopleSoft applications deliver fully populated country, state, and province code tables and update these tables as national boundaries and designations change.

Decimal Positions

Enter the number of decimal positions that should appear in the notation for the currency. For example, there are two decimal positions for Australian dollars (500.00 AUD), but no decimal positions for Japanese yen (500 JPY).

Scale Positions

Enter the scale positions you want to round for this currency. This controls how many numbers appear to the left of the decimal when displayed. The data is actually stored with full precision in the database itself.

For example, if you want all million-dollar amounts displayed as the number of millions without the zeros, enter 6 as your scale position. In this case, 24,000,000 is displayed as 24, but is stored in the database as 24,000,000.

Defining Currency Quotation Methods

This section discusses how to define currency quotation methods.

Page Used to Define Currency Quotation Methods

Page Name	***Definition Name***	***Navigation***	***Usage***
Currency Quotation Method page	CURR_QUOTE_PNL	Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Quotation Method	Set up and maintain a currency quotation method for each from-currency and to-currency pair.

Currency Quotation Method Page

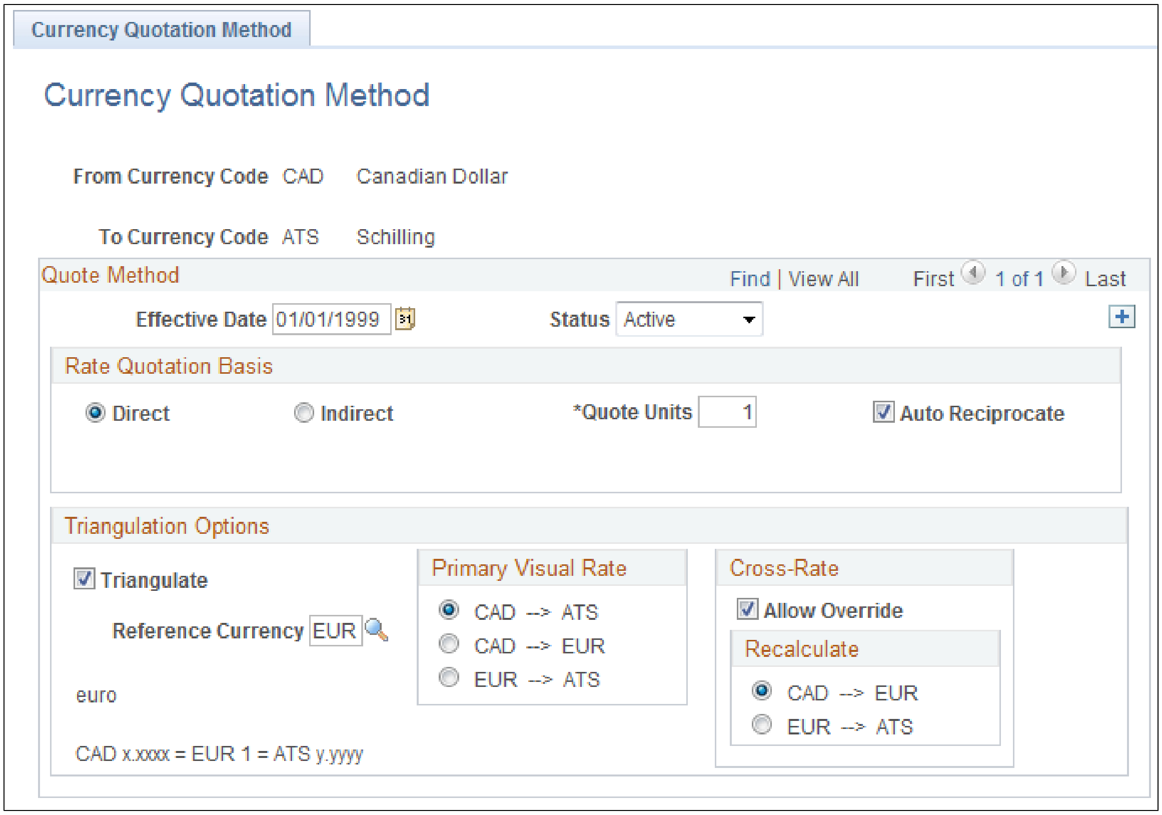
Use the Currency Quotation Method page (CURR_QUOTE_PNL) to set up and maintain a currency quotation method for each from-currency and to-currency pair.

Navigation

Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Quotation Method

Image: Currency Quotation Method page

This example illustrates the fields and controls on the Currency Quotation Method page. You can find definitions for the fields and controls later on this page.



From Currency Code CAD Canadian Dollar

To Currency Code ATS Schilling

Effective Date 01/01/1999

Status Active

● Direct ○ Indirect

*Quote Units 1

☑ Auto Reciprocate

☑ Triangulate

Reference Currency EUR

euro

CAD x.xxxx = EUR 1 = ATS y.yyyy

● CAD --> ATS
○ CAD --> EUR
○ EUR --> ATS

☑ Allow Override

● CAD --> EUR
○ EUR --> ATS

A currency quotation method, defined for an exchange rate, stores data that determines how the application interprets a visual rate entered by a user (or multiple visual rates, in the case of triangulated exchange rates) into the RATE_MULT and RATE_DIV values stored on the Market Rate Data table. Conversely, a currency quotation method also determines how the stored RATE_MULT and RATE_DIV values are interpreted into the visual rate displayed to the user.

The quotation method can be direct or indirect, and it can be non-triangulated or a triangulated conversion using a third reference currency. The currency quotation method also determines the quotation units of the from-currency.

See Understanding Conversion Factor Fields and the Visual Rate.

It is not necessary to define a currency quotation method for every exchange rate. If, during maintenance of market rates, no quotation method is found for an exchange rate, the page logic assumes the following defaults:

- The exchange rate is direct.
- The quotation units are equal to 1.
- The exchange rate is not triangulated.

Note: This use of default values supports backward compatibility with previous exchange rate data, including calculated reciprocal rates, if your implementation requires them.

See Understanding Conversion Factor Fields and the Visual Rate.

Note: You can view the currency quotation method for an exchange rate on the Exchange Rate Detail page while working on the Market Rate page.

See Defining Market Rates.

Direct and Indirect	In the Rate Quotation Basis section, indicate whether the rates for this currency pair are quoted directly or indirectly. For example, when defining a currency quotation method for USD and FRF: • Select *Direct* if you want one USD to equal x.xxxx FRF. • Select *Indirect* if you want x.xxxx USD to equal one FRF. Even currency quotation methods for currency pairs that triangulate must be classified as either direct or indirect. In this case, the value is used to display the calculated cross rate. Support for indirect and direct quotation methods allows applications to eliminate use of calculated reciprocal rates by using a single rate by which you either divide or multiply, depending on whether the conversion method is direct or indirect.
Quote Units	Enter a quote unit for the exchange rate, as is common business practice for some currencies. This field can have any value, but is usually a power of 10. Sometimes called scaling factors, quote units are often used to preserve more decimal precision. For example, the exchange rate between Swiss francs (CHF) and Deutsche marks (DEM) may be stated as 100 CHF = 119.335 DEM instead of 1 CHF = 1.19335 DEM.
Auto Reciprocate	Select to automatically create or update the rate for the reciprocal currency pair on the Market Rate page whenever an exchange rate is added or updated. For example, if you create a currency quotation method for USD to EUR. The reciprocal currency quotation method for EUR to USD is automatically created, regardless of this setting. When you create a rate for USD to EUR on the Market Rate page, the EUR to USD reciprocal rate is automatically created if this Auto Reciprocate option is selected for the currency pair. If the either rate for the currency pair is updated on the Market Rate page, the reciprocal rate is updated as long as the Auto

	Reciprocate option is selected for one of the currencies in the pair.
Triangulate	Select to triangulate conversions between this currency pair using a reference currency.
Reference Currency	Enter the reference currency for a triangulated conversion.
Primary Visual Rate	With triangulated currency pairs, there are three exchange rates to consider: • The rate between the from-currency and the reference currency. • The rate between the reference currency and the to-currency. • The calculated cross rate between the from-currency and the to-currency. Select which of these three rates you want as the primary visual rate. This is the rate that displays on the primary pages and reports. For online applications, other components of the rate can be viewed and modified on the Exchange Rate Detail page.
Allow Override	For triangulated currency pairs, select to enable users to override the cross rates on the Market Rate page and Exchange Rate Detail page.
Recalculate	If the Allow Override option is selected, select to indicate which of the two other rates should be recalculated to bring the triangle back into balance. Because the triangulated rate is initially a calculated rate, if you allow it to be overridden, the rates that are used to initially calculate this rate must be recalculated.

Defining Market Rates

This section discusses how to:

- Define market rate indexes.
- Define market rate types.
- Create market rate definition.
- Define market rates.
- Access rate definition details.
- Access exchange rate details.

Pages Used to Define Market Rates

Page Name	***Definition Name***	***Navigation***	***Usage***
Market Rate Index	RT_INDEX_TBL	Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Market Rate Index	Create market rate indexes, which provide a means of organizing market rates in the PeopleSoft system.
Market Rate Type	RT_TYPE_TBL	• Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Exchange Rate Type • Set Up <Product Line>, Common Definitions, Market Rates, Market Rate Type	Define rate types that further categorize market rates. Examples of rate types include current, commercial, floating, average, and historical.
Market Rate	RT_RATE_PNL	• Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Market Rates • Set Up <Product Line>, Common Definitions, Market Rates, Market Rates	Maintain and view market rates. The fields available on the page vary depending on the rate category. This page shows the rate definition for any two currencies.
Market Rate Definition	RT_RATE_DEF_TBL	• Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Market Rate Definition • Set Up <Product Line>, Common Definitions, Market Rates, Market Rate Definition.	Define tolerance limits for rates and determine what action occurs if a new rate falls outside the tolerance limit. The Market Rate Definition (RT_RATE_DEF_TBL) page shows all of the rate definitions for a rate index.
Rate Definition	RT_RATE_DEF_SEC	Click the Rate Definition link on the Market Rate page.	View market rate definition details, including the maximum variance and error handling definitions specified for the currency pair on the Rate Definition page.
Exchange Rate Detail	EXCH_RT_DTL	Click the Exchange Rate Detail icon on the Market Rate page.	Access exchange rate detail information.

Market Rate Index Page

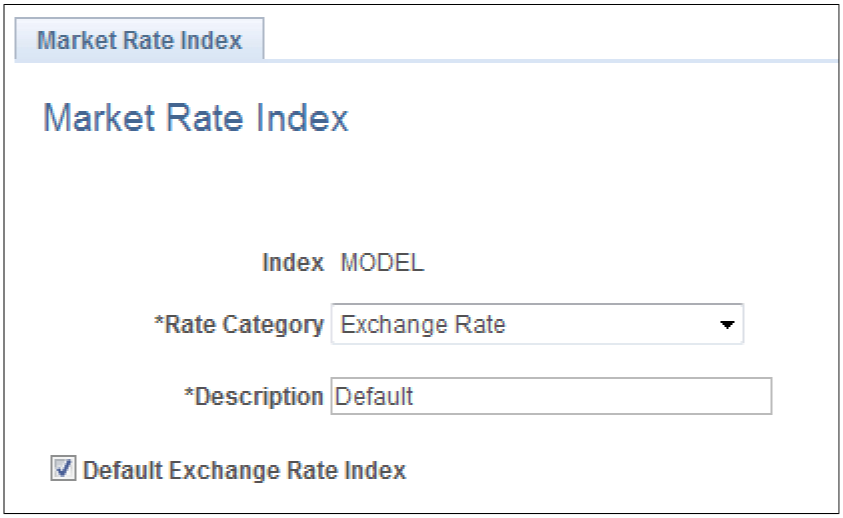
Use the Market Rate Index page (RT_INDEX_TBL) to create market rate indexes, which provide a means of organizing market rates in the PeopleSoft system.

Navigation

Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Market Rate Index

Image: Market Rate Index page

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



Market Rate Index

Index MODEL

*Rate Category Exchange Rate

*Description Default

☑ Default Exchange Rate Index

Market rate indexes are stored in the RT_INDEX_TBL table.

Index	Displays the key term for the highest level of organization for market rates in the application.
Rate Category	Select a general category for the market rate index, such as *Exchange Rate, Commodity Price,* or *Interest Rate.*
Default Exchange Rate Index	Select to indicate that the selected market rate index is the default exchange rate index. This field is available only if: • The Rate Category field is set to *Exchange Rate.* • No other index is currently defined as the default exchange rate index. The Market Rates Index page does not ensure that a default market rate index has been defined. However, if no default has been defined, the Market Rate Default view does not return any data. The Market Rate Definition Default view (RT_DEF_DFLT_VW) selects rows from the Market Rate Definition table that have a term of zero and an index defined as the default exchange rate index.

Market Rate Type Page

Use the Market Rate Type page (RT_TYPE_TBL) to define rate types that further categorize market rates.

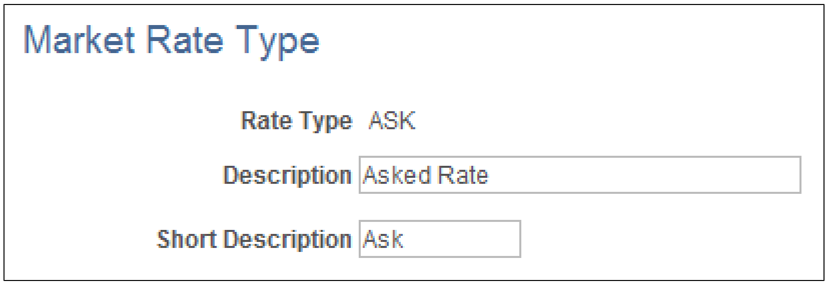
Examples of rate types include current, commercial, floating, average, and historical.

Navigation

- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Exchange Rate Type
- Set Up <Product Line>, Common Definitions, Market Rates, Market Rate Type

Image: Market Rate Type page

This example illustrates the fields and controls on the Market Rate Type page. You can find definitions for the fields and controls later on this page.



Market Rate Type

Rate Type ASK

Description Asked Rate

Short Description Ask

Rate types are stored in the RT_TYPE_TBL edit table. Rate types serve as categories within a market rate index. For example, some common types of exchange rates are official rate, spot rate, and free market rate.

Enter a description and short description to define each market rate type that you use.

Market Rate Definition Page

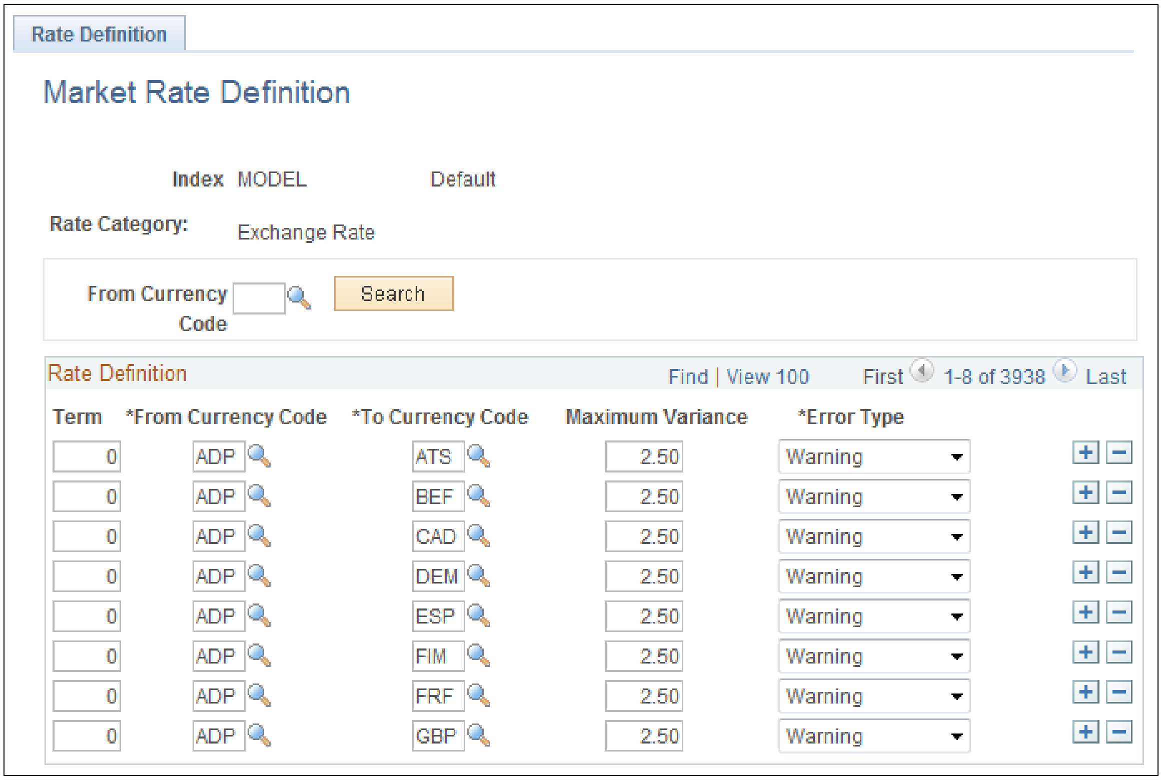
Use the Market Rate Definition page (RT_RATE_DEF_TBL) to define tolerance limits for rates and determine what action occurs if a new rate falls outside the tolerance limit.

Navigation

- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Market Rate Definition
- Set Up <Product Line>, Common Definitions, Market Rates, Market Rate Definition.

Image: Market Rate Definition page

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



Index MODEL Default

Rate Category: Exchange Rate

From Currency Code

Term	*From Currency Code	*To Currency Code	Maximum Variance	*Error Type
0	ADP	ATS	2.50	Warning
0	ADP	BEF	2.50	Warning
0	ADP	CAD	2.50	Warning
0	ADP	DEM	2.50	Warning
0	ADP	ESP	2.50	Warning
0	ADP	FIM	2.50	Warning
0	ADP	FRF	2.50	Warning
0	ADP	GBP	2.50	Warning

This page shows all of the rate definitions for a rate index.

Market rate definitions specify the valid term, currency, and other appropriate field combinations for market rates. For example, if you have a market rate definition for an exchange rate with a term of 30, a from-currency of CHF, and a to-currency of USD, you can enter a rate using this combination on the Market Rate page.

If you have not created a market rate definition on this page when you create the a market rate on the Market Rate page, the system automatically creates one for you using the default values of 2.5 percent maximum variance and warning message processing.

It is common for applications to support tolerance checking (against user-specified tolerances) in all places where exchange rates can be entered or overridden. With the introduction of indirect quotation methods and quote units, tolerance checking is even more critical to ensure data entry accuracy.

Note: The information you see on this page depends on the selected market rate index. For example, if you select an index associated with a rate category of *Interest Rate,* fields on this page display interest-related data.

From Currency Code	Enter the from-currency code with which you want to populate all From Currency fields on the page.
Refresh	Click to populate the From Currency field with the currency you selected in the From Currency Code field.

Rate Definition

Term	Enter the desired term expressed in days. A zero term indicates that the spot rate = zero term. Only PeopleSoft Treasury uses non-zero terms; all other applications must use a zero term for spot rate.
From Currency Code	In addition to using the From Currency Code field to populate all From Currency field on this page, you can also manually enter the appropriate from-currency. This value is used with its associated To Currency field value as part of an exchange rate pair. When you use triangulation, include a definition row for each of the currency pairs involved in the triangulation.
To Currency Code	Enter the appropriate to-currency. This value is used with its associated From Currency field value as part of an exchange rate pair.
Currency	This field displays when you are working with a rate definition with a rate category set to *Interest Rate*. Select the currency for which you are creating an interest rate definition. The From Currency and To Currency fields do not display.
Day Count Basis	This field displays when you are working with an interest rate definition. Select an interest basis: *30/360* *30E/360* *Actual/360* *Actual/365* *Actual/Actual*
Maximum Variance	Enter the percentage of variance that is allowed when a user maintains or overrides a market rate. If the change exceeds the tolerance, an error results. The default value is 2.50 (2.5%).
Error Type	Select the type of error that results when the defined maximum variance is exceeded during data entry.

