PeopleSoft®

PeopleTools 8.42
Development Tools
Using PeopleSoft Applications

November 2002

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Development Tools
Using PeopleSoft Applications
SKU TOOLS842UPA-B 1102

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Printed in the United States.

Contents

About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications.*

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a 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 this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not 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 W.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date The last date for which a report or process includes data.

Business Unit An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description Enter up to 30 characters of text.

Effective Date The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run** Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

Run Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Request ID An ID that represents a set of selection criteria for a report or process.

User ID An ID that represents the person who generates a transaction.

SetID An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.

Short Description Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

Using PeopleSoft Applications Preface

This preface provides useful information about PeopleBooks in general and provides a general overview of the contents of Using PeopleSoft Applications.

Using PeopleSoft Applications

This PeopleBook introduces you to the various elements of the PeopleSoft Internet Architecture and how to perform basic functions as you navigate through the system using the navigation hierarchy, components, and pages.

Note. As a licensee of PeopleTools, you are licensed to use the base portal technology, which is limited to navigation to licensed PeopleSoft applications. If you want to register additional non-PeopleSoft content, customize your homepage, or create any pagelets, you must license PeopleSoft Enterprise Portal.

CHAPTER 1

Working With Browser-Based Applications

This chapter provides an overview of browser-based applications and describes how to:

- Log in to PeopleSoft applications.
- Use navigation.
- Use the universal navigation header.
- Process components.
- Use PeopleSoft Internet Architecture buttons.
- Use keyboard shortcuts.
- Use accessibility features.

Understanding Browser-Based Applications

In PeopleSoft 8, you will use your applications in a purely internet environment. We call this environment *PeopleSoft Internet Architecture.* PeopleSoft Internet Architecture is a server-centric architecture that requires the installation of only a web browser on individual user machines (if one does not already exist).

The PeopleSoft Internet Architecture is your "window" to PeopleSoft applications as well as other web-based applications and content. Within your browser, log in to the PeopleSoft Internet Architecture as you would when opening your favorite website. The PeopleSoft Internet Architecture uses menu navigation with folder dropdowns and a *universal navigation header* that includes the following navigational tools: Home, Worklist, Add to Favorites, and Sign out. This header will appear at the top of every page as long as you are signed on.

We deliver your PeopleSoft application with a demonstration database. Sample data in the demonstration database helps you see how the system works. You can also use the demonstration database to experiment with how specific PeopleSoft applications work. The PeopleBooks for the various applications frequently refer to the demonstration information to clarify concepts and provide a common frame of reference for examples.

PeopleSoft Internet Architecture Terminology

PeopleSoft applications are made up of a navigational structure, components (groups of pages), and pages. Using these elements, you can enter new data or change, delete, and modify the existing data in your application. Working the PeopleSoft Internet Architecture is similar to browsing web pages and it is a simple, intuitive way of working with your database.

The following are some of the basic elements used in PeopleSoft Internet Architecture:

Menus
PeopleSoft's navigation structure, located on the left side of your screen. Using folder drilldowns, the menu begins with a top level that represents the first level of organization. Within each menu item you'll find additional folders and content references, which take you to a transaction page.

Content Reference
A link in the menu that accesses a transaction page. It is simply a reference to a URL (Uniform Resource Locater) for the transaction page.

Keys
The display-only fields that uniquely identify your data. To display a page, you perform a search using the key fields, such as Empl ID (Employee Identification).

See Chapter 3, "Using Keys and Search Pages," page 27.

Page
The individual display and data-entry screens for each part of your PeopleSoft application. Pages appear in the browser window.

Logging In to PeopleSoft

Logging in to a PeopleSoft application is like opening a secured page on a website.

To log in to a PeopleSoft application:

1. Open your default browser window.
2. Enter the URL for your application, or select the bookmark for the page where you want to work.

   The Sign In page appears.
3. Select the language you want your transaction pages to appear in.
4. Enter your User ID and Password.

   Your user ID and password are case sensitive. Passwords always appear as asterisks in the display as you enter them.
5. Tab to or click the Sign In button to log in.

   The PeopleSoft online system validates your user ID and password. If either the user ID or password is invalid, the system displays an error message below the Sign In button. You must reenter your user ID and password, or contact your security administrator for assistance.

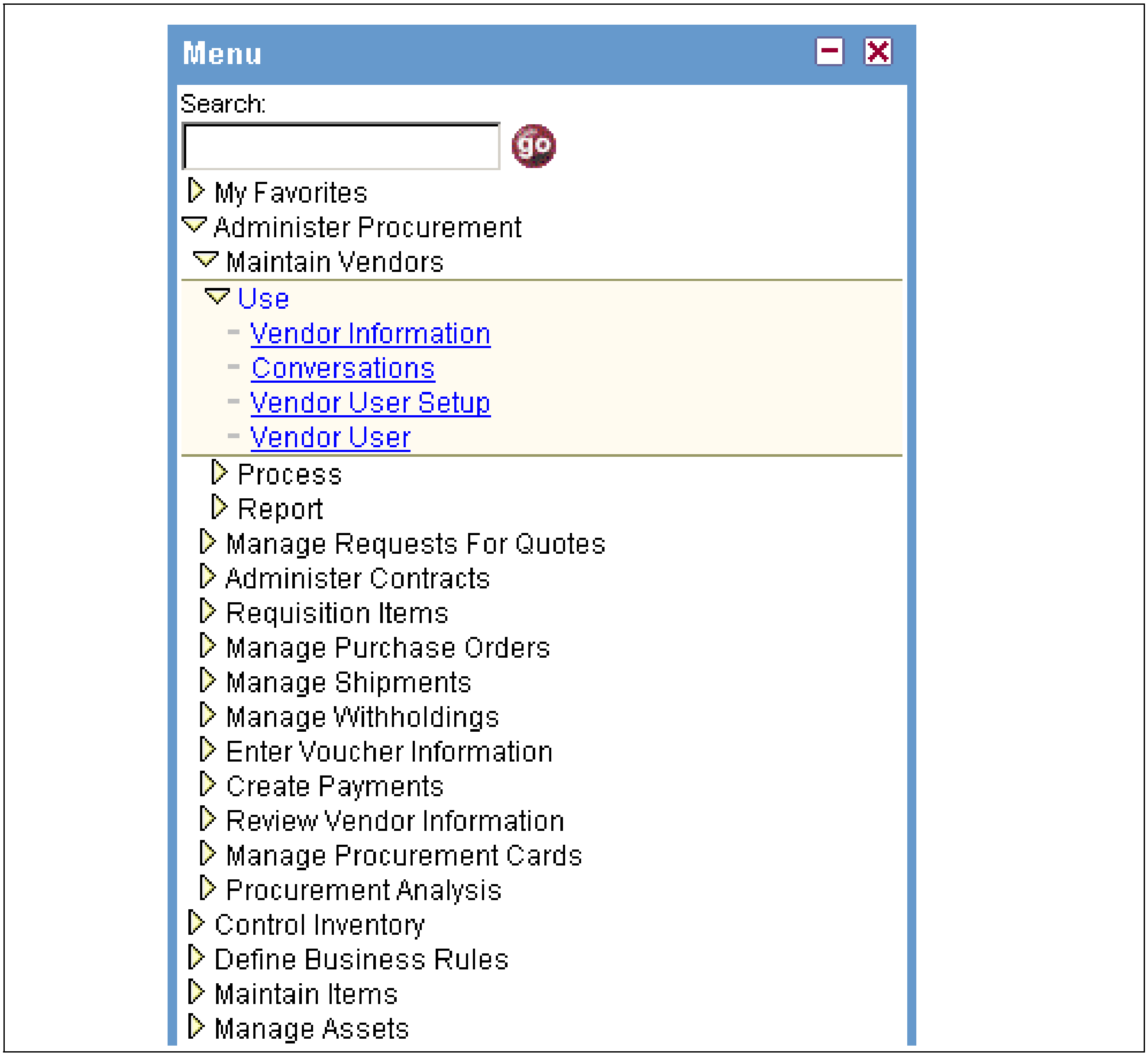
After you log in, the mouse pointer turns into a small hourglass, signifying that the online system is working to initiate your request. Whenever the system accesses data in the database, the hourglass appears on your desktop. If the login information you entered is valid, the system displays the homepage for your PeopleSoft system.

PeopleSoft Internet Architecture structure has the ability to have "single signon" access. This allows you to work in multiple PeopleSoft applications and databases without having to log out and sign in again. If your site has not implemented single signon, then the system prompts you to enter a user ID and password each time you access a different PeopleSoft application.

For security purposes, your PeopleSoft system will log you off from your application after a certain period of inactivity (determined by your security administrator). Two minutes prior to your session timeout, the system provides a warning that your browser session is about to expire. You then have the option of continuing with your current session by clicking the OK button in the warning message. If you do not respond within two minutes, the session ends and the expired connection page opens. To return to your application, click the Return to PeopleSoft 8 Sign In link. The sign in page appears, and you can once again log in to your application.

Using Navigation

PeopleSoft's browser-based interface provides an intuitive way of updating or viewing data in your database. Menu navigation consists of a hierarchy of folders and content references. Expanding and collapsing folders are the primary means of getting around your PeopleSoft application.



Example of menu navigation

The main level, also known as *Home*, contains a general list of the areas you can link to in that application. From this point you can expand any folder to access additional folders or content references that open transaction pages.

Note. As a licensee of PeopleTools, you are licensed to use the base portal technology, which is limited to navigation to licensed PeopleSoft applications. If you want to register additional non-PeopleSoft content, customize your homepage, or create any pagelets, you must license PeopleSoft Enterprise Portal.

See *PeopleTools Internet Technology*, “PeopleTools Internet Technology Preface,” Understanding PeopleSoft Portal Licensing.

Using the Universal Navigation Header

The universal navigation header is located at the top of your PeopleSoft Internet Architecture page and remains static as you navigate through the pages. The navigation header contains the following links: Home (homepage), Worklist, Add to Favorites, Sign out and Search.

Home	Returns you to your homepage, found on the universal navigation header.
Worklist	The Worklist page provides summary information about all items on your personal Worklist. This page also provides links enabling you to view additional details about the work, to perform the indicated work, and to reassign work items. See also Using Worklists.
Add to Favorites	Favorites allow you to create your own list of bookmarks to components and transaction pages. Once you add a favorite, it is maintained under the My Favorites folder in the menu. Expand the My Favorites folder and click the hyperlink you want to view.
Sign out	Select this button to log off from the application and return to the sign on page.
Search	A search engine integrated with the PeopleSoft Internet Architecture that allows you to search for any registered content references.

Working With Favorites

This section describes how to:

- Add an item to your favorites list.
- Edit your favorites list.

Note. Guest accounts do not have access to My Favorites or Add to Favorites. Security must be granted before accessing favorites.

Adding Favorites

To add to favorites:

1. Click Add to Favorites in the universal navigation header in the page that you want to bookmark. The Add to Favorites page displays.
2. Enter a unique description for the favorite.
3. Click Add to Favorites (the page name will be the default).

   The favorite is saved and displayed in the My Favorites folder.

Editing Favorites

On the Edit Favorites page you can re-label favorites, delete favorites, or modify the sequence in which they appear on your menus. You can also edit saved favorites when a URL is updated or one is deleted.

To edit favorites:

1. Expand the My Favorites folder in the left hand navigation.

2. Click Edit Favorites.

   The Edit Favorites page opens displaying a grid with the favorites you have selected and their sequence number.

3. Locate the favorite you wish to modify and make your changes.

4. Save you changes.

Processing Components

In this section, we discuss how to:

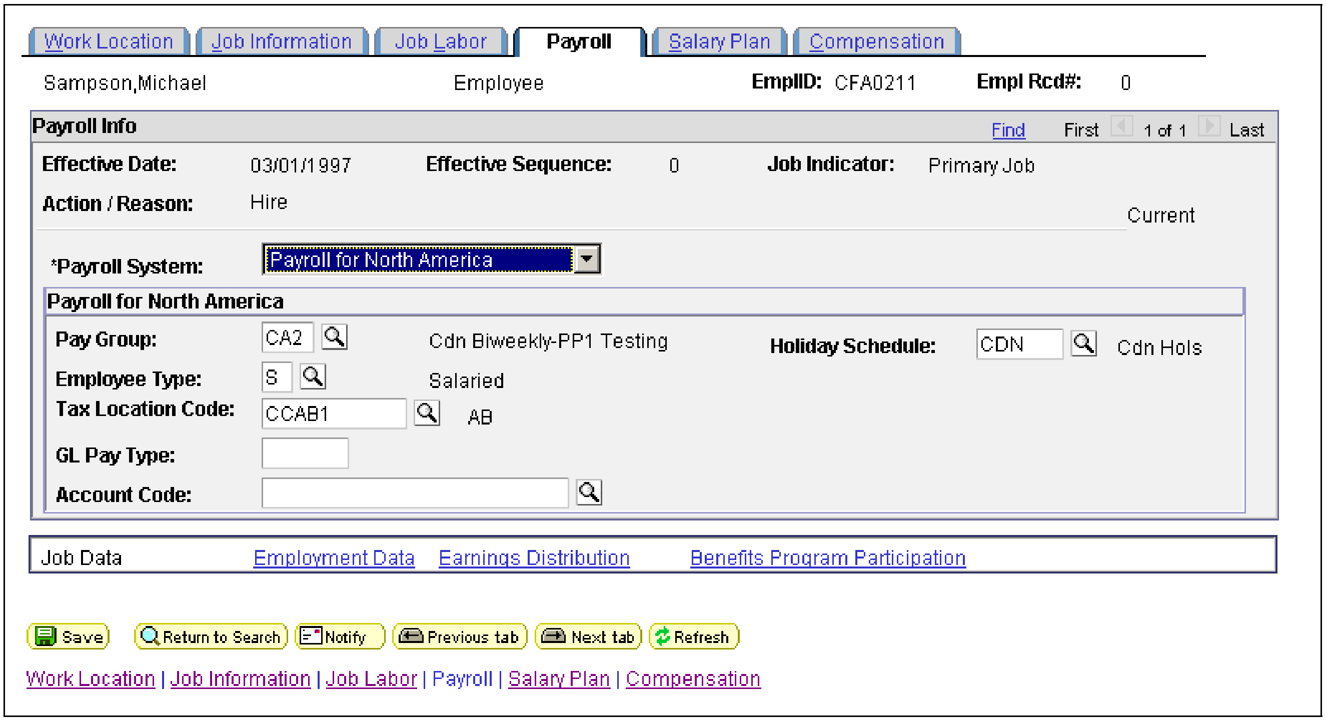
- Access a page or component.
- Link to related pages.
- Open a new browser window.
- Save pages.

Opening a Page or Component

Components consist of several pages within the same window. Usually these are pages that are related and need to be completed in succession. As you finish with one page, click the folder tab of the next page to open it. You can think of this as leafing through several pages of a single form: if you must enter more information than fits on a single page, move to the next page to complete the process.

In addition to clicking page tabs, you can also click the links at the bottom of each page in the component to move to the next page. Alternatively, you can press the corresponding Access Keys.

See Chapter 1, “Working With Browser-Based Applications,” Access Keys, page 12.



Sample component

All pages in a group have the same search record, so the prompt in the initial search dialog box is the same regardless of which page you access first. You won't be prompted to enter new search criteria as you move from page to page in the component.

Likewise, during save, pages in a component are treated as a single entity. When you click Save, the data on the pages is committed to the database. If you have not completed all required fields, the system prompts you to enter additional data.

To access a component:

1. Select the content reference from the menu that relates to your page.
2. On the search page, enter search criteria to identify the row of data you want to retrieve from the database.

   See Chapter 3, "Using Keys and Search Pages," Entering Search Criteria, page 29.
3. Click Search to perform the search.

   If you didn't enter complete key information, the system prompts you with the search results grid to choose the data you want to view. The page or component you selected then opens in your browser.

Linking to Related Pages

Occasionally you'll see pages that, in addition to having links to other pages in the component, have links to related components or pages, such as the sample component displayed in the previous section. The related links, "Employment Data," "Earnings Distribution," and so on appear at the bottom of the transaction area above the toolbar. Click any one of these links to access that page or component. This convenience enables you to move easily to related transactions to enter data without going through the search process again.

When you click a component link, you'll notice that the new transaction contains the same component links, enabling you to return to the original transaction if desired. The component or page in which you are working appears in black text and is not underlined. Some applications may identify these related links in another way. For example, you might see the phrase "Go to:" along with the related links at the bottom of a page. You may also see a drop-down list box with "…More," which contains several more related transaction links.

Opening a New Window

The New Window link is located at the top of the component pages. Click this link to open a new browser window, or child window. The new window shows the current component page as well as the navigation to your current position. From this window, you can view or enter new data. You may open as many child windows as needed using the New Window link. Do *not*use your browser's File, New > Window feature. Doing so copies the current HTML from the parent window, instead of opening a new PeopleSoft-maintained window session.

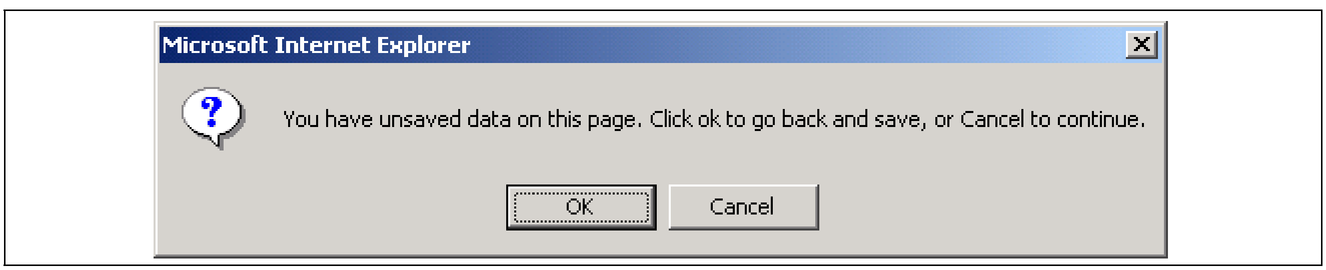
Note. When entering or viewing data in two different languages, use a separate instance of your browser program and sign in under the same user ID and password.

See Also

Chapter 3, "Using Keys and Search Pages," Using Search Pages, page 27

Saving Pages

After making changes to a page, you*must* click Save in the toolbar to commit your changes to the database. If you attempt to leave the page without saving by clicking another content reference from the menu or by clicking a different toolbar button, such as Next in List, you'll receive a save warning. Click OK to return to the page to save your changes. Clicking Cancel exits the page without saving.



Save warning

There are, however, other ways to exit a page. In these cases, the system issues no save warning.

- Clicking the Back button in the browser menu.

  In some browsers you can return to the page with your edits intact by clicking the Forward button.

- Closing the browser session.

Using Buttons and Links

PeopleSoft Internet Architecture provides you with buttons and links to help you process transactions in your system. In general, if the action to be performed is related to navigation, it appears as a link, which you can click to move to another page. If the action is truly an action, such as *save* or *process,* it appears as a button. Click the button or link to execute the command.

If a gray button appears on your page, that action is currently not available to you or inactive. For example, when working in a transaction for the first dataset from a search list, you might see the following:

Active and inactive buttons

Your only option in this instance is to click the Next in List button.

Similarly, links often appear at the bottom of your page to indicate which of the component’s pages you are on. Notice from the sample component displayed previously that the active page, Payroll, is not actually a link because it is not underlined, as shown below.

Page links in a component

While most buttons and links in the system are self-explanatory, in this section, we’ll provide details about the following:

- Search page buttons.
- Processing buttons.
- Toolbar buttons.
- Pop-up menus.

Tool Tips

Tool tips are pop-up text messages that appear on your page when your mouse is hovered over a button or link. Sometimes called hover text, tool tips display additional information about the action that button or link will perform. Prompt buttons, for example, display what the system will look up for you. Toolbar and search buttons display text describing the button and the hot key to access it.

Search Page Buttons

The following search-related buttons are located on search pages of all types.

Processes the search. You can select Search By criteria and enter characters in the “begins with” edit box to limit your search. (ALT+1)

Clears entered text from all fields on the page (without saving) so that you can enter new criteria.

Processing Buttons

The following buttons are used for processing transactions.

Apply	Usually found on a page that you opened by clicking a prompt button. Enables you to apply the data input without returning you to the main page, in case you want to perform additional searches.
OK	Accepts the data input made on an auxiliary page and returns you to the main page.
Cancel	Clears the page and any data that you may have entered or changed without saving. When you click Cancel, the system doesn't warn you to save changes. Click Cancel if you entered data incorrectly and want to begin again.

Toolbar Buttons

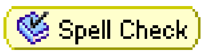
You'll find the toolbar at the bottom of most pages. The toolbar may include search list navigation buttons, page navigation buttons, and page action buttons, but the toolbar changes depending on the type of page that's active or the settings that the developer has set for a particular transaction. So not all buttons shown in the following table appear on every page. Likewise, some buttons may be unavailable for entry.

Save	Sends the information you've entered on the page to the database. You'll generally save when you come to the end of a component. The Save button always updates the data for all pages in a group. When activated, the system displays the "Saved" message in the upper-right corner of the page.
Return to Search	Returns you to the search page.
Next in List	*Next In List:* Displays the information for the next data row in your search results grid. This button is unavailable if you didn't select the data row from a search results grid, if there was only one row in the grid, or if the data that appears is the last row in the grid.
Previous in List	Displays the data for the previous data row in your search results grid. This button is unavailable if you didn't select the data row from the search results grid, if there was only one row in the grid, or if the data that appears is the last row in the grid.
Next tab	Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.
Previous tab	Displays the previous page in the current component. If you're in the first page of the component, this button is unavailable.
Update/Display	Accesses existing rows of data in the database. If data is effective-dated, only current and future rows appear.
Include History	Displays all rows of data: current, future, and history.
Correct History	Accesses existing rows of data in the database and displays all effective-dated rows. Enables you to update all rows, including history rows.

Forces a transmission to the application server to validate all data entered on the page.

Displays when there are several pages that are related to the current page. Clicking this button opens a new page with a list of related page links.

Opens the Send Notification page where you can specify names, email addresses, or worklists to send notifications.



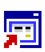
Activates spell check for all spell check enabled fields on the page. Each field is checked individually. As each field is checked, processing continues to the next field displaying the spell check page if there are errors. If there are no errors, the “No Errors” message displays.

See Chapter 4, “Working With Pages,” Using Spell Check, page 42.

Pop-Up Menus

Pop-up menu buttons appear next to fields on a page. These buttons are as follows:

Displays if the pop-up menu contains more than one item. Takes you to a new page to select among the menu items listed.



Displays if the pop-up menu contains only one menu item. Takes you directly to the new transaction page.

Using Keyboard Shortcuts

Working in an internet browser-based environment can often be mouse intensive. However, PeopleSoft offers keyboard navigation alternatives to using the mouse. These shortcuts are classified into two categories:

- Hot keys.
- Access keys.

To view a printable list of these shortcuts while online, press CTRL+K while in a search or transaction page.

Note. Certain browsers may treat access keys and hot keys differently. See Customer Connection for more specific information on browser differences.

Hot Keys

Hot keys perform immediate actions. When pressed, the designated actions occur. Notice that several hot keys perform different functions depending on the page you are in, such as a transaction page or a search page.

ALT+1

Saves page in a transaction.

Moves to the Search or Add button on a Search or Look Up page.

Moves to the OK button on a secondary page.

ALT+2	Returns to the search page from the transaction page.
ALT+3	View next row in list when button is active.
ALT+4	View previous row in list when button is active.
ALT+5	Opens Look Up page.
	Opens the calendar prompt.
ALT+6	Opens the pop-up window on a page.
ALT+7	Inserts one or more rows in a grid or scroll area.
ALT+8	Deletes row in a grid or scroll area.
ALT+0	When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.
ALT+ .	View next set of rows in grid or scroll area.
ALT+ ,	View previous set of rows in grid or scroll area.
ALT+ /	Finds data in grid or scroll area.
ALT+ ‘	View all rows of data in grid, scroll area, or search page results list.
**ALT+ **	Toggles between Add a New Value and Find an Existing Value in a Search page.
CTRL+ J	Displays system information.
CTRL+ K	When in a search page or transaction page, opens a page with a list of keyboard navigation shortcuts using hot keys and access keys.
CTRL+ Y	Toggles menu between collapse and expand.
CTRL+ TAB	Toggles focus through the frame set.
ENTER	Activates the OK button, where appropriate.
	On a Search page, activates the Search button.
	On a Look Up page, activates Look Up button.
ESC	Activates the Cancel button, where appropriate.

Access Keys

Access keys move the focus of your cursor to a particular button on a page. Pressing ENTER executes the command—the equivalent of clicking the appropriate button.

The following table outlines the shortcuts you may use in place of clicking the equivalent action button with your mouse. After pressing the desired key combination, you must then press the ENTER key to execute the action. For example, to save a page press ALT+1 followed by ENTER. Note that some access keys have multiple actions assigned to them, and the usage depends on the currently active page.

You can also use access keys for page tabs to help you move between pages in a component. Identify these access keys by noting the letter in the page tab name that is underlined. To open a page, press ALT and the underlined letter, and then press Enter to execute the action.

Alt+9	Accesses the Help line.
**Alt+ **	Toggles between Update/Display, Include History, and Correct History action modes on the toolbar in a transaction page.
Ctrl+ Z	Accesses the search box of the menu.

Menu Navigation Access Keys

Navigate between menus using Ctrl+Z. This will move the focus of your cursor to the menu. From the menu, use your tab key (or shift-tab for reverse direction) to navigate through the menu.

Using Accessibility Features

PeopleSoft applications include several accessibility features that help people with disabilities navigate the applications. These features support the use of assistive technologies, such as screen readers for blind users.

Our accessibility features include the following:

- Alternate text for images, group boxes, buttons, navigation buttons for grids and scroll areas, collapsible section icons, hide and expand grid tabs, prompt buttons, and scroll left or right buttons.
- Additional links and anchors that enable screen reader software to bypass navigation content, such as page tabs.
- The removal of page links from the bottom of pages to reduce redundancy when using screen reader software.
- A feature that presents the elements on the body of a page in a linear format (for blind users operating a screen reader only).

Your system administrator grants access to the Accessibility Features option in PeopleTools. However, you can turn this option on or off in My Personalizations.

Note. If the Accessibility Features option does not appear on the Personalization page, contact your system administrator to enable this feature.

To enable accessibility features:

1. Click the My Personalizations bookmark in the navigation.

   The Personalization Information page displays.

2. In Personalization Categories, click the Personalize Options link that is next to General Options description.

   The Option Category: General Options page displays.

3. Select the Override Value from the dropdown list.

   a. Select the Use Accessible Layout Mode to alter the display of a page for maximum efficiency.

   b. Select the Use Standard Layout Mode to use the standard page layout.

   c. Select the Accessibility Features Off option to turn the accessibility features off (by default, this will be set).

