PeopleSoft®

Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

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Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications
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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 conventions 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.

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, https://www.peoplesoft.com/corp/en/login.jsp

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, 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 letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

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

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Appendix A, "ISO Country and Currency Codes" ISO Country Codes.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Appendix A, "ISO Country and Currency Codes" ISO Currency Codes.

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

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

Using PeopleSoft Applications Preface

This preface 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 Pure 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.

See *Enterprise PeopleTools 8.45 PeopleBook: Internet Technology*, "Internet Technology Preface," PeopleSoft Portal Licensing.

CHAPTER 1

Working With Browser-Based Applications

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

- Sign in to PeopleSoft applications.
- Use navigation.
- Use the universal navigation header.
- Use the pagebar.
- Process components.
- Use buttons and links.
- Use keyboard shortcuts.
- Use accessibility features.

Understanding Browser-Based Applications

In PeopleSoft 8, you use your applications in a purely internet environment, called *PeopleSoft Pure Internet Architecture.* PeopleSoft Pure 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 Pure Internet Architecture is your "window" to PeopleSoft applications as well as other web-based applications and content. Within your browser, sign in to the PeopleSoft Pure Internet Architecture as you would when opening a website. The PeopleSoft Pure Internet Architecture uses a dynamic menu pagelet for navigation and a *universal navigation header* that includes the following navigational tools: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. This header appears at the top of every page as long as you are logged in.

PeopleSoft delivers 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.

See Chapter 1, “Working With Browser-Based Applications,” Understanding the Universal Navigation Header, page 6.

PeopleSoft Pure 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. Using the PeopleSoft Pure 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 Pure Internet Architecture:

Menu pagelet	The PeopleSoft navigation structure, located on the left side of your screen. The menu pagelet contains links to content references, enabling access to transaction pages. Links display in a hierarchical format. Menu items can expand or contract, depending on content.
Content Reference	A link in the menu pagelet that accesses a transaction page. It is a reference to a uniform resource locator (URL) 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).
Page	The individual display and data-entry screens for each part of your PeopleSoft application. Pages appear in the browser window.

See Chapter 3, “Using Keys and Search Pages,” page 35.

Signing In to PeopleSoft Applications

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

To sign 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 in which you want your transaction pages to appear.
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. Press TAB and ENTER, or click the Sign In button to sign 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 sign 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 sign in information that you entered is valid, the system displays the homepage for your PeopleSoft system.

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

For security purposes, your PeopleSoft system logs you out of your application after a period of inactivity determined by your security administrator. Prior to your session timeout, the system might provide 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 sign in to your application.

Important! To ensure data security in environments where multiple users have access to the same workstation, it is recommended that users close the browser after logging out of PeopleSoft.