None: No error processing occurs and the new rate is used, even if it exceeds the maximum variance.

Stop: Processing halts and the system prevents you from saving the new rate.

Warning: This is the default value. A warning appears that you can ignore and proceed to save the new rate.

Market Rate Page

Use the Market Rate page (RT_RATE_PNL) to maintain and view market rates.

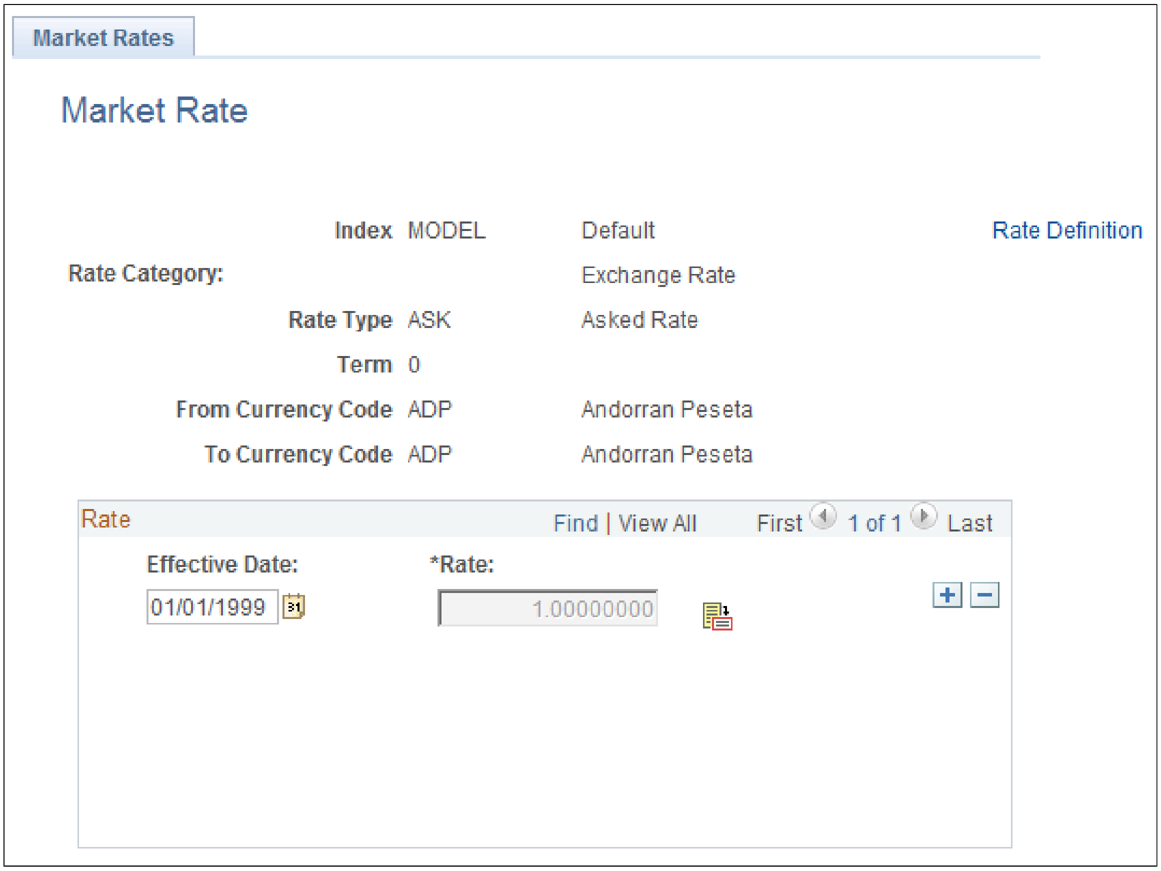
The fields available on the page vary depending on the rate category. This page shows the rate definition for any two currencies.

Navigation

- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Market Rates
- Set Up <Product Line>, Common Definitions, Market Rates, Market Rates

Image: Market Rate page

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



Index MODEL Default

Rate Category: Exchange Rate

Rate Type ASK Asked Rate

Term 0

From Currency Code ADP Andorran Peseta

To Currency Code ADP Andorran Peseta

Effective Date: 01/01/1999

*Rate: 1.00000000

Note: The Market Rate page provides the details about the exchange rate between two currencies. The Exchange Rate Detail page is a secondary page of the Market Rate (RT_RATE_PNL) page. After you access the Market Rate page, you must click the Exchange Rate Detail icon beside the Rate field on the Market Rate page to access the Exchange Rate Details page.

The data you enter on this page is stored in the RT_RATE_TBL table that is the common repository for all types of market rates including exchange rates and interest rates.

You cannot edit this page if all of the following are true:

- The rate is triangulated.
- The primary visual rate is the cross rate.
- The Allow Override option is clear for the exchange rate's quotation method on the Currency Quotation Method page.

Note: When working with interest rates, the From Currency Code and To Currency Code fields may contain the same field value.

Index	Displays the key term for the highest level of organization for market rates in the application.
Rate Category	Displays the general category for the market rate, such as *Exchange Rate, Commodity Price,* or *Interest Rate.*
Rate Type	Displays the selected rate type for this market rate. Some examples of rate types are commercial, average, floating and historical.
Term	Displays the entered term.
From Currency Code	Displays the selected currency that you are converting from.
To Currency Code	Displays the selected currency that you are converting to.
Rate Definition	Click to access the Rate Definition page and view market rate definition details, including the maximum variance and error handling definitions specified for the currency pair.

Rate

Effective Date	Enter the date that you are initiating the currency exchange.
Rate	Displays the visual rate. If you are working with a triangulated exchange rate, this field displays the primary visual rate, which is typically the cross rate, but can also be one of the other component rates of the triangle. During online maintenance of market rates, you don't view or change RATE_MULT and RATE_DIV values directly, but instead access this visual rate, which is calculated by page logic based on RATE_MULT, RATE_DIV, and the currency quotation

method defined for the currency pair on the Currency Quotation Method page. The visual rate is stored temporarily on a page work record.

Click the Exchange Rate Detail icon to the right of the Rate field to access the Exchange Rate Detail (EXCH_RT_DTL) page, where you can view all three visual rates of a triangulated exchange rate.

If a quotation method has been defined for the currency pair and the Auto Reciprocate option for the currency quotation method is selected, then creating or maintaining a rate for a currency pair on this page automatically creates or updates the rate for the reciprocal currency pair. For example, if you change the USD-to-GBP rate, the GBP-to-USD rate is automatically updated. You can only auto-reciprocate currency pairs for which currency quotation methods have been defined on the Currency Quotation Method page.

See Currency Quotation Method Page.

Note: The results of updating the rate definition do not take effect until you save, close, and reopen the Market Rate page.

Rate Definition Page

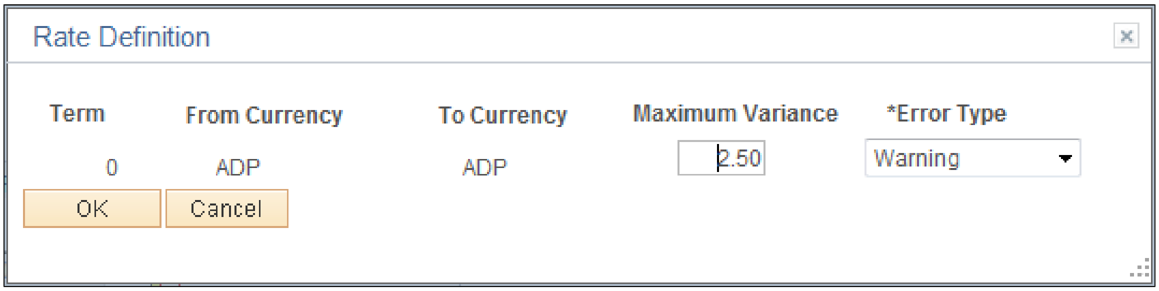
Use the Rate Definition page (RT_RATE_DEF_SEC) to view market rate definition details, including the maximum variance and error handling definitions specified for the currency pair on the Rate Definition page.

Navigation

Click the Rate Definition link on the Market Rate page.

Image: Rate Definition page

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



Rate Definition

Term	From Currency	To Currency	Maximum Variance	*Error Type
0	ADP	ADP	2.50	Warning

Exchange Rate Detail Page

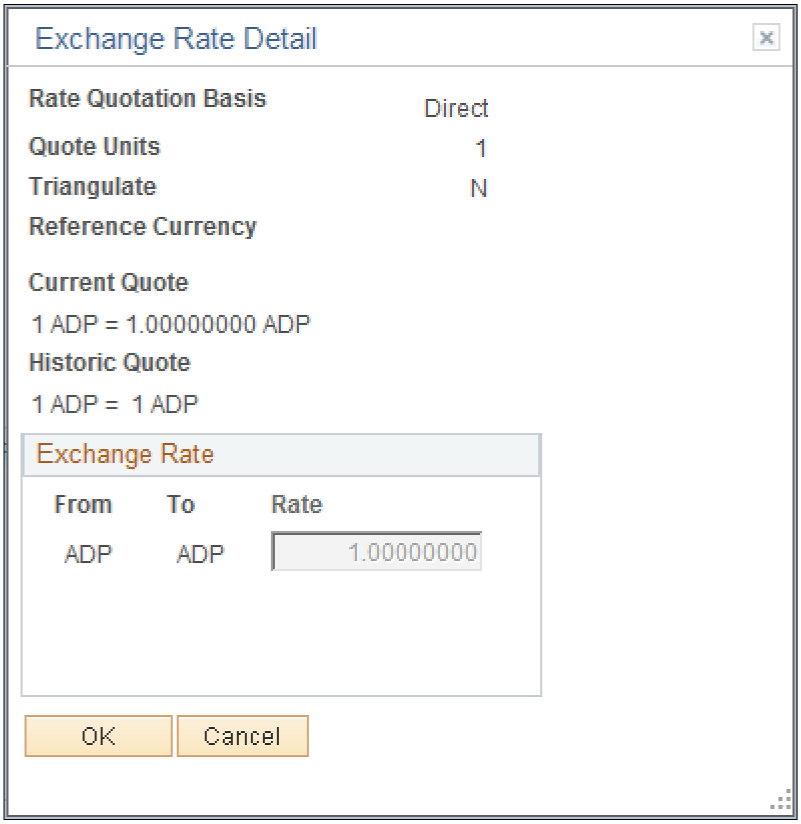
Use the Exchange Rate Detail page (EXCH_RT_DTL) to access exchange rate detail information.

Navigation

Click the Exchange Rate Detail icon on the Market Rate page.

Image: Exchange Rate Detail page

This example illustrates the fields and controls on the Exchange Rate Detail page. You can find definitions for the fields and controls later on this page.



Exchange Rate Detail

Rate Quotation Basis: Direct

Quote Units: 1

Triangulate: N

Reference Currency

Current Quote

1 ADP = 1.00000000 ADP

Historic Quote

1 ADP = 1 ADP

Exchange Rate

From	To	Rate
ADP	ADP	1.00000000

The primary record for this page is the Exchange Rate work record. For triangulated rates, you can update rate values for all three components of the triangulated rate.

Rate Quotation Basis	Displays the quotation basis for the exchange rate as defined in the Currency Quotation Method page.
Quote Units	Displays the quote units for the exchange rate as defined in the Currency Quotation Method page.
Triangulate	Displays the triangulation setting for the exchange rate as defined in the Currency Quotation Method page.
Reference Currency	For triangulated exchange rates, displays the reference currency used in the triangulated exchange.
Current Quote	Displays the current exchange rate used to convert the from-currency to the to-currency. For a direct, non-triangulated rate, this field displays quote units (or 1) to the left side of the equal sign and the visual rate on the right. For example:

1 USD = 1.40000000 CAD

For an indirect, non-triangulated rate, this field displays the visual rate to the left of the equal sign and quote units (or 1) on the right. For example:

1.400000000 CAD = 1 USD

For a triangulated rate, this field displays the two component rates of the triangle: the rate for converting the from-currency to the reference currency (USD to EUR) and the rate for converting the reference currency to the to-currency (FRF to EUR). For example:

1.25 USD = 1 EUR = 6.8 FRF

Historic Quote

If page logic determines that the exchange rate, as stored in the database, is inconsistent with the current quotation method, this field displays a quote based on the current quotation method, instead of the quotation method active on the rate effective date.

Data provided in the historic quote field allows you to see how the exchange rate has changed over time, using a consistent quotation method, even if the quotation method has actually changed.

For example, if you are viewing a historical rate where FRF was converted to USD directly using a calculated reciprocal rate of 1 FRF = 0.1470588 USD and the current quotation method for this currency pair is indirect, the conversion function recalculates the visual rate based on indirect quotation, that is 6.8000001 FRF = 1 USD.

This field also displays a quote if the historic quote method was non-triangulated and the current quote method is triangulated.

A historic quote is also displayed if you override a cross rate and bypass triangulation, because the exchange rate being used is inconsistent with the current quotation method.

If the system determines that the exchange rate is consistent with the current quotation method, the field displays *Not Applicable.*

Exchange Rate

Displays a single visual rate for non-triangulated exchange rates, or all three component visual rates for triangulated exchange rates. You can edit the cross rate for triangulated exchange rates only if the Allow Override option box is selected for the exchange rate on the Currency Quotation Method page.

Calculating Cross, Triangulated, and Reciprocal Rates

This section discusses how to run the EOP_RATECALC Application Engine process to calculate cross, triangulated, and reciprocal rates.

Page Used to Run the EOP_RATECALC Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Calculate Cross/Reciprocal Rate - Parameters	RUN_EO9030	• Set Up Financials/ Supply Chain, Common Definitions, Market Rates, Cross/Reciprocal Rate Calc • Set Up HCM, Foundation Tables, Currency and Market Rates, Calculate Cross/ Reciprocal Rt • Set Up CRM, Common Definitions, Market Rates, Cross/Reciprocal Rate Calc	Set run control parameters and run the EOP_RATECALC Application Engine process that calculates cross, triangulated, and reciprocal rates.

Understanding the EOP_RATECALC Process

Run the EOP_RATECALC process to calculate rates and update the market rates table.

The process performs three functions:

- Generates cross rates for non-triangulated currency pairs.

  For example, an organization subscribes to a rate service that provides all rates respective to USD. Starting with a USD to Canadian dollar rate and a USD to Mexican peso rate, the system can calculate a new Canadian dollar to Mexican peso cross rate.

- Generates triangulated rates for triangulated currency pairs.

  For example, the EUR to an EPC (euro participating currency) fixed rate has been established on the market rate table and a new EUR to USD rate has just been entered. Using this information, the process can create a new USD to EPC triangulated rate. The difference between triangulated rates and cross rates affects how the data is stored in the database. When calculating a cross rate, you actually create a new rate. When calculating a triangulated rate, the individual components of the source rates are stored on the target.

- Generates reciprocal rates for those currency pairs that are not automatically reciprocated.

  For example, using a USD to CAD rate as the source, the process calculates the CAD to USD reciprocal. If currency quote methods are in place, the visual rate remains the same and there is a difference in how the data is stored in the database (RATE_MULT and RATE_DIV are inverse). If currency quote methods are not used, the process actually calculates an inverse rate, meaning that the visual rates will differ.

Calculate Cross/Reciprocal Rate - Parameters Page

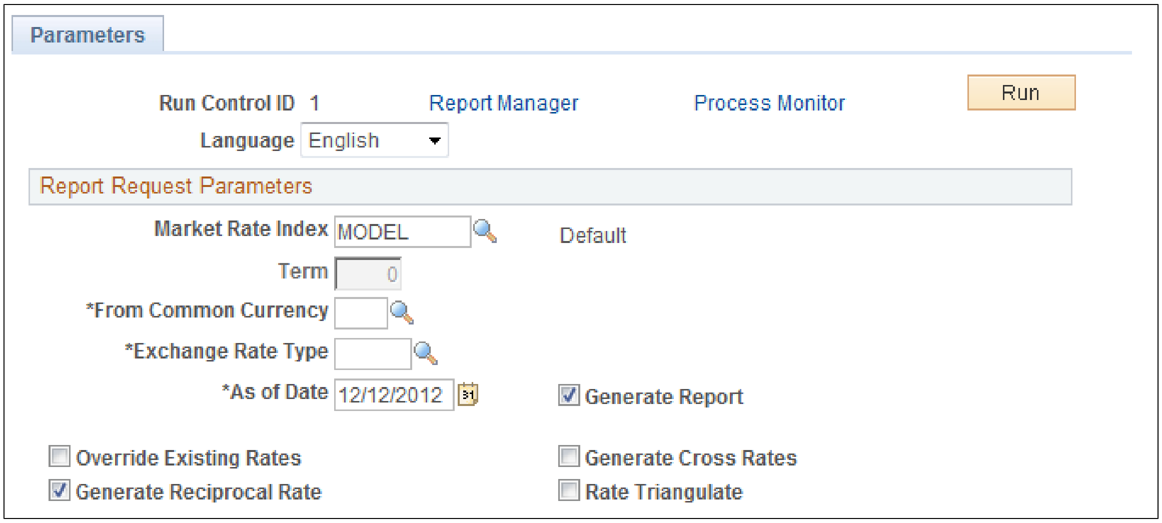
Use the Calculate Cross/Reciprocal Rate - Parameters page (RUN_EO9030) to set run control parameters and run the EOP_RATECALC Application Engine process that calculates cross, triangulated, and reciprocal rates.

Navigation

- Set Up Financials/Supply Chain, Common Definitions, Market Rates, Cross/Reciprocal Rate Calc
- Set Up HCM, Foundation Tables, Currency and Market Rates, Calculate Cross/Reciprocal Rt
- Set Up CRM, Common Definitions, Market Rates, Cross/Reciprocal Rate Calc

Image: Cross/Reciprocal Rate - Parameters page

This example illustrates the fields and controls on the Cross/Reciprocal Rate - Parameters page. You can find definitions for the fields and controls later on this page.



Run Control ID 1

Language English

Report Request Parameters

Market Rate Index MODEL Default

Term 0

*From Common Currency

*Exchange Rate Type

*As of Date 12/12/2012

☑ Generate Report

☐ Override Existing Rates

☑ Generate Reciprocal Rate

☐ Generate Cross Rates

☐ Rate Triangulate

Oracle supports the use of Oracle Business Intelligent Publisher (BI Publisher or BIP) to generate the Cross/Reciprocal Rate Calc (EO9030) report.

Important! This calculation process includes two SQR reports - Cross/Reciprocal Rate Calc (EO9030) and Update History Rates (EO9031). Select to run EO9030 if you do not implement Application Integration Architecture (AIA) in your system. Select to run EO9031 if you are an AIA customer and wish to update history rates via this process.

Market Rate Index	Select a market rate index. Applications other than PeopleSoft Treasury should use the default index that you select for the exchange rate.
Term	This value defaults from the value entered on the Market Rate Definition page.

From Common Currency	Select a currency code to calculate a reciprocal rate.
Exchange Rate Type	Select the exchange rate type to use for this calculation.
As of Date	Select the effective date of the newly created exchange rates, which are the output of the process. The as of date also determines the rates used as the basis for the calculations, which are the input of the process. The report uses the most current currency quotation method for the currency pair as the input to the process. If the as of date is the current effective rate on the specified date, it can affect triangulation. For example, a USD to EPC (euro participating currency) triangulated rate effective April 1, 2004 might be comprised of the EUR to USD rate also effective April 1, 2004 and the fixed EUR to an EPC rate effective on the date the newly participating EPC officially becomes a euro participating currency.
Generate Report	Select to generate a report that displays the cross, triangulated, and reciprocal rate calculations performed by the process.
Override Existing Rates	Select to have the calculated rates override rates for the exchange rate type, regardless of the as of date.
Generate Reciprocal Rate	Select to calculates reciprocal rates for currency pairs that do not have the Auto Reciprocate option select on the Currency Quotation Method page. You can select this option alone, or in combination with the Generate Cross Rates and Rate Triangulate options. This process does not directly manipulate the exchange rates. The system uses numerator and denominator values instead, such that the following is true: (from-currency / RATE_DIV) × RATE_MULT = to-currency Fro example, suppose you want a reciprocal rate between USD and CHF and assume a two-to-one ratio. If the exchange rate for USD to CHF is quoted directly (either using a direct quote method that you selected or using the system default), this rate is stored as RATE_MULT = 2 and RATE_DIV = 1. The rate is represented as 1 USD = 2 CHF, with a visual rate of 2. In turn, the CHF to USD rate must be indirect. The reciprocal is a simple exchange, storing the rate as RATE_MULT = 1 and RATE_DIV = 2. The visual rate remains 2. If quote methods are not being used, the CHF to USD rate must be quoted directly (the default), so the reciprocal rate is actually a calculated inverse. This rate is stored as RATE_MULT = 0.5 and RATE_DIV = 1, with a visual rate of 0.5.