4. Click the OK button to save the page.

To verify your accessibility personalization, log out of the system and sign in again.

CHAPTER 2

Setting User Preferences

There are several settings you can define to customize your homepage and your data entry experience. This chapter describes the following:

- Personalizing your PeopleSoft portal homepage
- Setting user personalizations

Personalizing Your Homepage

With the PeopleSoft Portal and other licensed PeopleSoft portals, you can define and store your own portal homepages and specify preferences for layout and content. The first time you log in to a PeopleSoft portal, you will see the default homepage for that portal until you define a personal homepage.

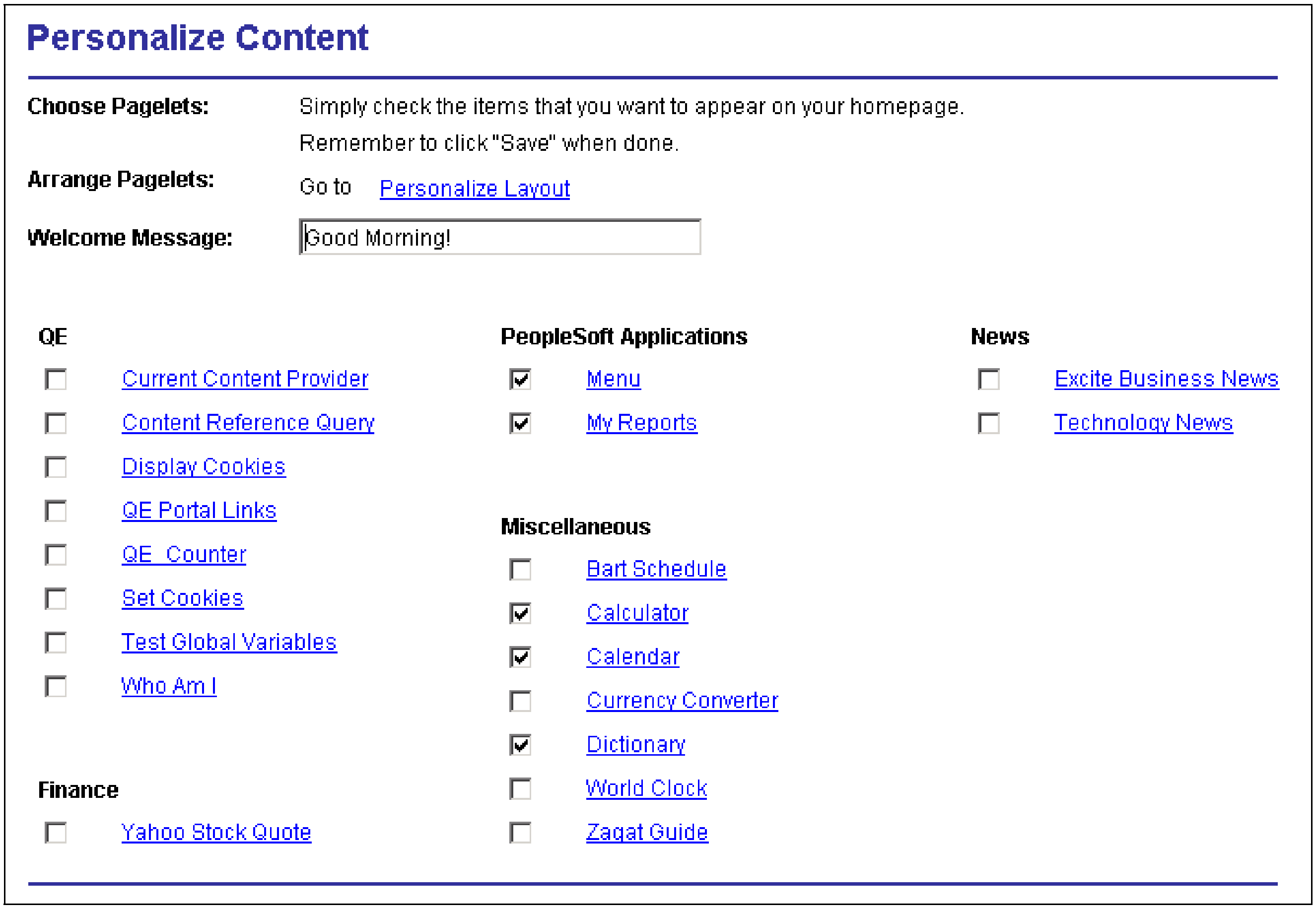
This section discusses how to personalize the content and layout for your homepage by adding pagelets.

Pages Used in This Section

Page Name	Object Name	Navigation	Usage
Personalize Content	PORTAL_HPCOMP	Select the Content link just above the menu on the home page.	Select the pagelets you want to appear on your homepage.
Personalize Layout	PORTAL_HPLAYOUT	Select the Layout link just above the menu on the home page.	Organize the layout of the pagelets on your homepage.

Personalizing Content

Access the Personalize Content page.



Personalize Content page (representative example)

To customize content on your personal homepage:

1. Enter a welcome message, if desired.

   This appears in the header on your homepage when you log in to the portal.

2. Select check boxes to choose the pagelets that you want to appear on your personalized homepage.

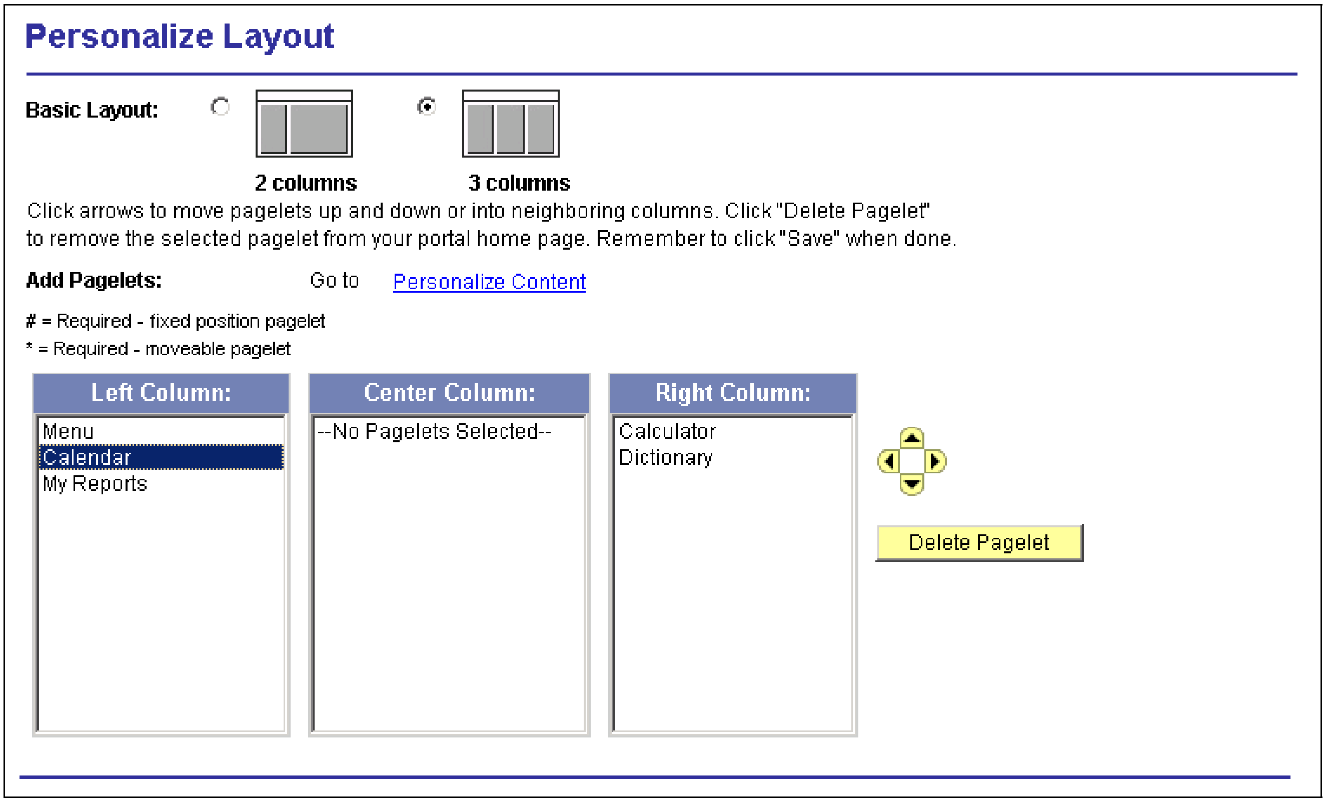
   The selection of pagelets is preset by the portal administrator. You can preview each pagelet by clicking the pagelet name. A preview of the pagelet opens in another smaller window. If a pagelet is not available to you, text in the pagelet indicates this. Any links in the pagelet are disabled.

3. Select the Save button.

4. To arrange how the pagelets appear on your homepage, select Personalize Layout.

Personalizing Layout

Access the Personalize Layout page.



Personalize Layout page (representative example)

To customize the layout of your personal homepage:

1. Select a basic layout (two columns or three columns).

   A two-column layout results in one narrow column on the left side of your homepage and one wider column to the right. A three-column layout results in three narrow columns of equal width. If you place a wide pagelet in a narrow column, the column stretches to accommodate the wider pagelet.

   Note. The system moves required pagelets (indicated by the # sign) from the third to the second column when you select two-column layout.

   ---

2. Arrange the pagelets by highlighting a pagelet name and clicking the arrow keys.

   You can move pagelets right or left, from one column to another, and up and down within a column.

   To delete a pagelet, select it and click the Delete Pagelet button. (This does not remove the pagelet from the system—it only removes it from your personal homepage.)

3. Click Save.

4. Select the Return to Home link to view your new choices.

   From the homepage you can choose to minimize or remove the pagelet altogether. Use the minimize and remove buttons in the pagelet header to do so. When you minimize a pagelet, the minimize button is replaced with the restore button. Click the restore button to fully open the pagelet again. Selecting the remove button opens the Removal Confirmation page for that pagelet. Select *Yes-Remove* or *No-Do Not Remove*.

See Also

PeopleTools Internet Technology, "Changing the Portal Interface"

Setting User Personalizations

There are four user personalizations for your system which you can access from the main menu.

Main menu

This section describes how to:

- Change your password and set up forgotten password help.
- Use the personalizations pages.
- Work with your system profile.
- Add words to your personal dictionary.

Changing Your Password

This section discusses how to:

- Change your password.
- Set up forgotten password help.

Change My Password

Click Change my Password in the menu to access the page where you can change your password information. Use 1 to 32 characters to create your password. Your administrator, however, has the option of implementing additional password controls that may result in additional requirements for password changes.

To change your password:

1. Select My System Profile from the menu.

   The actual navigation may differ depending on your implementation.
2. Click Change Password.

   The Change password page appears.
3. In the Current Password edit box enter the current password.
4. Enter a new password in the New Password edit box.

   Remember that passwords are case sensitive.
5. In the Confirm Password edit box, enter your new password again.
6. Click OK.

Setting Up Forgotten Password Help

If you forget your password, you can set up password help to enable the system to email you a new password. Access password help set up from the General Profile Information page. Here you can enter your own question and answer or select a predefined question from your system administrator.

To set up password help:

1. Select My System Profile from the menu to open the General Profile Information page.
2. Select *Change or set up forgotten password help* from the Password section.
3. Enter a question or select the lookup button to choose a preset question or password hint.
4. Enter the appropriate response to your question.
5. Click OK to save your entry.

Using Personalizations

Users of PeopleSoft browser-based applications include casual users and power users. The casual user is someone who uses PeopleSoft applications only occasionally. They do not use PeopleSoft applications on a daily basis because they are not an integral part of their daily tasks. For example, a casual user may use the PeopleSoft self-service applications only occasionally to maintain his or her employee information, or to enroll in benefits, and so on.

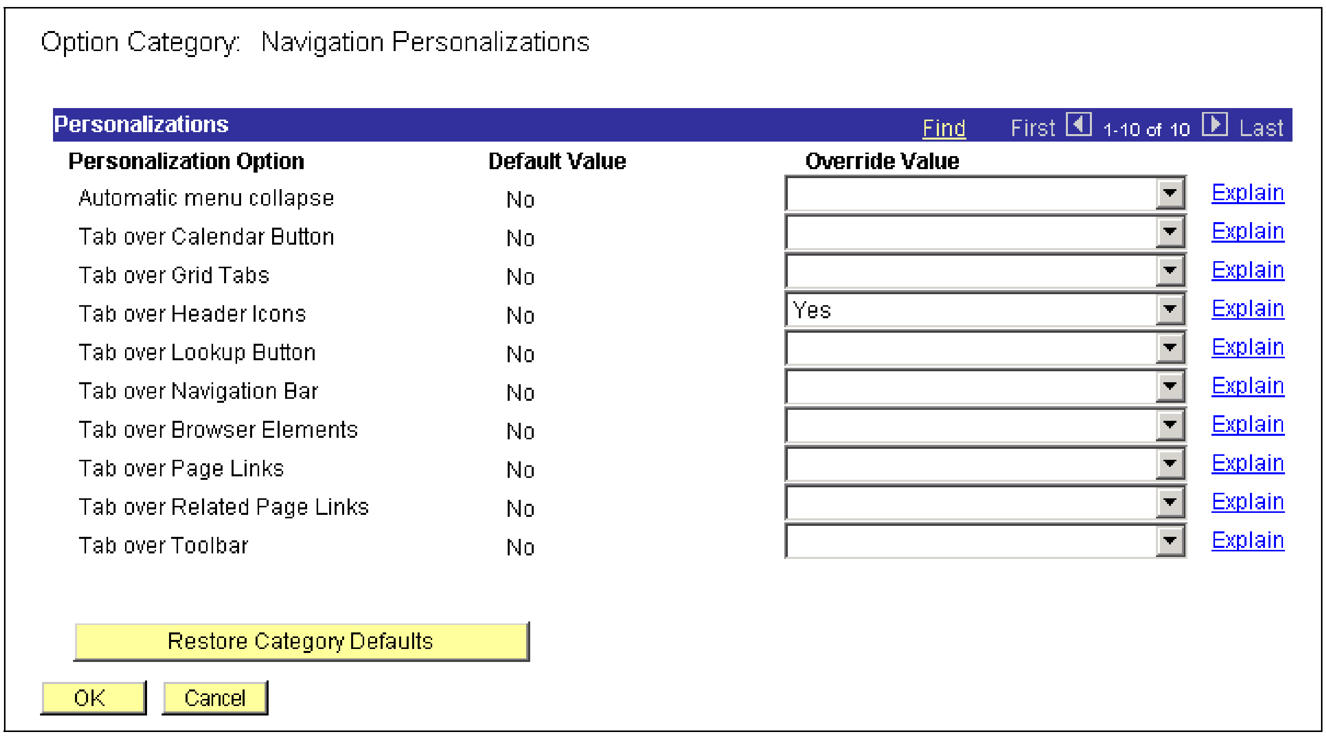
Power users, on the other hand, use the PeopleSoft system on a regular basis because it is part of their daily job. They may use the PeopleSoft Financials application every day, for example. They do a great deal of “heads down” data entry, moving quickly from one transaction page to the next, entering data as they go. A power user may be an AP Clerk, HR Benefits Manager, Purchasing Manager, Order Entry Clerk, and so on.

We also understand that everyone has different styles of working with their PeopleSoft applications. Some people use the mouse exclusively, while others prefer to use the Tab key and other keyboard commands. For this reason we enable you to set up your environment in a way that works best for you.

You do this on the Personalizations page, which can be accessed by selecting My Personalizations from the root menu. The Personalizations page includes the following categories:

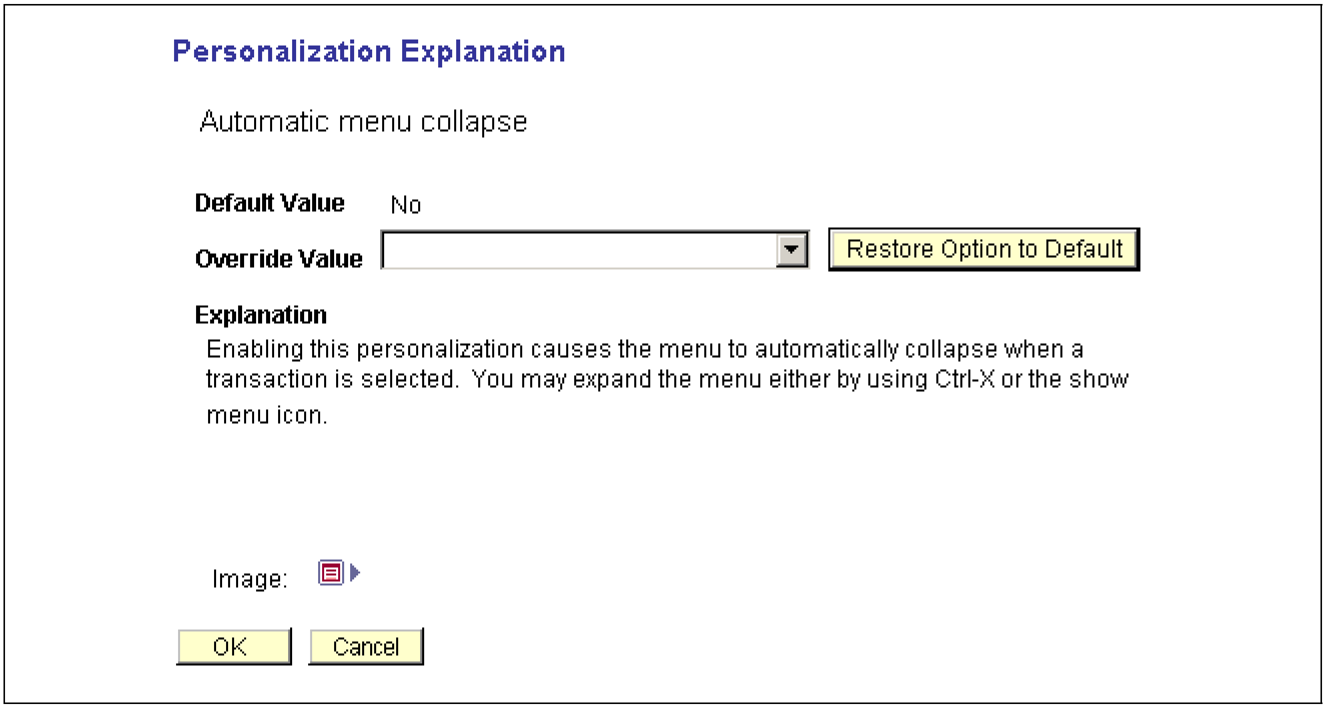
- General Options.
- Interntl (International) & Regional Settings.
- System & Application Messages.
- Navigation Personalizations.

Select the Personalize Option button for the personalization category you want. Each of the personalization pages lists the Personalization Option, the Default Value for that option, and an Override Value drop down list box where you can select a new value to replace the default. Use the Explain link at the end of each row for an explanation of that option.



Sample Navigation Personalizations page

The Personalization Explanation page defines the settings available to you for each feature. Here we explain exactly what the setting is, with a visual example if applicable. You can select the override value on this page as well as restore the option to its default value. Select OK to save your changes and return to the personalizations page.



Personalization Explanation page

General Options

Personalizing General Options includes Accessibility Features, Time page held in cache, Multi Language Entry, and Spell Check Dictionary. If you require support for assistive technologies, such as screen readers, you would change the accessibility options. For Multi Language Entry, on pages where multiple language entry is available, you can choose to enter data in the language you specify in the Data Language dropdown list. On this page you can also reset your foreign language dictionary to use a different language for your spell checker.

See Chapter 4, “Working With Pages,” Using Spell Check, page 42.

Interntnl (International) & Regional Settings

Select Interntnl and Regional Settings to personalize your date, time, and nunmber formats. Choose settings for afternoon and morning designators (AM or PM, or am or pm), date format (MM/DD/YY, DD/MM/YY, or YY/MM/DD), a local time zone, and so on.

System & Application Messages

The System and Application Messages category contains personalizations that control the display of various system messages. When you become familiar with your application, you can turn these messages off. The options include a Save Warning and a Save Confirmation message.

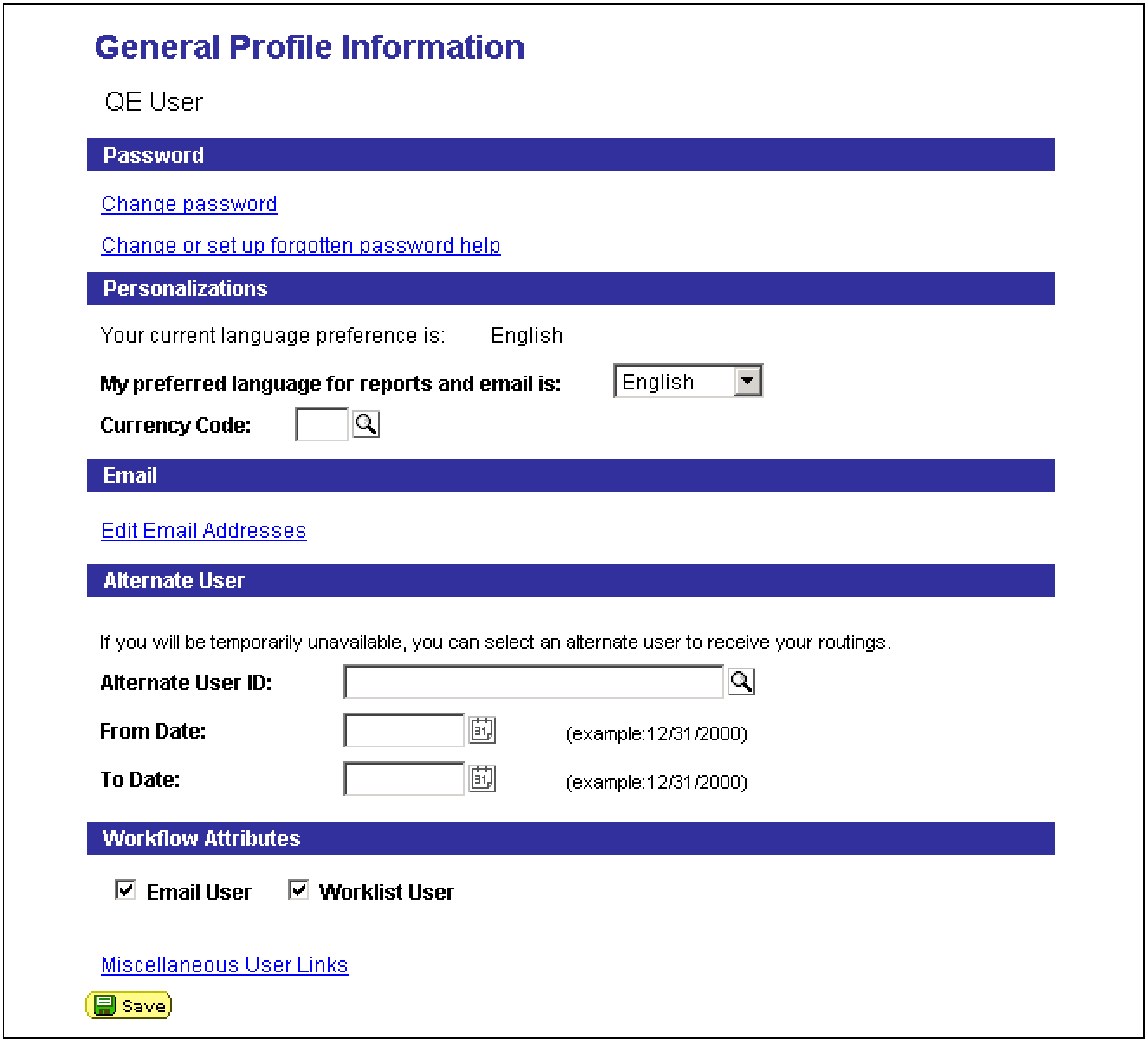
Navigation Personalizations

If you use the keyboard as your primary means of navigation, the Navigation Personalizations may enhance your data entry experience. Most of the settings on this page are "tab over" settings. This means that if you frequently use the TAB key to move around your page, you can skip certain page elements that you know you will not need to access. For example, you may prefer to always type the date into a date field and then press the TAB key to quickly move to the next field rather than opening the calendar prompt, selecting the date, and then closing the prompt. By selecting the Tab over Calendar Icon, when you tab on your page, your cursor focus will never rest on a calendar icon.

Another selection on this page, Automatic menu collapse, allows you to select if the menu should collapse every time you open a transaction page.

Using My System Profile

My System Profile includes many items that reflect your user preferences. Use this page to change your password, email address, alternate user, and other system settings.



General Profile Information page

Password

You have the following self-service options related to passwords:

- Change your log in password.
- Change or set up forgotten password help.

  Follow this link to enter a question you'll be asked when you select help for a forgotten password. The system then emails you your password if you answer the question correctly.

Personalizations

This section lists your current language setting and allows you to change the language setting for your reports and email. You can also select the currency code for the currency symbol and decimal placement you would like to display on pages when you enter currency values.

Note. For more personalizations options, go to the My Personalizations page.

Email

Follow the Edit Email Addresses link to edit your current email address or enter additional email types such as home or business. The Email Addresses page contains a grid where you can enter up to 5 addresses.

Alternate User

The Alternate User options expose the Workflow attribute, Alternate User, to self-service. If you are set to be on vacation or some other type of temporary leave, you can add the User ID of a colleague who is looking after your tasks in your absence. Use the prompt to select the correct Alternate User ID, and enter the dates during which you want the alternate ID to be active. After that time has passed, your routings automatically get routed back to you.