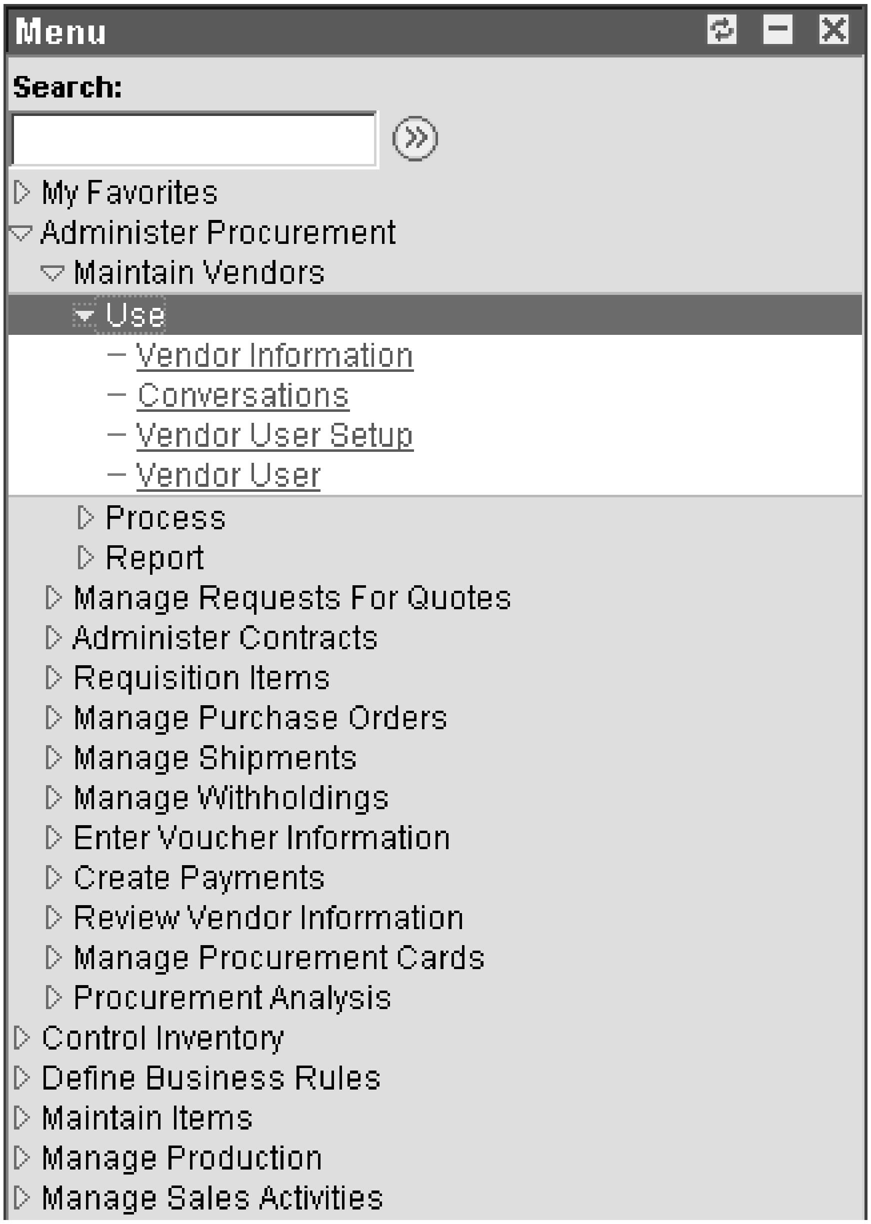
Using PeopleSoft Pure Internet Architecture Navigation

PeopleSoft's browser-based interface provides two means of accessing data in your database. This section discusses how to:

- Use the menu pagelet.
- Use navigation pages.

Using the Menu Pagelet

The PeopleSoft browser-based interface provides an intuitive way of updating or viewing data in your database. Navigation using the menu pagelet consists of a hierarchy of folders and content references. Expanding and collapsing these folders are the primary means of getting around your PeopleSoft application.



Example of menu pagelet

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

Use the buttons at the top of the menu to refresh, minimize, or close the menu pagelet altogether. The refresh button returns the menu to the home state. Once the menu pagelet is closed, you can reopen it from the Personalize Content page.

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

See *Enterprise PeopleTools 8.45 PeopleBook: Internet Technology*, "Internet Technology Preface," PeopleSoft Portal Licensing.

Using the Menu Pagelet Search Feature

Use the Search field to search for a registered content reference within the system. Enter the name of the page you want to find and press ENTER or click the search button. This action opens the Search page displaying the results. If your search produces a large number of results, modify your search criteria and select the Search Within Results option, then Find to narrow your search further. Use the Customize Settings link to hide or show summaries of each search result and to control the number of search results to appear on each page.