	In this example between USD and CHF, using a quote method and using a calculated inverse produced the same end result, 1/2 equals 0.5. But in actual practice, the manipulation of exchange rates is a major task and is one of the reasons for establishing the currency quote method.
Generate Cross Rates	Select to automatically generate cross rates. For example, to generate cross currency rates for USD, CAD, and MXP, you enter USD to CAD = 1.473 and USD to MXP = 9.8793. The system automatically generates CAD to MXP = 9.8793/1.473 = 6.7069246. If you choose to generate cross rates, the From Cur (from-currency) and To Cur (to-currency) fields display and you must select a from-currency and a to-currency. You can enter a wild card of % in either or both fields to indicate from all or to all currencies.
Rate Triangulate	Select to convert two currencies through a third currency. Select to convert two currencies through a third currency. If you select Rate Triangulate, the From Cur (from-currency) and To Cur (to-currency) fields display and you must select a from-currency and a to-currency. You can enter a wild card of % in either or both fields to indicate from all or to all currencies.
Quote Method Required	Select to indicate that you want the process to perform selected calculations only if the currency pairs have an existing currency quotation method definition.

Using the Currency Exchange Calculator

This section discusses how to convert amounts using the currency exchange calculator.

Page Used to Convert Amounts Using the Currency Exchange Calculator

Page Name	***Definition Name***	***Navigation***	***Usage***
Currency Exchange Calculator	CURRENCY_EXCHNG_PN	• Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Exchange Calculator • Set Up <Product Line>, Common Definitions, Currency, Currency Exchange Calculator	Calculate currency exchange between currencies. This tool enables you to select a rate type other than the base currency, but does not enable you to override the exchange rate.

Currency Exchange Calculator Page

Use the Currency Exchange Calculator page (CURRENCY_EXCHNG_PN) to calculate currency exchange between currencies.

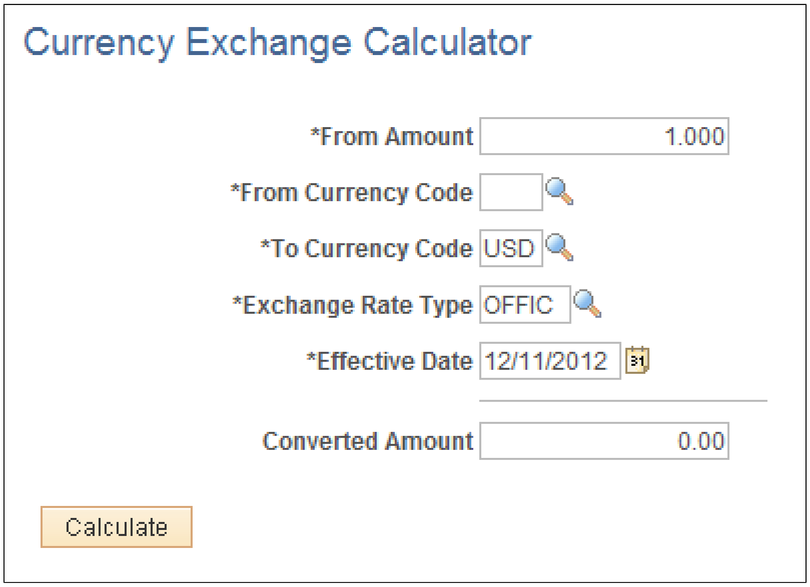
This tool enables you to select a rate type other than the base currency, but does not enable you to override the exchange rate.

Navigation

- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Exchange Calculator
- Set Up <Product Line>, Common Definitions, Currency, Currency Exchange Calculator

Image: Currency Exchange Calculator page

This example illustrates the fields and controls on the Currency Exchange Calculator page. You can find definitions for the fields and controls later on this page.



Currency Exchange Calculator

*From Amount 1.000

*From Currency Code

*To Currency Code USD

*Exchange Rate Type OFFIC

*Effective Date 12/11/2012

Converted Amount 0.00

From Amount	The currency exchange is based on the from amount that you enter and the current exchange rate set up on the Market Rate page. See Defining Market Rates.
From Currency Code	Select the currency code from which to calculate the exchange amount.
To Currency Code	Select the currency code to which to calculate the exchange amount.
Exchange Rate Type	Select the type of exchange rate to use for this calculation.
Converted Amount	Click the Calculate button to calculate the amount and display it in this field.

Chapter 6

Working With PeopleSoft Forms and Approval Builder

Understanding PeopleSoft Forms and Approval Builder

The Forms and Approval Builder enables you to design online forms, specify the approval process they require, and deploy them to users within your organization. Use this feature to convert manual procedures within your organization to paperless processes that include workflow-based approvals and an audit trail for tracking progress. No coding is required on your part, and future upgrades to your PeopleSoft system will not require you to update these forms, since the forms you create are not customizations.

Once a form is published, users navigate to the form using the main menu, complete the fields and submit it for approval. Each published form includes three tabs: Form, Instructions, and Attachments. An audit trail of the approval history and comments is automatically generated as the form goes through the approval process. You can review the audit trail to see the history for each step of the approval chain.

Form Design

To create forms, you use the Design Form Wizard component (FORM_DESIGN_WIZARD), which guides you through the following steps of the form creation process:

- Defining the basic information for a form, including the form ID and form owner.
- Providing instructions that describe how to use the form.
- Specifying the fields that appear on the form.
- Attaching files to the form (optional).
- Defining the menu item that is used to access the form.
- Specifying the approval workflow that is required for the form.
- Previewing, testing, and activating the form.

Forms can contain fields arranged into one or two columns. You can specify which fields are required, and define the edits that a field must pass in order for the completed form to be saved. As you design the form, you can use the following field types:

- Numeric
- Text
- Date
- Time
- Yes/No

- Prompt

  Enables form users to select values from existing PeopleSoft records to complete the field.

- Code

  Enables you to build a list of values that appear in a drop-down list. Form users can select a value from the list to complete the field.

- Section

  Enables you to organize the form into multiple sections.

Form Status

It is important to understand the distinction between a form and a form instance. For the purposes of this documentation, when we use the term *form*, we are referring to the “master” form, or template, that form designers create using the Form Design Wizard component. A *form instance* is a deployed form that has been completed by a form user. Each form instance is automatically assigned a unique sequence number, so all completed forms can be tracked and managed independently.

The possible status values for a *form* are:

In Design	Indicates a form that is being designed, and is not active.
Activated	Indicates a form that is active and available for form users to complete. Depending on your user role, you can activate a form using the following pages: • Design Form: Complete page of the Form Design Wizard component. • Manage Forms page. **Note:** Only the owner of a form or a form administrator can activate/inactivate a form or reassign a form to a new owner.
Inactive	Indicates a form that has been inactivated by either the form's owner or a form administrator. Form administrators or form owners can inactivate forms by using the Manage Forms page. When a form is inactive, form users are not permitted to complete the form.

The possible status values for a *form instance* are:

Initial	When a form user accesses an activated form and begins to complete it, the status of the form instance is set to *Initial.*
Pending	When the form user finalizes the form instance and submits it for approval, the status changes to *Pending.*
On Hold	When an approver or reviewer requests more information about a submitted form, the status changes to *On Hold.*

Approved, Denied,* or *Cancelled	As the form instance flows through the required approval chain, the status subsequently updates to approved, denied, or cancelled.

Security and Delivered Roles

User roles determine who has permission to access, design, and administer forms. The following table lists the delivered roles and associated permission lists for Form and Approval Builder.

Role Name	***Description***	***Permission Lists***	***Access Rights***
FORM_USER	Form user: Can complete and submit forms.	EOFM1000	The form user has add/update/display access to forms that have been created with the Form Design Wizard (form instances).
FORM_DESIGNER	Form designer: Can complete and submit forms, design forms, and manage forms that they are assigned to as the owner.	EOFM1000 EOFM2000	The form designer has add/update/display access to forms that have been created with the Form Design Wizard, *and* has add/update/display access to the Form Design Wizard component. Form designers have update/display access to only *their* forms when using the Manage Forms (FORM_RPT) component.
FORM_ADMIN	Form administrator: Can complete and submit forms, design forms, and manage *all* forms.	EOFM1000 EOFM2000 EOFM3000 EOSD2000	The form administrator has the same access as the form designer, and additionally, has update/display access to *all* forms when using the Manage Forms (FORM_RPT) component.
FORM_CI_DEVELOPERS	Form to component interface (CI) developer: Can complete and submit forms, design forms, manage *all* forms, and map forms to component interfaces (integrate forms).	EOFM1000 EOFM2000 EOFM3000 EOFM4000 EOSD2000	The form to CI developer has the same access as the form administrator, and in addition can set up form integration by mapping forms to component interfaces using the Forms to CI Mapping page.

Row level security is enforced on the completed forms; only the form's owner or approver/reviewer can access the form instance.

Note: A security administrator will need to update existing User IDs and/or create new User IDs to include the appropriate roles before those users begin working with Form and Approval Builder.

See *PeopleTools: Security Administration*, “Administering User Profiles”.

Requirements

Form and Approval Builder is available only on the Employee portal.

Related Links

"Understanding Approval Features *(PeopleSoft 9.2: Approval Framework)*"

Designing Forms

This section describes designing forms using the Form Design Wizard component (FORM_DESIGN_WIZARD) and discusses how to:

- Define basic information.
- Provide user instructions.
- Specify the fields for a form.
- Define field edit details.
- Associate file attachments.
- Specify the menu location.
- Assign approval workflow.
- Preview and activate the form.

Note: Access to the Form Design Wizard component is limited to form designers and form administrators. In addition, only form owners can modify existing forms.

Pages Used to Design Forms

Page Name	***Definition Name***	***Navigation***	***Usage***
Design Form - Step 1: Basic Information	FORM_DSN_WZR_MAIN	Enterprise Components, Forms, Design a Form	Define a form's basic information.
Design Form - Step 2: Instructions	FORM_DSN_WZR_INST	Click Next on the Design Form - Step 1: Basic Information page of the Forms Design Wizard.	Provide instructions for users that describe how to complete and submit a form.
Design Form - Step 3: Form Fields	FORM_DSN_WZR_FLDS	Click Next on the Design Form - Step 2: Instructions page of the Forms Design Wizard.	Define the fields that appear on the form.
Form Field Edits	FORM_L_FLD_SEC	Click the Details link for a field on the Design Form - Step 3: Form Fields page.	Define additional requirements for fields.

Page Name	***Definition Name***	***Navigation***	***Usage***
Design Form - Step 4: Attachment Templates	FORM_DSN_WZR_ATCH	Click Next on the Design Form - Step 3: Form Fields page of the Forms Design Wizard.	Associate file attachments with a form.
Design Form - Step 5: Publish to Menu	FORM_DSN_WZR_PRTL	Click Next on the Design Form - Step 4: Attachment Templates page of the Forms Design Wizard.	Specify the menu location for a form.
Design Form - Step 6: Approval Process	FORM_DSN_WZR_AW	Click Next on the Design Form - Step 5: Publish to Menu page of the Forms Design Wizard.	Assign the approval workflow required for a form.
Design Form: Complete	FORM_DSN_WZR_DONE	Click OK on the Design Form - Step 6: Approval Process page.	Preview and activate or redesign a form.

Design Form - Step 1: Basic Information Page

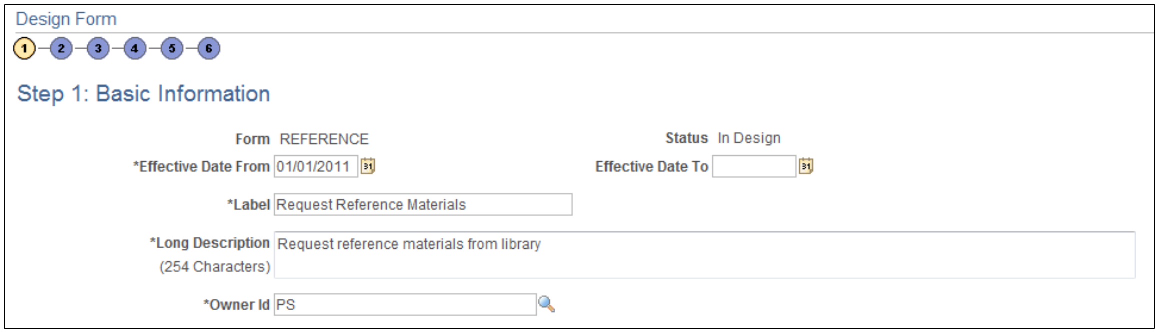
Use the Design Form - Step 1: Basic Information page (FORM_DSN_WZR_MAIN) to define a form's basic information.

Navigation

Enterprise Components, Forms, Design a Form

Image: Design Form - Step 1: Basic Information page

This example illustrates the fields and controls on the Design Form - Step 1: Basic Information page. You can find definitions for the fields and controls later on this page.



Form REFERENCE

Status In Design

*Effective Date From 01/01/2011

Effective Date To

*Label Request Reference Materials

*Long Description (254 Characters) Request reference materials from library

*Owner Id PS

Form	The unique identifier for the form. You specify this ID when you add a new form.
Status	Lists the current status of the form. The value for this field is automatically assigned. Values are: • *In Design:* Indicates the form is being designed and has not yet been published.

- *Activated:* Indicates the form's design is complete, and the form has been published.
- *Inactive:* Indicates a form that has been inactivated by either the form's owner or a form administrator.

  Form administrators or form owners can inactivate forms by using the Manage Forms page. When a form is inactive, form users are not permitted to complete the form.

Effective Date From	Enter the date the form is first available for use.
Effective Date To	Enter the date the form expires. Leave this field blank if you intend to use the form indefinitely.
Label	Enter a label for the menu item that users will select to access the form. Names can contain only alphanumeric and underscore characters.
Long Description	Enter a description for the form. The description appears below the form's label when users access the published form.
Owner Id	Enter the User ID of the person who is the responsible for the form. Only this person can modify the form design.

Design Form - Step 2: Instructions Page

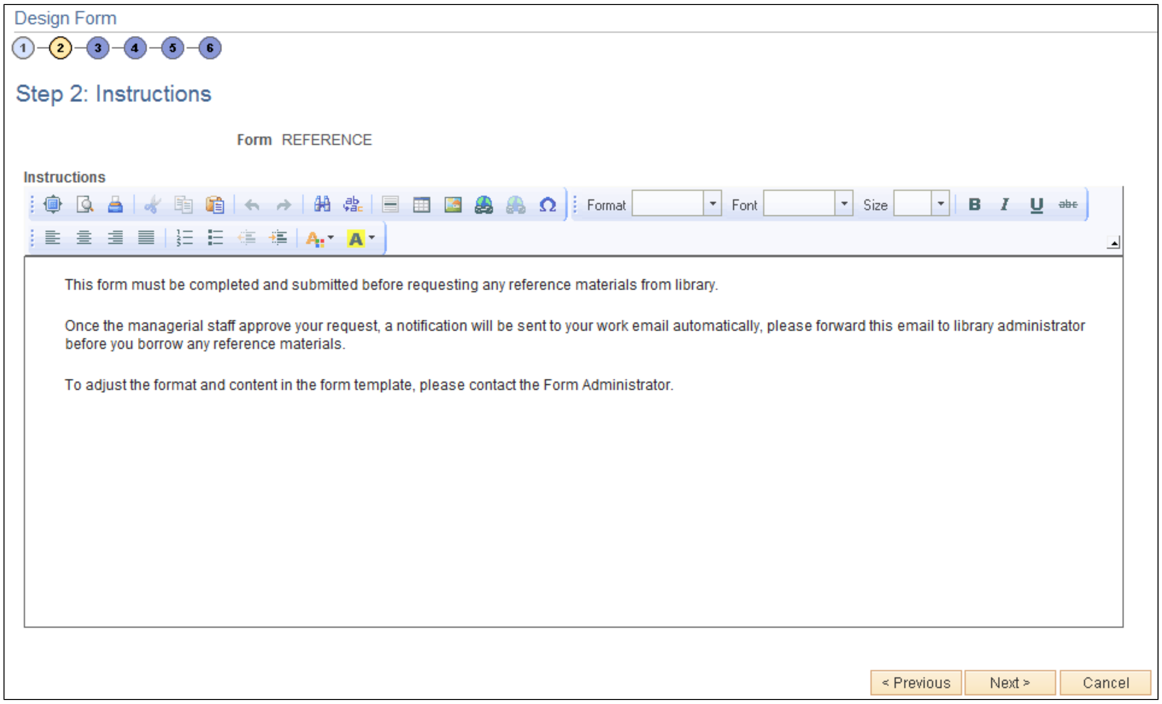
Use the Design Form - Step 2: Instructions page (FORM_DSN_WZR_INST) to provide instructions for users that describe how to complete and submit a form.

Navigation

Click Next on the Design Form - Step 1: Basic Information page of the Forms Design Wizard.

Image: Design Form - Step 2: Instructions page

This example illustrates the fields and controls on the Design Form - Step 2: Instructions page. You can find definitions for the fields and controls later on this page.



Form REFERENCE

Instructions

This form must be completed and submitted before requesting any reference materials from library.

Once the managerial staff approve your request, a notification will be sent to your work email automatically, please forward this email to library administrator before you borrow any reference materials.

To adjust the format and content in the form template, please contact the Form Administrator.

Enter instructions for completing the form using the HTML editor. Use the toolbar buttons to copy and paste, format text, and insert graphics or links.

Design Form - Step 3: Form Fields Page

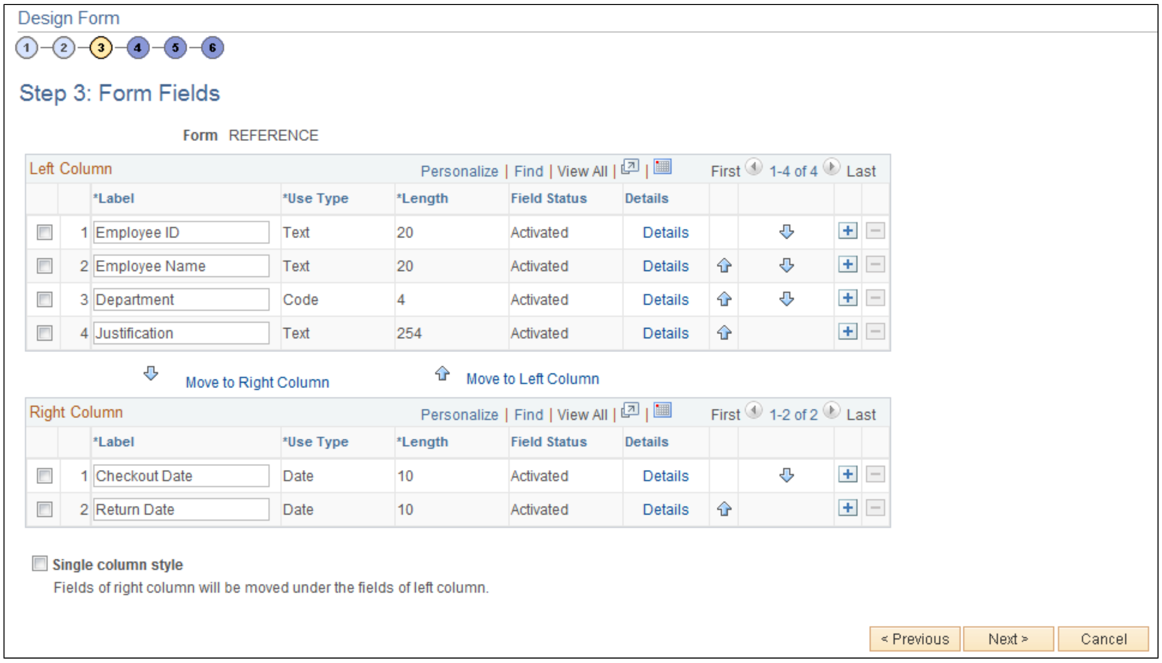
Use the Design Form - Step 3: Form Fields page (FORM_DSN_WZR_FLDS) to define the fields that appear on the form.