Workflow Attributes

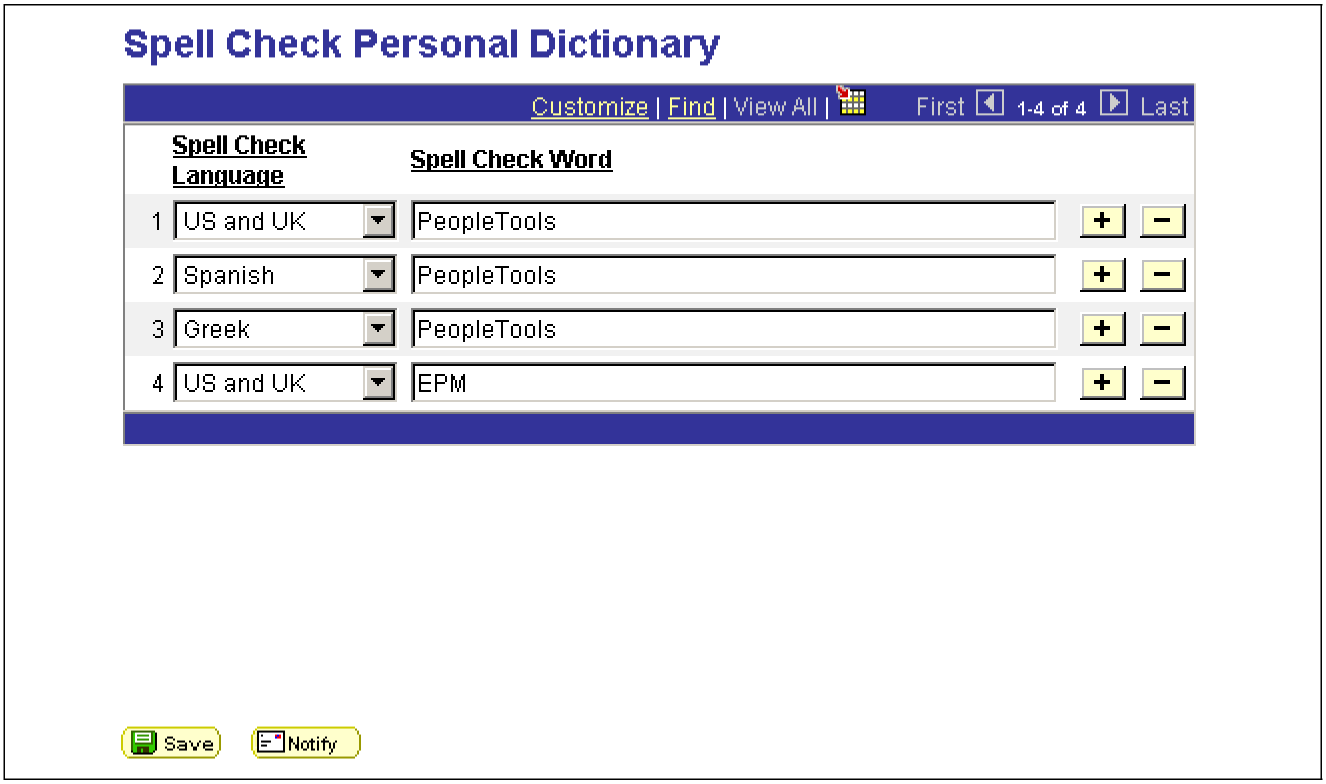
These settings affect how you receive "ad hoc" workflow routings through your workflow system. An email user receives notifications through email while a worklist users receives notifications through worklists. The options you choose are determined by the way workflow is set up at your site.

Miscellaneous User Links

If you have access to additional security links, they appear here. These links are controlled by the links that appear on the My Profile page in the Setup, Security Links component.

Using the Spell Check Personal Dictionary

As you use spell check, you will find that you may need to add certain words or acronyms to your personal dictionary so that spell check does not continually attempt to correct them. You can add these words directly from the Spell Check page, or, you can add several at once using the Spell Check Personal Dictionary page. This page enables you to add, update, and delete words, as well as add words by language. The words that you enter in your personal dictionary are attached to your user ID, so your personal dictionary is available to you no matter where you work.



Spell Check Personal Dictionary

Access the Spell Check Personal Dictionary page by selecting My Dictionary from the root menu.

Spell Check Language Select the language dictionary you want the word to be added to. To enter the same word in multiple languages, make an entry for each language.

Select Session to add a word for your current session's spell check dictionary. After saving this word, the Spell Check Language field will refresh to the current spell check language.

Spell Check Word Enter the word or abbreviation you want added to your personal dictionary. Entries must be 40 characters or less.

The words that you add to your personal dictionary are case sensitive. The case determines how spell check will validate correct spelling. The system applies the following case sensitive rules:

1. If the added word is all lower case, such as worklist, then the following are considered valid:
   - exact match, all lower case (worklist)
   - all upper case (WORKLIST)
   - initial capitals (Worklist), regardless of its position in the sentence. Mixed case (WorkList) would be considered incorrect.
2. If the added word is all upper case, such as CRM, then only an exact match is valid.
3. If the added word is in initial capitals, such as California, then only an exact match and all upper case (CALIFORNIA) are considered valid.

4. If the added word contains an embedded capital letter, such as PeopleSoft, then only an exact match is valid. Therefore, if case is not relevant to the validity of the word, use all lower case.

CHAPTER 3

Using Keys and Search Pages

This chapter provides an overview of keys and search pages and describes how to use search pages to retrieve the data you need.

Understanding Keys and Search Pages

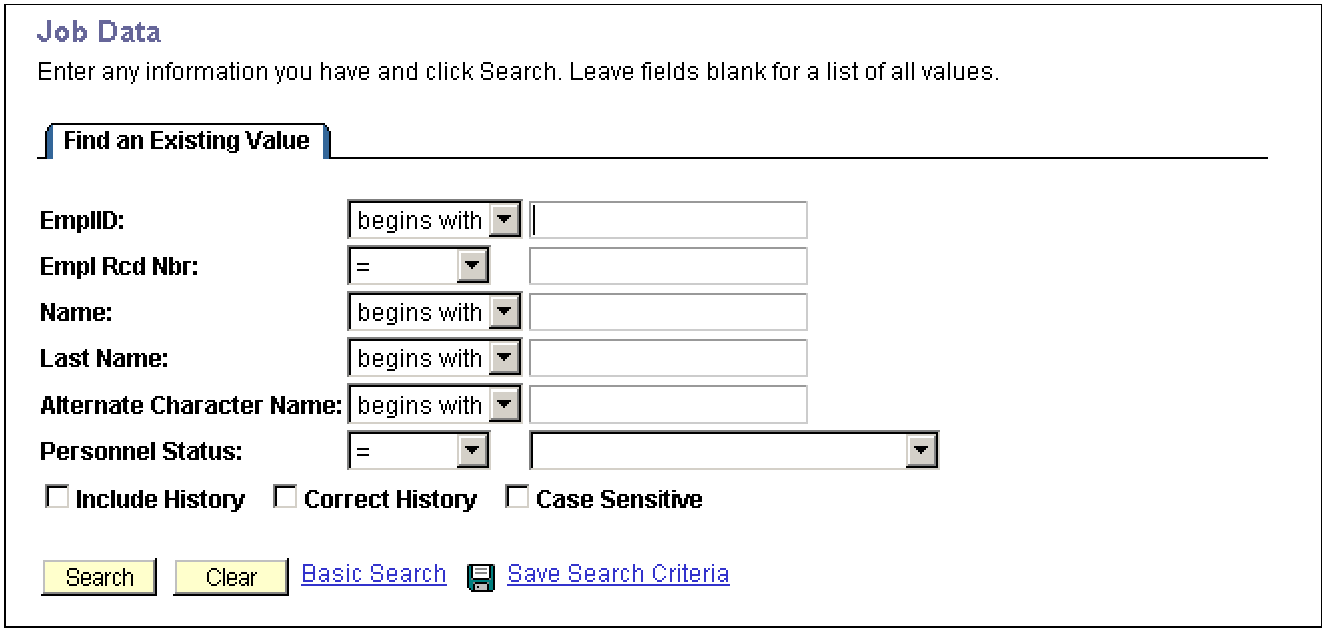
A field or a combination of fields uniquely identifies every table in your PeopleSoft database. For example, the Employee ID field uniquely identifies your employee records. Or, as another example, when employees enroll in training classes, the combination of employee ID, course code, and the starting date of the course session uniquely identifies enrollment requests.

The fields that uniquely identify your data are called the *keys.* To display a page, you'll enter the keys to search for on the Search page so that the system can retrieve the correct row of data. For example, if you want to retrieve the Personal Data page for Jim Smith, you must specify the key data in the *search record* for that employee.

A search record is the list of defined search keys that help you locate data. The search keys are the fields you are prompted for on a search page. Most transaction pages or components have search records associated with them. If you select other pages that have a common search record, such as pages within a component or an associated link, you won't be prompted to enter search criteria again. You'll be prompted for new search keys only when you select a new page outside of the component with a different search record.

Using Search Pages

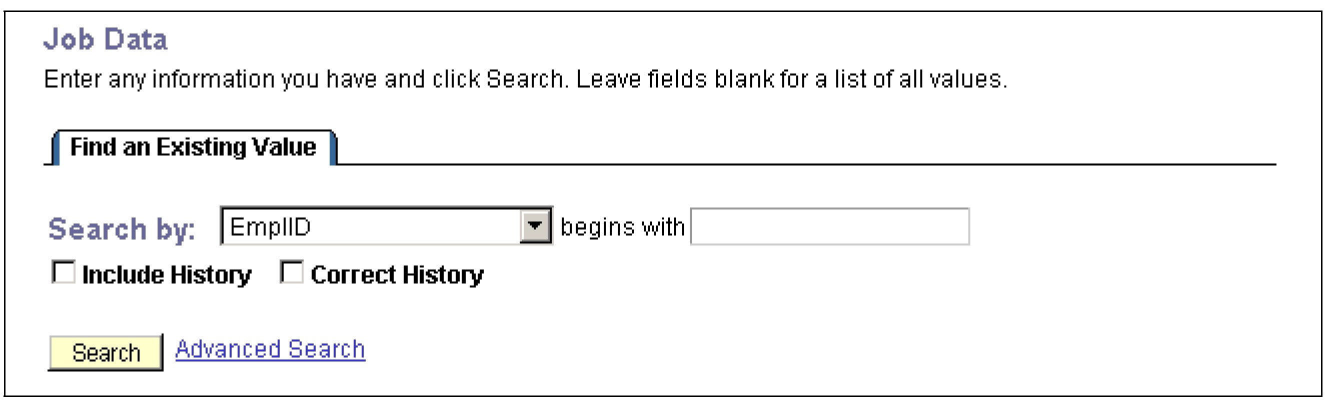
There are two types of search pages: the basic search page and the advanced search page. When you select a page, the system often displays an advanced search page, on the Find an Existing Value tab. Depending on the component, you may have the opportunity to add a new row of data to the table, such as a new employee, using the Add a New Value tab.



Example of an advanced search page

The options on the advanced search page enable you to narrow your search by entering values in more than one type of criteria. The advanced search page contains several keys to search for your record. Depending on the component, the options included on the advanced search page might be Include History, Correct History, and Case Sensitive. Select the appropriate check box to designate the type of action you want to perform on your record. If you are unsure, do not select either option. You'll have an opportunity to select these options again when you open the page for which you are searching.

If the search page offers a basic search option, it appears as a link next to the search action buttons. In general, a basic search page offers just one or two fields by which you may perform your search. However, you may designate which key field you want to search with by entering text in the Search by edit box. Similar to the advanced search page, the Include History, Correct History, and Add a New Value options may also be available.



Example of a basic search page

In this section, we discuss how to:

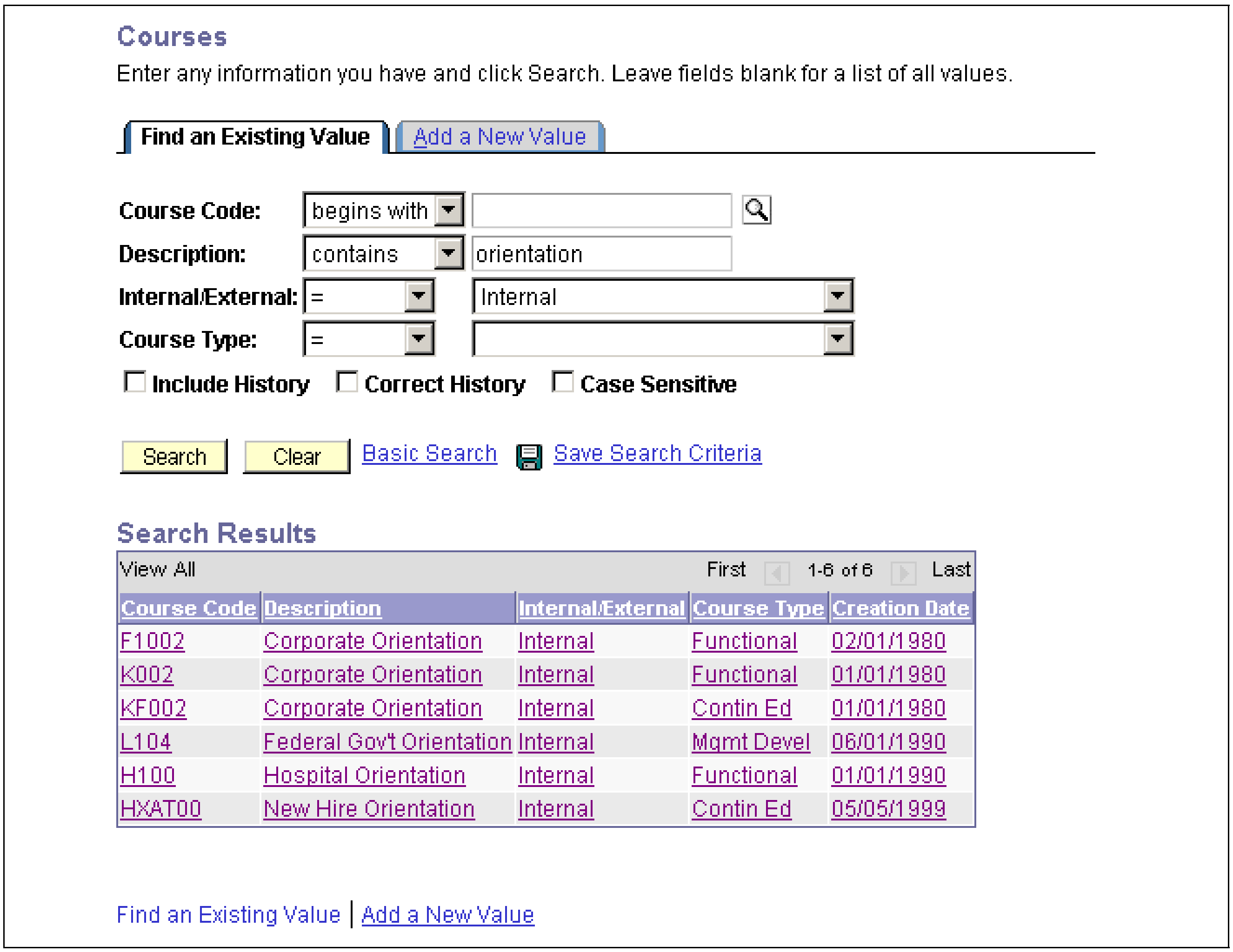
- Enter and save search criteria.
- Use wildcards.

See Also

Chapter 4, "Working With Pages," Using Effective Dates, page 33

Entering Search Criteria

When entering search criteria, you can enter a full or partial value for any key field. Based on what you enter, the system uses the search record to present a list of possible matches or, if there is only one match, the page you requested. Often, however, you don't have all the needed information. For example, in the courses table you may want to find all internally taught orientation courses. By entering the word "orientation" in the Description field, the system narrows the search by displaying all courses that contain orientation in the description. With this information, you may be able to determine which course you want based on the results in the Search Results grid. To access a course, click any of the links in the Search Results grid..



Example of a search results list

Note. The search results for the advanced search contain links for each column entry, while the basic search page results display only the first column as a link.

The search function can retrieve up to 300 entries from the database, displaying a number of results at a time in the Search Results grid. Use your browser's scroll bar to view all listings on the current page. If the list is subdivided, click the right arrow above the grid to view the next set of listings.

If your search retrieves more than the maximum 300 listings, the Search Results grid indicates this by displaying the number of results in the grid header. Attempt to narrow your search in another way if you cannot retrieve the data you need on the first attempt.

When you access a page, notice that the key fields from the search page appear as the uppermost display-only fields on the page, most often just below the tabs.

Using Operators

Operators allow you to search on limited amounts of information, such as first letters for customer, company, or state names. The following operators are available:

Operator	Field Use
begins with	Character fields
contains	Character fields
=	All field types
not=	All field types
<	All field types
<=	All field types
>	All field types
>=	All field types
between	All field types
in	All field types

Using an operator for more than one field helps to make your search even more specific. For example, a search for a course with a name that contains the word "orientation" could be further narrowed by selecting the "=" operator for the Internal/External field and selecting Internal from the drop down list box, as shown in the previous screen.

Saving Search Criteria

You can save the specifics of the your search using Save Search Criteria. Click the link and you'll be able to give the search a name, review the included values, and save your search. Later on, the Use Saved Search dropdown list will appear so that you can select a previously saved search. Once a search is saved, that specific search record is available for use in other search pages that use the same search record. You can remove any saved searches on the Delete Saved Searches page.

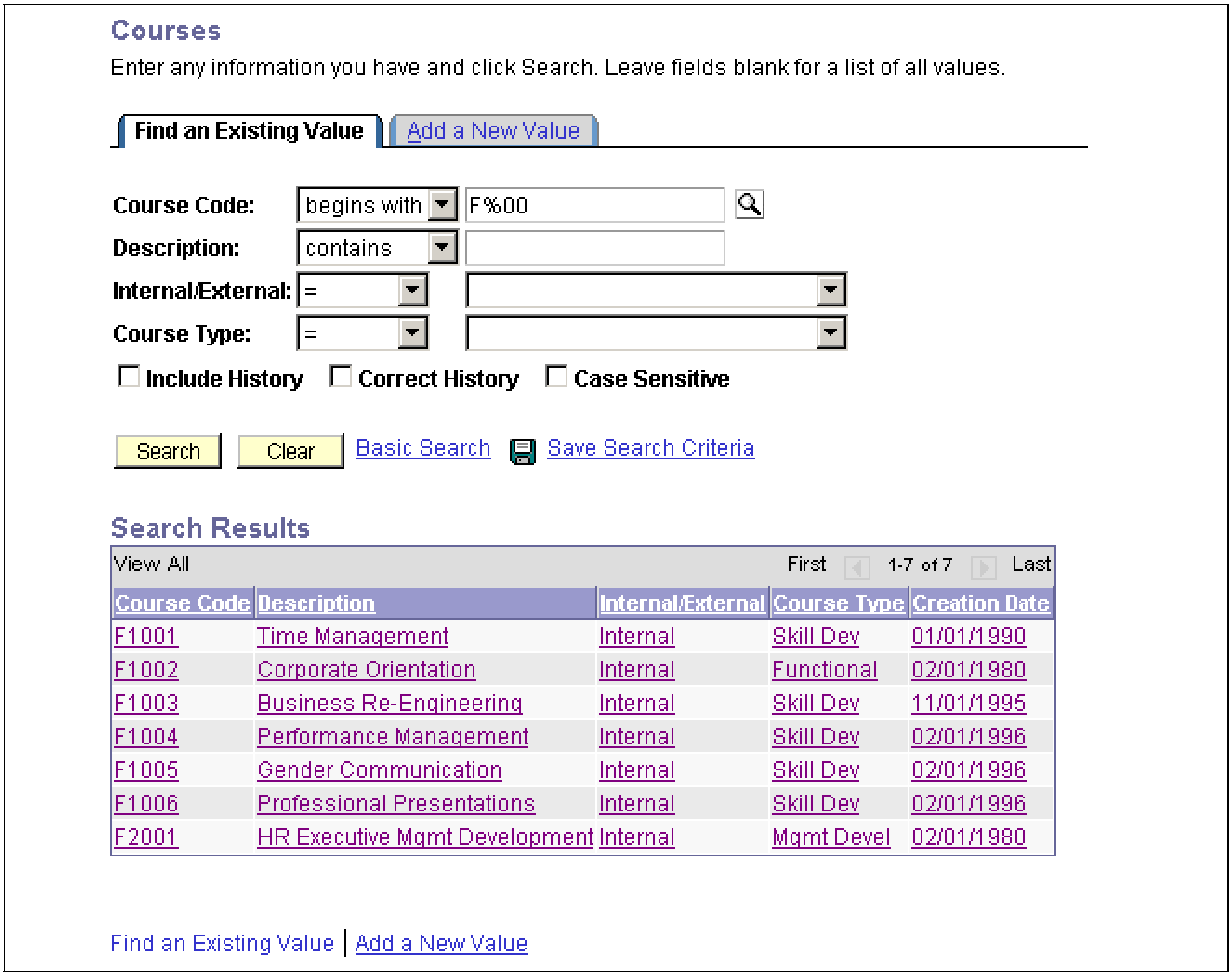
Using Wildcards

PeopleSoft applications support three wildcard features when searching for data in character fields. These wildcards can be helpful in finding the exact information you want to process. The following are the supported standard wildcard features.

Wildcard	Definition
% (percent sign)	Match one or more characters.
_ (underscore)	Match any single character.
\ (back slash)	Escape character—don't treat the next character as a wildcard.

Note. Certain applications support wildcards specific to only that application. See your application PeopleBook for specific information on the wildcards available to you.

For example, you can enter a number string of possible course codes along with the % sign, such as *F%00,* and the system returns a list of courses whose codes match that criterion.



Courses

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

Find an Existing Value | Add a New Value

Course Code: begins with F%00

Description: contains

Internal/External: =

Course Type: =

Include History   Correct History   Case Sensitive

Search   Clear   Basic Search   Save Search Criteria

Search Results

View All   First 1-7 of 7 Last

Course Code	Description	Internal/External	Course Type	Creation Date
F1001	Time Management	Internal	Skill Dev	01/01/1990
F1002	Corporate Orientation	Internal	Functional	02/01/1980
F1003	Business Re-Engineering	Internal	Skill Dev	11/01/1995
F1004	Performance Management	Internal	Skill Dev	02/01/1996
F1005	Gender Communication	Internal	Skill Dev	02/01/1996
F1006	Professional Presentations	Internal	Skill Dev	02/01/1996
F2001	HR Executive Mgmt Development	Internal	Mgmt Devel	02/01/1980

Find an Existing Value | Add a New Value

Using wildcards in a search page

CHAPTER 4

Working With Pages

This chapter provides an overview of working with pages in your PeopleSoft system and describes how to:

- Use effective dates.
- Use aesthetic elements.
- Use data-entry fields.
- Use grid and scroll area controls.
- Work with HTML trees.
- Understand field-level prompts and validation.

Understanding Pages

Pages are the primary graphical interface by which you will view and alter data in your PeopleSoft system. You can think of pages as representations of rows of data in your database tables. You'll use them to view, enter, and update data stored in application tables. Each page also provides features in the form of buttons or links to help you navigate through the system. As you change or add information to your database, you'll need to be familiar with effective-dating logic and the various page action options as you work with historic, current, and future data.

It will also be helpful if you familiarize yourself with the types of page elements you'll encounter on pages and how they work. We use many different types of elements to organize information on pages and to enable you to enter data, including aesthetic, data-entry, and functional or data processing elements.

Using Effective Dates

PeopleSoft's effective-dating logic enables you to maintain an accurate history of information in the database. Effective dating allows you to store historical data, see changes in your data over time, and enter future data. For example, you may want to track several events in the career of Tom Sawyer: when he was hired, transferred, and promoted. By inserting rows of data based on his employee ID, you can build a job history.

When you enter new information that is related to existing data, such as a transfer or pay rate change, you don't want to lose or overwrite the data already stored in the database. To retain history, add a data row identified by the date when the information goes into effect: the *effective date.* You can use the information to look at what's happened up to now and plan for the future. The PeopleSoft system categorizes effective-dated rows into the following basic types:

Timeframe	Definition
Current	The data row with the date closest to—but not greater than—the system date. Only one row can be the current row.
History	Data rows that have effective dates earlier than the current data row.
Future	Data rows that have effective dates later than the system date.

Page Action Options and Effective Dates

The types of actions you can perform on rows of data depend on the data row type. When you retrieve, modify, or insert rows in a table, the Update/Display, Include History, and Correct History actions apply specific rules based on the effective date:

Action	Rule
Update/Display	Retrieves only current and future rows. You can change future rows but not current rows. You can also add a new current row.
Include History	Retrieves all rows. However, you can make changes to future rows only. You can also add a new current row.
Correct History	Retrieves all rows and allows you to change or correct any row and insert new rows regardless of the effective date or sequence number.

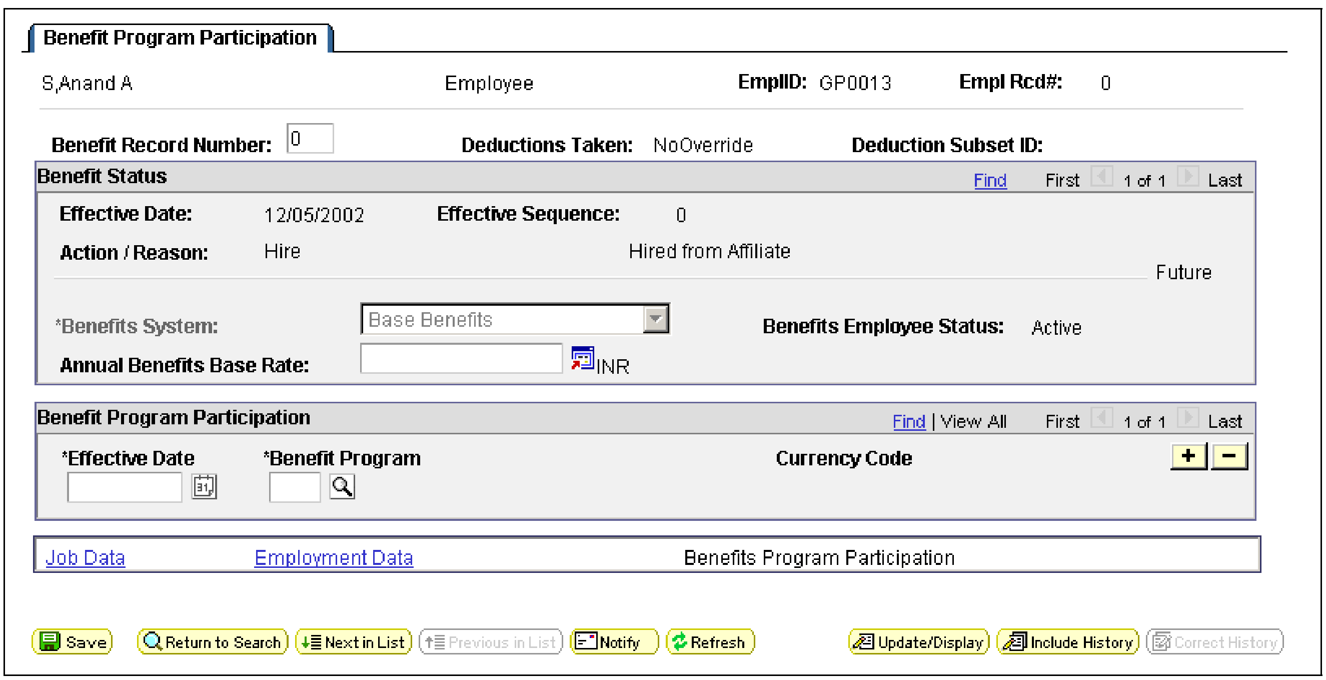
To see how these actions work together, let’s take a look at four possible events in the career of Tom Sawyer as an employee for Test Company 1, listed by effective date. Assume today is February 1, 2002.