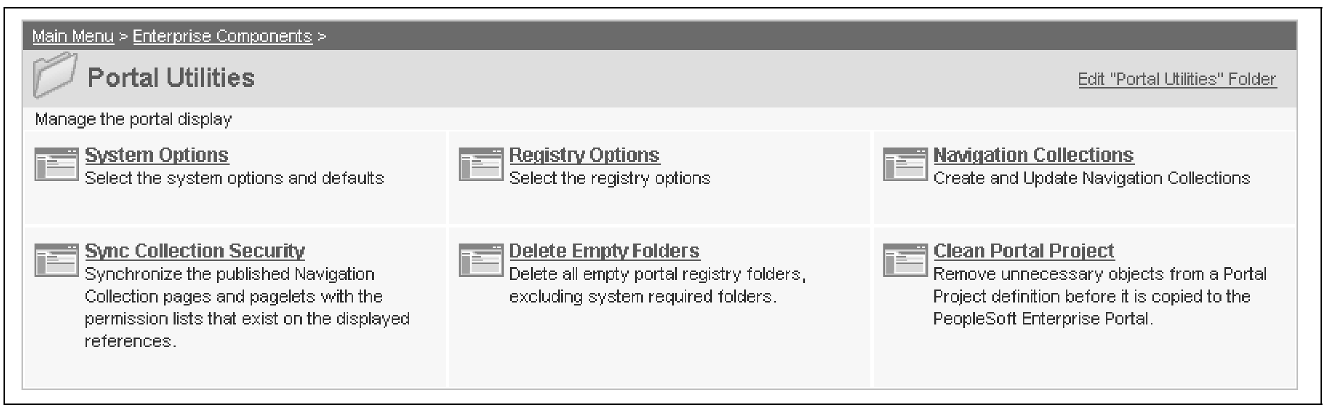
Note. For the system to display search results, your system administrator must create a search index in PeopleTools. If you consistently do not get any search results, contact your system administrator for more information.

Using Navigation Pages

In addition to the menu pagelet, PeopleSoft applications may include navigation pages, which serve as alternatives to the menu pagelet. These navigation pages provide a user-friendly navigation tool in the form of task-driven pages that provide intuitive access to pages needed to complete your business processes. These navigation pages can be configured to incorporate the use of icons to further increase the user's ability to intuitively navigate their tasks.

You access navigation pages by clicking a folder in the menu pagelet. Elements embedded in the folder, including content references and other folders, are arranged in a graphical format on a navigation page displayed to the right of the menu pagelet. For example, clicking the Portal Utilities folder in the menu pagelet displays the Portal Utilities navigation page as shown here:

Important! Navigation pages are available only with the 8.9 application release and selected 8.8 applications.



Portal Utilities standard navigation page

Using the Universal Navigation Header

This section provides an overview of the universal navigation header and discusses how to:

- Add favorites
- Edit favorites

Understanding the Universal Navigation Header

The universal navigation header is located at the top of your PeopleSoft Pure Internet Architecture page and remains static as you navigate through the pages. The navigation header contains the these links:

Home Click to return to your homepage.

Worklist Click to access the Worklist page, which 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, and reassign work items.

See Chapter 6, "Using Workflow," Using Worklists to Receive Notifications, page 77.

MultiChannel Console Enables users defined as agents in PeopleSoft MultiChannel Framework to access and manage tasks assigned to them. This is an optional setting that your system administrator enables. If you do not have access to this feature, the system displays a warning message indicating this.

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft MultiChannel Framework*, "Configuring MCF Agents" and *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft MultiChannel Framework*, "Managing Tasks and Using Chat in PeopleSoft MultiChannel Framework".

Performance Trace Click to monitor the performance of a business process that you typically complete. This is an optional setting that your system administrator enables using PeopleTools Security and therefore may not display to all users.

Add to Favorites Click to add a page to your favorites list for easy accessibility. Favorites enable 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 link that you want to view.

Sign out Click to sign out of the application and return to the Sign In page.

Important! For security purposes it is important that you sign out when you are finished with your PeopleSoft session rather than simply closing the browser window. It is possible that other users may be able to access your cached homepage from another portal if you do not sign out properly.

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 favorites:

1. Click Add to Favorites in the universal navigation header in the page that you want to bookmark.

   The Add to Favorites page appears.

2. Enter a unique description for the favorite if desired.

   The page name displays automatically as the default in the Description field.

3. Click OK.

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

Note. Pages that are not registered in the portal registry cannot be added to the My Favorites folder. See your portal administrator for assistance.

Editing Favorites

On the Edit Favorites page you can relabel favorites, delete favorites, change the URL, or modify the sequence in which they appear on your menu pagelet.