Navigation

Click Next on the Design Form - Step 2: Instructions page of the Forms Design Wizard.

Image: Design Form - Step 3: Form Fields page

This example illustrates the fields and controls on the Design Form - Step 3: Form Fields page. You can find definitions for the fields and controls later on this page.



Step 3: Form Fields

Form REFERENCE

Left Column

		*Label	*Use Type	*Length	Field Status	Details
☐	1	Employee ID	Text	20	Activated	Details
☐	2	Employee Name	Text	20	Activated	Details
☐	3	Department	Code	4	Activated	Details
☐	4	Justification	Text	254	Activated	Details

Right Column

		*Label	*Use Type	*Length	Field Status	Details
☐	1	Checkout Date	Date	10	Activated	Details
☐	2	Return Date	Date	10	Activated	Details

☐ Single column style

Fields of right column will be moved under the fields of left column.

Insert rows within the Left Column and Right Column grids to define the fields that appear on the left and right columns of the form.

For each row, specify values for the following parameters to define the requirements for that field.

Label	Enter the label to use for this field.
Use Type	Select the field type, and field length, if required (depends on the Use Type). Values are: *Code:* Use to define a code field that allows the form user to select a response from a list of codes. *Date:* Use for dates. *Number:* Use for numeric entries (only positive values are allowed). *Prompt:* Defines a prompt field that allows the user to select data from existing PeopleSoft database tables. *Section:* Use to separate a form into sections. The section can include a header with instructive text, and an HTML editor is provided for you to define the section.

	Signed: Use for signed numeric entries (values can be positive or negative). *Text:* Use for text entries. *Time:* Use for time entries. *Y/N:* Use for yes/no responses.
Length	Select the field length. You can modify this field only for Number, Prompt, Signed, and Text fields; the remaining field types use a preset length. The syntax for numeric fields is *X.Y*, where the value before the decimal *(X)* is the number of integer digits allowed, the value after the decimal *(Y)* is the number of decimal places allowed.
Field Status	Indicates the status of the field, either *Activated* or *In Design.*
Details	Click to access the Form Fields Details page, where you define additional requirements for the field, including whether the field is required, and edits for the field when a user completes the form. See Form Field Edits Page.
⇧ **and** ⇩	Click the arrow icons to reposition a field.
Move to Right Column	Click to move selected fields to the right column.
Move to Left Column	Click to move selected fields to the left column.
Single column style	Select to create a form that contains a single column. Any fields that are defined in the right column will appear under the left column fields when you view the form.

Form Field Edits Page

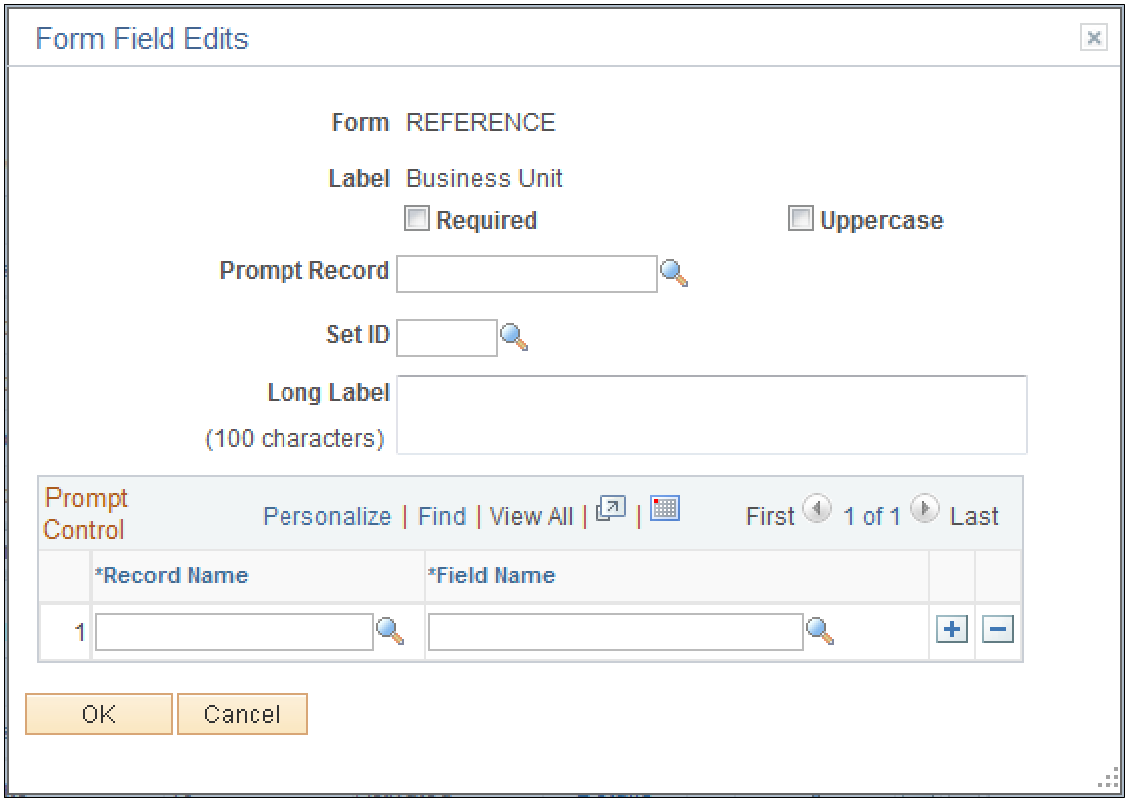
Use the Form Field Edits page (FORM_L_FLD_SEC) to define additional requirements for fields.

Navigation

Click the Details link for a field on the Design Form - Step 3: Form Fields page.

Image: Form Field Edits page displaying an example for a prompt field

This example illustrates the fields and controls on the Form Field Edits page example for a prompt field. You can find definitions for the fields and controls later on this page.



Form Field Edits

Form REFERENCE

Label Business Unit

☐ Required ☐ Uppercase

Prompt Record

Set ID

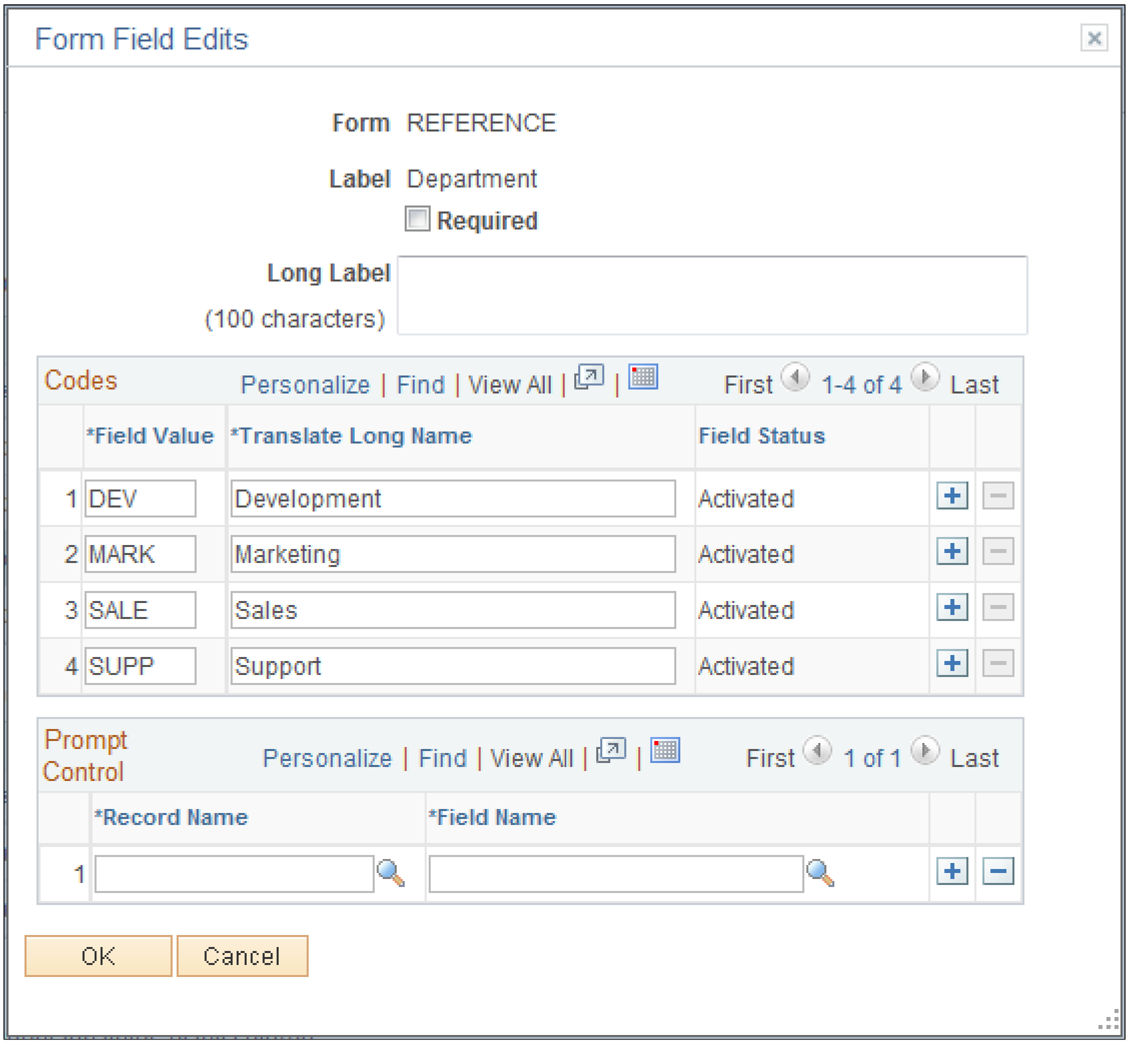
Long Label (100 characters)

Prompt Control

	*Record Name	*Field Name
1		

Image: Form Field Edits page displaying an example for a code field

This example illustrates the fields and controls on the Form Field Edits page example for a code field. You can find definitions for the fields and controls later on this page.



Form REFERENCE

Label Department

☐ Required

Long Label (100 characters)

Codes

	*Field Value	*Translate Long Name	Field Status
1	DEV	Development	Activated
2	MARK	Marketing	Activated
3	SALE	Sales	Activated
4	SUPP	Support	Activated

Prompt Control

	*Record Name	*Field Name
1		

The fields that appear on this page differ depending on the field's Use Type. The examples provided show how the page appears for a Prompt field and a Code field. The following information lists all of the possible fields that can appear on this page.

Required	Select to require that a user enter a value in this field in order to save the form.
Uppercase (available only when the Use Type is set to Prompt or Text).	Select to have the system convert the field value to uppercase when the form is saved. Available for only Prompt and Text fields. Use this option for code values, such as department ID, for which it does not matter whether the user enters the value in uppercase or lowercase.
Long Label	Enter up to 100 characters as an alternate label for this field. If you enter a long label, then it will be appear on the form *instead* of the short label (the value specified in the Label field on the Design Form - Step 3: Form Fields page).

Prompt Record and SetID (available only when the Use Type is set to Prompt)	Select the record that contains the values to use for this field. For SetID based tables, specify the SetID from which to retrieve the values. To complete this field type, a form user can select one of the values from the prompt list, or they can enter a value by typing it into the field. The records that are available for selection are established by form administrators using the Define Prompt Records page. See Defining Prompt Records.
Prompt Control (available for all Use Types except Section)	To use the value that a form user enters for this field as the key by which to filter the list of available values in one or more prompt fields elsewhere on this form, insert rows in the Prompt Control grid, and select the Record Name and Field Name for each of the form fields that will reference this field. For example, to limit the Project IDs available in a prompt field to only those that are associated with the business unit that the user has already selected while completing the form, when designing the form you would: • Add a row to the Business Unit field's Prompt Control grid and specify the record name that equates to the project record, and the field name in that record that equates to business unit. • Define the Project ID field as a Prompt field, and specify the same record name that was used for the business unit Prompt Control record name as the prompt record for Project ID. The records that are available for selection are established by form administrators using the Define Prompt Records page. See Defining Prompt Records.
Field Value and Translate Long Name (appear only when the Use Type is set to Code)	Use to define the codes and their associated translate values that are valid for this field. The translate values appear in the drop-down list when the user completes the field.

Design Form - Step 4: Attachment Templates Page

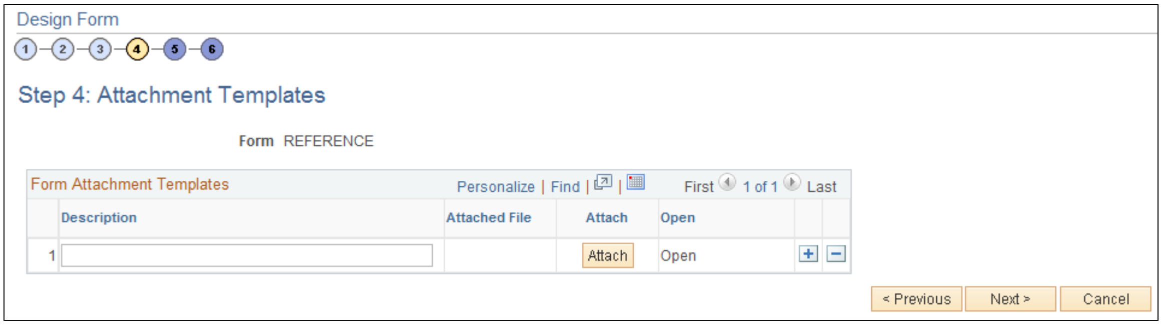
Use the Design Form - Step 4: Attachment Templates page (FORM_DSN_WZR_ATCH) to associate file attachments with a form.

Navigation

Click Next on the Design Form - Step 3: Form Fields page of the Forms Design Wizard.

Image: Design Form - Step 4: Attachment Templates page

This example illustrates the fields and controls on the Design Form - Step 4: Attachment Templates page. You can find definitions for the fields and controls later on this page.


Design Form

Step 4: Attachment Templates

Form REFERENCE

1
2
3
4
5
6
Form Attachment Templates
Personalize | Find | | First 1 of 1 Last
Description
Attached File
Attach
Open
1
Attach
Open
< Previous
Next >
Cancel

Attach	Click to attach a file. In the window that appears, click the Browse button to navigate to and select the file, then click the Upload button.
Description	Enter a description for the file. If you leave this blank, the file name is used.
Attached File	Displays the file name of the attached file.
Open	Click to open the attached file.

Design Form - Step 5: Publish to Menu Page

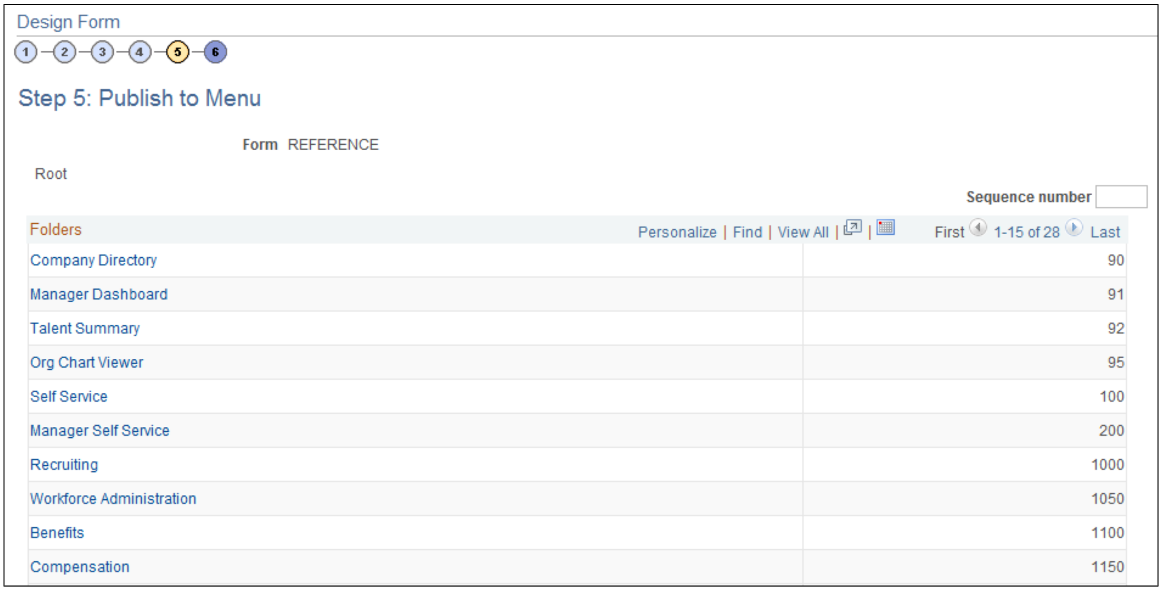
Use the Design Form - Step 5: Publish to Menu page (FORM_DSN_WZR_PRTL) to specify the menu location for a form.

Navigation

Click Next on the Design Form - Step 4: Attachment Templates page of the Forms Design Wizard.

Image: Design Form - Step 5: Publish to Menu page (1 of 2)

This example illustrates the fields and controls on the Design Form - Step 5: Publish to Menu page (1 of 2). You can find definitions for the fields and controls later on this page.



Design Form

Step 5: Publish to Menu

Form REFERENCE

Root

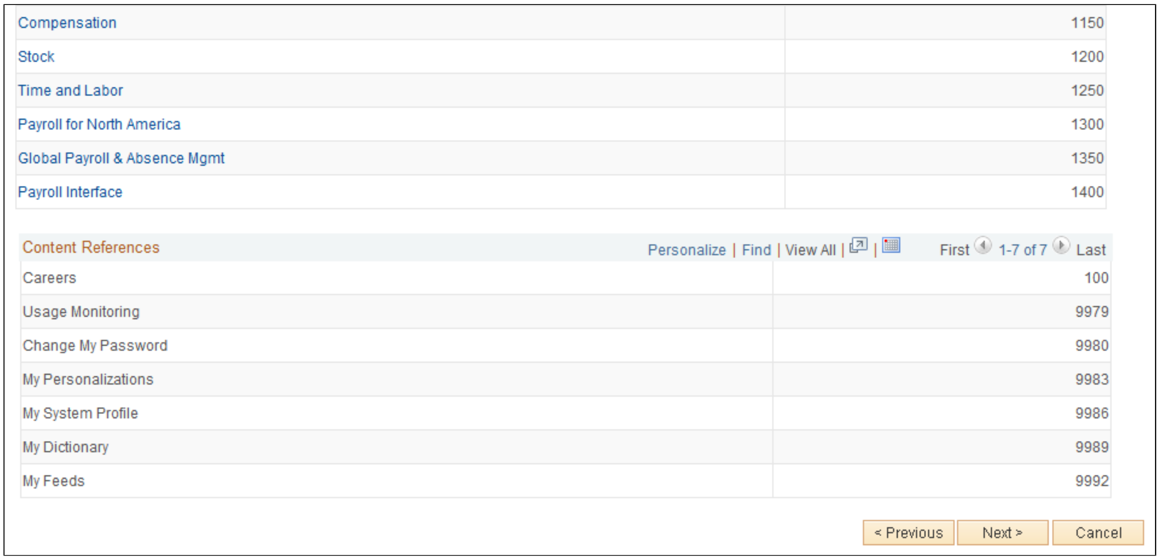
Sequence number

Folders

Company Directory	90
Manager Dashboard	91
Talent Summary	92
Org Chart Viewer	95
Self Service	100
Manager Self Service	200
Recruiting	1000
Workforce Administration	1050
Benefits	1100
Compensation	1150

Image: Design Form - Step 5: Publish to Menu page (2 of 2)

This example illustrates the fields and controls on the Design Form - Step 5: Publish to Menu page (2 of 2). You can find definitions for the fields and controls later on this page.