Effective Date	History	Current	Future
Hired 1/1/1994	X		
Transferred 1/1/1996	X		
Promoted 8/1/2001		X	
Expected Termination 1/1/2003			X

The action type that you select dictates whether you can access certain fields and what you can do with each type of row.

Action Mode	View	Change	Insert New Rows
Update/Display	Current, Future	Future only	Effective date greater than or equal to current row.
Include History	History, Current, Future	Future only	Effective date greater than or equal to current row.
Correct History	History, Current, Future	All existing rows	No effective date restrictions.

The page action buttons are located in the toolbar at the bottom right of each page on which they are applicable. A grayed out button indicates the page is currently in that mode. For example, the Benefit Program Participation page is currently in Correct History mode.



Sample page in Correct History mode

Update/Display Mode

When you select Update/Display, you can access only current and future rows; you can't access history. Using the example, you can view only the current data, effective-dated August 1, 2001, and the future data, effective-dated January 1, 2003 (his promotion and then his termination).

- You can insert new rows with an effective date later than the date on the current row—after August 1, 2001.
- You can change the future-dated row, effective-dated January 1, 2003, and you can change any additional rows you insert with a date later than today, February 1, 2002.

If you insert rows with effective dates between August 1, 2001, and February 1, 2002, you can't change them if you return to the page in Update/Display mode.

Include History Mode

Select Include History, and you can view any of Tom Sawyer's job data, dating back to his hire date, and forward to the day we expect he will be fired. But, as with Update/Display, you can update only future-dated rows, effective-dated February 2, 2002, and on. You can also insert new rows with an effective date later than the current row—any date after August 1, 2001.

Correct History Mode

When you select Correct History, you have access to all data rows. You can view, change, and insert rows of data, regardless of the effective date. You can view and edit any of Tom Sawyer's job data, dating back to his hire date, and forward to the day we expect he will be fired. You can also insert new rows with an effective date later than the current row—any date after August 1, 2001.

Note. As you move between the Update/Display, Include History, or Correct History modes, you will be prompted to save your changes if necessary.

Using Aesthetic Elements

Aesthetic elements help organize or emphasize different fields or information on the page. These elements are not used to update data in the database; they are purely visual. Aesthetic elements include:

Element	Definition
Frame	Display-only box that groups a set of fields on a page.
Group box	Display-only box with text labels that group and identify related fields, such as options.
Horizontal rule	Display-only horizontal line that separates fields or other elements on a page.
Static image	Unchanging graphic, such as your company logo or other visual element.
Static text	Display-only alphanumeric field that describes a page, field, or group of fields.

Using Functional Elements

Functional elements are controls that perform a specific function, such as push buttons and hyperlinks. Aside from the standard toolbar buttons on the bottom of the page, you may see other push buttons and links on your transaction page that are not associated with a grid or scroll area. For example, there may be a button next to a field that performs a calculation based on a value you just entered. You can activate this push button by clicking it with your mouse or by pressing the ENTER key. Hyperlinks can also be activiated with the ENTER key.

Using Data-Entry Fields

On pages, you'll see several types of data-entry fields, each designed to offer different ways to enter and maintain information. The different kinds of data-entry fields serve a common purpose: to provide you with a simple way to enter and update data in your tables. You'll type data directly into some fields, such as edit boxes and long edit boxes. Other data-entry fields, such as radio buttons and drop-down list boxes, present you with a list of choices. Understanding how to use each type of data-entry element will help you use the system more efficiently.

Data-entry elements, which are always associated with specific database fields, include the following:

- Check boxes.
- Edit boxes.
- Long edit boxes.
- Radio buttons.
- Drop-down list boxes.
- Drop-down calendars.
- Images.
- Grids.
- Scroll areas.

Tabbing Between Fields

To move among the data-entry fields on a page, press the TAB key or click once on the field. The TAB key moves you one field at a time in a sequence determined in the page definition. Tabbing also rests on prompts to give you the option of viewing the prompt table or calendar. To open a prompt or calendar, you can press the ENTER key. Or, to get to the next field, press the TAB key again. SHIFT+TAB moves you back rather than forwards.

Note. Tabbing between fields may function differently for power users that have modified page tabbing behavior in the My Personalizations page.

Required Fields

In most applications, an asterisk next to a data-entry field on a page indicates that the field is required. You must enter data into that field if you want to continue on to the next field or save the page. In some cases, where the developer has set deferred processing mode for the page, you may not be informed of a required field until you attempt to save or leave the page. If you save the page before entering data, the field turns red and an error message appears on the page. Click OK within the error message, and then enter the correct data in that field. Required fields are often drop-down lists or are accompanied by a prompt button to assist you in entering the correct data.

Check Boxes

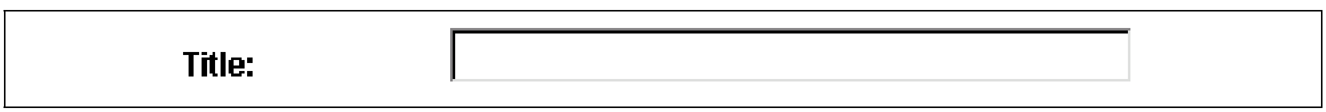
A small, square box that enables or disables an option is a check box. Typically, you *select* the check box by clicking within it, which adds a check mark and enables the option. Click it again to *clear* the check box, and the option is disabled.

Check boxes correspond to fields with only two valid values. You can often select more than one check box in a related set.

Edit Boxes

An edit box is a rectangular box into which you enter data. The size of the edit box, or the number of characters you can enter, is determined by the length of the database field. Edit boxes for fields with prompt tables have a look up button to the right. Edit boxes with spell check enabled have a spell check button to the right.

Highlight an edit box by moving to it with the TAB key or by using your mouse to double-click and highlight the text. You may type over existing highlighted text. If the text is not highlighted, then you are inserting rather than replacing text.



Edit box

Some edit boxes are associated with database fields that have formatting attributes assigned to them. For example, most Name fields are defined with a name format that requires you to enter data in the following way:

LastName,FirstName Initial

This format is case sensitive, so capitalization counts. Also, note that there is no space between the comma after the last name and the first name. If a field is not case sensitive, the system converts what you type to uppercase before writing it to the database.

Other types of formatting include the following:

- Social Security, Social Insurance, or other government ID numbers.
- Dates.
- ZIP or other postal codes.
- Multinational phone numbers.

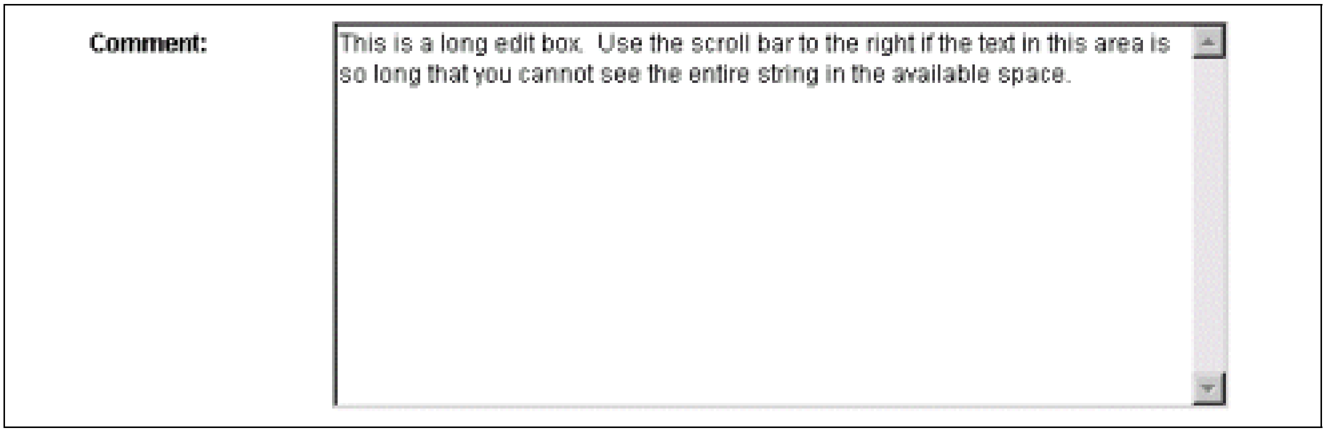
For these types of formats, you generally type only the characters; the system inserts the appropriate dashes and slashes for you. For dates, enter the standard six-digit date format, such as MMDDYY (include zeros), and the system automatically changes the display to show a four-digit year.

Note. Number formatting may perform differently for power users that have personalized their systems.

If you enter a field value incorrectly, the system highlights the field in which an invalid value was added. A warning message appears by your browser with an explanation of the problem.

Long Edit Boxes

Long edit boxes are rectangular boxes into which you enter long text items, such as comments. These boxes store free-form text fields. If you type more lines than you can see at one time, use the scroll bar to the right of the box to move through text. Long edit boxes with spell check enabled have a spell check button in the upper right hand outside corner.

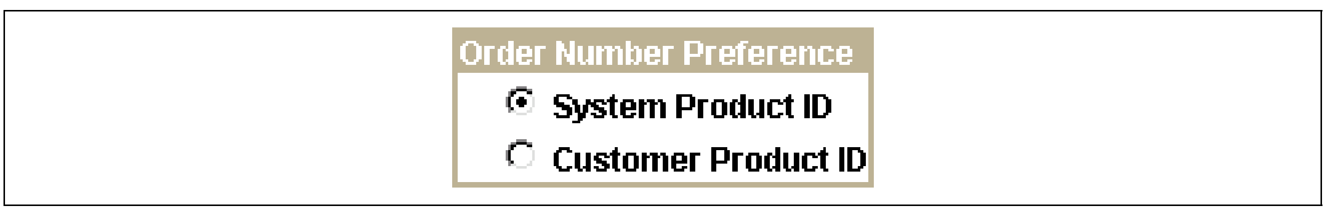


Long edit box

Radio Buttons

A radio button is a small round button that represents one option in a group of mutually exclusive options. You can select only one radio button in a group at one time. Select radio buttons by clicking in the desired circle or button, which enables the option.

Typically, radio buttons are associated with database fields that have valid values stored on the Translate table—a sort of all-purpose table where the system can store a relatively small, static set of values for a field not generally maintained by users. In many cases, radio buttons are placed together in a group box.



Radio buttons in a group box

Drop-Down List Boxes

Drop-down list boxes are edit boxes restricted to values from a predefined list. They look like a data-entry field with a prompt button at one end. Clicking the prompt button expands the edit box to display a list of valid values from which you can select a single option.

To select a single item from the list, click the arrows until your choice is visible and then click the item itself. The value you choose appears in the box when the list retracts again. You can also type the first letter of the item in the box to select it. If there is more than one choice for a letter, typing the letter more than once toggles through the list. For example, in the example, first click the down arrow. English is the default value for the language, so if you wanted to select Greek, type the letter G twice. Alternatively, use the down arrow key on your keyboard to select the desired field entry. Once your choice is highlighted, press ENTER.

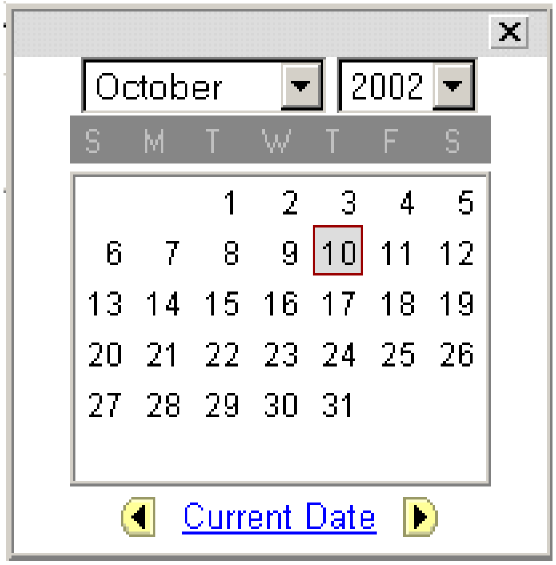
Drop-down list box

Radio buttons and drop-down list boxes are used in similar situations—when the list of valid values is static and relatively limited. Typically, you'll see radio buttons where there are fewer than six valid values, and you'll see drop-down list boxes where there are more values or when page space is too limited to display multiple radio buttons.

Calendar Prompts

When entering information in a date field, you can select the calendar prompt button to the right of the field to help you choose a date. You may also enter the current day's date by typing "today" in the date field. Tab out of the field and the current date appears. This feature can also use languages specific to the locale.

Opens a small calendar that displays the current month. Alternatively, you can press ALT+5 while in the field containing the prompt to open the calendar.



Calendar prompt

To change the calendar month, select the drop-down list box arrow for the month. To change the year, select the drop-down list box arrow for the year. Click the correct day of the month to select the day. Press the ESC key to cancel and close the calendar.

Images

You can insert or update images in your PeopleSoft system. For example, the Employee Photo page enables you to store and maintain photos of your employees in your PeopleSoft database.

In this section, we discuss how to:

- Insert an image.
- Delete an image.

Inserting an Image

You can insert employee photos into your PeopleSoft database such as for company identification badges.

To insert an image at runtime:

1. Open the page in which you want to insert the photo.
2. Click the Add button.

   A Search page displays enabling you to search for the image you want to insert. You can browse for the image from your desktop, your hard drive, or the network.
3. Click the Browse button.

   A dialog box opens enabling you to browse for the image file. Note that the format type of the image you insert must be the same as the image format type defined for the field in which you are inserting the image. For example, in the Employee Photo page, only JPG images can be inserted into the employee photo field. If you attempt to upload an image of another format type, the system displays an error message. For other types of image fields, you may be able to insert JPG, BMP, GIF, or DIB images, depending on how that image field was defined by the developer in PeopleSoft Application Designer.

4. Click the Upload button.

   The upload page closes and your newly inserted image appears on the page.

Deleting an Image

To delete an image at runtime:

1. Open the page from which you want to delete the image.
2. Click the Delete button.

   The system automatically deletes the image on the page without posting a warning message prior to deletion. However, if you exit the page without saving, the system doesn't delete the image from the database, and the image is present when you reopen the page.

Grids

Grids are entry fields arranged like a spreadsheet with a navigation bar or footer and Add, Multi-Row Insert, and/or Delete buttons for each row.

See Also

Chapter 4, "Working With Pages," Using Grid and Scroll Area Controls, page 46

Scroll Areas

Scroll areas are areas where entry fields are arranged in a frame with a navigation bar or footer. Each row of data may contain Add, Multi-Row Insert, and/or Delete buttons.

See Also

Chapter 4, "Working With Pages," Using Grid and Scroll Area Controls, page 46

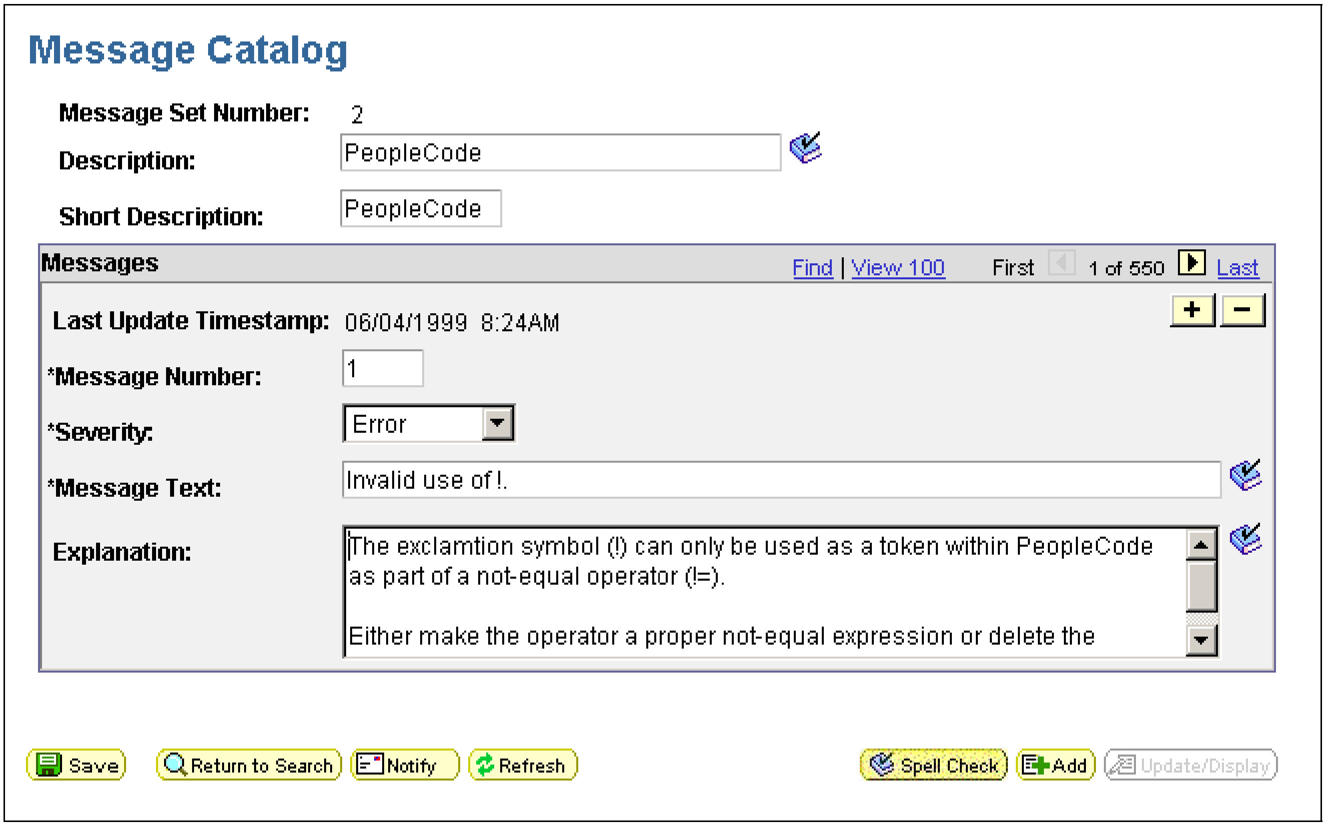
Using Spell Check

PeopleSoft applications are equipped with a spell check feature that you can use on data entered in edit boxes and long edit boxes. Activate spell checker by clicking the spell check icon to the right of those fields where spell check is available or the spell check toolbar button.

Activates spell check for corresponding field. If there are no spelling errors, a message appears indicating this: No misspellings found. Can also be activated by pressing ALT+5 when cursor is in the field.

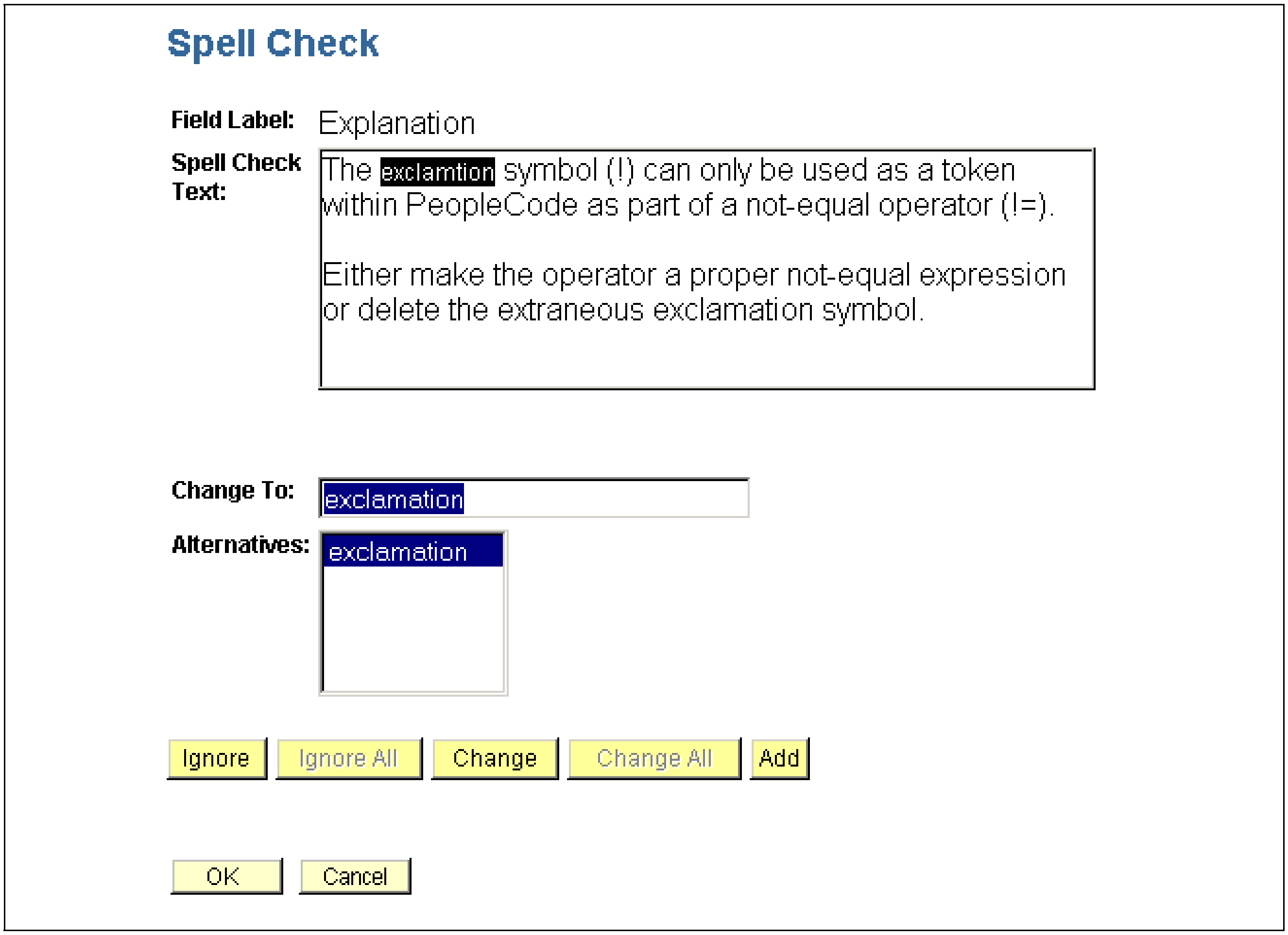
Activates spell check for all fields in the component that have been enabled for spell check, regardless of whether those fields have changed. The system checks each field and then proceeds to the next spell check field until all fields in the component have been checked. If there are no errors, the "No misspellings found" message displays.

In the example below, the Description:, Message Text:, and Explanation: fields have spell check available.



Spell check icons

The spell check button opens the Spell Check page. This page displays the text in error and offers a list of alternatives if applicable. You can choose to ignore the occurence, ignore all occurences, change the spelling, change the spelling for all occurences of the word, or add the word to the current language dictionary. See the table below for more details.



Spell Check page

Field Label	Displays the field label text of the field currently being checked.
Spell Check Text	Shows all the text in the field being checked, highlighting the first misspelled word. This field is display only. This field information is particularly important when multiple fields are being checked simultaneously using the toolbar action or mandatory spell check.
Change To	Initially displays the first highlighted value in the Alternatives list. Users can select a new value from the Alternatives list or enter a new word in the Change To field. The maximum length is based on the maximum field length, which is 40 characters. If a new value is entered, the system spell checks the entry when you choose the Change or Change All buttons to verify the correct spelling. If the system does not find any alternative spellings, the Change To field will be blank and the Change and Change All buttons are disabled.
Alternatives	Lists other possible spellings. The options listed match the case of the misspelled word.
Ignore	Leaves current spelling as is and locates the next misspelled word.
Ignore All	Leaves current spelling as is for all text in the field that exactly matches the original text. This action is case sensitive; only exact matches will be ignored.

Change Corrects the error to the value in the Change To box. Users can either select one of the proposed alternatives or type in their own value. The system then focuses on the next misspelled word.

Change All Corrects all occurrences of the error with the value in the Change To box. Users can either select one of the proposed alternatives or type in their own value. The system then focuses on the next misspelled word. Like Ignore All, this action is case sensitive; only exact matches will be changed.

Add Adds the highlighted misspelled word (as is) to the users personal dictionary. The system then focuses on the next misspelled word. Additions to the dictionary must be 40 characters or less.

See Chapter 2, "Setting User Preferences," Using the Spell Check Personal Dictionary, page 24.

Mandatory Spell Check

You may notice that certain pages have a mandatory spell check requirement, such as those that require an email response. For these pages, the system automatically runs spell check on spell check enabled fields when you save the page. A field is eligible for automatic spell check if you have changed it's contents and you have not already run the spell checker for that field. If there is more than one spell check field, spell check runs in succession. If there are no errors, the system saves the data without issuing a message.

Foreign Language Dictionaries

The spell checker supports 17 languages. The default spell check dictionary is based on your current login language. When you logged in to your PeopleSoft application, if you selected French as your login language, your dictionary when using the spell checker will also be in French. You can change your langauge dictionary on the My Personalizations page. The language personalization, SCLANG (Spell Checking Language), defaults to the Universal Language Code that is already set for your system by your system administrator.

To change language dictionaries:

1. Select My Personalizations from the navigation menu.
2. Click the Personalize Option button for the General Options personalization category.
3. Enter the desired language dictionary in the Override Value edit box for Spell Check Dictionary.
4. Click OK.

   Only one dictionary can be used per logon session. To change language dictionaries again, make the change in My Personalizations and then logout of the system before proceeding. If you want to return to having your default spell check dictionary selected automatically based on your current login language, remove your Override Value or set it to "Use Session Language."

Using Grid and Scroll Area Controls

On some pages, you may want some of the fields to repeat so that you can enter multiple rows or occurrences of data. For this purpose, we use grids and scroll areas. With these two control types, you have the ability to add, edit, and view multiple occurrences of data for a group of fields on one page. You can think of all the fields in each of these controls belonging to one table in your database. Each time you add a new row, you are actually adding a new row of data to the database table.

Rows of data in both grids and scroll areas always share the same high-level key. For example, for employee records, you may have more than one emergency contact listed for each employee. If you have two emergency contacts listed for an employee, each of those contacts has that employee's ID number as a key field. If you insert a new row, the system automatically copies the shared key data into the new row.

In this section, we discuss how to:

- Navigate through data.
- Use grids.
- Use scroll areas.
- Use effective-dated scroll areas and grids.
- Use multiple scroll areas and grids on a page.

Navigating Through Data

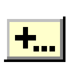
Grids and scroll areas contain the same type of navigation structure. Instead of using a scroll bar to scroll through the rows of data, we use navigation buttons and links. The following table describes the action options that might appear on your grid or scroll area. You'll find these buttons or links in the navigation header, within the row itself, or to the right of the tabs in a tabbed grid, as appropriate. Certain options, such as Customize and the download to spreadsheet icon, appear only on grids.

In this section, we discuss how to:

- Navigate using page buttons and links.
- Add rows.
- Delete rows.
- Select rows.
- Find data.