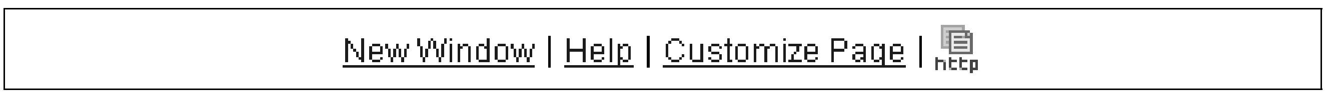
To edit favorites:

1. Expand the My Favorites folder in the menu pagelet.
2. Click Edit Favorites.

   The Edit Favorites page appears, displaying a grid with the favorites that you selected and their sequence numbers. If there are no favorites currently saved, a message indicates this in place of the Favorites grid.
3. Locate the favorite that you want to modify, and make your changes.
4. Save your changes.

Using the Pagebar

Just below the universal navigation header sits the pagebar, which is a series of links and buttons. The availability of these options are controlled by the application developer. All options may not be available for each component.



Pagebar

New Window

Opens a new browser window.

See Chapter 1, “Working With Browser-Based Applications,” Opening New Windows, page 10.

Help

Opens the online PeopleBooks help for the specific transaction page that is displayed.

Customize Page

Enables you to control the initial display of the page. Opens the Page Customization page where you can:

- Select the initial page in the component to be displayed.
- Save the state of the expanded and collapsed sections.
- Save the state of the View All settings on the page for grids and scroll areas.
- Customize the page field tabbing order.

You can also elect to copy and share the settings that you have saved for the customized page.

See Chapter 2, “Setting User Preferences,” Customizing Pages, page 20.

Copies the current page URL to the clipboard so that it is available for pasting in emails or other applications. The copied URL includes page, action, and search key information to display in the context of the portal, if you are using the portal. If you did not pass through the portal, then the system displays the page only without the portal frames.

See *Enterprise PeopleTools 8.45 PeopleBook: Internet Technology*, “Administering Portals,” Defining Content References.

Processing Components

This section discusses how to:

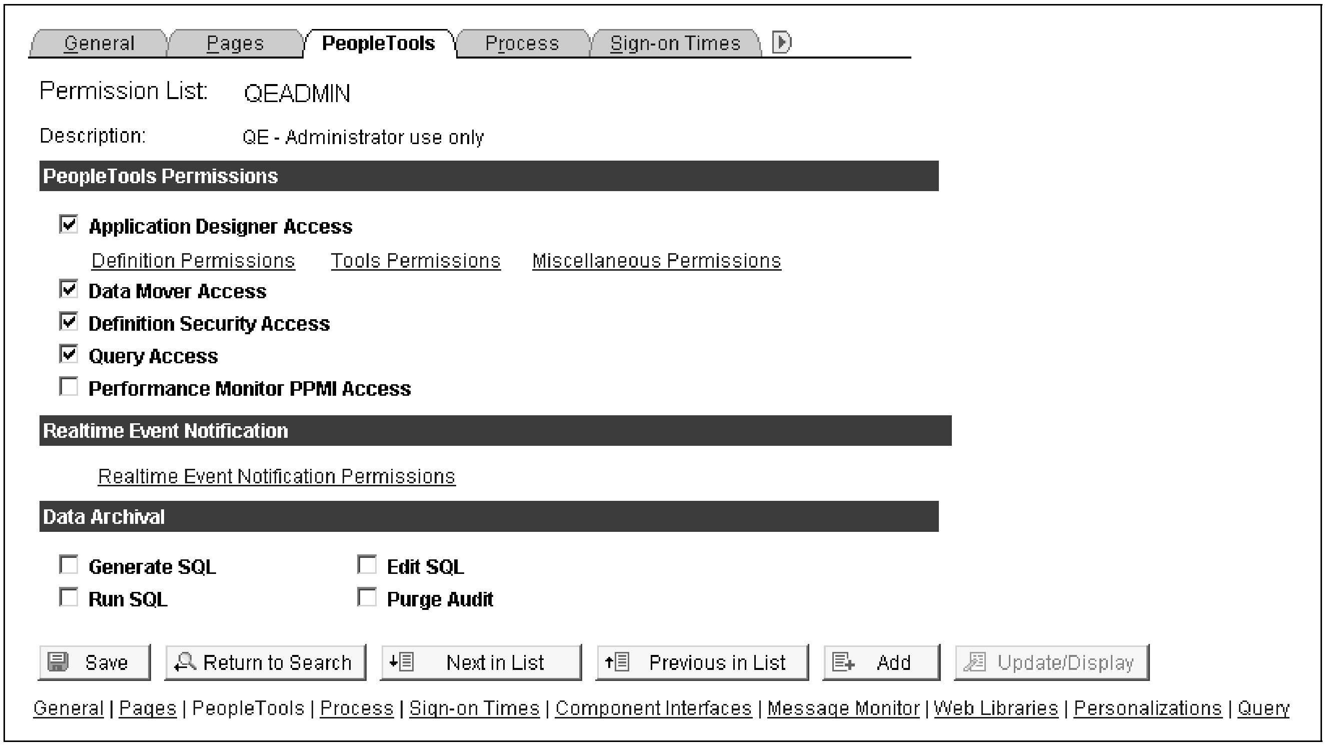
- Access pages or components.
- Link to related pages.
- Open new windows.
- Save pages.