Compensation	1150
Stock	1200
Time and Labor	1250
Payroll for North America	1300
Global Payroll & Absence Mgmt	1350
Payroll Interface	1400

Content References

Careers	100
Usage Monitoring	9979
Change My Password	9980
My Personalizations	9983
My System Profile	9986
My Dictionary	9989
My Feeds	9992

The menu hierarchy appears near the top of the page, below the form name; the highest level, Root, is equivalent to Main Menu in the menu hierarchy. Click the links to navigate to the level of the menu hierarchy in which you want the form to appear. Then, enter a value in the Sequence number to control the order in which it appears in the menu. In the example shown, the form will appear as the last item under Main Menu, Manager Self-Service, along with Review Forecasted Time and Travel and Expense Center.

Sequence number	Enter a value to specify the order within the menu that the form will appear. Items appear in ascending order.
Folders	This grid lists the folders at the currently selected menu level, and their associated sequence number. Click a folder to navigate to that folder level of the menu hierarchy.
Content References	This grid lists the available components at the selected level of the menu hierarchy and their associated sequence number. This is the level at which the form will appear in the menu. **Note:** Only the components that your assigned role permits you to access appear in the grid.

Design Form - Step 6: Approval Process Page

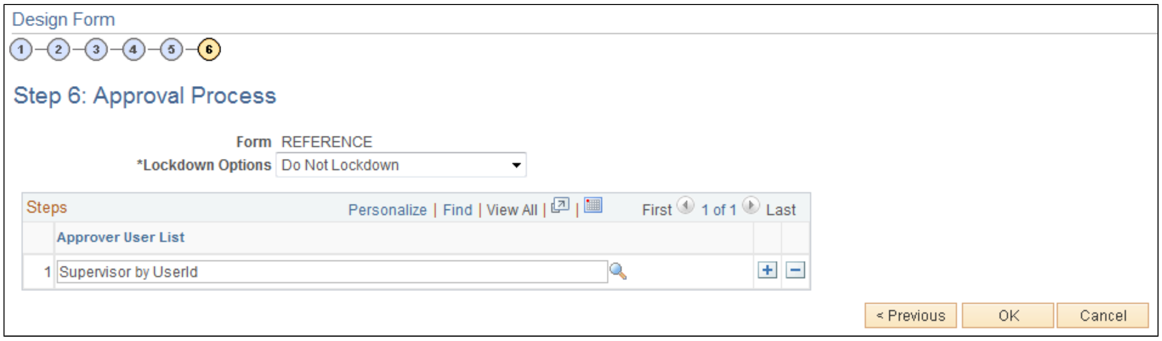
Use the Design Form - Step 6: Approval Process page (FORM_DSN_WZR_AW) to assign the approval workflow required for a form.

Navigation

Click Next on the Design Form - Step 5: Publish to Menu page of the Forms Design Wizard.

Image: Design Form - Step 6: Approval Process page

This example illustrates the fields and controls on the Design Form - Step 6: Approval Process page. You can find definitions for the fields and controls later on this page.



Form REFERENCE

*Lockdown Options Do Not Lockdown

Approver User List

1 Supervisor by UserId

Lockdown Options	Specify if a form instance can be modified after it has been submitted, and under what conditions. Values are: • *Do not lockdown:* Select this option to allow changes to be made to the form instance at any time. This option enables users to update a form even after it has been submitted and approved. • *Lockdown after submit:* Select this option to prevent any changes to the form instance after it has been submitted (the approval status is *Pending,* or *Approved.*) • *Lockdown after approval:* Select this option to prevent any changes to the form instance after it has been approved (

the approval status is *Approved*). Changes can still be made after it has been submitted, up until the time it is approved.

Note: If a form is integrated with PeopleSoft applications, the form cannot be modified after it has been posted to PeopleSoft transactional tables.

Approver User List	Insert rows and select the Approver User Lists required for this form. Approver paths must be sequential, branching is not supported.

Approver user lists are established using the User List Definition page (Enterprise Components, Approvals, Approvals, User List Setup).

See "Defining Users for Approval Framework *(PeopleSoft 9.2: Approval Framework)*".

After you have specified all the required Approver User Lists, click OK. The system automatically creates the approval Process Definition ID using the same name as the form name.

The predefined form approval configuration supports the following notification events: *Route for Approval*, *Route for Review*, *On Final Approval* and *On Final Denial.*

Design Form: Complete Page

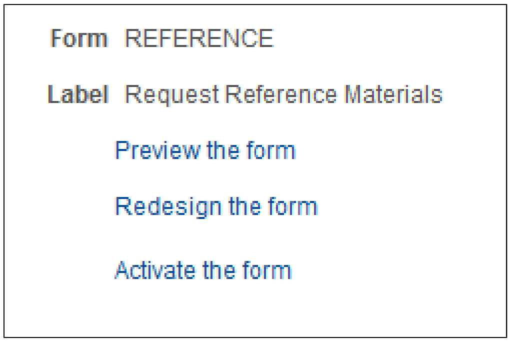
Use the Design Form: Complete page (FORM_DSN_WZR_DONE) to preview and activate or redesign a form.

Navigation

Click OK on the Design Form - Step 6: Approval Process page.

Image: Design Form: Complete page

This example illustrates the fields and controls on the Design Form: Complete page. You can find definitions for the fields and controls later on this page.



Form REFERENCE

Label Request Reference Materials

This page enables you to preview your form, modify it, if needed, and activate it when you've finalized the design by using the following links:

Preview the form	Click to preview the form. A preview of the designed form appears, as the user would see it when they complete the form. Navigate within the form to preview each page, and interact with the form fields to test them.

Redesign the form	Click to return to the Form Design Wizard component, where you can continue designing the form.
Activate the form	Click to activate and publish the form. A confirmation message appears. The form status updates to *Activated.*

Defining Prompt Records

This section discusses how to specify which PeopleSoft database records can be used as prompt fields in Form and Approval Builder. Access to this page is limited to form administrators.

Page Used to Specify Prompt Records

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Prompt Records	FS_SD_PROMPTREC	Enterprise Components, Forms, Define Prompt Records	Specify records for prompt fields.

Define Prompt Records Page

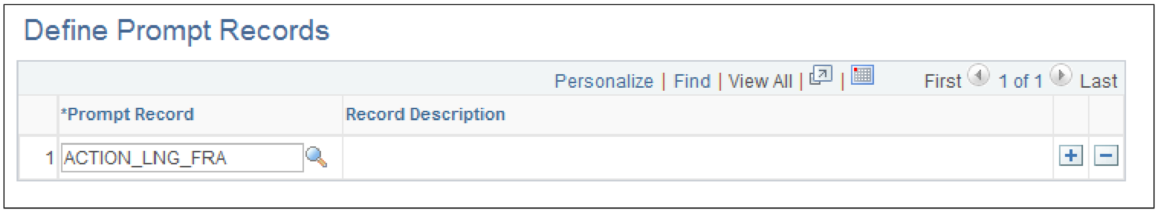
Use the Define Prompt Records page (FS_SD_PROMPTREC) to specify records for prompt fields.

Navigation

Enterprise Components, Forms, Define Prompt Records

Image: Define Prompt Records page

This example illustrates the fields and controls on the Define Prompt Records page. You can find definitions for the fields and controls later on this page.



1 ACTION_LNG_FRA

Prompt Record	Insert rows and select a database record. Only the records specified on this page are available for selection as prompt fields and prompt control fields in the form designer.

Managing Forms

This section provides an overview of form management and discusses how to manage forms.

Page Used to Manage Forms

Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Forms	FORM_RPT	Enterprise Components, Forms, Manage Forms	Manage forms.

Understanding Form Management

Form designers and form administrators can review and manage forms using the Form Management component. Use this page to review how many of each form are in the system, see the current approval status, and activate/inactivate forms. This component works like most inquiry pages; first specify the search criteria, then click the Search button to retrieve the forms that meet the criteria. Data is categorized into the following tabs: Action, Counting, and Owner.

Form designers can access only forms that they are assigned to as owner, form administrators can access all forms.

Manage Forms Page

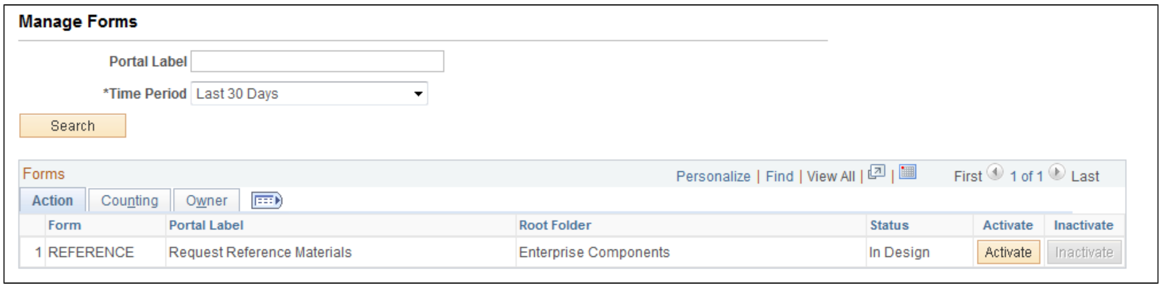
Use the Manage Forms page (FORM_RPT) to manage forms.

Navigation

Enterprise Components, Forms, Manage Forms

Image: Manage Forms page

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



Manage Forms

Portal Label

*Time Period Last 30 Days

	Form	Portal Label	Root Folder	Status	Activate	Inactivate
1	REFERENCE	Request Reference Materials	Enterprise Components	In Design	Activate	Inactivate

Search Criteria

Enter values in the following fields, then click Search to retrieve form information:

Portal Label	Enter the form's label (the menu item name under which it is published) to view only the subset of forms that have been published to that menu. This is equivalent to the field "Label" when you design a form. Leave this blank to review information for all of your forms.
Time Period	Select the time period to use for determining form instance count totals.

Values are:

- *Custom Time Period*

  Select this option to review forms within a specific date range. Specify the dates by completing the From Date and To Date fields.
- *Last 30 Days*
- *Last 60 Days*
- *Last 90 Days*

Form Fields

These form fields appear on each tab:

Form	The Form ID that was defined in the Form Design Wizard component when the form was created.
Portal Label	The menu item used for the form. This is the value of the Label field that was specified on the Form Design Wizard: Basic Information page during form design.
Portal Folder	The name of the folder the form is published under.
Status	The form's current activation status, either *Activated* or *In Design.*

Activating/Inactivating Forms

Select the Action tab to activate or inactivate forms.

Activate	Click this button to activate an inactive form. If the form's current status is *In Design,* the system transfers you to the Form Design Wizard component, where you can complete the form design and then activate it.
Inactivate	Click this button to inactivate an active form.

Reviewing Form Counts

Select the Counting tab to review form counts for the specified time period.

Total	Lists the total number of form instances (forms that have been completed by form users).
Initial	Lists the number of form instances that have been completed by form users, but have not yet been submitted for approval.
Pending	Lists the number of form instances that have been submitted for approval but have not yet been approved, denied, or cancelled.

Cancelled	Lists the number of form instances that have been cancelled.
Approved	Lists the number of form instances that have been approved.
Denied	Lists the number of form instances that have been denied.

Reassigning Form Ownership

Select the Ownership tab to reassign a form to a new owner.

Owner ID	Lists the current owner. To change ownership, select a new owner from the prompt list.
Change Ownership	Click to assign the user listed in Owner ID as the new owner of the form.

Working with Forms

This section describes how to:

- Search for forms.
- Complete forms.
- Preview the form approval path.
- Approve or deny forms.

Pages Used to Work with Forms

Page Name	***Definition Name***	***Navigation***	***Usage***
Search/Fill a form	FORM_ADD	The menu navigation to access the form depends on the menu under which it was published. You can access the form by selecting one of these paths: • Enterprise Components, Forms, Search/Fill in a form • <Menu Path>, <Form Label>	Search for an existing form instance to update, or complete a new form instance.
Form	FORM FORM2	Access the form using the menu under which it was published.	Complete a form instance and submit it for approval.
<Portal label (approval preview)>	FORM_APPR_MAP	Click the Preview Approval button on the Form page.	Preview the approval path for a form.

Page Name	***Definition Name***	***Navigation***	***Usage***
Instructions	FORM_INSTR	Access the form using the menu under which it was published, and click to select the Instructions page.	Review form instructions if needed.
Attachments	FORM_ATCH	Access the form using the menu under which it was published, and click to select the Attachments page.	Download and upload attachments to the form if needed.
Form Approval	FORM_APPR_ACTION	Enterprise Components, Forms, Approve/Review a Form Approvers can also access pending forms from their worklist.	Approve or deny a form.

Search/Fill a Form Page

Use the Search/Fill a Form page (FORM_ADD) to search for an existing form instance to update, or complete a new form instance.

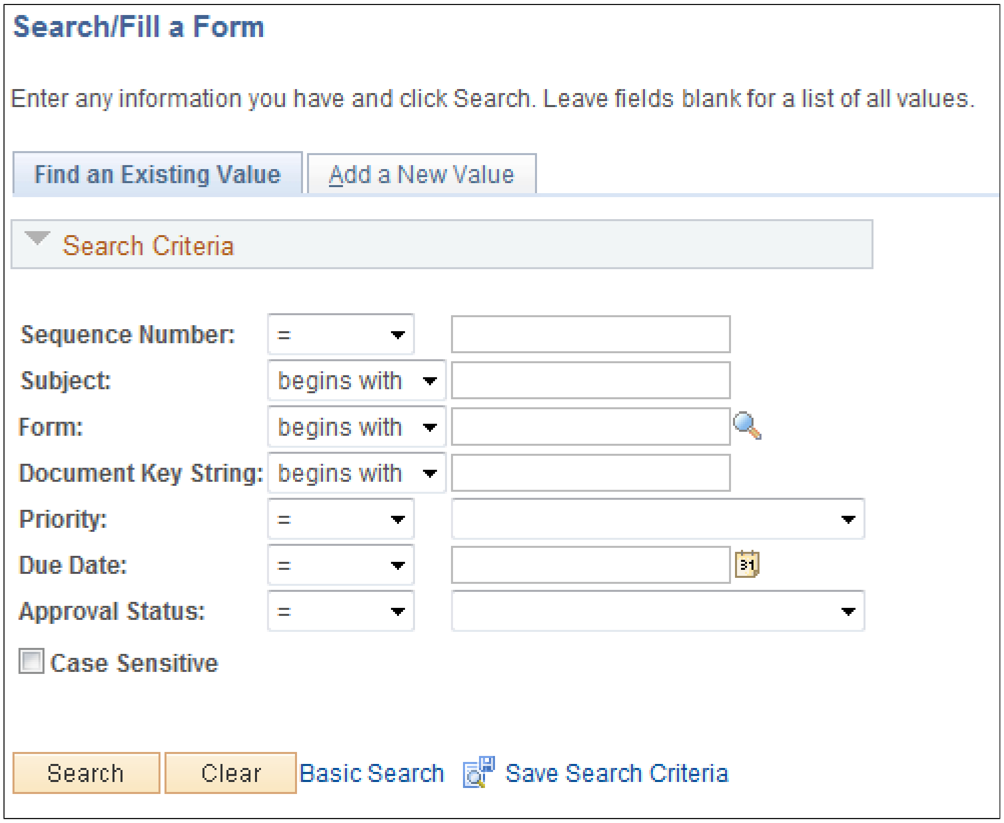
Navigation

The menu navigation to access the form depends on the menu under which it was published. You can access the form by selecting one of these paths:

- Enterprise Components, Forms, Search/Fill in a form
- <Menu Path>, <Form Label>

Image: Search/Fill a Form page

This example illustrates the fields and controls on the Search/Fill a Form page. You can find definitions for the fields and controls later on this page.



Search/Fill a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Sequence Number: =
Subject: begins with
Form: begins with
Document Key String: begins with
Priority: =
Due Date: =
Approval Status: =
☐ Case Sensitive

To find an existing form instance:

1. Select the Find an Existing Value tab.
2. Enter values in the fields to find the form instances that meet the criteria and click Search.
3. Click the form to view, you will transfer to the Form page where you can review the form.

The Document Key String is a concatenation of a form's key field values separated by the slash character (/).

To add a new form instance, navigate to the Form component pages using the menu under which the form was published.

Form Page

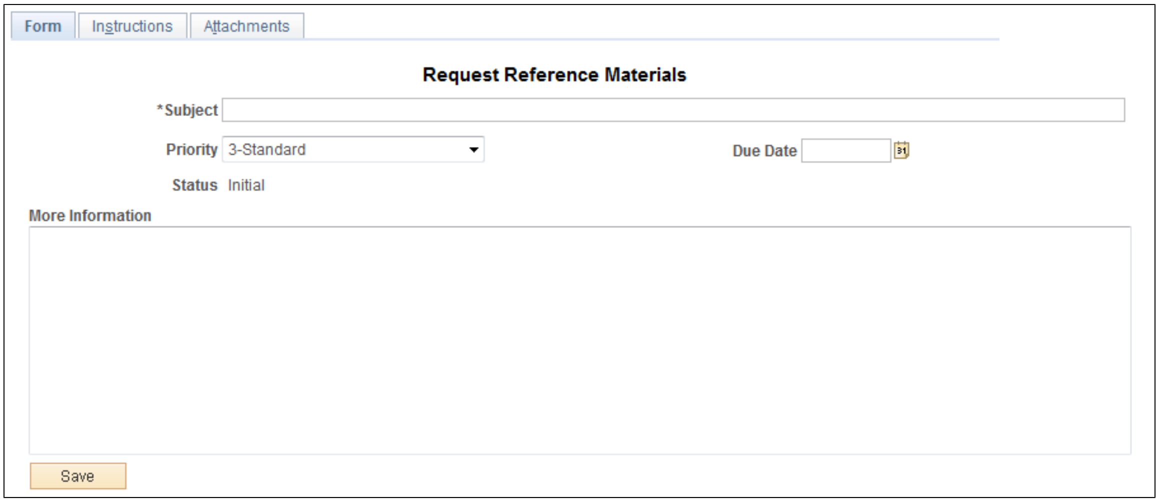
Use the Form page (FORM or FORM2) to complete a form instance and submit it for approval.

Navigation

Access the form using the menu under which it was published.

Image: Form page showing a new form instance that has not been completed

This example illustrates the Form page when a new form instance is added, but has not been completed. You can find definitions for the fields and controls later on this page.


Form
Instructions
Attachments
Save

Request Reference Materials

*Subject

Priority 3-Standard

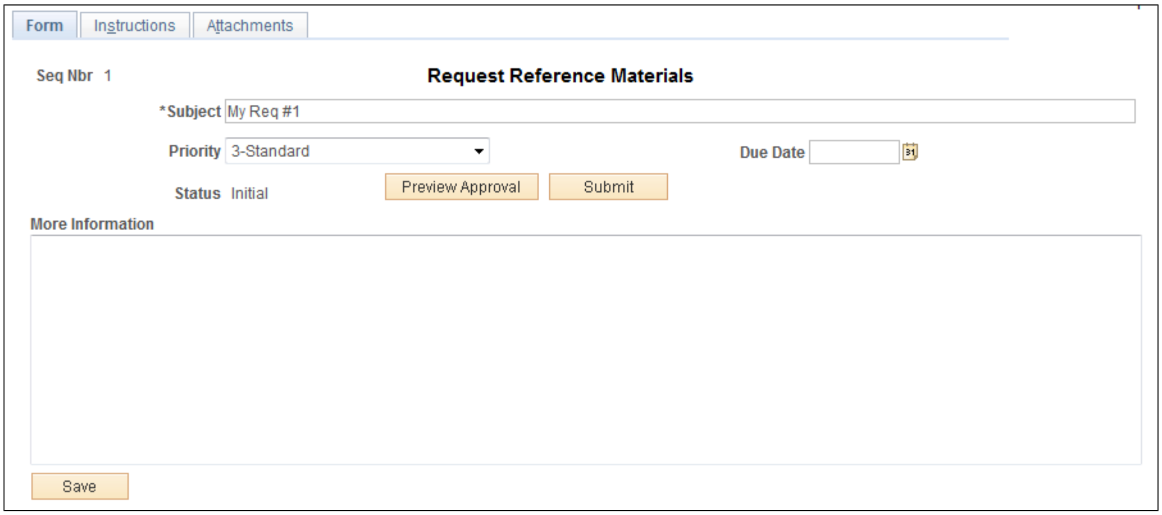
Due Date

Status Initial

More Information

Image: Form page showing a saved form instance that is ready to submit for approval

This example illustrates the Form page when it is saved and ready to submit for approval.