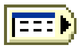
Navigating Using Page Buttons and Links

Inserts a new row.



Inserts multiple rows. Specify the number of rows (1 to 99 rows).

Deletes the current row of data.

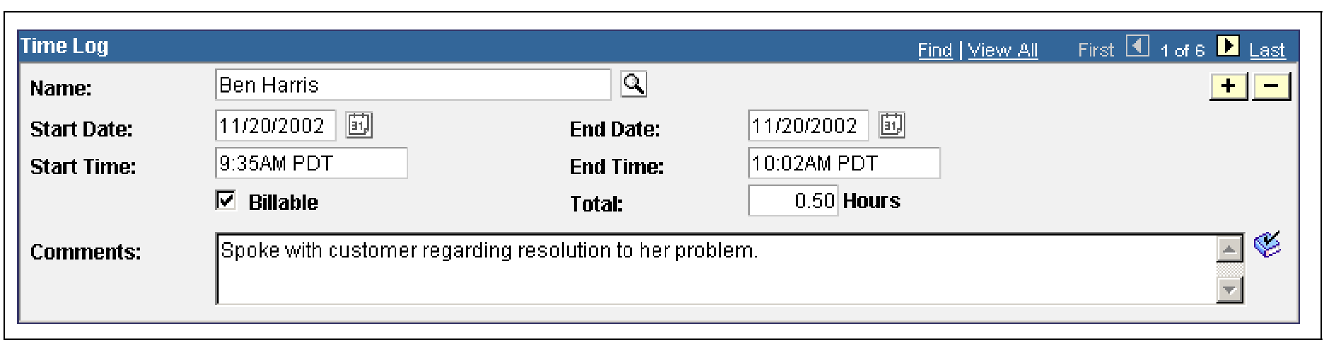
	Displays the next row of data.
	Displays the previous row.
	In a tabbed grid only, expands grid columns to the right so that tabs are no longer needed.
	In a tabbed grid only, the expanded grid is returned to its tabbed state
Customize	Takes you to the customization page for that grid, which enables you to sort by column, reorder columns, hide, and freeze columns.
	Enables you to download the contents of a grid to a Microsoft Excel spreadsheet.
View	Displays the maximum number of rows available to be viewed at once on a page. When this feature is enabled, the link morphs to read View 1 so that you can return to the original setting.
Find	Enables you to find a specific row of data.
First	Takes you to the first row of data.
Last	Takes you to the last row of data.

There are also keyboard shortcuts for all of the above buttons and links.

See Chapter 1, "Working With Browser-Based Applications," Hot Keys, page 11.

In addition to these links and buttons, you'll notice a numbering system for the rows. For example, if a grid or scroll area is set to view only one row at a time, the navigation header would read *1 of 2* or *1 of 20*, depending on how many entries there are. If the grid or scroll area is set to view three rows of data at a time, it reads *1-3 of 20*. Click the arrows to view the next series of rows. Using the Time Log scroll area as an example, we see that it contains 6 total rows of data, displaying just one row at a time.

.



Sample scroll area

Adding Rows

If you click the Add button, the navigation header shows that there are 37 rows of data in the table rather than the previous 36.

If you do not insert a new row, any data you enter overwrites the existing data in that row. The system does not prompt you to insert a row; it assumes that you want to type over existing information. However, the changes you make don't take effect until you save the page. If you exit the page without saving, the data you typed over remains intact. Typing over existing data in the effective-dated table can only be done in Correction mode.

You can also add several rows at once to your grid or scroll area by using the Multi-Row Insert button. When you click this button, the system prompts you to specify the number of rows needed. You can add up to 99 rows at once. The developer of the specific page you are working in controls the availability of this option.

Deleting Rows

You can also delete rows of data from a grid or scroll area. To delete a row of data, select the row by using the navigation header or by clicking a field in the row. Then click the Delete button. The system confirms the deletion by asking if you want to proceed. It also reminds you that the row won't be deleted from the database until you save the transaction; however, the row is automatically removed from the grid or scroll area. To retrieve the row, click the Back button in your browser or close the transaction without saving your changes. When you do, any other changes you made to the page are not saved.

Selecting Rows

For certain grids and scroll areas, you have the ability to select a single row or multiple rows in case you need to batch a number of processes. Single row selection is available when the system displays a radio button to the left of each grid row or in the upper-left corner of a scroll area. Select a row by clicking one of the radio buttons in front of the row. Multiple row selection is available when the system displays check boxes to the left of each grid row and in the upper-left corner of a scroll area. Select as many rows as needed by clicking each check box.

Finding Data

The Find feature on a grid or scroll area enables you to locate specific data, which is particularly useful if your table contains hundreds of rows. Note that this feature allows you to search the data within the grid or scroll area only. It does not search for any data outside the control. The Find feature looks for matches in edit boxes, display-only fields, disabled or gray fields, dynamic links, and text in long edit boxes. It does not find column headings, field labels, text values on icons, static links, and hidden fields. Find searches from the left-most visible object of the current row down, based on the text you enter in the search prompt.

The Find link represents the find feature in the navigation bar of your grid or scroll area. When you click the Find link, a dialog box appears, prompting you to enter your search string. The find feature searches through all rows of data in the buffer and brings the first occurrence in your search string to the top of the row list in the grid. If you are in a scroll area that shows only one row of data at a time, the find feature opens that row of data. To find the next occurrence, click the Find link and enter your search string again.

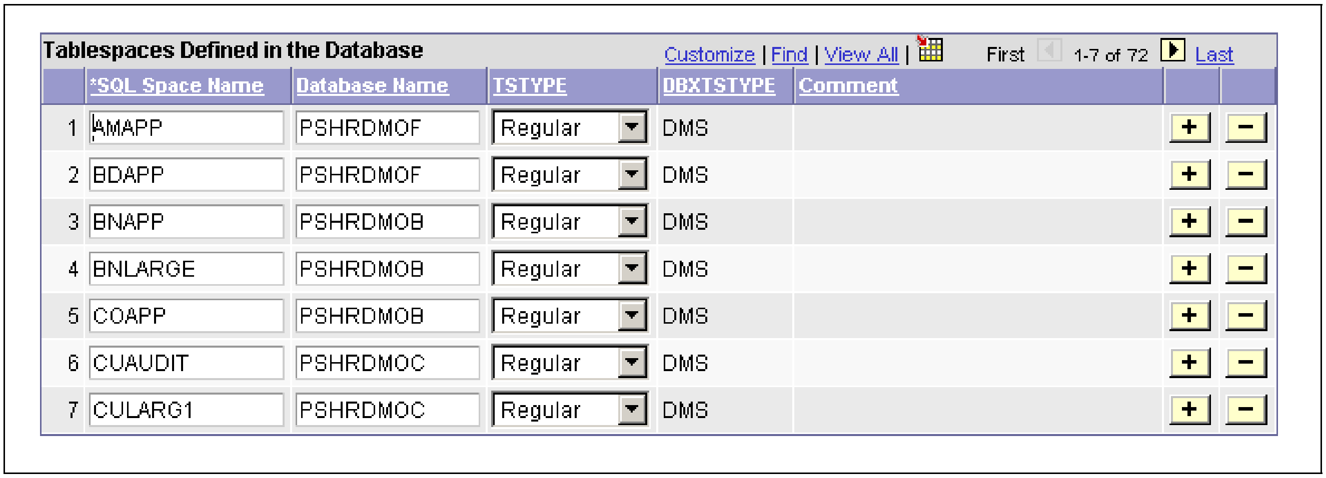
If what you are looking for does not appear in the currently visible rows, the find feature opens a new display of rows. This is so that the row that contains the word you are looking for appears in the grid. Note that on tabbed grids, the find feature searches only the active tab.

Find searches only the current scroll level, it does not search the grid data as well. Each control, if it is set up to perform a find, has a separate Find link in the navigation header of that control.

Note. Your browser may also contain a Find feature. This tool, however, does not search through data in your PeopleSoft database. It searches the html code only for what appears on the current open page. Thus, it only searches through field headings, read-only text, and headings in grids, group boxes, and scroll areas.

Using Grids

Grid controls resemble and behave like an embedded spreadsheet with column headings, rows, and cells. The cells are generally equivalent to regular edit boxes and allow you to enter data as if you were in a spreadsheet program. You might also see a grid that contains a drop-down list box, check box, image, link, or button, in addition to edit boxes. The cells can also contain display-only information, as in the DBXTSTYPE column in the grid below.



Tablespaces Defined in the Database — Customize | Find | View All | First 1-7 of 72 Last

	*SQL Space Name	Database Name	TSTYPE	DBXTSTYPE	Comment		
1	AMAPP	PSHRDMOF	Regular	DMS		+	−
2	BDAPP	PSHRDMOF	Regular	DMS		+	−
3	BNAPP	PSHRDMOB	Regular	DMS		+	−
4	BNLARGE	PSHRDMOB	Regular	DMS		+	−
5	COAPP	PSHRDMOB	Regular	DMS		+	−
6	CUAUDIT	PSHRDMOC	Regular	DMS		+	−
7	CULARG1	PSHRDMOC	Regular	DMS		+	−

Sample grid

To navigate through the data in the grid, use buttons and links in the navigation header. When you add a new row, that row appears below the row where you clicked the Add button.

Grid fields may also contain look-up prompts and calendar prompt buttons. These prompt buttons behave the same as they would if elsewhere on the page..

See Chapter 4, "Working With Pages," Working With Field-Level Prompts and Validation, page 57 and Chapter 4, "Working With Pages," Calendar Prompts, page 40.

In this section, we discuss how to:

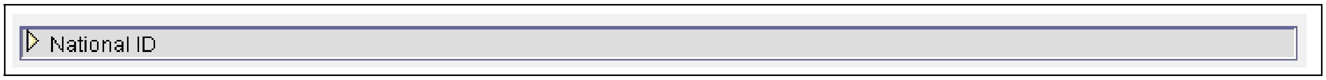
- Tab for multiple views of a grid.
- Collapse grids.
- Customize your grid.
- Manipulate grid column order.
- Manipulate grid column sort order.
- Download grid data.

Tabbing for Multiple Views of a Grid

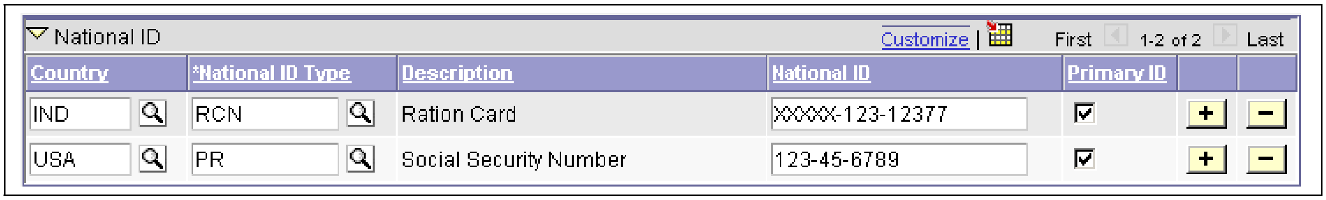
Tabbed grids allow you to view multiple columns of information without scrolling to the right. By clicking the tabs just below the grid navigation bar, you can view the remaining columns of grid data. Alternatively, some grids may have an Expand All button to the right of the tabs, which enables you to expand the grid columns to the right so that no tabs show.

Collapsing Grids

You may also encounter grids that can be collapsed or expanded. Click the right-pointing triangle in front of the grid heading to expand a grid that's hidden from view (collapsed). Following are the collapsed and expanded states of the National ID grid from the Eligibility/Identity page in the Personal Data component.



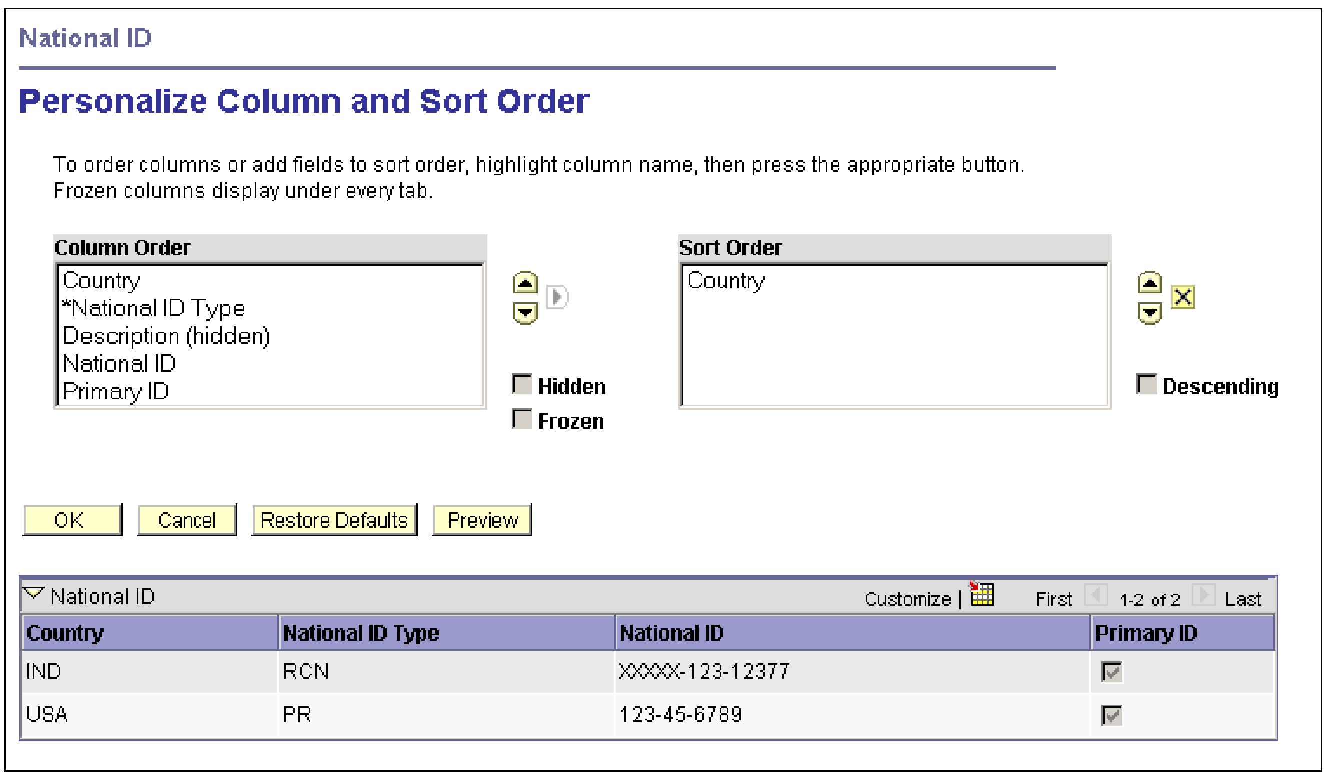
Collapsed grid



Expanded grid

Customizing Your Grid

For most grids, you can customize the order of the columns, the sort order, which columns are frozen, and which columns are hidden. You can control these settings by selecting the Customize link in the header or footer bar of the grid. Any personalizations that you make remain for that grid until you change them.



Personalize grid page example

Any tabs in the grid are active so that you can view all sample data. Use the following toolbar buttons to personalize your grid:

OK Saves the personalizations you have made and returns you to the transaction page with the changes in effect.

Cancel	Cancels all personalization settings you may have set, if any, and returns you to the transaction page.
Restore Defaults	Restores all original default settings for the grid. Default settings can be restored at any time, even if you have exited the transaction.
Preview	Enables you to preview any personalization settings you make in the display-only grid at the top of the page. Clicking Restore Defaults automatically returns the sample grid to the original settings.

To change the column order:

1. In the Column Order grid of the grid personalization page, select the column you want to move.

   To select multiple columns in succession, press the SHIFT key as you select additional column names. Or to select multiple columns that are separated from each other, press the CTRL key.

   If your grid contains tabs, the system displays the tab separators in the Column Order table. You can move the tab separator just as you would a regular column, thus altering the number of columns the system displays at once.

2. Select the up or down arrow buttons to move the column up or down in the list.

   If you move a frozen column after an unfrozen column, the system turns off the frozen setting.

3. Repeat steps one and two for any other columns you want to move.
4. Click the OK button to save your changes and return to the transaction page.

To hide a column:

1. In the Column Order grid of the grid personalization page, select the column you want to hide.

   To select multiple columns in succession, press the SHIFT key as you select additional column names. Or to select multiple columns that are separated from each other, press the CTRL key.

2. Click the Hidden check box.

   Note that when you use the Find feature in the grid, the system won't search any columns you set as hidden.

3. Click the OK button to save your changes and return to the transaction page.

To freeze a column:

1. In the Column Order grid of the grid personalization page, select the column you want to freeze.

   Note that any columns that the developer already defined as frozen displays with the Frozen check box selected. You can override this setting by clicking the check box to turn it off.

2. Select the Frozen check box.

   The system automatically freezes all columns above it in the Column Order grid. If you move a frozen column after an unfrozen column, the system turns off the frozen setting.

3. Click the OK button to save your changes and return to the transaction page.

Manipulating Grid Column Sort Order

In the Sort Order grid on the personalize page for that grid, you can alter the sort order of grid columns. When you save the personalization settings, the new sort order remains persistent, meaning that your sort remains every time you access that grid, even if you log off the PeopleSoft system and log in again later.

To specify a persistent sort order for a grid:

1. In the Column Order grid of the grid personalization page, select the column you want to sort.

   Note that you can sort Hidden columns; however, you cannot select the following column types for sorting:

   - Tab separators
   - Images
   - Push buttons or hyperlinks
   - HTML areas

2. Click the right arrow to display that column in the Sort Order grid.

   To select multiple columns in succession, press the SHIFT key as you select additional column names. Or to select multiple columns that are separated from each other, press the CTRL key.

3. Use the up and down arrow buttons to alter the sort hierarchy.

   You can sort multiple columns at once. The system considers the first column in the list the primary sort, the second the secondary sort, and so on. Any columns you move to the sort order grid are sorted in ascending order. To sort in descending order, select the Descending check box for the highlighted column. The system applies the *(desc)* text next to the column name to indicate which columns are in descending sort order.

4. Click the OK button to save your changes and return to the transaction page.

   The system saves your sort settings until you change them again or until you select the Restore Defaults button in the personalize page.

You can override the sort order of a column in a grid directly in the transaction page without altering the personalization settings. To do so, click the column heading link (non-underlined) for the column you want to sort. This sorts the column in ascending order. You can toggle between ascending and descending order by repeatedly clicking the column heading link. The last column heading link you click becomes the primary sort for the grid. Note that this type of sorting is only temporary. When you exit the transaction, the system does not save the sort order you just performed.

Downloading Grid Data

Some grids enable you to download grid data to a Microsoft Excel spreadsheet. The download feature extracts all active, unhidden rows regardless of whether or not the rows are visible on your screen.

To download grid data:

1. Select the Download link in the grid.

   The File Download dialog box opens.

2. Select the Save this file to disk option, and enter the directory in which you want to store the grid data.

   You can then view and manipulate the data as needed within the Excel spreadsheet. Note that the system downloads all field types (columns) with the exception of images.

Using Scroll Areas

A scroll area behaves like a grid, in that each occurrence represents one row of data in the database. You'll notice, however, that within a scroll area the fields are randomly arranged rather than setup like a spreadsheet. These field groupings, although not physically displayed in a row, should still be considered as rows of data in the database.

A scroll area looks like a group box with navigation tools in the navigation header. It does not actually contain a scroll bar that you would use to scroll up and down between the various rows. Instead, use the buttons and links in the navigation header to help you *scroll* through the data rows. Inserting a new row into the scroll area inserts a new row into the database table.

Using Effective-Dated Scroll Areas and Grids

Many scroll areas and grids are controlled by an effective date and an effective-dated status. These scrolls can have two values: active and inactive. The active and inactive values enable you to keep a complete history of data for every value that you add. In most cases, you will never want to delete a value; you will only make it inactive. Thus, you can retain a complete history of all your data and table values—whether you changed them two years ago or want them to go into effect in two months—for trend analysis and other historical reports.

With all this information at your fingertips, you can "roll back" your system to a particular point from which you can perform analyses or projections for your company. You can also maintain all data on your employees as it changes over time.

For example, when going through the employee review process, it is important to maintain records of past reviews so that you can refer back to see how an employee has improved or not over time. Then, as employee review time arrives again, you would simple add a new row of data to the table by clicking the Add button rather than typing over the existing row. When you add a new row, the Eff Date automatically populates with the system date, which is usually today's date. You can keep this date or change it to a future date if the information you are entering doesn't take effect until later.

Because the system date is at or after the new effective-dated row you've created, the new information becomes the current row. That means the row you saw before you added a new row is now historical information. If you were to return to this page and click the Update/Display button, which displays only current and future rows, you would see only the last data row you entered. If you also wanted to see older data rows, you would have to click the Include History button.

To correct incorrect data already in the system, click the Correct History button. You don't need insert a row because the row of data already exists and you don't want to maintain incorrect information.

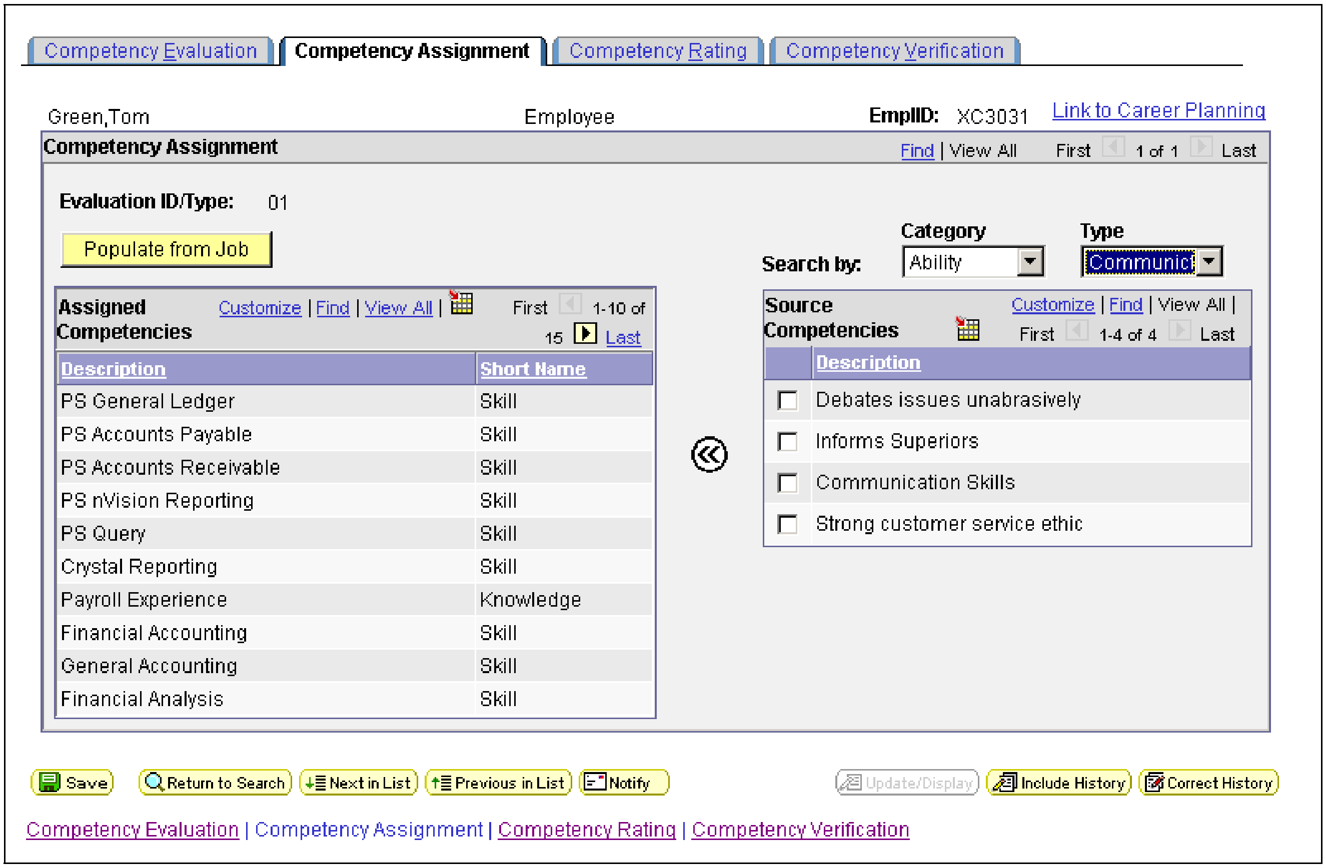
See Also

Chapter 4, "Working With Pages," Using Effective Dates, page 33

Using Multiple Scroll Areas and Grids on a Page

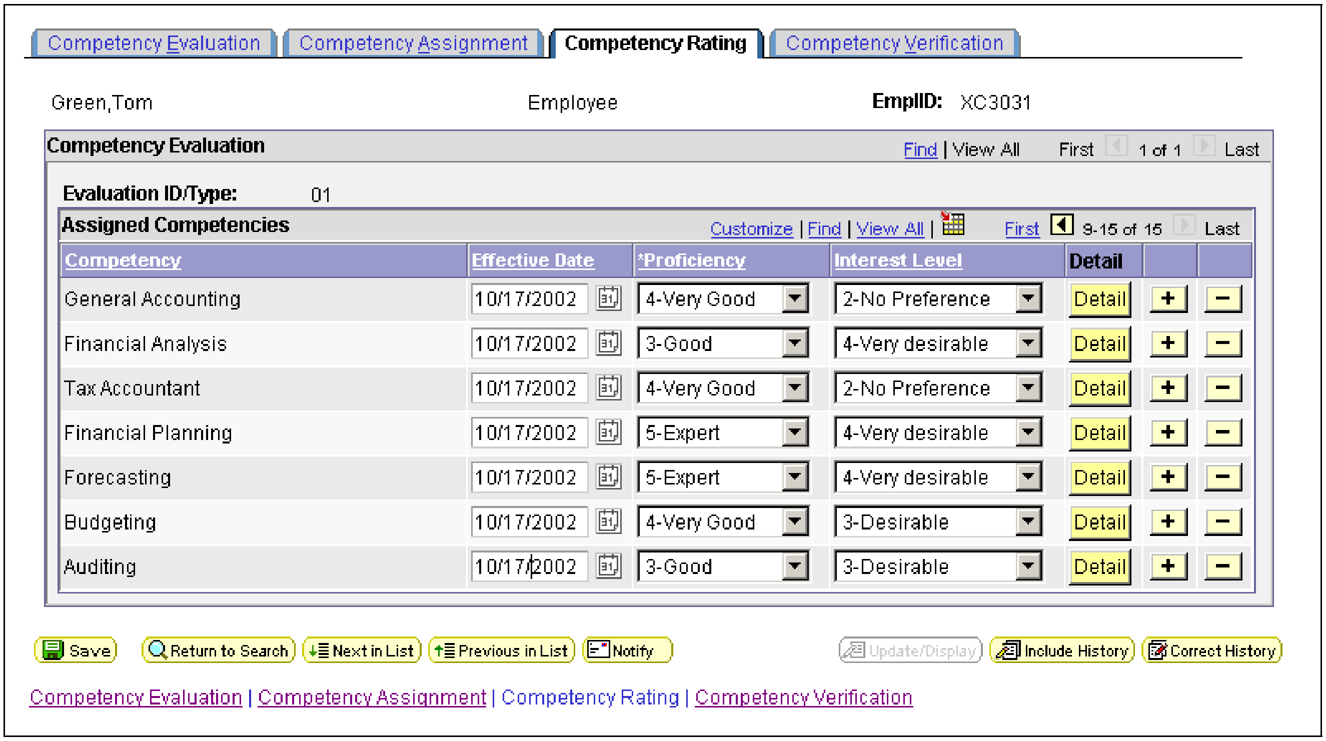
As you work with PeopleSoft applications, you'll encounter pages that contain multiple scroll areas and grids. These scroll areas and grids may be one on top of the other or side by side, or they may be contained within each other (nested). The fields controlled by one scroll area or grid are associated with only one database table. Those pages with multiple scroll areas or grids contain fields that write to multiple tables.