Accessing Pages or Components

Components consist of several related pages within the same window. Typically, significant pages such as those containing required fields, come early in the page order. As you finish with one page, select the folder tab of another page to open it. You can think of this as leafing through several pages of a single form.

In addition to selecting 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,” Using Access Keys, page 14.



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 a 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 pagelet or navigation page that relates to your page.
2. On the search page, enter search criteria to identify the row of data that you want to retrieve from the database.
3. Click Search to perform the search.

   If your search criteria returns multiple results, the system displays the results in a grid from which you can select the data you want to view. If your criteria returns only one result, the system automatically displays the result in a page on the browser.

See Chapter 3, "Using Keys and Search Pages," Entering and Saving Search Criteria, page 36.

Linking to Related Pages

Occasionally you will 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 that appears 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 of these links to access that page or component. This convenience enables you to move easily to related transactions for the same key field to enter data without going through the search process again.

When you click a component link, you will 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 might also see a drop-down list box with "…More," which contains several more related transaction links.

Opening New Windows

The New Window link appears at the top of the component pages. Click this link to open a new browser window or child window that displays the search page for the current component. From this window, you can view or enter new data. You may open as many child windows as needed by clicking the New Window link. Do *not* select File, New, Window from the browser menu. Doing so copies the current HTML from the parent window, instead of opening a new PeopleSoft-maintained window session.

When entering or viewing data in two different languages, use two separate instances of your browser program and sign in to each PeopleSoft session under the same user ID and password.

Important! When a user opens a window from within an application and then logs out from there, PeopleSoft must log out from the application for security reasons. To remain logged into the application, you can just close the new window.

See Also

Chapter 3, “Using Keys and Search Pages,” Using Search Pages to Retrieve Data, page 36

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 pagelet or by clicking a different toolbar button, such as Next in List, a save warning appears. Click OK to return to the page to save your changes. Click Cancel to exit the page without saving.

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

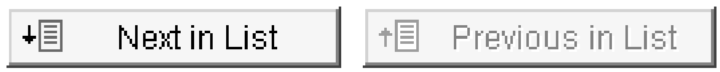
This section provides an overview of buttons and links and discusses how to:

- Use search page buttons.
- Use processing buttons.
- Use toolbar buttons.
- Use pop-up menus.

Understanding Buttons and Links

PeopleSoft Pure 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 carry out the command.

If a grayed out button appears on your page, that action is currently not available to you or is 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 components' 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 here:

Page links in a component

Most buttons and links in the system are self-explanatory; however, in this section, we provide details about some processing buttons, toolbar buttons, and pop-up menus.

Tool Tips

Tool tips are pop-up text messages that appear on your page when your mouse hovers over a button or link. Sometimes called hover text, tool tips display additional information about the action that the button or link performs. 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.

Using Processing Buttons

The following buttons are used for processing transactions.

Click to apply the data input without returning to the main page, in case you want to perform additional searches. Usually found on a page that you opened by clicking a prompt button.