Form
Instructions
Attachments
Preview Approval
Submit
Save

Seq Nbr 1

Request Reference Materials

*Subject My Req #1

Priority 3-Standard

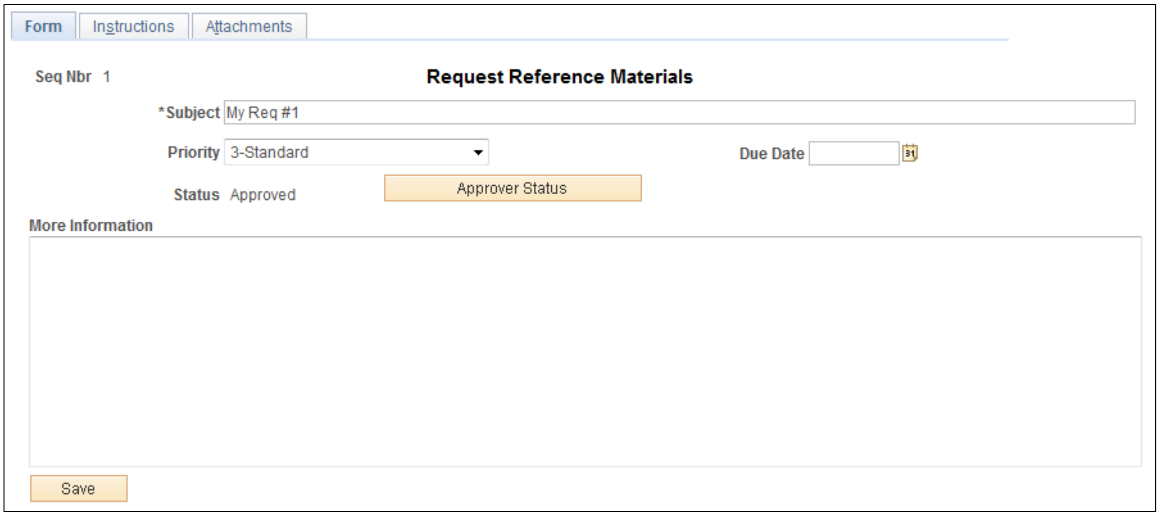
Due Date

Status Initial

More Information

Image: Form page showing a posted integrated form instance

This example illustrates the Form page showing a posted integrated form instance.



Request Reference Materials

Seq Nbr 1

*Subject My Req #1

Priority 3-Standard

Due Date

Status Approved

More Information

Users can complete the fields, review the instructions, and download and upload attachments as required. Each form instance will have the following fields, in addition to the fields defined by the form designer.

Seq. Nbr (sequence number)	The system assigns a unique sequence number to identify each completed form when the form instance is saved.
Subject	Enter a subject. Form users can search for form instances using the subject field.
Priority	Select a priority for the form. This field is for informational purposes only.
Status	Lists the status of the form. This value is automatically assigned.
Due Date	Specify the date the form is required to be approved or denied. This date is for informational purposes only.
More Information	Enter additional information for the form.

The following action buttons appear depending on the form's current status.

Approver Status	Click to view the current approval flow for the form. Available for forms in Pending status.
Submit	Click to submit the form for approval. Available for forms in Initial or Cancelled status.
Cancel Approval	Click to cancel the form. Available for forms in Pending status. Any pending approvals are canceled.
Preview Approval	Click to view the approval workflow.

	Available for forms in Initial or Cancelled status.
Save & Post Form	Click this button to post the data to the transactional tables of the component the form instance is associated with. A message appears to confirm that the form has been successfully posted to the transactional tables. This button is available only for form instances in *Approved* status that have a defined component interface mapping, and only to users that have access to the application component that is associated with the component interface to which the form is mapped. For example, if a user has access to the Department component then they will have access to this button if the form instance has been approved and the form is set up to integrate with the Department component interface.
Related Documents	Click the document key string link within this grid to access the data within the related component. Available only for successfully posted forms.

Attachments

The attachments page enables form users to download any attachments that were defined as part of the form, as well as upload any documents that are required for the form to be approved.

<Portal label (approval preview)> Page

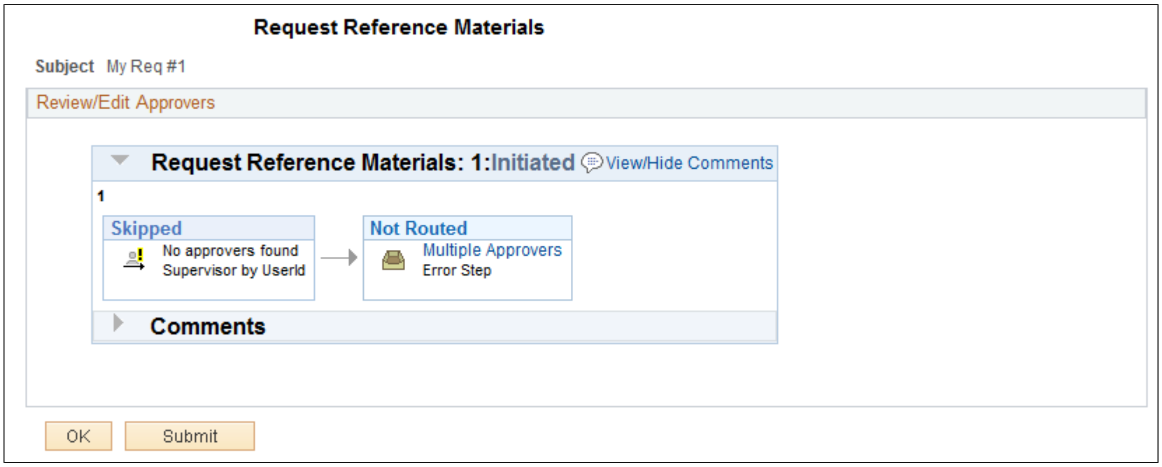
Use the <portal label (approval preview)> page (FORM_APPR_MAP) to preview the approval path for a form.

Navigation

Click the Preview Approval button on the Form page.

Image: <portal label (approval preview)> page

This example illustrates the fields and controls on the <portal label (approval preview)> page. You can find definitions for the fields and controls later on this page.



Request Reference Materials

Subject My Req #1

Request Reference Materials: 1:Initiated

Skipped
No approvers found
Supervisor by UserId

Not Routed
Multiple Approvers
Error Step

Click the Submit button to submit the form for approval, or click the OK button to return to the form page.

➕	Click to insert additional approvers after the form has been submitted. **Note:** You can only insert ad-hoc approvers.

Related Links

"Understanding Approval Features *(PeopleSoft 9.2: Approval Framework)*"

Form Approval Page

Use the Form Approval page (FORM_APPR_ACTION) to approve or deny a form.

Navigation

Enterprise Components, Forms, Approve/Review a Form

Approvers can also access pending forms from their worklist.

Enter any comments, then click Approve or Deny to update the form.

Related Links

"Understanding Approval Features *(PeopleSoft 9.2: Approval Framework)*"

Integrating Forms with PeopleSoft Applications

This section provides an overview of form integration and discusses how to:

- Map form fields with component interfaces.
- View integrated form instances.

Pages Used to Integrate Forms with PeopleSoft Applications

Page Name	***Definition Name***	***Navigation***	***Usage***
Form to CI Collection Mapping	EODC_CI_MAP	Enterprise Components, Forms, Form to CI Mapping	Map form fields to component interfaces.
Document Form References	EODC_FORM_XREF	Enterprise Components, Forms, Document Form References	View the form instances that updated a component.

Understanding Form Integration

Forms and approval builder includes a framework that enables you to integrate forms with PeopleSoft application components. Using this integration is optional, and involves creating component interfaces for the components you want the form to integrate with, then mapping the form fields to their associated component interface fields. Only those with PeopleTools expertise should be involved with setting up the integration. The integration can be used only to add new records, not to update existing data.

Integration is limited to simple transactions; only one row per component level can be mapped. For example, you can create a new department with only one effective dated row (Level 1) and one chartfield attribute/value pair (Level 2). You cannot insert multiple rows per level using this feature.

Note: This documentation assumes you have experience with component interfaces, security, and Application Designer. This framework is designed to help implement form integration with the transactional PeopleSoft system; it is not designed for end users. When implementing this feature, care should be taken to follow the standard methodology required for all software development, especially testing the form integration before deploying it to a production environment.

For more information, please refer to the following product documentation:

See *PeopleTools: PeopleSoft Application Designer Developer's Guide* and *PeopleTools: PeopleSoft Component Interfaces*

Integration Framework

The forms integration framework includes the following objects:

Form to CI Collection Mapping Component (EODC_CI_MAP) (Form to Component Interface Collection Mapping Component)	The pages within this component enable you to: • Associate a form with one or more PeopleSoft application component interfaces. • Map form fields to the component interface properties. These mappings serve as input to the forms integration framework, which is used to post the form data to the PeopleSoft transactional tables, and also provides a link from the form to the transactional components. See Form to CI Collection Mapping Page.
Forms Integration Framework Application Classes	These application classes use the form to CI mappings to post form instance data to the PeopleSoft application through the component interface.
Approval Framework	Used to provide notifications and worklist entries for forms.
Security	Once a form is approved, form users with add/update access to the application component that the form is associated with (specified by the component interface it is mapped to) are able to post the form to the PeopleSoft application, using the Save & Post button that is available on the Forms page.

After the form has been successfully submitted to the PeopleSoft application, no additional changes to the form are allowed.

Form Integration Implementation Steps

Integrating forms involves the following steps:

1. Determine the component in the PeopleSoft application that you want the form to integrate with.
2. Create a component interface to use for the integration, following the guidelines provided in the Component Interface Guidelines section that follows.

   See the *Component Interface Guidelines* section in this topic.
3. Design the form using the Form Design Wizard, following the guidelines provided in Form Design Guidelines section that follows.

   Keep in mind the structure of the CI you wish to map to. You must ensure the fields of your form are of the correct data type to map to the CI fields, and that you have all of the fields listed on your form that the CI is going to require.

   See the *Form Design Guidelines* section in this topic.
4. Map the form to the component interface properties, using the Form to CI Collection Mapping page.

   See Form to CI Collection Mapping Page.
5. Once the Form Design and Form To CI Mappings have been properly tested, copy them to the production database.

   You need to copy the required integration objects (for example, new component interfaces that you created for the Form to CI Integration, new prompt records, and so on), the form design, and form to CI mappings. The Form To CI Mappings are located in these records: EODC_DOC_HDR, EODC_DOC_LN, and EODC_CI_MAP.

   If the underlying CI or form design changes after being released to the production database, you must review the mappings and ensure that they are still valid.

Component Interface Guidelines

Because forms generally do not contain a large number of fields, to simplify the form to CI collection mapping, we recommend that you create separate component interfaces when you implement the form integration. Consider the following recommendations when creating these component interfaces:

- Make the CI Collection Name for all levels the same as the Component Level Main Record. This should be the default when creating the Component Interface.
- Make sure that the Read Only attribute of the CI Properties is *not* set to Y.

  Integration may fail if the CI property is set to Read Only
- Remove all unwanted CI Properties so that you expose only those needed for the integration.

- Update the appropriate permission lists (EOFM2000 and EOFM4000, for example) to grant access to the newly created component interfaces.

  Form approvers must have access to the related component interface to be able to post integrated forms.

Form Design Guidelines

Keep the following considerations in mind when designing integrated forms:

- For every form field that will map to a CI property, both the CI property and the corresponding form field must have the same field type and field length.

  Note: If the required field length is not available in the form designer, then choose either a shorter or longer field length. If you choose a longer field length, the value will be truncated before it is posted to its associated transaction table.

- For prompt fields, the prompt values must match those in the prompt list of the CI property they map to; this may require you to create a new prompt.
- For code fields, you must ensure that the codes are the same as those of the CI Property being mapped to.
- Set all the required fields according to the base component associated with the CI, otherwise an error message that a required field has not been completed will appear when a form user attempts to save and post the form data.

Form to CI Collection Mapping Page

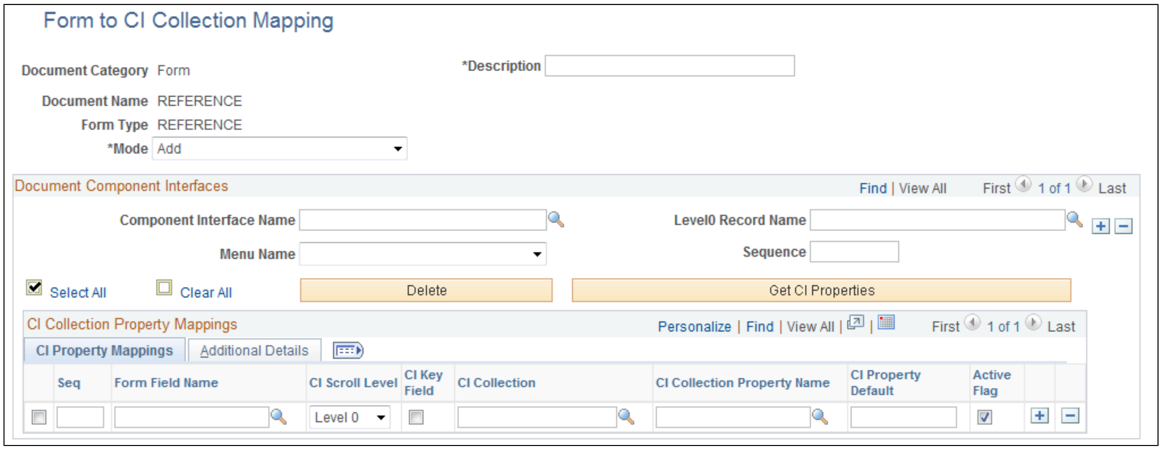
Use the Form to CI Collection Mapping page (EODC_CI_MAP) to map form fields to component interfaces.

Navigation

Enterprise Components, Forms, Form to CI Mapping

Image: Form to CI Collection Mapping page

This example illustrates the fields and controls on the Form to CI Collection Mapping page. You can find definitions for the fields and controls later on this page.



Form to CI Collection Mapping

Document Category Form

Document Name REFERENCE

Form Type REFERENCE

*Mode Add

*Description
Document Component Interfaces
Find | View All
First 1 of 1 Last
Component Interface Name
Level0 Record Name
Menu Name
Sequence
Select All
Clear All
Delete
Get CI Properties
CI Collection Property Mappings
Personalize | Find | View All |
First 1 of 1 Last
CI Property Mappings
Additional Details
Seq
Form Field Name
CI Scroll Level
CI Key Field
CI Collection
CI Collection Property Name
CI Property Default
Active Flag
Level 0

Document Category	Indicates the type of document. Currently, *Form* is the only valid value.
Document Name	Select the form to map.
Description	Enter a description for the mapping.
Form Type	Automatically populates to the same value as Document Name. You cannot edit this field.
Mode	Select the action allowed to the component when a form instance is saved. For this release, *Add* is the only permitted option.

Document Component Interfaces

Insert a row for each component interface to associate with the form and complete the following fields:

Component Interface Name	Select the component interface to associate with the form.
Menu Name	Select the name of the registered menu item of the component interface. The value for this field is automatically populated when you specify the component interface name, but if there is more than one menu associated with the CI, then you can select the required one. When a form user completes an instance of the form, the system transfers them to this menu item when they click Link to Related Component on the form instance.
Level0 Record Name	Select the Level0 record of the component interface to associate with the form.
Sequence	Enter a number to specify the order in which to execute the component interface. When mapping multiple component interfaces to a form, this is especially important if there are data dependencies.
Get CI Properties	Click to populate the CI Collection property Mappings grid with the values for the specified component interface. You can then remove or update any fields as required. Alternatively, you can manually add each row within the CI Collection property Mappings grid.

CI Collection Property Mappings

Define the mapping for each form field in this grid. You can either add rows individually for each form field you want to map (recommended when there are only a few fields to map), or you can click Get CI Property Mapping to populate the grid with all the CI properties, select the form field that maps to each property, specify field defaults, then delete any rows you do not need.

Seq (sequence)	Enter a number to specify the order in which to process the field mapping. Processing order is important because any data in a

	form that depends on other data must be processed after the data on which it depends is entered.
Form Field Name	Select the name of the form field to map. Only form fields with *Active* status appear in the selection list.
CI Scroll Level	Select the CI component buffer level to map the field to. Three levels are supported.
CI Key Field	Select to specify the field is a key field. You must specify all the key fields associated to the Level0 main record. For lower levels, you specify only any additional keys; you do not need to repeat the Level 0 keys. For example, if Level0 keys are SETID and DEPTID, and Level1 keys are SETID, DEPTID, and EFFDT, then select the CI Key Field check box for SETID and DEPTID for Level 0, for level1 select the CIKey Field check box for EFFDT. The CI Key Field check box is selected initially, so you must review and adjust these for each field.
CI Collection	Select the name of the CI Collection to map to this form field.
CI Collection Property Name	Select the name of the CI Collection property to map to this form field.
CI Property Default	Enter a value in this field to define a default value to assign to this field when the form is used. For example, you could map the SETID form field to the CI Property of SETID and set the default value to SHARE. When a form user creates a new form instance, the SETID field on the form will be initially set to SHARE, but the form user can override the default value as needed. Default values are currently limited to number, text, and date. Date values must be entered in YYYYMMDD format.
Active Flag	Select to activate the field mapping, deselect to inactivate the field mapping. Inactive mappings are ignored by the Form to CI Framework when posting data to the transactional tables.
CI Level Main Record	Select the component level main record that is associated with the CI Collection. This information is required since a CI property can potentially be associated with a work record, and the system needs to know the CI Level Main Record information in the mapping so that the framework can identify it.
CI Parent Collection Name	Lists the parent collection associated with the corresponding CI Collection. For example, for a Level 1 CI Collection, the parent collection will always be PS_ROOT. This value is automatically populated.

CI Record Name	Lists the component record name associated with the corresponding CI Property. This value is automatically populated based on the CI Collection and CI Collection Property.
CI FieldName	Lists the component field name associated with the corresponding CI Property. This value is automatically populated based on the CI Collection and CI Collection Property. The system uses both CI Record Name and CI Field Name to perform the default value validation and conversion (the default value currently supports only string values, therefore, it needs to be converted to the appropriate field type (Number or Date)).

Document Form References Page

Use the Document Form References page (EODC_FORM_XREF) to view the form instances that updated a component.

Navigation

Enterprise Components, Forms, Document Form References

For each form instance that integrated with the specified component interface, the following information is provided:

Document Key String	Displays the concatenation of the values of all the form's key fields separated by the slash character (/), for example, SHARE/0000000065.
Form	Lists the name of the form.
Form Instance	Lists the unique form instance.
Subject	Lists the form's subject. Click to access the Form page.
Action	Lists the mode by which the component was modified. Currently, only Add mode is supported.
Last Updated By and Last Update Date/Time	Lists the user that most recently updated the form, and the date and time it was modified.

Chapter 7

Configuring Toolbars

Understanding Toolbars

This section discusses:

- Toolbar elements.
- Delivered toolbars.
- Delivered toolbar buttons.

Toolbar Elements

A toolbar contains these parts:

- Title area.
- Button bar.
- Component-specific data.
- Toolbar footer.