The Competency Assignment page in the following example contains two grids side by side. With this format, you can transfer data from one grid to the other. In our example, select a value from the Category and Type drop-down list boxes to populate the Source Competencies grid. To select the descriptions you want to appear on Tom Green's evaluation, select the appropriate check boxes under the Description field in the Source Competencies grid. Then click the double left arrow button to move those descriptions to the Assigned Competencies grid.



Side by side grids

Once you have assigned the competencies to the evaluation, you can evaluate Tom using the Competency Rating page. The Competency Rating page in the following example contains the Assigned Competencies grid nested within the Competency Evaluation scroll area.



Nested grid in a scroll area

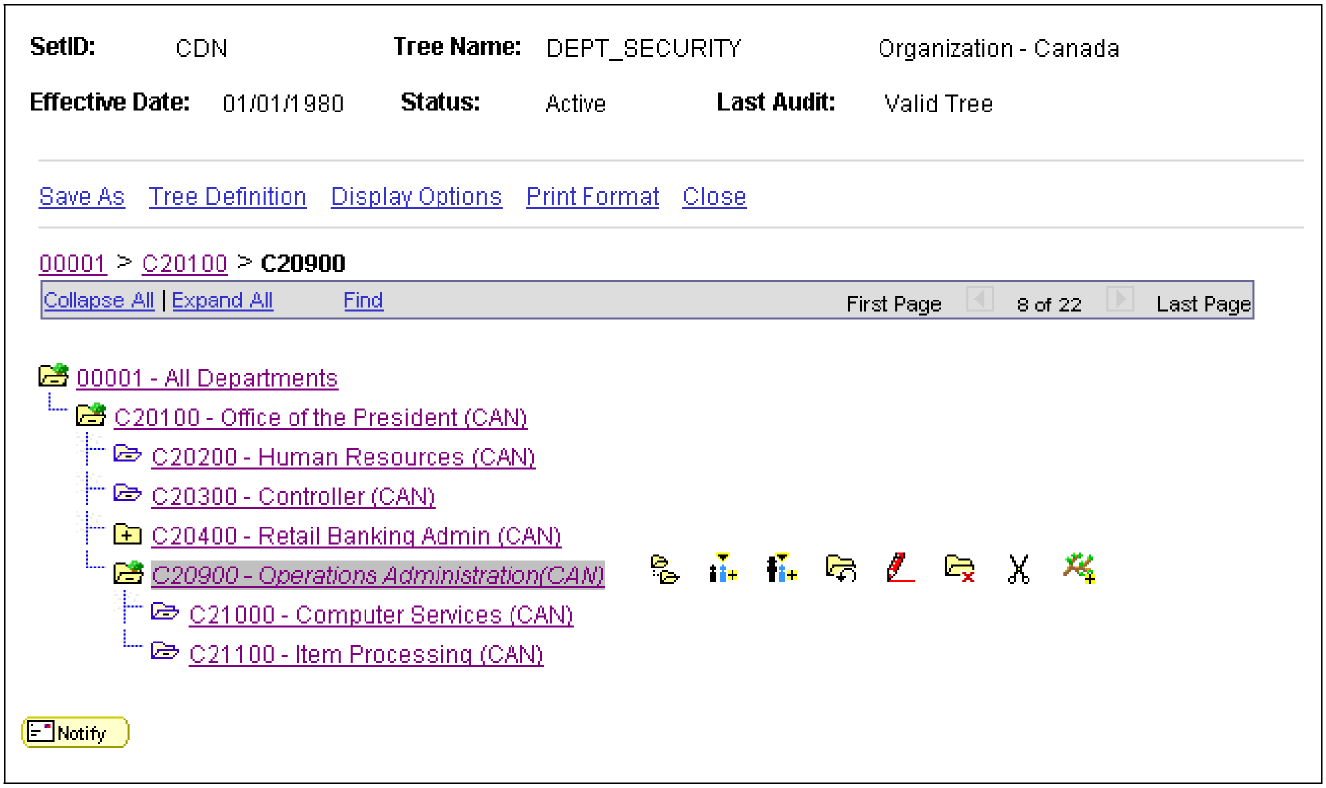
The Evaluation ID/Type fields associated with the outer scroll area refer to the type of evaluation. The fields associated with the Assigned Competencies inner scroll area refer to the specific competencies included in the evaluation.

Another way of looking at nesting is to think of the scroll area and grid as having a parent/child relationship. The table that stores information about individual competencies is a child of the table that stores information about particular evaluations. Child tables share the same key structure as the parent tables, plus one or more additional keys to uniquely identify individual rows. If you insert new rows in the parent table, the fields on that table, as well as the child table, are cleared because these tables are not effective-dated.

Working with HTML Trees

When talking about trees, we use terminology derived from the idea of a family tree. The nodes that report to the root node are called its *children*; the root node is their *parent*. Nodes that have the same parent are called *siblings*.

These terms refer to the relationship between nodes and are not permanent attributes of the nodes themselves. A single node can be a parent, child, and sibling all at the same time. In the following example, *Operations Administration* is a child of *Office of the President*, a parent of *SULLIVAN*, and a sibling of *Human Resources, Controllers* and *Retail Services.*



Sample HTML tree

Click on the yellow folders with + (plus) signs to expand another level. The open folders represent the lowest level of the tree and are not expandable. Click the links beside the nodes to see representations of the data. Clicking a link either opens an entirely new page or displays data for that link to the right of the HTML tree.

Navigating Within an HTML Tree

Navigate the tree using the navigational bar (the horizontal bar at the top of the tree) and the breadcrumbs, as shown above. You can perform the following actions on the selected tree by using the links and images on the navigation bar.

Collapse All Click to close all of the visible nodes except for the root node. The root node is always expanded.

Expand All Click to expand all of the nodes on the tree, so that the entire tree or branch hierarchy is visible.

Expands all parent/child relationships, but the tree hierarchy is still presented one page at a time. Use the Next and Previous page arrows to page forward and backward through the tree.

Find Click to access the Find Value page and search for nodes and detail values.

As you find your way through your tree, navigational breadcrumbs appear above the navigation bar. They show you a basic map of your route through the tree and can also be used to jump back to a previously visited node. Breadcrumbs represent nodes in the current branch (A type nodes) and the parent branch of the opened branch (B type nodes). In the example, node 00001 is the parent branch of C20100 and C20100 is the parent node of C20900.

The maximum number of breadcrumbs displayed is 7. When you exceed that number, the system removes the earlier ancestor nodes. This ensures that breadcrumbs always begin with the parent node of the currently selected node.

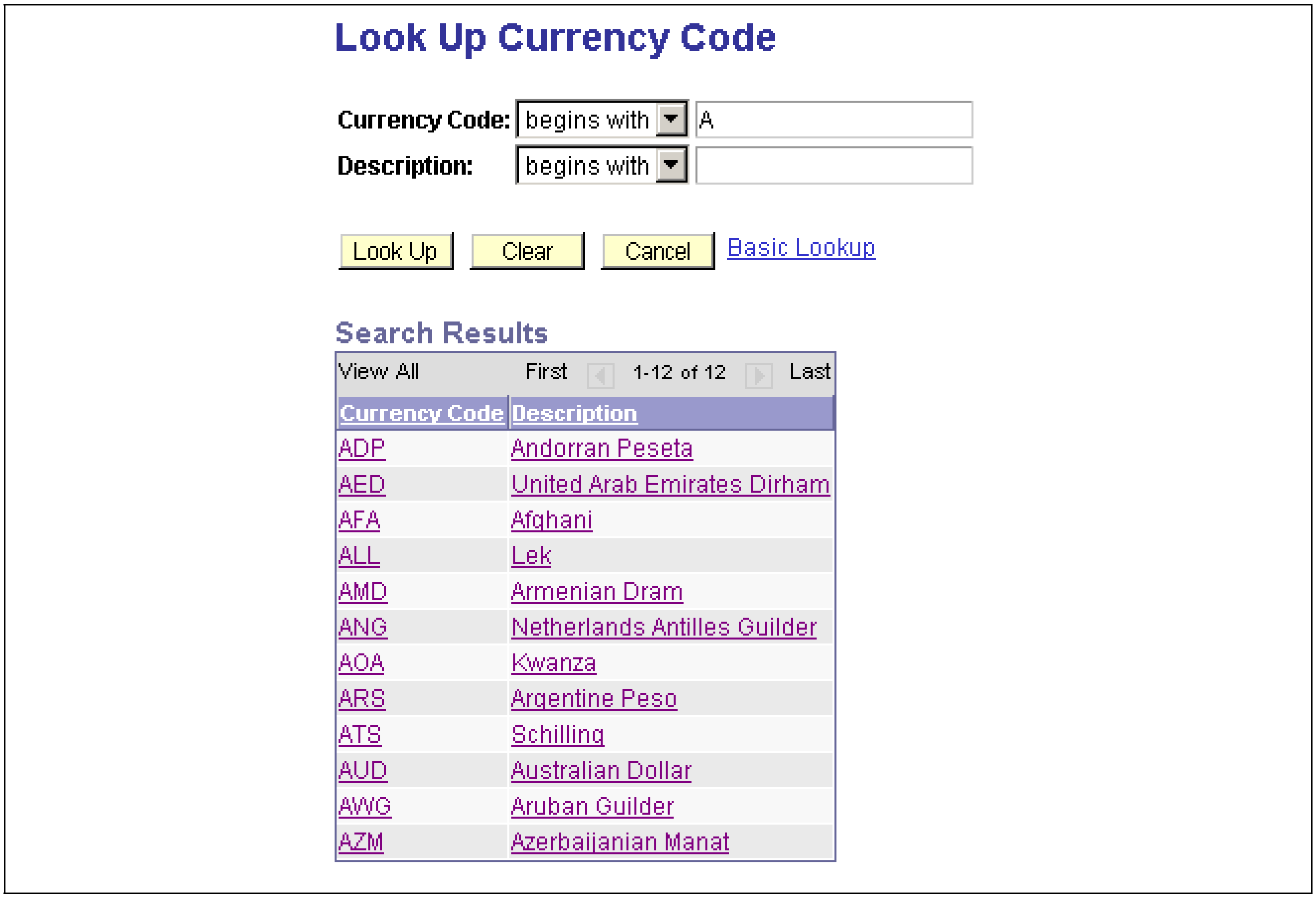
Working With Field-Level Prompts and Validation

Some edit box fields are linked to database prompt tables, which store values for information shared across your organization, such as department IDs, country codes, and state codes. They're called prompt or look up tables because you can prompt the system to give you a list of values from which you can select the correct value. In many cases, fields are defined so that the system edits or validates the values you enter against a prompt table and ensures that the values are valid.

Many of these values have individual prompt tables of their own. For example, currency codes and country codes are each stored in their own respective tables: CURRENCY_CD_TBL and COUNTRY_TBL. Fields prompting against these kinds of prompt table appear as edit boxes on your screen with a look up button to the right.

Look up button

To initiate a search, click the look up button. The Look Up page opens displaying all valid values for that field up to 300 rows. To narrow your search, you can select to search by a certain field in the Search By field. If you only have partial data, the search operators in the dropdown list box can help make a search more specific. As with a search page, use the Advanced Lookup page to enter additional criteria by which to search. When you find the field value you need in the Search Results grid, selecting the link automatically populates the field from the original page with your selection.



Look Up page example

Alternatively, if you know a partial value of the Currency Code, you can enter that value on the main page and then click the prompt button, as in the example above. The Search Results populate with all the choices available to you based on the partial value you entered.

Note. Your system administrator may opt to exclude extremely large tables from auto prompting for performance reasons.

See Also

Chapter 3, "Using Keys and Search Pages," Using Search Pages, page 27

CHAPTER 5

Working With Processes and Reports

In this chapter, we provide an overview of PeopleSoft processes and reports and describe how to:

- Request reports in PeopleSoft Applications.
- Check the status of reports.
- View reports in Report Manager.

Note. The procedure described in this chapter applies to most standard reports, but not all of them. Some PeopleSoft applications include reports that you run from outside the system, using PS/nVision or a third-party application. The documentation for your application tells you which application to use.

Understanding PeopleSoft Processes and Reports

Although much of your interaction with the PeopleSoft system involves working with the online pages of a PeopleSoft application, you'll also execute off-line, or batch, processes that run in the background while you're still using the application or even after you've left the office.

A batch process is a predefined process or program that runs independent of any end user intervention. Typical, off-line processes include payroll, journal posting, complex mathematical calculations, or generating reports that you share with colleagues.

You run batch processes in the PeopleSoft system using Process Scheduler Manager. Process Scheduler Manager enables your organization to define processes, submit requests for processes, and set up an "agent" that scans for submitted processes and runs them.

As an end user, you need only to be concerned with successfully submitting process requests, monitoring their progress, and viewing their output in Report Manager. You can safely leave process definitions and configuring the Process Scheduler Server Agent to the technical staff at your site. This chapter covers the general procedure for running the standard reports that come with your PeopleSoft applications. If you, or someone in your organization, have added custom reports to the system, the procedure should be similar.

Requesting Reports in PeopleSoft Applications

This section discusses the following four major steps required to run a standard report. Using these steps, you can produce many types of reports:

1. Select the report you want to run.
2. Enter the parameters for the report.

3. Specify where and when you want the report to run.
4. Choose the report output type and the report distribution method.

Selecting Reports

To run a report, select it from the appropriate menu in your PeopleSoft application. Many applications have a Report menu that lists the available reports.

Run Controls

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

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

Run Control IDs

Each run control you create receives a unique run control ID and these IDs are product-specific. Refer to your PeopleSoft product documentation for details on the run control IDs you will be using. When you select a report from a menu, a search dialog box appears, asking for a run control ID. If you are in Add mode, enter a new ID for the run control you're about to define. If you're in Update/Display mode, enter an existing run control ID, or click on the Search button and select from the list of available run control IDs.

Note. If you're running a number of reports from the same menu in a row, you must enter only the run control ID for the first report. When you select a second report from the menu, the application remembers which run control you're using.

To select a report from your PeopleSoft application:

1. Select the required PeopleSoft application menu item.

   For example, Process Financial Information, Maintain Ledgers.
2. Select Report, and then click on the required report name.

   When you select a report name, you have the choice of two actions:

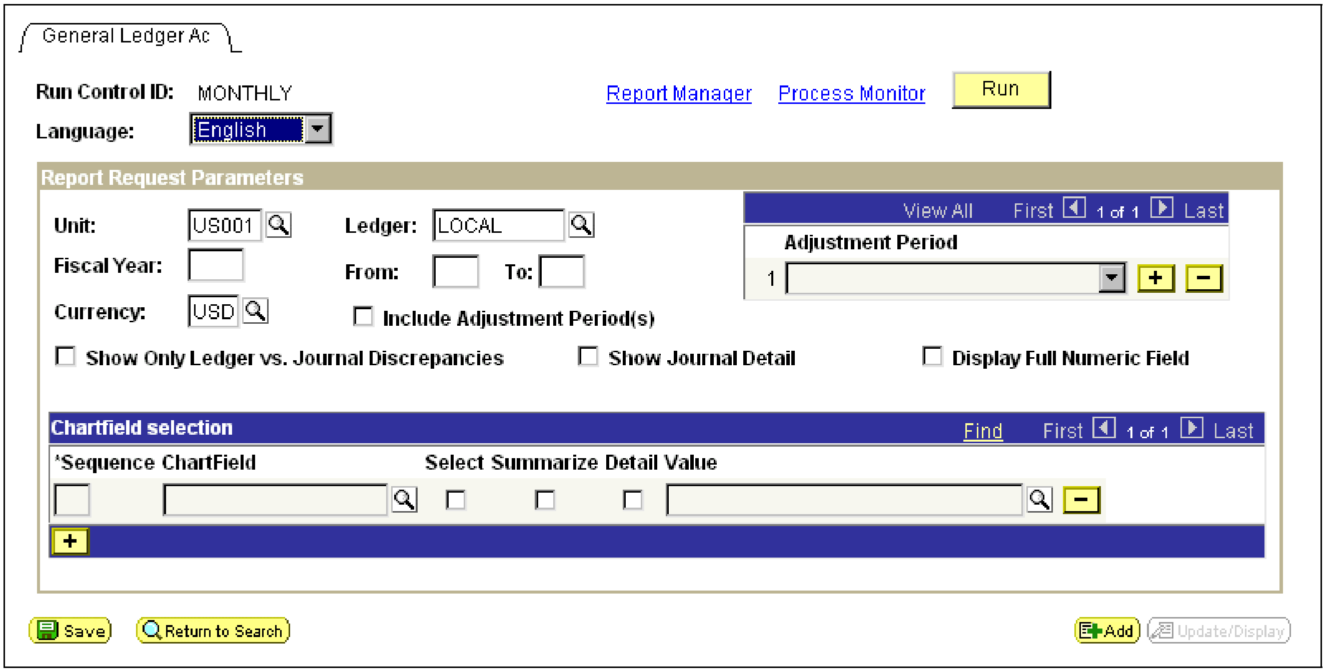
   • Add a new run control ID

   • Select an existing run control ID.

However, you might want to just print a predefined report. Both options enable you to do this. What you're adding or selecting is not the reports themselves, but run controls.

Specifying Report Parameters

You can execute off-line processes from pages in your PeopleSoft application in a variety of ways. Which way you use the processes depends on the application. Navigate to the page from which you want to run your process. For many reports, you need to enter values for parameters that specify what data the report includes, such as From and To dates or Business Units. The parameters page appears after you enter the run control ID. The following is an example for the General Ledger Activity report.



General Ledger Activity page

If you selected an existing run control ID, the values in this panel reflect the settings from the selected run control; if you added a new value, or you're using an HRMS application, they're the default values.

You can change any of these settings. However, keep in mind that your changes are saved to the run control when you save or run the report.

To run your report, click Run and the Process Scheduler Request page appears.

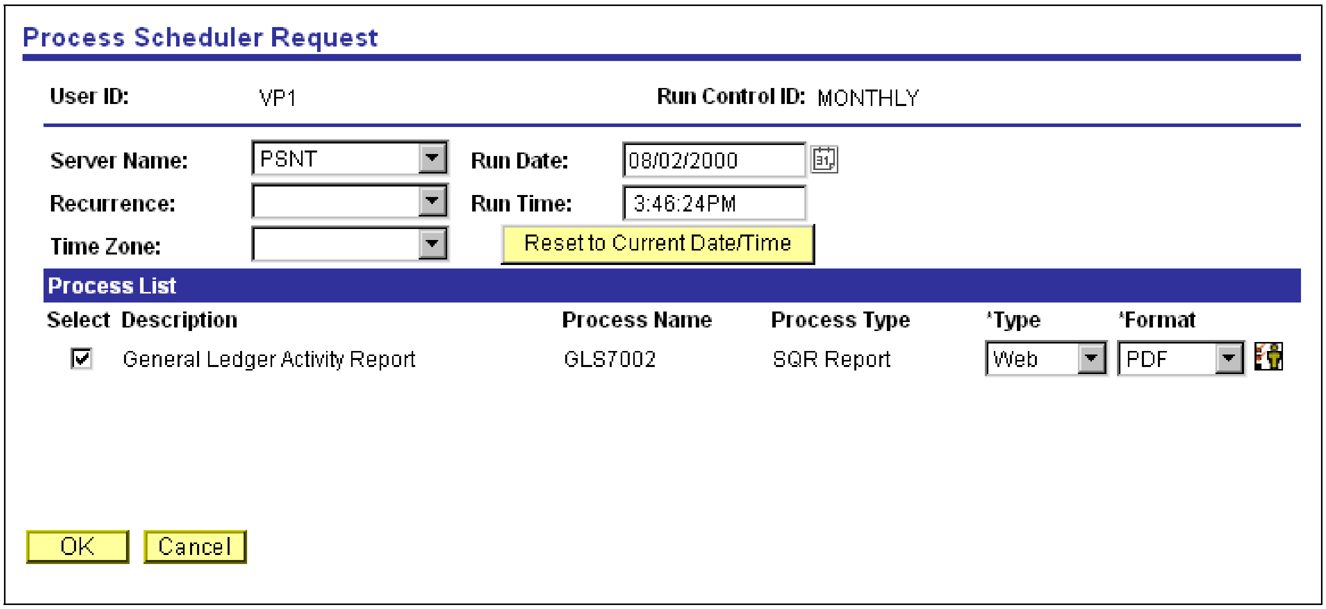
Note. PeopleSoft HRMS applications don't save run control information for reports that you've successfully run. You need to enter the parameters each time you run a report.

Specifying Where and When to Run Reports

You submit a process request from the Process Scheduler Request page. This page shows you the options that you have selected for a particular process request and what processes are available for you to submit. Select the options that you want to use in running your process and select the checkbox for each process that you want to run. Clicking OK queues your process request.

The options available to you on this page are determined by your security profile. For example, each end user has a user profile, which is linked to one or more *roles.* A role is a group of end users with a specific identity, and each role has one or more permission lists that control what a user can access. You can run only those processes that are associated with your permission list. If you are in the human resources department, you most likely belong to a human resources role and therefore can run only human resources processes. The number of processes that appear in the list on the Process Scheduler Request page is directly associated with your security profile.

Note. Select the run options that you want to use in running your process. Depending on your security, you can select the server and run date and time variables for your process. In the Process List group box, then select the check box for each process that you want to run.



Process Scheduler Request page

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

Recurrence — The recurring time intervals for a process request to run. For instance, if you need to run a process every weekday at 5 P.M. that resolves all the transactions managed by your website, you could select the run recurrence definition of M-F at 5pm to schedule this process to run at the appropriate times.

Time Zone — The time zone in which your process will run. For instance, you could be in Eastern Standard Time (EST) and schedule a process to run in PST (Pacific Standard Time).

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

Run Time — The time at which you want the process to run.

Reset to Current Date/Time — Sets the Run Date and Run Time to the present date and time.

Select Description — This helps to uniquely identify a process or job. You should be familiar enough with the processes that you run as part of your daily tasks to identify them by this description.

Jobs are listed as links. Click on the link to display the individual processes and jobs associated with the selected job.

Process Name

The name of the process as it appears in the definition.

Process Type

The type of process, such as COBOL, or Crystal.

Type

The destination type for this job or process. The destination type entered for individual processes or jobs attached to a job will overwrite the destination type entered for the parent job.

File. This enables you to write the output to a file that appears in the Output Destination.

Printer. This value resolves to the default printer defined for a workstation or a server. You can enter a custom printer location if you have the appropriate security access.

Email. If you want a report to be distributed, or sent to a particular email list, you can enter the appropriate distribution information or email address in the Distribution Detail page by clicking on the Distribute To icon. This option is available for SQR, nVision, and Crystal.

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

Format

Just as you have a few options for Destination Type, there are even more options regarding your Output Format. There are a variety of possible output types depending on what Process Type you have selected. The default output format for Crystal, SQR, and nVision is HTML.

The format entered for individual processes or jobs attached to a job will overwrite the format entered for the parent job.

Opens the Distribution Detail page that allows you to enter additional distribution information when the output destination type you select is Web or Email.

Selecting Output Types

There are several kinds of file output types that you can choose for your process. The following table shows a list of file output types listed by process type.

File type	Crystal	SQR	nVision
Excel (*.xls)	X		X
Word (*.doc)	X		

File type	Crystal	SQR	nVision
Acrobat (*.pdf) (Must have Acrobat Reader installed to read these files.)	X	X	
HP Format (*.lis)		X	
Line Printer (*.lis)	X	X	
Rich Text Files (*.rtf)	X		
SQR Portable Format (*.spf)		X	
Text Files (*.txt)	X		
Post Script Files (*.lis)		X	
Crystal Reports (*.rpt)	X		
Comma Delimited (*.csv)		X	
HTML (*.htm)	X	X	X

Note. You must have Adobe Acrobat Reader installed on your workstation to be able to read Acrobat (.pdf) files.

Setting Report Distribution

The Distribution Detail page allows you to choose the recipients of your process output. To set up distribution for your process output, click on the Distribution icon.