Click to accept the data input made on an auxiliary page and return to the main page.

Click to clear 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.

Using Toolbar Buttons

The toolbar appears 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. Not all buttons shown in the following table appear on every page. Likewise, some buttons may be unavailable for selection.

Click to send the information that you've entered on the page to the database. You generally save when you come to the end of a component. The Save button updates the data for all pages in a component. When activated, the system displays the saved message in the upper-right corner of the page.

Click to return to the search page.

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.

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 first row in the grid.

Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.

Displays the previous page in the current component. If you're in the first page of the component, this button is unavailable.

Click to access existing rows of data in the database. If data is effective-dated, only current and future rows appear.

Displays all rows of data: current, future, and history.

Click to access existing rows of data in the database and display all effective-dated rows. Enables you to update all rows, including history rows.

Note. This button is available only if you have the proper permission.

Click to add a row of data to the database for the current transaction.

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

Note. This button is displayed only for components that are enabled for Deferred Mode Processing.

Displays when there are several pages that are related to the current page. Click to access a new page containing a list of related page links.

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

Click to activate 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 appears.

See Chapter 4, “Working With Pages,” Using Spell Check, page 58.

Using Pop-Up Menus

Pop-up menu buttons appear next to fields on a page.

Click to access a new page to select among the menu items listed.

Appears if the pop-up menu contains more than one item.

Click to access the new transaction page directly.

Appears if the pop-up menu contains only one menu item.

Using Keyboard Shortcuts

This section provides an overview of keyboard shortcuts and discusses how to:

- Use hot keys.
- Use access keys.

Understanding Keyboard Shortcuts

Working in a 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 and access keys.

To view a printable list of these shortcuts while online, press CTRL+K while on 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.

Using 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 that you are on, such as a transaction page or a search page.

ALT+1

Saves a page in a transaction.

Moves to the Search or Add button on a search or lookup page.

Moves to the OK button on a secondary page.

ALT+2

Returns to the search page from the transaction page.

ALT+3

View the next row in the list when the button is active.

ALT+4

View the previous row the in list when the button is active.

ALT+5	Accesses the 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 a 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 the next set of rows in a grid or scroll area.
ALT+ ,	View a previous set of rows in a grid or scroll area.
ALT+ /	Finds data in a grid or scroll area.
ALT+ ‘	View all rows of data in a grid, scroll area, or search page results list.
**ALT+ **	Toggles between Add a New Value and Find an Existing Value on a search page.
CTRL+ J	Displays the system information page.
CTRL+ K	When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.
CTRL+ Y	Toggles the menu pagelet between collapse and expand.
CTRL+ TAB	Toggles the focus through the frame set.
ENTER	Activates the OK button, where appropriate. On a search page, activates the Search button. On a lookup page, activates the Look Up button.
ESC	Activates the Cancel button, where appropriate.

Using Access Keys

Access keys move the focus of your cursor to a particular button on a page. Press ENTER to carry out the command; this is the equivalent of clicking the appropriate button.

The following table outlines the shortcuts that you may use in place of clicking the equivalent action button. After pressing the desired key combination, you must then press the ENTER key to carry out 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 access a page, press ALT and the underlined letter, and then press ENTER to carry out the action.

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

Menu Pagelet Access Keys

Navigate between menus by pressing CTRL+Z. This moves the focus of your cursor to the menu pagelet. From the menu, press TAB (or SHIFT+TAB for reverse direction) to navigate through the menu.

Using Accessibility Features

This section provides an overview of accessibility features and discusses how to enable accessibility features.

Understanding 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.

PeopleSoft 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 Personalizations page, contact your system administrator to enable this feature.

Enabling Accessibility Features

To enable accessibility features:

1. Click the My Personalizations content reference in the menu pagelet.

   The Personalization Information page appears.

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

   The Option Category: General Options page appears.

3. Select *Override Value* from the drop-down list box:

   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 disable the accessibility features.

      This option is selected by default.

4. Click the OK button to save the page.

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

CHAPTER 2

Setting User Preferences

You can define several settings to customize your homepage and data entry experience.