Title Area

Based on the configuration, the title area includes one or more of these controls:

- Page title, if enabled, is shown left-aligned on top of the toolbar buttons.
- Date and time, if enabled, is shown right aligned on top of the toolbar buttons.

See Toolbar Definition - Description Page.

Button Bar

The button bar is similar to a browser's toolbar. It can include the following elements:

- PeopleTools actions

  This includes buttons such as Save, Refresh, Add, Next in List, Previous in List, Return to Search, and Update/Display, which map to the corresponding buttons (which are available at the bottom of a page) that are defined in PeopleTools.

- Custom actions

  This includes buttons that perform application-specific actions, such as cloning a case. Often, clicking a custom button displays a page on which you complete the action.

- The Personalize action

  This enables users to reconfigure the buttons on the button bar.

You can choose which toolbar elements to display and, for PeopleTools and custom actions, you can define their appearance sequence. There are two kinds of toolbar buttons: primary and secondary. Primary toolbar buttons are orange-colored, rectangular buttons with text label on them. They always appear on the left of the toolbar, and cannot be hidden through user personalizations. Secondary toolbar buttons, on the other hand, can be configured to show only the button icon, the text label, or both. End users can hide secondary toolbar buttons through personalizations, if the buttons are configured to support this functionality in the toolbar definition.

Also, you can modify the delivered toolbar buttons' definitions, or you can create new toolbar buttons using application classes.

See Toolbar Definition - Button Page.

Component-Specific Data

Under the button bar, the toolbar displays summary information about the object that you are viewing. For example, the Manage Job Opening toolbar shows summary information about the current job opening. PeopleCode in the underlying component makes this information available.

When you configure a toolbar, you choose which and how summary data appear.

See Toolbar Definition - Content Page

Toolbar Footer

If a page is too long to be displayed in a single browser window and you need to scroll to see the entire page, you can add a toolbar footer so that toolbar buttons are also available when users are at the bottom of the page. The toolbar footer is the same as the toolbar button area at the top of the page. One exception is that the footer has the Top of Page link instead of a Personalize link as you see in the header. When you click the right or left arrow for more buttons in either direction, the other toolbar shifts at the same time.

Delivered Toolbars

To obtain a list of system-delivered toolbars, and to identify the components and pages that use them, go to the Toolbar Definition component (Enterprise Components, Component Configurations, Toolbar, Toolbar Definition) and click Search without entering search criteria. The system displays all delivered toolbars on the Search Results list.

To review the buttons and display items that are available for use in toolbars, access the Toolbar Definition - Button Page and the Toolbar Definition - Content Page of the selected toolbar definition.

Delivered Toolbar Buttons

To obtain a list of system-delivered toolbar buttons, go to the Toolbar Button Definition component (Enterprise Components, Component Configurations, Toolbar, Toolbar Button Definition) and click Search without entering search criteria. The system displays all delivered buttons on the Search Results list.

Note that before you add a custom button to the toolbar of a component, confirm that the component has the PeopleCode to support the action that the button performs. For instance, do not include the Clone button in the toolbar of a component that does not have the code needed to support cloning.

Defining Toolbar Buttons

To define toolbar buttons, use the Toolbar Button Definition (EOTL_TB_BUTTON) component

Page Used to Define Toolbar Buttons

Page Name	***Definition Name***	***Navigation***	***Usage***
Toolbar Button Definition	EOTL_TB_BUTTON	Enterprise Components, Component Configurations, Toolbar, Toolbar Button Definition, Toolbar Button Definition	Define buttons for a toolbar.

Toolbar Button Definition Page

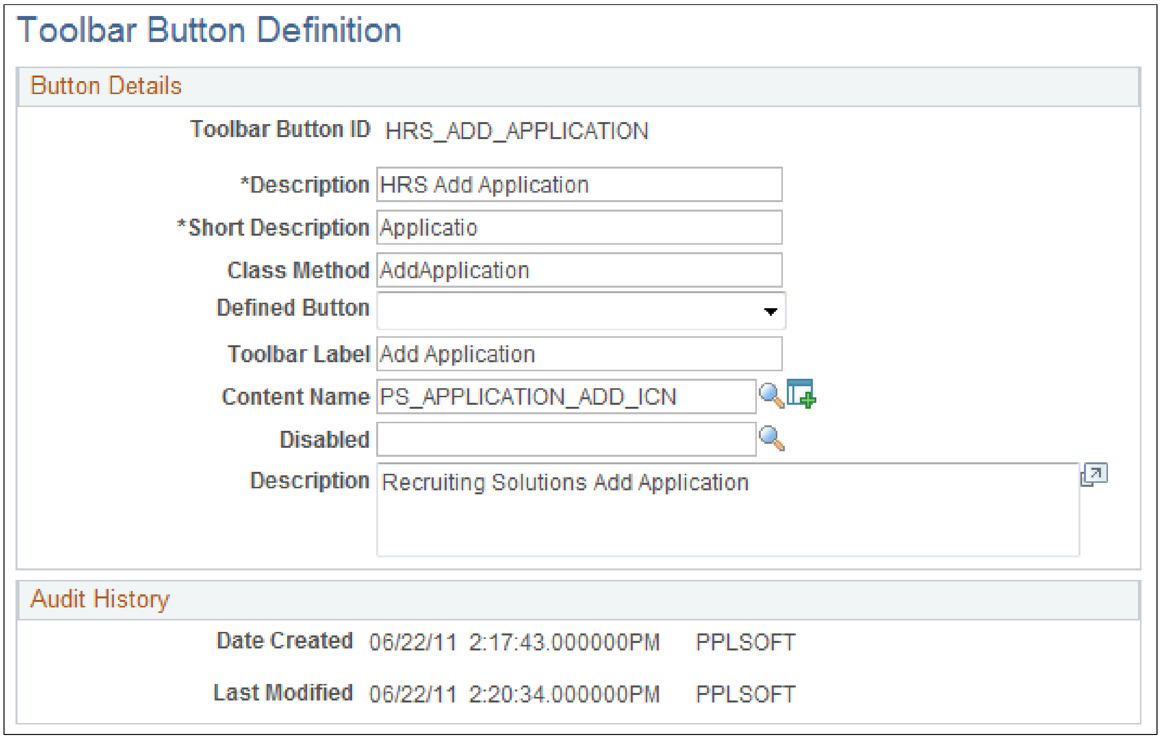
Use the Toolbar Button Definition page (EOTL_TB_BUTTON) to define buttons for a toolbar.

Navigation

Enterprise Components, Component Configurations, Toolbar, Toolbar Button Definition, Toolbar Button Definition

Image: Toolbar Button Definition page

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



Toolbar Button Definition

Button Details

Toolbar Button ID HRS_ADD_APPLICATION

*Description HRS Add Application

*Short Description Applicatio

Class Method AddApplication

Defined Button

Toolbar Label Add Application

Content Name PS_APPLICATION_ADD_ICN

Disabled

Description Recruiting Solutions Add Application

Audit History

Date Created 06/22/11 2:17:43.000000PM PPLSOFT

Last Modified 06/22/11 2:20:34.000000PM PPLSOFT

Toolbar Button ID	Displays the unique identifier of the toolbar button. This ID is referenced in PeopleCode to manipulate button properties.
Class Method	Enter the method name of the extended application class, which contains the PeopleCode that executes when a user clicks the button. This value does not contain spaces or special characters. **Note:** If you specify a value in this field, leave the Defined Button field blank.
Defined Button	Select a button value if the button is mapped to a PeopleTools-delivered action. Values are Add, CTI Phone Launch, Correction, Next Page In Component, Next in List, Previous Page In Component, Previous in List, Refresh, Related Links, Return to List, Save, Spell Check, Update/Display, and Update/Display All. These actions are the same as the similarly named PeopleTools buttons that normally appear at the bottom of a page.

Note: If you specify a value in this field, leave the Class Field field blank.

Toolbar Label	Enter the default button label, which is used as a tool tip for the button at runtime.
Content Name	Select the default icon that appears when the toolbar button is active. Select image definitions from the PeopleSoft image catalog. To use a custom graphic, you must add it to the catalog first.
Disabled	Originally used to specify the default icon that appeared when the toolbar button is inactive. Note that inactive toolbar buttons are now hidden rather than displayed: therefore the Disabled image is not used.
Description	Enter a detailed description, such as usage and comments, about the button.

Configuring Toolbars

To configure toolbars, use the Toolbar Definition (EOTL_TOOLBAR) component.

This section discusses how to:

- Define general toolbar attributes.
- Configure toolbar buttons.
- Configure component-specific toolbar content.
- Specify the default cursor position for pages.
- View the toolbar at runtime.

Pages Used to Configure Toolbars

Page Name	*Definition Name*	*Navigation*	*Usage*
Toolbar Definition - Description	EOTL_TOOLBAR_DEFN	Enterprise Components, Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Description	Define general toolbar attributes.
Toolbar Definition - Button	EOTL_TOOLBAR_BTNS	Enterprise Components, Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Buttons	Configure toolbar buttons.

Page Name	***Definition Name***	***Navigation***	***Usage***
Toolbar Definition - Content	EOTL_TOOLBAR_DISP	Enterprise Components Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Content	Configure component-specific toolbar content.
Toolbar Definition - Focus Fields	EOTL_TOOLBAR_FFLD	Enterprise Components, Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Focus Fields	Specify the default cursor position for pages.

Toolbar Definition - Description Page

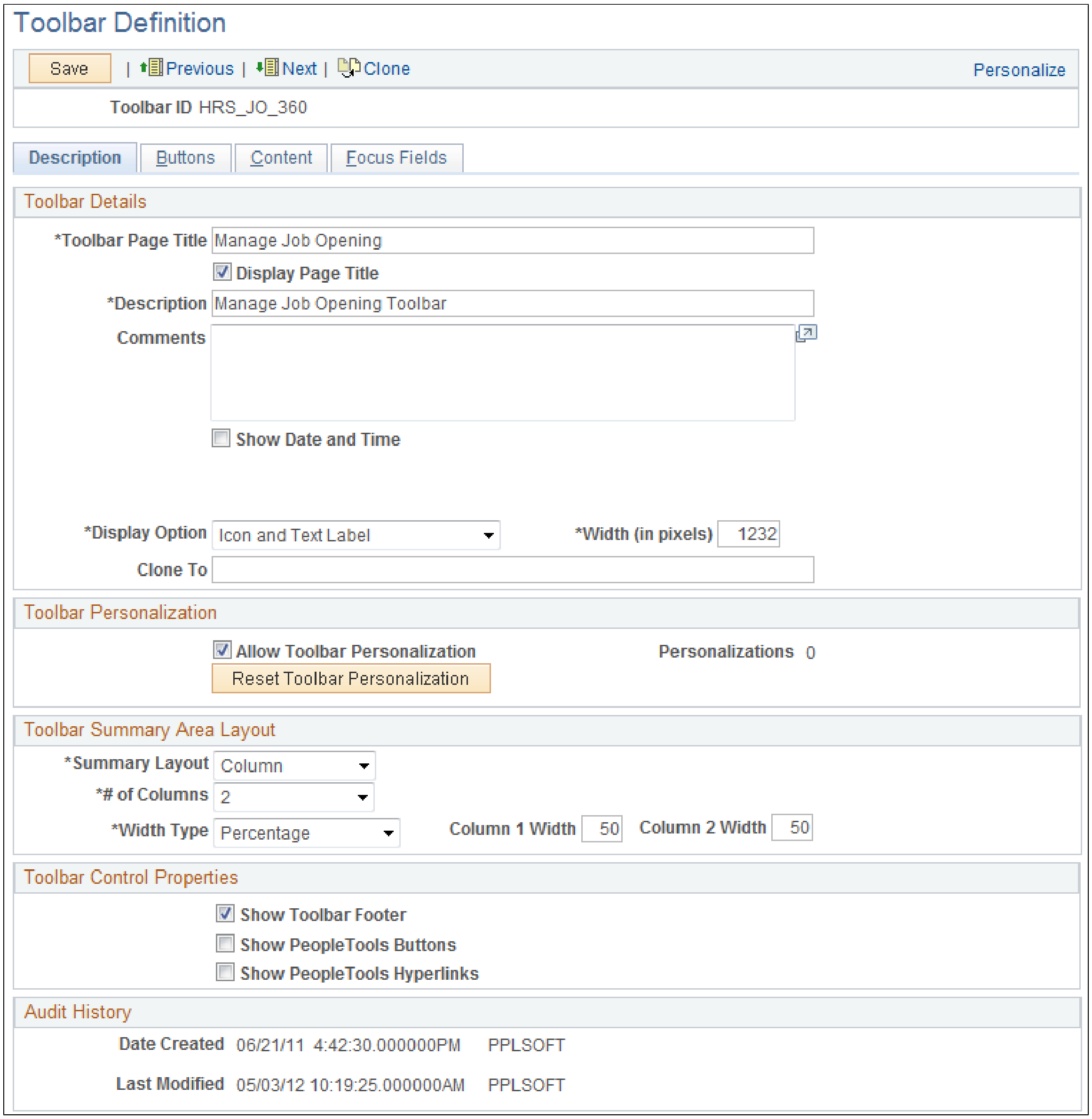
Use the Toolbar Definition - Description page (EOTL_TOOLBAR_DEFN) to define general toolbar attributes.

Navigation

Enterprise Components, Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Description

Image: Toolbar Definition - Description page

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


Toolbar Definition
Save
Previous
Next
Clone
Personalize
Description
Buttons
Content
Focus Fields
Reset Toolbar Personalization

Toolbar ID HRS_JO_360

Toolbar Details

*Toolbar Page Title: Manage Job Opening
☑ Display Page Title
*Description: Manage Job Opening Toolbar
Comments:
☐ Show Date and Time
*Display Option: Icon and Text Label
*Width (in pixels): 1232
Clone To:

Toolbar Personalization

☑ Allow Toolbar Personalization
Personalizations 0

Toolbar Summary Area Layout

*Summary Layout: Column
*# of Columns: 2
*Width Type: Percentage
Column 1 Width: 50
Column 2 Width: 50

Toolbar Control Properties

☑ Show Toolbar Footer
☐ Show PeopleTools Buttons
☐ Show PeopleTools Hyperlinks

Audit History

Date Created 06/21/11 4:42:30.000000PM PPLSOFT
Last Modified 05/03/12 10:19:25.000000AM PPLSOFT

Toolbar ID	Displays the toolbar's unique identifier. This ID is referenced in PeopleCode to manipulate toolbar properties.

Toolbar Details

Toolbar Page Title	Enter a page title that is displayed on the left side of the page above the toolbar buttons. A page title is not a required toolbar element, but it is recommended.
Display Page Title	Select to have the page title displayed. The default state for page title is set to *On*. Page title can be set dynamically through PeopleCode.
Description	Enter a description of the toolbar (for example, the name). This is a required field that is used to help users identify the toolbar on the Toolbar Definition component.
Show Date and Time	Select to have the date and time (in the user's time zone) appear on the toolbar when the user accessed the component associated with the toolbar.
Display Option	Select *Icon Only, Icon and Text Label,* or *Text Only.* You can see about seven buttons on the toolbar at a time, if both the button and text are displayed. This number varies depending on the length of text and language used in the application. Grey vertical separators appear between each button. Text links are active links all the time, not just on the roll over state. Buttons are clickable as well as any space between the button and the text. Any remaining buttons can be accessed by using the << or >> button on the left and right side of the buttons. Only secondary buttons are scrollable; primary buttons always appear. When you scroll to the right, the last button to the right becomes the first button on the next scroll set. The same is true when you scroll to the left.
Width (in pixels)	Enter the width of the toolbar in pixels. The default toolbar width is set to 745 pixels.
Clone To	Enter the ID of the new toolbar that the system clones from the current toolbar when a user clicks the clone button on the toolbar of this page.

Toolbar Personalizations

Allow Toolbar Personalization	Select to allow toolbar personalization.
Personalizations	Displays the number of user personalizations that the toolbar currently has. This information helps administrators to evaluate the usability of the current toolbar settings and to determine the impact that updating a toolbar has on users.
Reset Toolbar Personalizations	Click to delete any toolbar personalizations that users performed.

When changes to the toolbar functionality occur, administrators can use this button to refresh users' toolbar settings.

Toolbar Summary Area Layout

Summary Layout	Select *Column* or *Row.* The summary information area will be displayed under the button bar only after a customer or contact has been selected. Depending on the application, the summary area may contain other information besides customer information. The information in the content area is displayed in a two-column format, with the number of fields being configurable.
# of Columns (number of columns)	You can select a one or two column display if you select columns for the summary layout. The recommended number of columns is *2.*
Width Type	Define the width of the columns using either a pixel or percentage amount.
Column 1 Width and Column 2 Width	Enter the width of the item display area in pixels or as a percentage of the total toolbar width. If pixel is used, be sure that the sum of width of the columns does not equal or exceed the toolbar width value (some border and spacing values make the total width less than the toolbar width specified). If percentage is used, be sure that the width of all columns does not exceed 100%.

Toolbar Control Properties

Select to have the toolbar footer, PeopleTools buttons, and PeopleTools links displayed. It is suggested that you disable the PeopleTools buttons and links from being displayed because it may cause confusion to users if the button used for the same function appears twice on a page. When using a new toolbar, it is recommended that you disable the PeopleTools generated folder tabs from the component property settings.

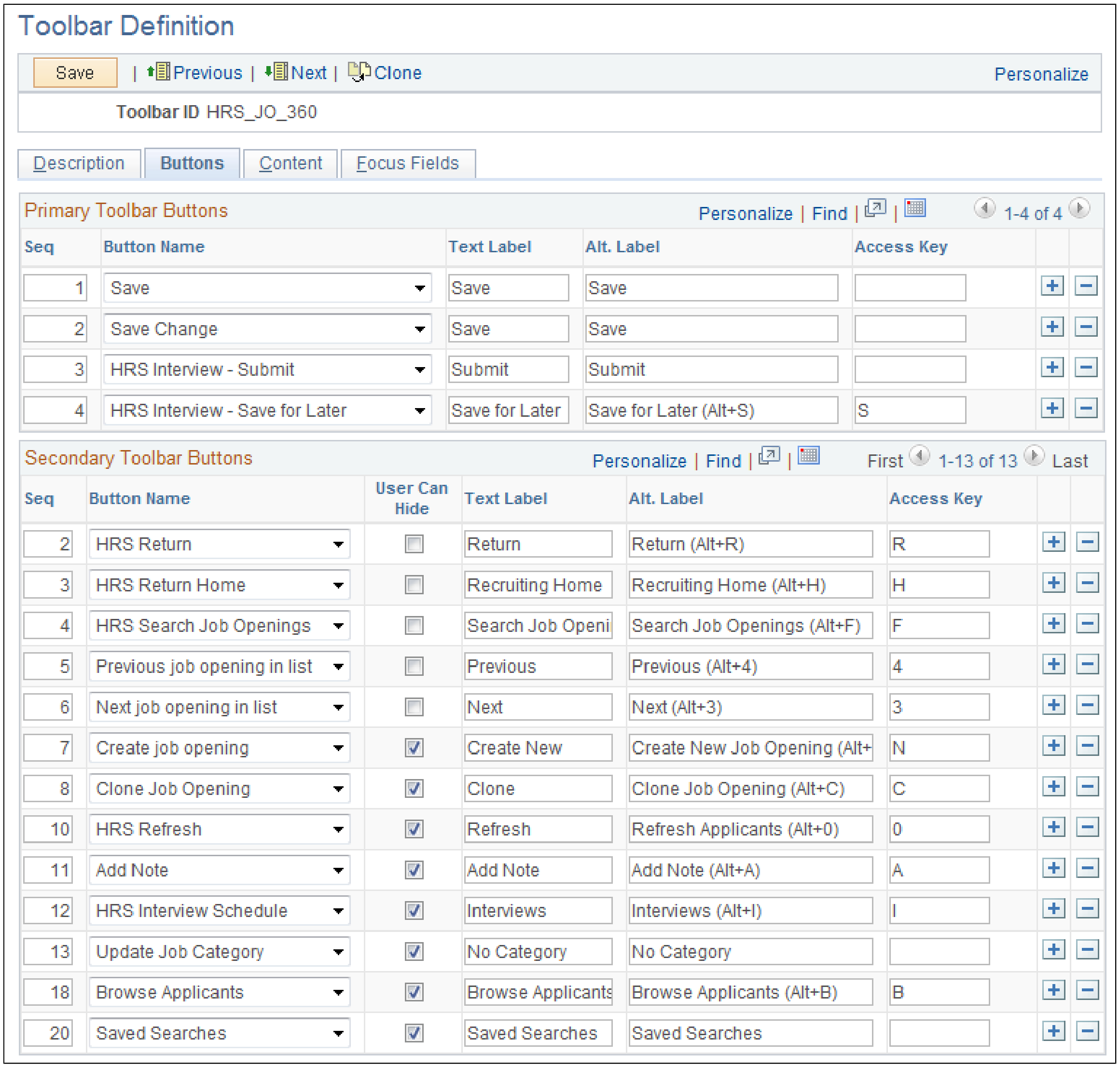
Toolbar Definition - Button Page

Use the Toolbar Definition - Button page (EOTL_TOOLBAR_BTNS) to configure toolbar buttons.