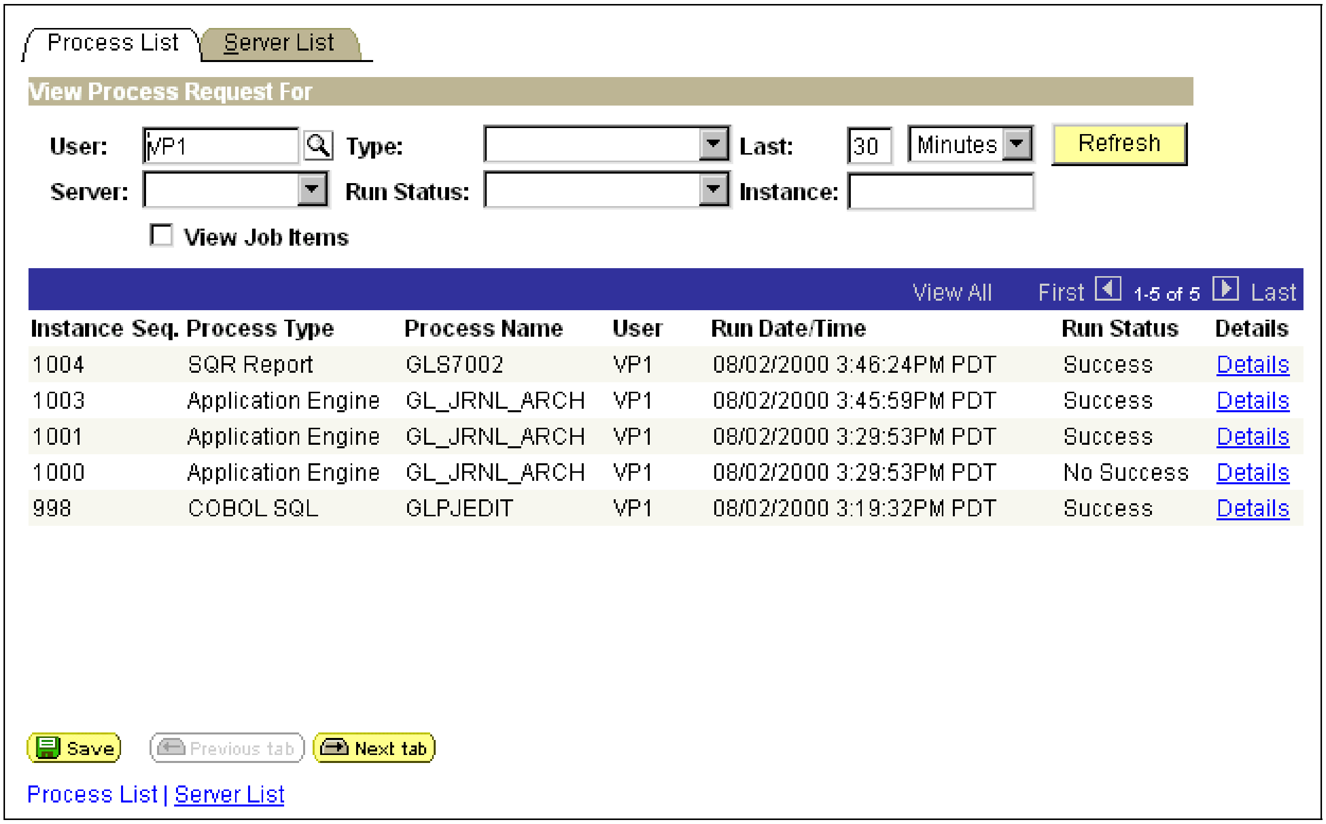
If the process that you are running allows output that can be emailed, for example, Crystal can create Adobe Acrobat (.pdf) files, you can enter an email subject and message and send the output to a group of email addresses.

You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper security to view this output.

Note. If you are entering a list of email addresses, make sure to use a *semicolon* to separate each address from the others.

Checking the Status of Reports

When you click OK from the Process Scheduler Request page, you are returned to your Application page.



Checking process status with Process Monitor

To check the status of your report:

1. Select the link to Process Monitor, or select PeopleTools, Process Scheduler, Process Monitor.

   When you run a report from a PeopleSoft application, the system automatically starts Process Monitor. Process Monitor is a tool designed to track the status of all completed and pending Process Scheduler requests.

   Depending on how much data you ask the system to retrieve, and depending on the system's current processing load, your report might take only a few moments or considerably longer to run.

   Your user ID appears in the User list box. If the list of processes is too long, you can use the navigation arrows on the screen to scroll through the list.

2. Use the Server, Type, Run Status, Last, and Instance list boxes to limit the processes that Process Monitor displays.

3. Click Refresh to update this page with the latest system activity.

   If the Run Status column says Initiated or Processing, the report is still running. When it says Success, the system has finished running the report.

Canceling or Holding Report Requests

Depending on the status of your report, you can cancel it or put it on hold. If the system is done processing a report, you can delete its information from Process Monitor. Click Details to display the options for canceling or holding a request.

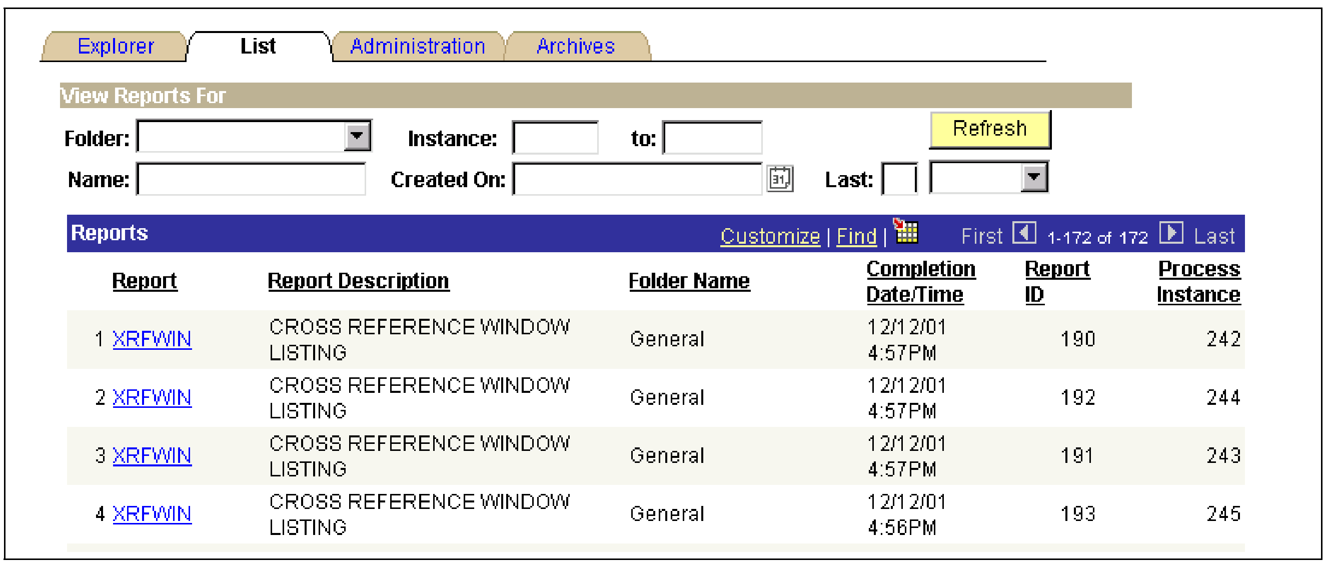
Viewing Reports in Report Manager

Report Manager is like your own personal “in box” of reports and processes that you have access to. It provides a secured means to view report content, check the status of a job, and see content detail messages.

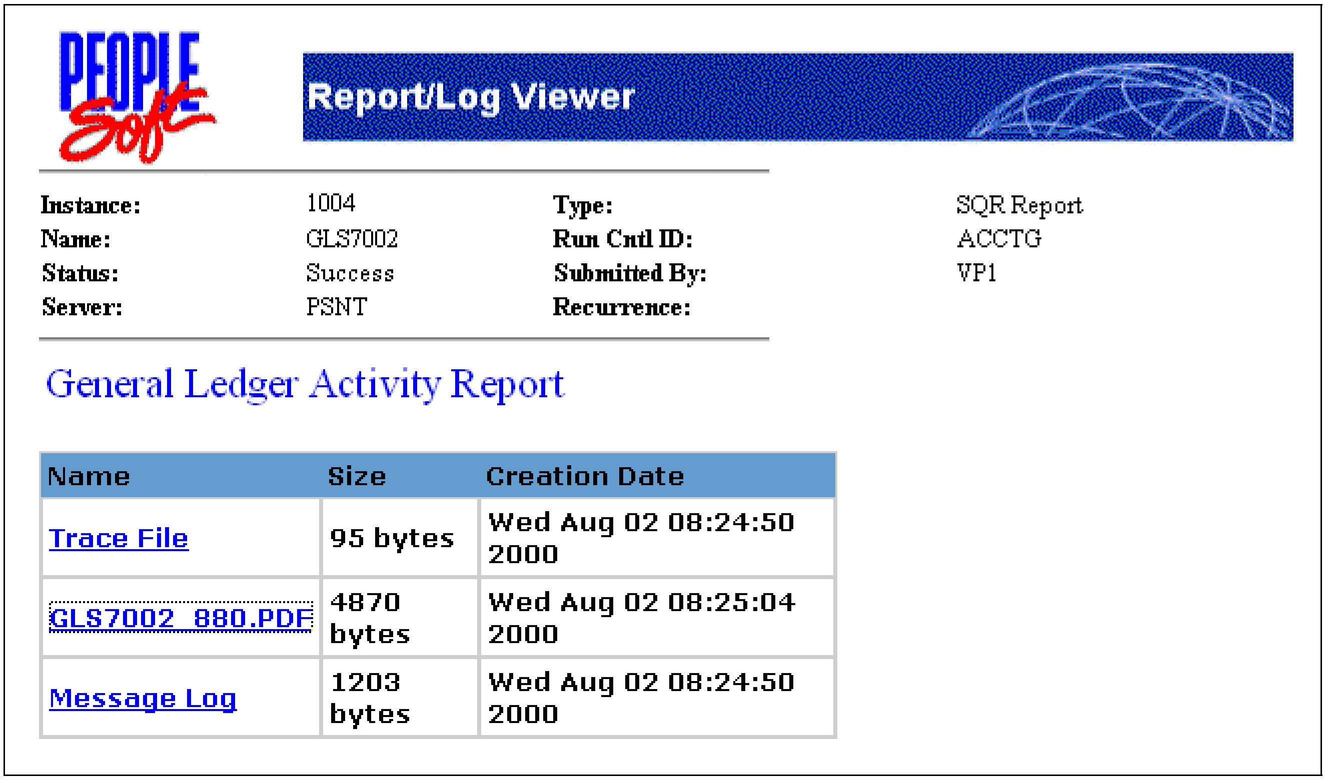
To view your list of reports:

1. Select Reporting Tools, Report Manager
2. Select View to view your report output.

   The Report/Log Viewer page appears in another browser window.
3. Click the link to the report or any associated files that you want to view. In the example, the General Ledger Activity report appears in Adobe Acrobat (.PDF) format.



Report List page



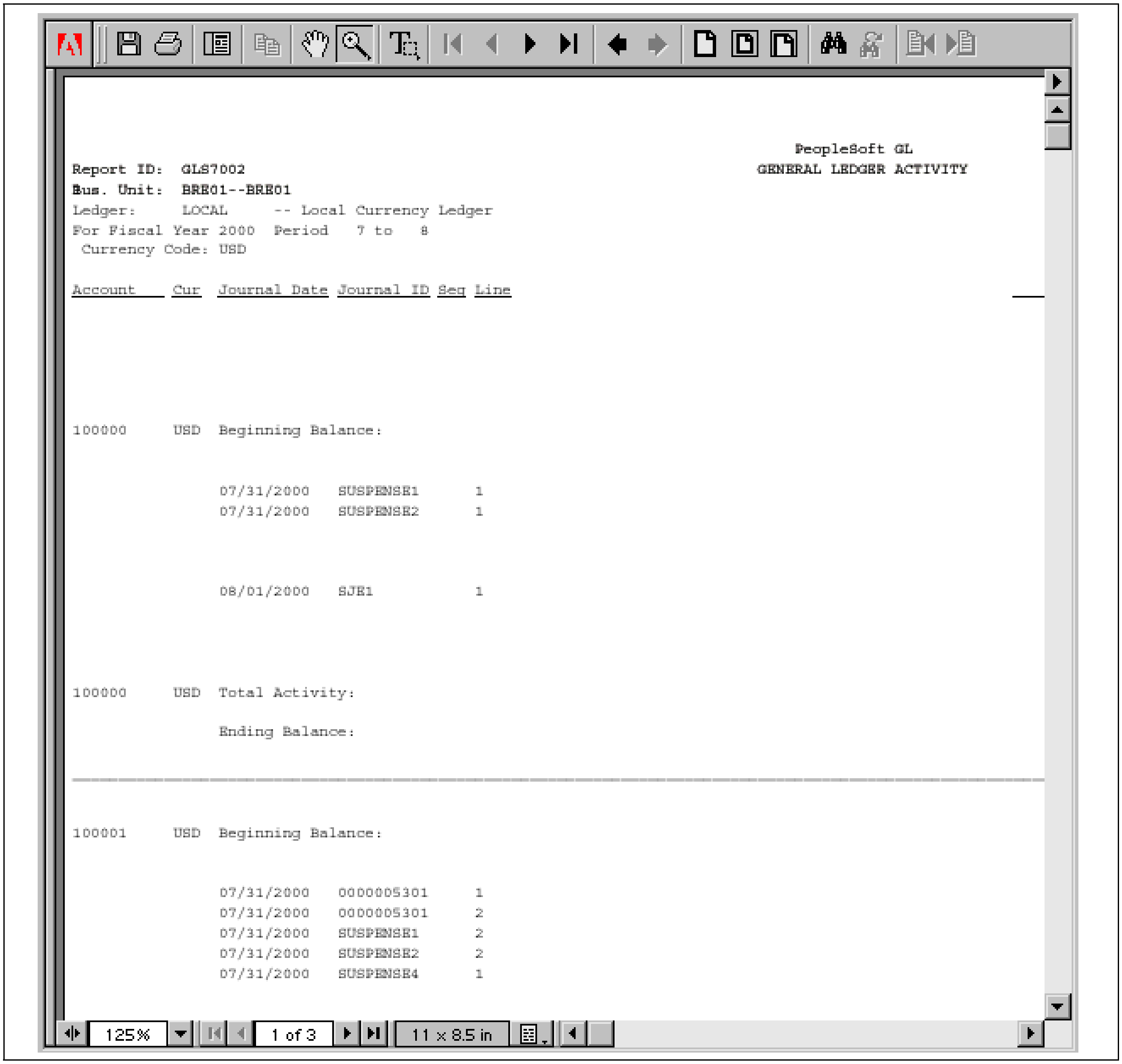
Report/Log Viewer

Instance:	1004	**Type:**	SQR Report
Name:	GLS7002	**Run Cntl ID:**	ACCTG
Status:	Success	**Submitted By:**	VP1
Server:	PSNT	**Recurrence:**	

General Ledger Activity Report

Name	Size	Creation Date
Trace File	95 bytes	Wed Aug 02 08:24:50 2000
GLS7002_880.PDF	4870 bytes	Wed Aug 02 08:25:04 2000
Message Log	1203 bytes	Wed Aug 02 08:24:50 2000

Report/Log Viewer page



PeopleSoft GL
GENERAL LEDGER ACTIVITY

Report ID: GLS7002
Bus. Unit: BRE01--BRE01
Ledger: LOCAL -- Local Currency Ledger
For Fiscal Year 2000 Period 7 to 8
Currency Code: USD

Account	Cur	Journal Date	Journal ID	Seq	Line
100000	USD	Beginning Balance:			
		07/31/2000	SUSPENSE1		1
		07/31/2000	SUSPENSE2		1
		08/01/2000	SJE1		1
100000	USD	Total Activity:			
		Ending Balance:			
100001	USD	Beginning Balance:			
		07/31/2000	0000005301		1
		07/31/2000	0000005301		2
		07/31/2000	SUSPENSE1		2
		07/31/2000	SUSPENSE2		2
		07/31/2000	SUSPENSE4		1

General Ledger activity report in Adobe Acrobat format

CHAPTER 6

Using Workflow

This chapter provides an overview of workflow and describes how to:

- Send notifications.
- Receive notifications.
- Work items.
- Use timeout worklists.

Understanding Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve several steps and several people working together. For example, when you enter an invoice, you are also initiating an approval and payment process: someone else reviews and approves it, and a third person submits payment to the vendor. The term *workflow* refers to this larger process.

To facilitate this type of multi-user process, PeopleSoft automatically triggers workflow *routings*—notifications to inform other people of the work awaiting them. So when you enter an invoice, PeopleSoft automatically notifies the appropriate approver that the invoice has been submitted and is awaiting review.

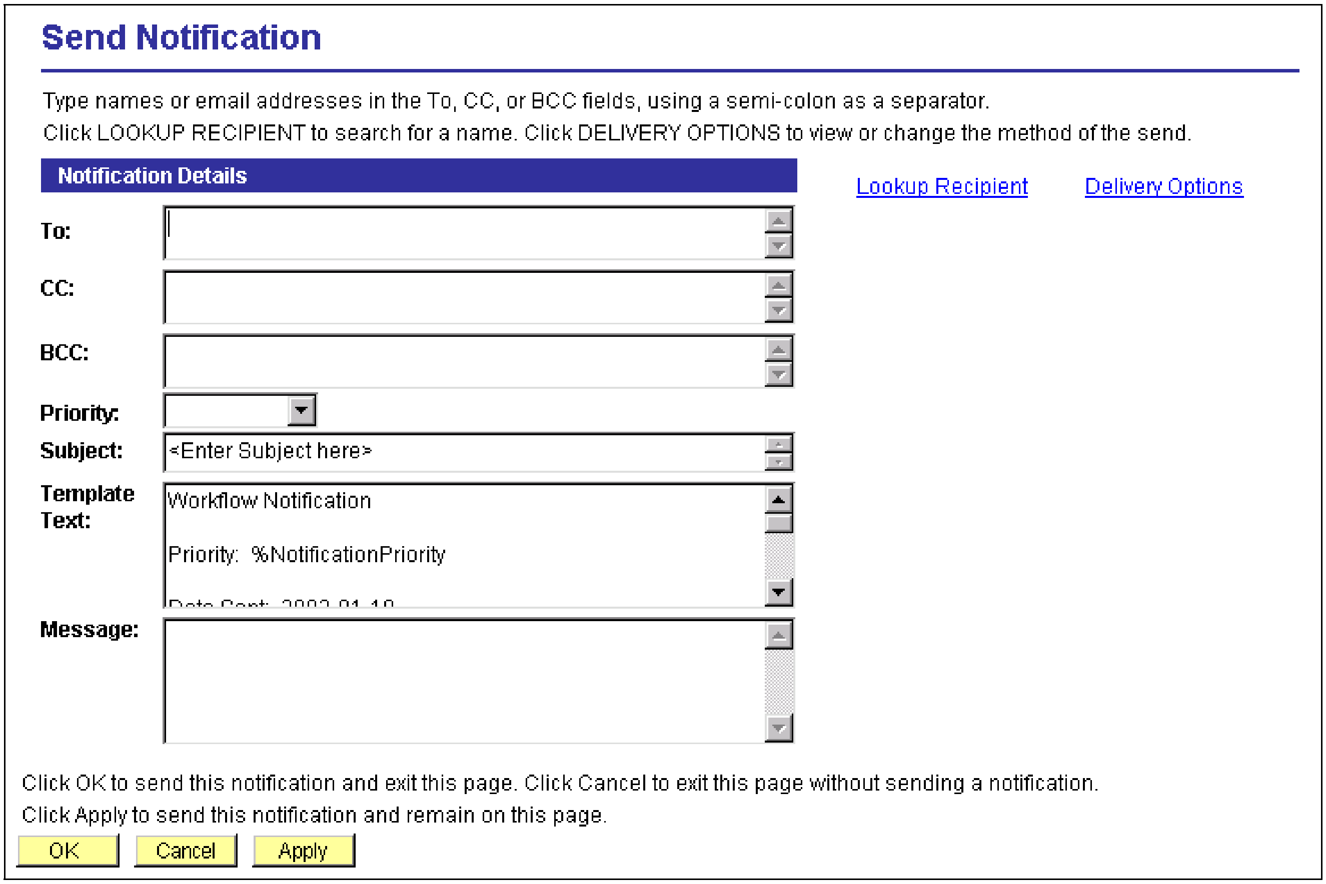
See Also

PeopleSoft Workflow, “Introducing PeopleSoft Workflow”

Sending Notifications

Notifications are sent automatically as a part of the standard workflow routings. You can also send notifications from most PeopleSoft components by using the Notify toolbar button. This button picks up any available Notification Templates for that component.

In both cases, the notifications can be sent via Worklist or by email.



Send Notification page

To
Who needs to take action on the notification. This field can contain one or more email addresses or user names separated by a semicolon.

CC
Carbon copy. CC recipients are made publicly aware of the notification.

BCC
Blind carbon copy. The sender makes BCC recipients aware of this notification privately.

Priority
Select a priority level for the notification: low, medium, or high. This priority is only reflected in the notification if the %NotificationPriority variable is in the template text.

Subject
The Subject is the topic or brief description of the notification. The Subject value may default from a template, but you can edit it.

Template Text
Template text cannot be edited. It is based on a predefined notification template. The text in the Template Text field will be sent in the language of the recipient. However, the notification template has to be defined with template text for each language.

Message
Message is where you can add your own comments to the notification. The Message text will be sent in the language of the sender.

Lookup Recipient
Click Lookup Recipient to access the Lookup Address page. Enter the first characters of a recipient and click Search. You will receive a list of people

	that match your search. If you want to use the person as a recipient click the checkbox for the type of recipient (To ,cc, bcc) and click Add to Recipient List.
Delivery Options	The checkboxes are populated based on the delivery options that are defined in the recipient's user profile. The Worklist checkbox is unavailable for external email addresses.

See Also

PeopleSoft Workflow, "Administering PeopleSoft Workflow," Setting Notification Options

Receiving Notifications

PeopleSoft offers two types of workflow notifications: worklist and email. Although this chapter focuses on worklists, be aware that you may also receive workflow notifications through email. When you receive an email notification, the notification may include a link to the PeopleSoft system where you'll perform the necessary work.

Using Worklists

When you're using a workflow-enabled application, the most obvious change in your day-to-day operations is the use of worklists.

A worklist is an organized list of the work items awaiting your attention. Select items to work on from a worklist, and an item automatically returns the pages you need. This enables you to bypass any other navigational structure and work directly from the worklist.

In this section, we discuss:

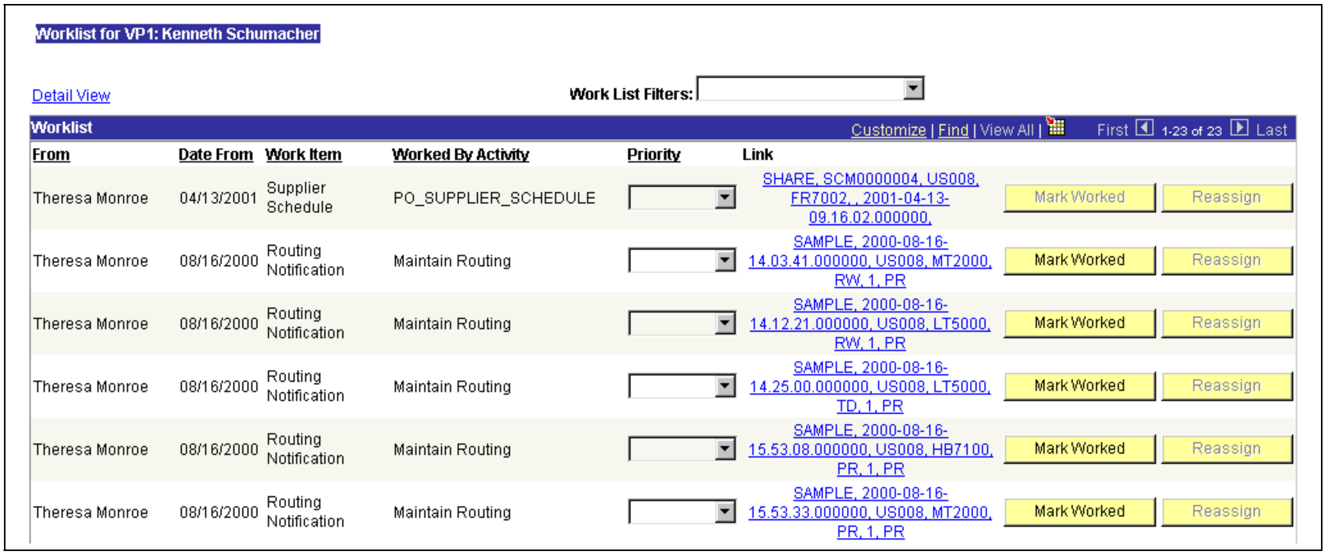
- The Worklist page.
- The Worklist Details page.

Worklist Page

The Worklist page provides summary information about all items on your personal worklist. This page also provides links enabling you to:

- View additional details about the work.
- Perform the indicated work.
- Reassign work items.

To view your worklist, select Worklist from the left hand navigation or click the Worklist button in the universal navigation header. The worklist grid is customizable. You can define the sorting and customize the columns of the grid.



Worklist Page

From Who triggered the work item.

Date From When the work item was triggered.

Work Item Work items are the types of activities you need to carry out. You can have multiple entries all with the same work item. For example, if you approve expense reports, you may have several entries with *Expense Approval* in the Work Item column. Each of these entries represents a different expense report that requires your attention.

Worked By Activity The activity that needs to be worked by the worklist item.

Priority Rank the worklist entry by importance. Priority values include 1 for High, 2 for Medium, and 3 for Low.

Link Takes you to the target page—the page where you work the item. The target page is specific to the type of work you're doing. For example, the link for an expense approval item takes you to the page where you can review and approve expense reports.

Mark Worked Enables you to remove an item from your worklist without actually going to the target page. You shouldn't use this option unless the item is a simple notification and there is no additional work required.

Reassign Enables you to forward the item to another user and removes the item from your list.

Refresh As items are added to and removed from your worklist, click this button to update the page with the most recent changes.

By default, all work items assigned to you are visible from the oldest to the newest. Click any of the column headings to sort work items according to the data in that column.

Performing the Work

To work an item in its target page, click Link on the Worklist page for the item you want to work. The system transfers you to the page where you can perform the required task. When you have worked the item, that item automatically disappears from your worklist.

If you need to manually mark an item as worked, such as when an entry is a simple notification with no necessary follow up, select the Mark Worked checkbox. The item disappears from your worklist.

Reassigning a Worklist

You can also reassign a worklist item to another user. Your organization can choose to prevent particular types of items from being reassigned.

To reassign a worklist item to another user:

1. Click the Reassign button.

   The Reassign page appears.

2. Enter the User ID of the person to whom you are reassigning the item.

   Click the Search button if you need help finding the appropriate user ID.

3. (Optional) Enter a Comment.

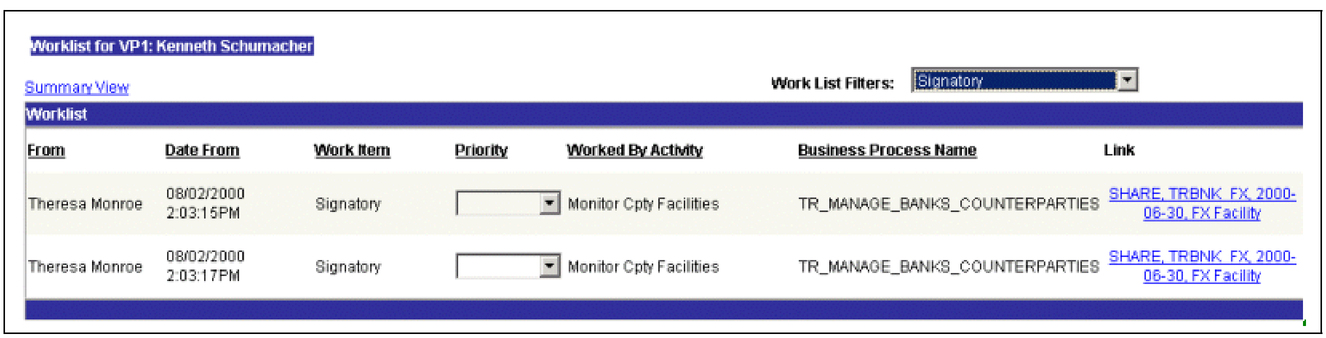
   The comment becomes part of the worklist item when it appears in the assignee's worklist.