Enterprise Components, Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Buttons

Image: Toolbar Button Definition - Buttons page

This example illustrates the fields and controls on the Toolbar Button Definition - Buttons page. You can find definitions for the fields and controls later on this page.



Toolbar Definition

Toolbar ID HRS_JO_360

Primary Toolbar Buttons

Seq	Button Name	Text Label	Alt. Label	Access Key
1	Save	Save	Save	
2	Save Change	Save	Save	
3	HRS Interview - Submit	Submit	Submit	
4	HRS Interview - Save for Later	Save for Later	Save for Later (Alt+S)	S

Secondary Toolbar Buttons

Seq	Button Name	User Can Hide	Text Label	Alt. Label	Access Key
2	HRS Return	☐	Return	Return (Alt+R)	R
3	HRS Return Home	☐	Recruiting Home	Recruiting Home (Alt+H)	H
4	HRS Search Job Openings	☐	Search Job Openi	Search Job Openings (Alt+F)	F
5	Previous job opening in list	☐	Previous	Previous (Alt+4)	4
6	Next job opening in list	☐	Next	Next (Alt+3)	3
7	Create job opening	☑	Create New	Create New Job Opening (Alt+	N
8	Clone Job Opening	☑	Clone	Clone Job Opening (Alt+C)	C
10	HRS Refresh	☑	Refresh	Refresh Applicants (Alt+0)	0
11	Add Note	☑	Add Note	Add Note (Alt+A)	A
12	HRS Interview Schedule	☑	Interviews	Interviews (Alt+I)	I
13	Update Job Category	☑	No Category	No Category	
18	Browse Applicants	☑	Browse Applicants	Browse Applicants (Alt+B)	B
20	Saved Searches	☑	Saved Searches	Saved Searches	

Seq (sequence)	Enter sequence numbers to determine the order of the toolbar buttons.
Button Name	Select the button to place on the toolbar. Buttons that perform custom actions cannot necessarily be shared between components because these actions can be component-specific. Use the separator image (a vertical line) as needed to group buttons.
User Can Hide	Select to allow users to show or hide the button from the toolbar on the Personalize Toolbar page.

	You may not want to give users the ability to manipulate the visibility of some basic yet important toolbar functions, such as Save or Add. In this case, clear the check box of these buttons. These buttons become required buttons that users cannot manipulate on the Personalize Toolbar page. They always show up in the toolbar.
Text Label	Specify the text that is displayed on the button (for primary toolbar buttons) or next to the button (for secondary toolbar buttons) if the toolbar is configured to show both button icon and text.
Alt. Label (alternate label)	Enter the text that users can see if they put the mouse over the button.
Access Key	If you enter an access key, the keyboard shortcut Alt + *access key* brings the system focus to the associated button. You must terminate the access key with the enter key to execute the toolbar button function associated with the hotkey. Access key is disabled in toolbar footers.

Toolbar Definition - Content Page

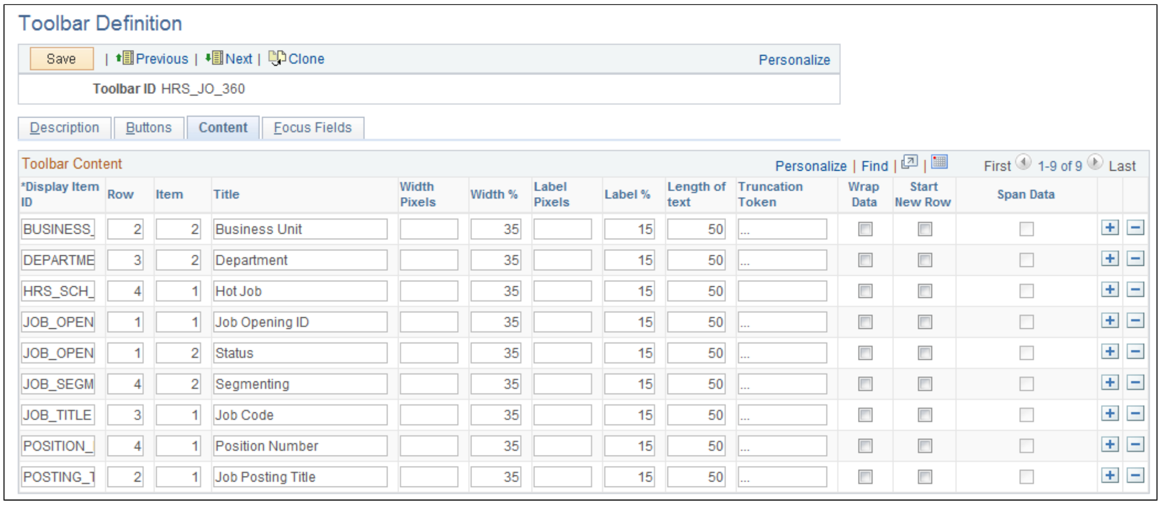
Use the Toolbar Definition - Content page (EOTL_TOOLBAR_DISP) to configure component-specific toolbar content.

Navigation

Enterprise Components Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Content

Image: Toolbar Definition - Content page

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



Toolbar ID HRS_JO_360

*Display Item ID	Row	Item	Title	Width Pixels	Width %	Label Pixels	Label %	Length of text	Truncation Token	Wrap Data	Start New Row	Span Data
BUSINESS_	2	2	Business Unit		35		15	50	...	☐	☐	☐
DEPARTME	3	2	Department		35		15	50	...	☐	☐	☐
HRS_SCH_	4	1	Hot Job		35		15	50		☐	☐	☐
JOB_OPEN	1	1	Job Opening ID		35		15	50	...	☐	☐	☐
JOB_OPEN	1	2	Status		35		15	50	...	☐	☐	☐
JOB_SEGM	4	2	Segmenting		35		15	50	...	☐	☐	☐
JOB_TITLE	3	1	Job Code		35		15	50	...	☐	☐	☐
POSITION_	4	1	Position Number		35		15	50	...	☐	☐	☐
POSTING_1	2	1	Job Posting Title		35		15	50	...	☐	☐	☐

Display Item ID	Enter the ID of the data to appear on the toolbar. The ID and the data that it references come from an array that component PeopleCode populates.
Row	Enter the toolbar row in which the content appears. Row 1 appears under the button bar. If you define display items for additional rows, those rows appear in order under row 1.
Item	Enter the position of the item in the row. Enter *1* for the item that appears in the leftmost position in the row, *2* for the next label to the right, and so forth.
Title	Enter a label for the item.
Width Pixels, Width %, Label Pixels and Label %	Enter the width of the display item label and data in pixels or as a percentage of the total toolbar width. If the latter, be sure that the total percentage for all fields on the same row does not exceed 100%. It is recommended that you indicate widths in percentage because the toolbar layout is adjusted automatically. The general guideline is 20% for the display item label, and 30% for the display item data. If pixel is used (for advanced HTML usage), the total width of all display columns on the same row should not equal or exceed the width of the toolbar as defined.
Length of text	Enter the maximum number of characters of data (not label text) that can appear in this row. The text is truncated with the specified truncation token if it exceeds the length of text value, and is wrapped if it is too long for the width that you specify.
Truncation Token	Enter the characters that indicate truncated data. This appears when the data is longer than the value that you entered in the Length of text field.
Wrap Data	Select to wrap data if its length exceeds what is specified for the text length.
Start New Row	Select if the display item should start on the next new row.
Span Data	Select to let the display item span across horizontally to use the other column to display its long item value. This option is enabled only when Start New Row field is selected.

Toolbar Definition - Focus Fields Page

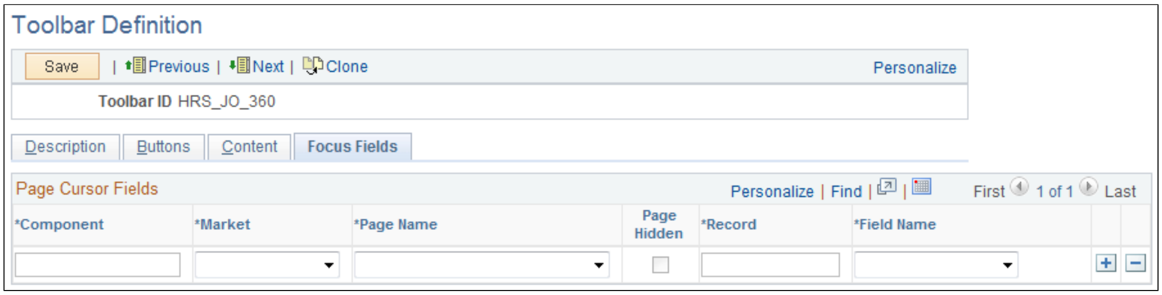
Use the Toolbar Definition - Focus Fields page (EOTL_TOOLBAR_FFLD) to specify the default cursor position for pages.

Navigation

Enterprise Components, Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Focus Fields

Image: Toolbar Definition - Focus Fields page

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


Toolbar Definition
Save
Previous
Next
Clone
Personalize
Description
Buttons
Content
Focus Fields
Page Cursor Fields
Personalize | Find
First
1 of 1
Last
*Component
*Market
*Page Name
Page Hidden
*Record
*Field Name

Toolbar ID HRS_JO_360

For pages that uses the toolbar, you can specify the field in which the cursor always appears when the page is rendered. The toolbar doesn't set the cursor position for any page that either doesn't have a focus field defined in the toolbar definition or its focus field doesn't exist on the page, for example, the button is hidden, or is removed from the page after the toolbar definition.

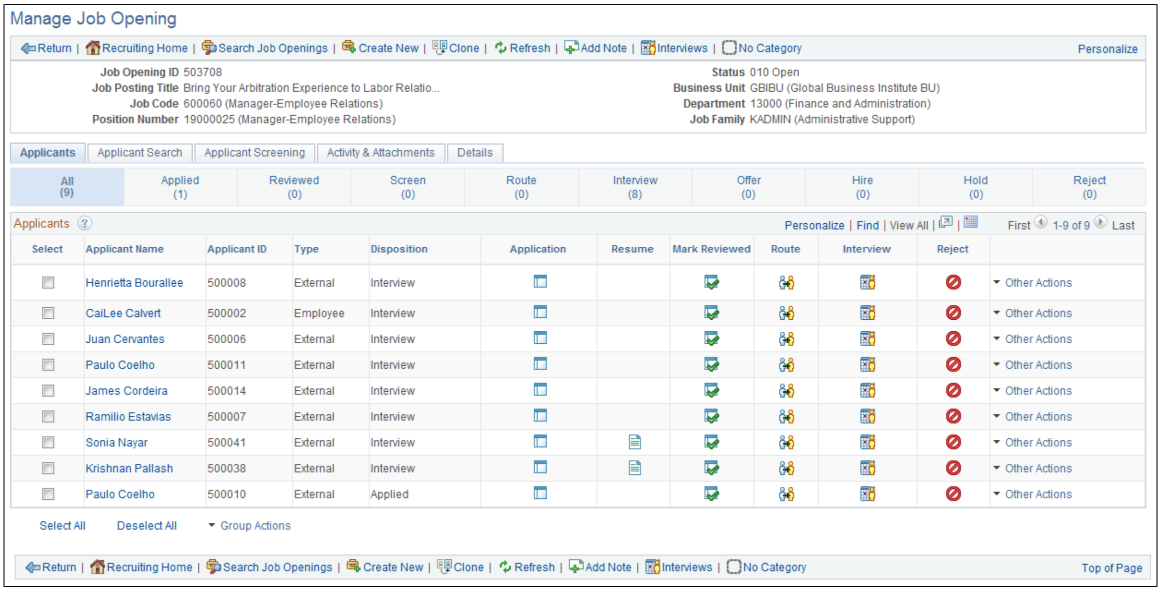
Component, Market, and Page Name	Enter the component and market of the page in which the selected toolbar definition is referenced. The component you enter determines the drop-down values for page names.
Record and Field Name	Enter the record where the focus field resides and the focus field itself. The record you enter determines the drop-down values for field names. Multiple fields on the same page can be defined. This is useful when you want to set the cursor on a different field when the user enters the page in a different type of transaction mode. The toolbar always puts the cursor to the first editable, available field on the page.

Viewing the Toolbar at Runtime

Access any PeopleSoft page that uses the toolbar.

Image: Toolbar used on the Manage Job Opening page (HRS_JO_360)

This example illustrates the toolbar used on the Manage Job Opening page (HRS_JO_360).


Manage Job Opening
Return | Recruiting Home | Search Job Openings | Create New | Clone | Refresh | Add Note | Interviews | No Category
Personalize
Applicants
Applicant Search
Applicant Screening
Activity & Attachments
Details
All (9)
Applied (1)
Reviewed (0)
Screen (0)
Route (0)
Interview (8)
Offer (0)
Hire (0)
Hold (0)
Reject (0)
Applicants
Personalize | Find | View All
First 1-9 of 9 Last
Select All
Deselect All
Group Actions
Return | Recruiting Home | Search Job Openings | Create New | Clone | Refresh | Add Note | Interviews | No Category
Top of Page

Job Opening ID 503708
Job Posting Title Bring Your Arbitration Experience to Labor Relatio...
Job Code 600060 (Manager-Employee Relations)
Position Number 19000025 (Manager-Employee Relations)
Status 010 Open
Business Unit GBIBU (Global Business Institute BU)
Department 13000 (Finance and Administration)
Job Family KADMIN (Administrative Support)

Select	Applicant Name	Applicant ID	Type	Disposition	Application	Resume	Mark Reviewed	Route	Interview	Reject	
☐	Henrietta Bourallee	500008	External	Interview	▭		☑	👥	📅	⊘	Other Actions
☐	CaiLee Calvert	500002	Employee	Interview	▭		☑	👥	📅	⊘	Other Actions
☐	Juan Cervantes	500006	External	Interview	▭		☑	👥	📅	⊘	Other Actions
☐	Paulo Coelho	500011	External	Interview	▭		☑	👥	📅	⊘	Other Actions
☐	James Cordeira	500014	External	Interview	▭		☑	👥	📅	⊘	Other Actions
☐	Ramilio Estavias	500007	External	Interview	▭		☑	👥	📅	⊘	Other Actions
☐	Sonia Nayar	500041	External	Interview	▭	📄	☑	👥	📅	⊘	Other Actions
☐	Krishnan Pallash	500038	External	Interview	▭	📄	☑	👥	📅	⊘	Other Actions
☐	Paulo Coelho	500010	External	Applied	▭		☑	👥	📅	⊘	Other Actions

Confirm that the toolbar buttons, content, and other controls work and are displayed as intended.

At runtime, you can find out which toolbar that a page is using (for debugging purposes). To do so, right click on the toolbar area of the page to view the HTML source code, and look for keywords *TOOLBAR ID* If the page uses the toolbar, a comment appears in the source code that indicate the actual toolbar being used, for example:

```
<!-- TOOLBAR ID: [HRS_JO_360] -->
```

Personalizing Toolbars

End users can personalize which buttons appear on the toolbar. Personalized configurations are associated with user IDs and do not affect the base toolbar definition. As an administrator, you can decide (during setup) whether users can personalize toolbars, and specify which buttons in the toolbar can be hidden by users in the personalization process.

This section discusses how to set toolbar preferences.

Page Used to Personalize Toolbars

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Toolbar	EOTL_TB_USER_PRSN	Click the toolbar's Personalize link on the page whose toolbar you want to personalize.	Set toolbar preferences.

Personalize Toolbar Page

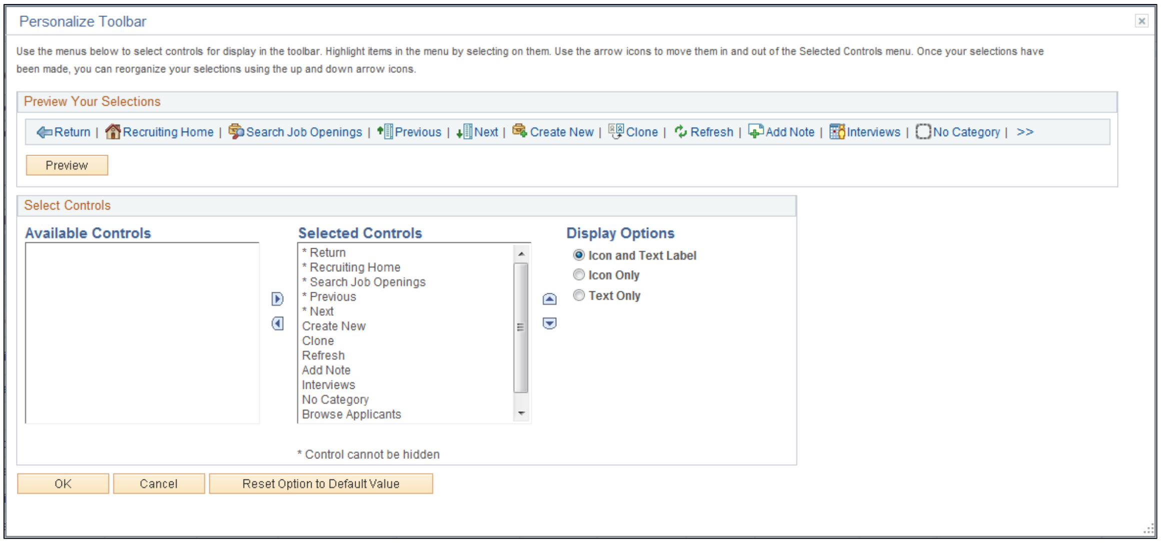
Use the Personalize Toolbar page (EOTL_TB_USER_PRSN) to set toolbar preferences.

Navigation

Click the toolbar's Personalize link on the page whose toolbar you want to personalize.

Image: Personalize Toolbar age

This example illustrates the fields and controls on the Personalize Toolbar age. You can find definitions for the fields and controls later on this page.



Personalize Toolbar

Use the menus below to select controls for display in the toolbar. Highlight items in the menu by selecting on them. Use the arrow icons to move them in and out of the Selected Controls menu. Once your selections have been made, you can reorganize your selections using the up and down arrow icons.

Display Options: ● Icon and Text Label ○ Icon Only ○ Text Only

Preview Your Selections
Return | Recruiting Home | Search Job Openings | Previous | Next | Create New | Clone | Refresh | Add Note | Interviews | No Category | >>
Preview
Select Controls
Available Controls
Selected Controls
* Return
* Recruiting Home
* Search Job Openings
* Previous
* Next
Create New
Clone
Refresh
Add Note
Interviews
No Category
Browse Applicants
* Control cannot be hidden
Display Options
OK
Cancel
Reset Option to Default Value

Note: If the Personalize link is not present on a toolbar, then that toolbar is not user-configurable.

Select Controls

Users can move buttons from Available Controls to Selected Controls for them to be displayed on the toolbar. In addition, the user can choose to view icons or text or both. Buttons with an asterisk are not subject to user personalization. They always show up in the toolbar.

After making some changes, click the Preview button to view the toolbar updated in real time.

Upon return from the page, the Personalized setting is automatically saved.