4. Click OK.

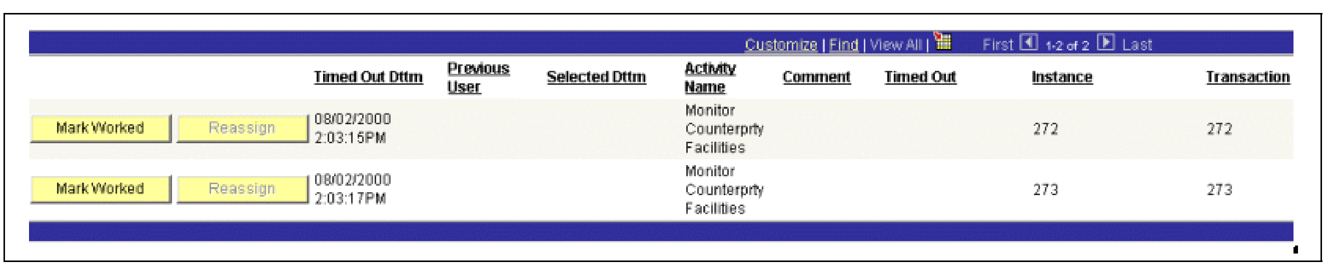
Worklist Details Page

The Worklist Details page provides additional information about items on your worklist. All the information from the Worklist page is repeated here, along with the additional details.

To view worklist details, choose Worklist, Worklist Details.



Worklist Details scroll area (1 of 2)



Worklist Details scroll area (2 of 2)

In addition to the fields and buttons that are on the Worklist Page, the Worklist Details page includes additional details about each item.

Timed Out Dttm (timed out date and time) The date and time when the item will time out if it isn't already worked.

Previous User The user whose action triggered this item.

Selected Dttm (selected date and time) The date and time when you first selected this item (in order to work the item).

Comment The comment (if any) entered by the user if the item was forwarded from another user.

Timed Out Indicates if the item has timed out.

Instance A unique identifier for each item of the same type.

Transaction A unique identifier for each item in the worklist.

Working Items

Depending on how the worklist item has been defined, there are different requirements for what actions are sufficient before the item is considered worked and removed from your worklist.

You cannot tell which type of worklist item you have just by looking at it, but understanding the different types that exist will help you understand why different items respond to different actions.

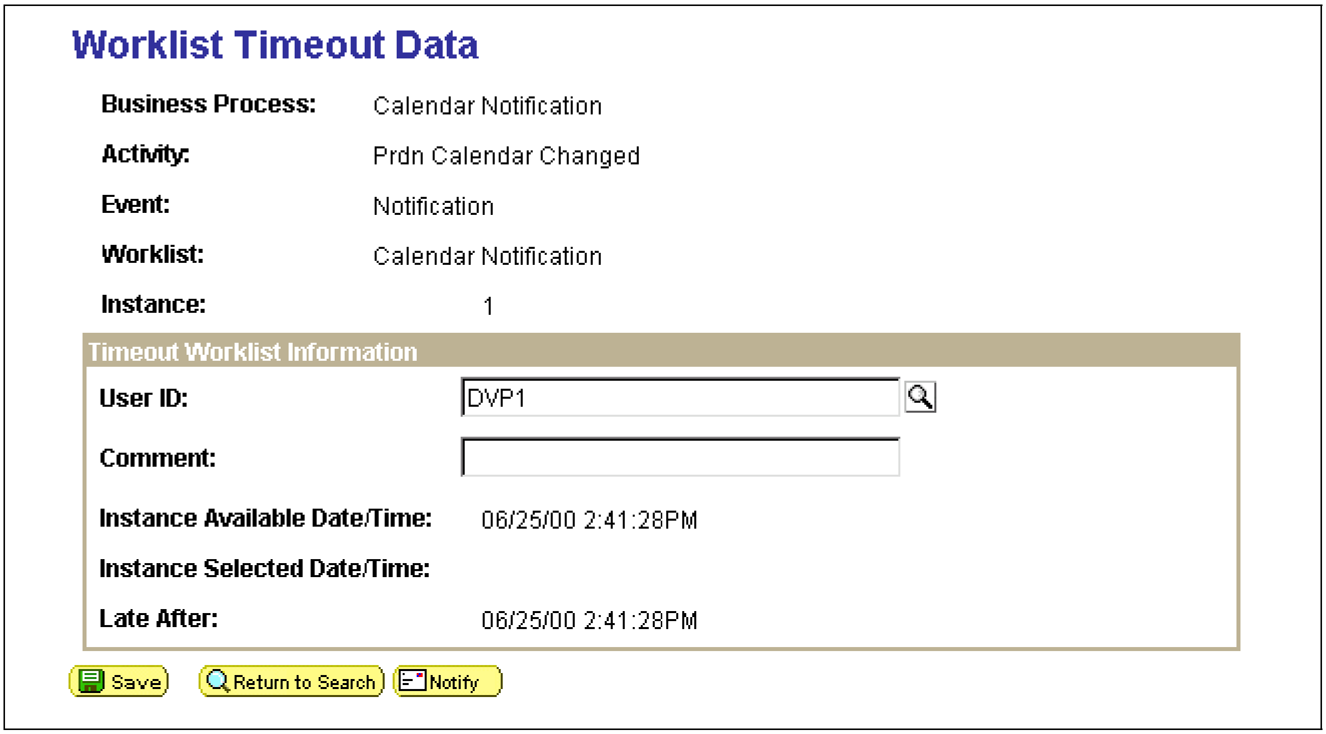
Worklist Type	Description
User Specified	A work item is marked as "worked" when you click Mark Worked. This option is typically used when you may need to return to the same work item several times or wait for supporting information.
Saved	A work item is marked as "worked" when you save your work on the page assigned to the worklist. This option is typically used when you can complete the item in one visit to the target page.
Selected	A work item is marked as "worked" as soon as you select it from the worklist. This option is typically used when the work items serve primarily as a notification.
Programmatic	A work item is marked as "worked" by behind-the-scenes processing attached to the page. This option is typically used when the data on the page must be evaluated to determine whether the item can be considered worked.

Using Timeout Worklists

Items on your worklist have built-in timeout parameters. Depending on how your organization handles timeout processing, you may receive an email or another worklist entry if you haven't worked an item by the time it times out.

When you open a timeout notification in your worklist, you are transferred to the Timeout Worklist Data page. You can also access this page by selecting PeopleTools, Workflow, Monitor Worklist, Update Timeout Data.

On this page, you can view information about the timed out work item, enter a comment on the item, or reassign the item to another user.



Worklist Timeout Data page

CHAPTER 7

Using PeopleSoft Navigator

This chapter provides an overview of PeopleSoft Navigator and describes how to:

- Access PeopleSoft Navigator.
- Understand the PeopleSoft Navigator hierarchy.
- Work with PeopleSoft Navigator.
- Navigate to a page.
- Navigate to the next page in an activity.
- Understand how workflow fits in.

Understanding PeopleSoft Navigator

PeopleSoft offers multiple navigation methods for accessing application pages. The Using Navigation section in this PeopleBook describes standard navigation hierarchy. PeopleSoft Navigator is an alternative navigational structure that uses a process-oriented organization to show you how individual steps fit together into a single activity or process. This section discusses some of the advantages of PeopleSoft Navigator.

Advantages of PeopleSoft Navigator

The navigation is organized around areas of functionality, PeopleSoft Navigator maps are organized procedurally. For example, the delivered navigation hierarchy for PeopleSoft HRMS is organized functionally: payroll-related pages appear under a different hierarchy than benefits-related pages. Using PeopleSoft Navigator's process-oriented organization, on the other hand, you might have a *hire* activity that includes both payroll-related and benefits-related steps.

PeopleSoft Navigator's process orientation also provides a big picture of the process, helping you to understand the overall flow of work in your organization. Unlike the text-based navigation, PeopleSoft Navigator displays graphical maps. These maps clarify relationships among the steps in a process and ease your navigation through sequential tasks.

Navigator maps can also show you any workflow notifications that are triggered by changes you make in a page. Without PeopleSoft Navigator, you wouldn't necessarily know when you trigger a workflow notification. A PeopleSoft Navigator map can clarify when a notification is sent.

See Also

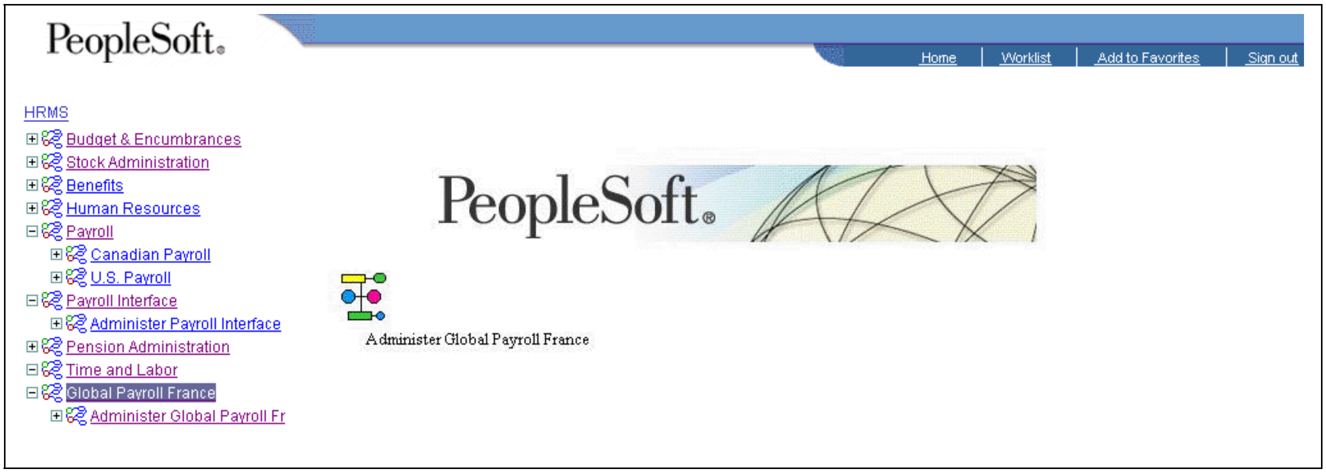
PeopleSoft Workflow, "Introducing PeopleSoft Workflow"

PeopleSoft Workflow, "Building Workflow Maps"

Accessing PeopleSoft Navigator

To access PeopleSoft Navigator, select Worklist, Navigator from the navigation. PeopleSoft Navigator appears as a two-part screen. On the left, you see a tree with nodes that represent various processes; on the right, you see the map that corresponds to the highest level of the tree.

The specific tree and map that appear depend on how your user profile is defined through PeopleSoft Security.



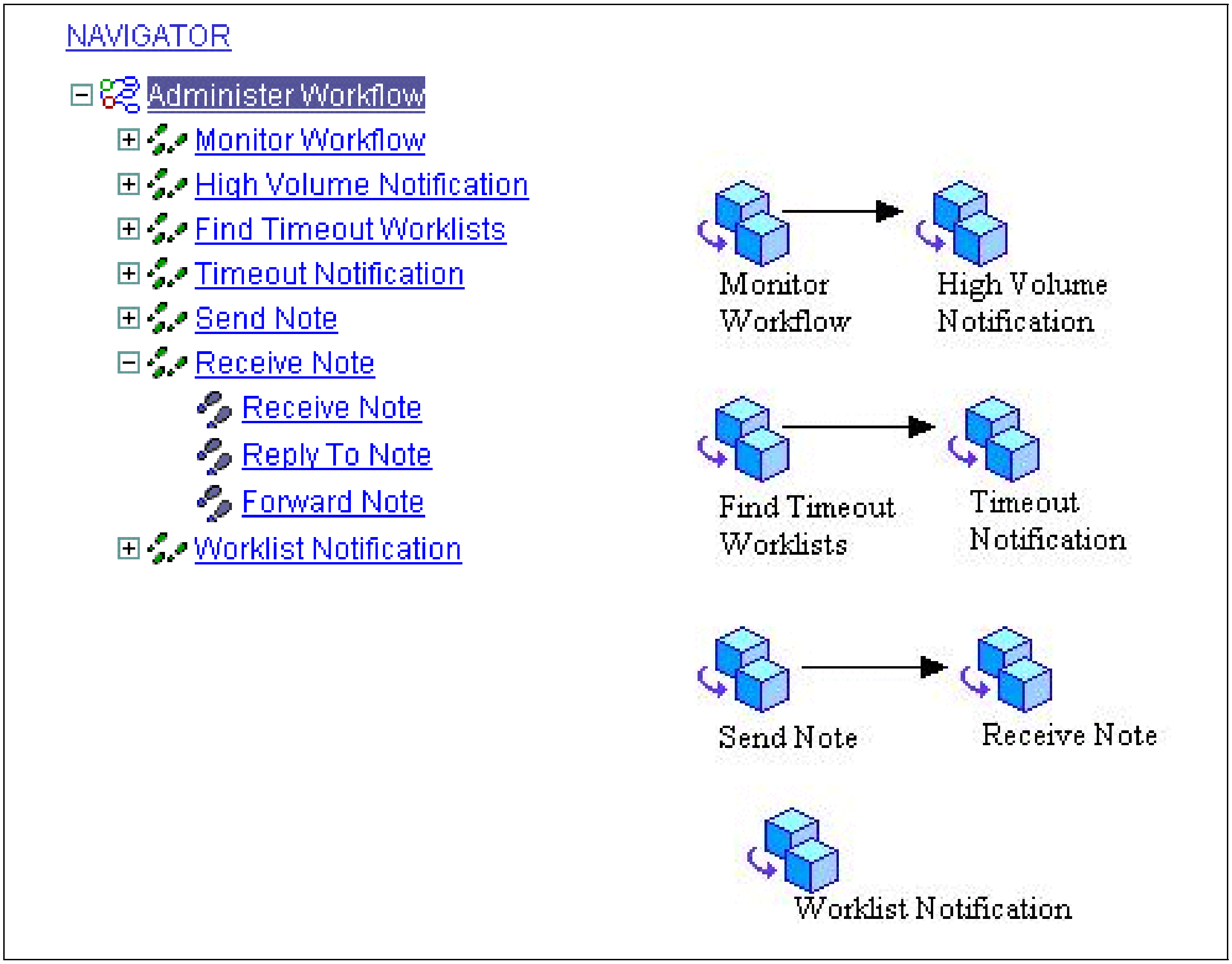
Navigator homepage

You can return to the standard navigation hierarchy at any time by clicking Home in the page header.

Understanding the PeopleSoft Navigator Hierarchy

PeopleSoft Navigator maps are organized hierarchically, enabling you to drill down from processes to subprocesses to the lowest level page where an individual transaction occurs. Workflow uses three hierarchical levels. The first two levels, business processes and activities, are both maps: graphical representations of the relationships between the component objects (other maps or steps).

The third level, steps, are not maps. Steps are elements within activities and represent the level at which the user interacts directly with application pages.



PeopleSoft Navigator hierarchy

See Also

PeopleSoft Workflow, "Building Workflow Maps," Understanding Map Hierarchies

Working With PeopleSoft Navigator

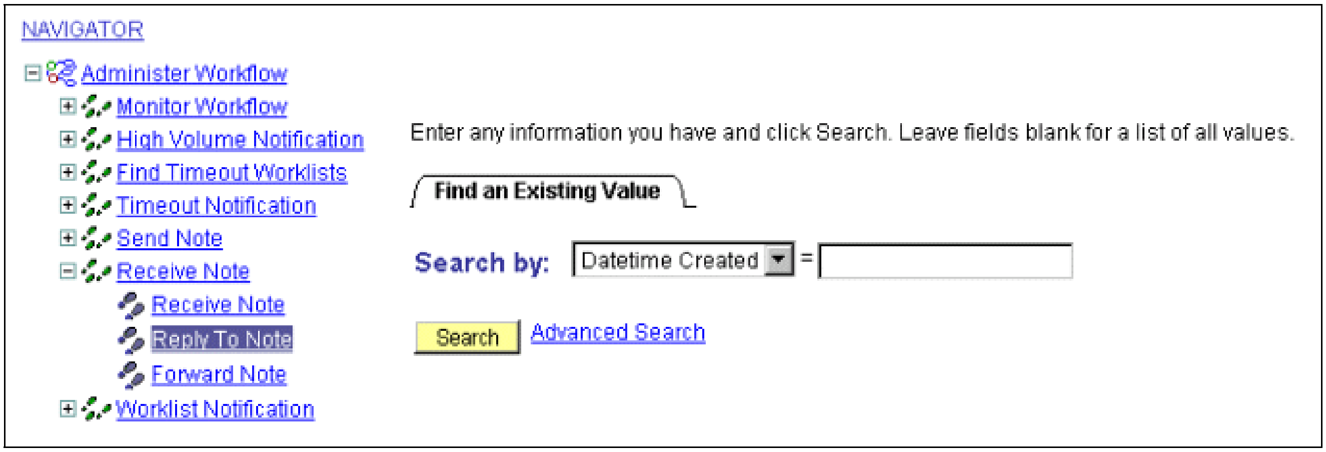
You can drill down through the PeopleSoft Navigator hierarchy by opening nodes in the tree or by clicking icons in the map. Regardless of your method, both the tree and the map always show the currently selected item. Navigate the map hierarchy using the following actions:

- To select a tree node and simultaneously expand it, click either the node or the + (plus) next to the node.
- To collapse a tree node, click the − (minus) to the left of the node.
- To return to a higher-level map, click the appropriate tree node; you cannot use the map to move to a higher level.

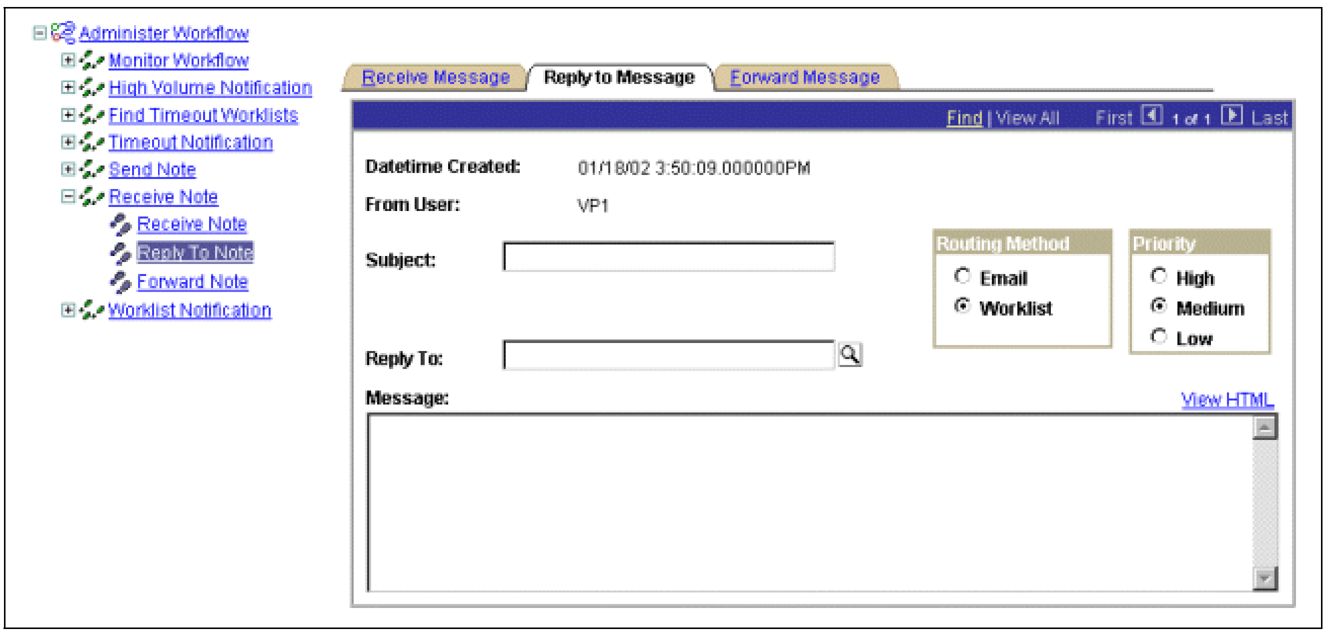
Navigating to a Page

When you click a step (the map element corresponding to a single page), the corresponding page appears on the right side of the screen where the map otherwise appears. A page accessed through PeopleSoft Navigator has the same access requirements as a page accessed through the standard application navigation.

For example, if you click the Dependent Data step in the Maintain Dependent Info map, you'll first see the Dependent Data search page. Only after you enter search criteria does the Dependent Data page appear.



Search page in PeopleSoft Navigator



Application page in PeopleSoft Navigator

All the standard page operations, including the Save and Return to Search buttons, are available. The PeopleSoft Navigator tree also remains available, and you can use it to move to maps or to other pages.

Navigating to the Next Page in an Activity

When an activity contains sequential steps, PeopleSoft Navigator offers two ways to move through the sequence.

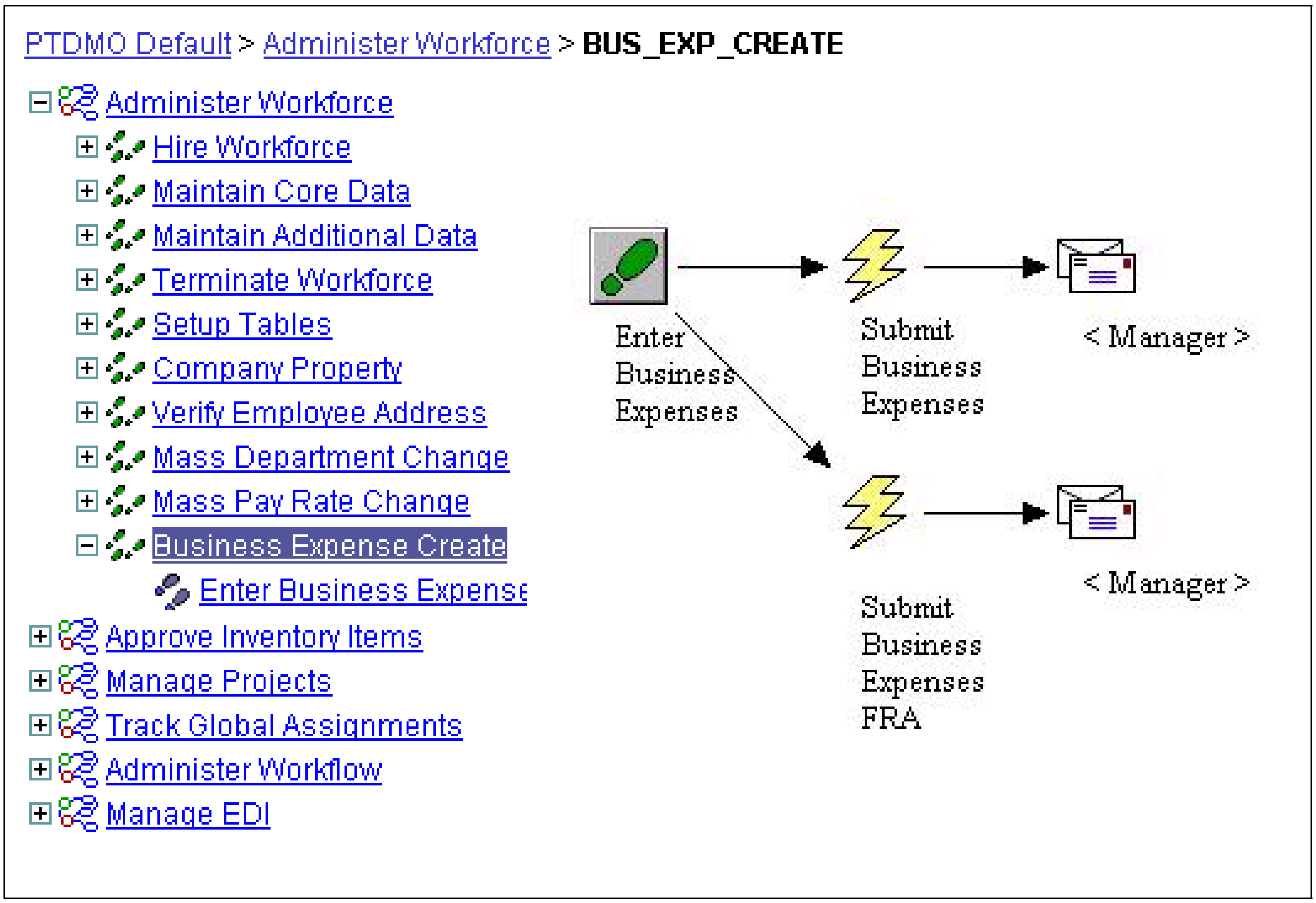
- Continue using the tree by clicking the next step in the activity.

- Click the navigation links that appear at the top right of any page that appears in PeopleSoft Navigator.

Depending on where the page falls in the sequence of pages, links for the Prev (Previous) page and Next page appear. When you move from page to page, key fields are remembered so that you don’t have to go through the search page unless you’re moving to a page with different high-level keys.

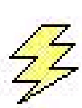
Understanding How Workflow Fits In

Some PeopleSoft Navigator maps incorporate a visual representation of associated workflow processing. The icons associated with workflow processing appear only in the maps, not in the PeopleSoft Navigator tree. These icons do not do anything when you click them; they merely provide information.

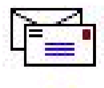


Map with workflow icons

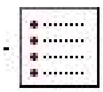
Some of the icons you are likely to see include:



Event: A condition that triggers a workflow notification.



Email Routing: A workflow notification that is delivered to the user by email.



Worklist Routing: A workflow notification that is delivered to the user through that user's worklist.

See Also

PeopleSoft Workflow, "Building Workflow Maps," Understanding Workflow Maps

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

account You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting entry A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to anotherand a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery methodit may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

application agent An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attachment In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.

background process In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.

category In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activitys delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If youre working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail valuesdynamic detailsdirectly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, *event* also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See *activity.*
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft applicationfor example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addressesfor a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary locationindicated by a *1*is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *participant object.*
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan contextif three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See *Batch Processes.*
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for *record output value-added tax flag.* See *record input VAT flag.*
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

results management process
In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.

role user
A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

routing
Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takesemail message, electronic form, or worklist entry.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context
In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query
You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section
In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event
In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

self-service application
Self-service refers to PeopleSoft applications that are accessed by end users with a browser.

session
In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template
In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

Learning Management activitycharacteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See *Structured Query Report (SQR).*
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: http://serverx/InternetClient /InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_ 401k.PAGES.FieldFormula.iScript_Home401k
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL See *uniform resource locator (URL).*

user interaction object In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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