This chapter discusses how to:

- Personalize your homepage.
- Customize pages.
- Change your password.
- Set 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 that you sign in to a PeopleSoft portal, you see the default homepage for that portal until you define a personal homepage.

This section discusses how to:

- Personalize content
- Personalize layout

See Also

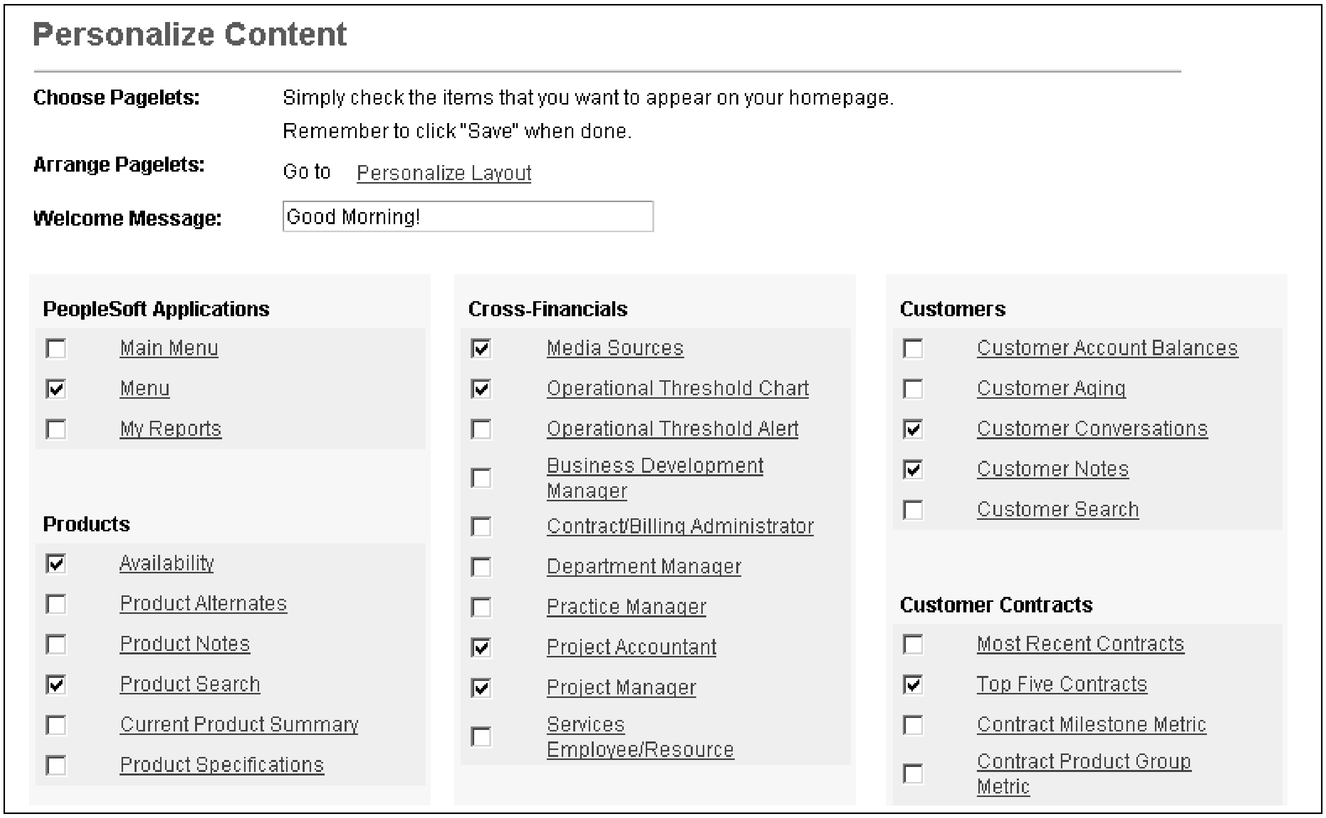
Enterprise PeopleTools 8.45 PeopleBook: Internet Technology, "Administering Portal Homepages and Pagelets," Creating Tabbed Homepages

Pages Used to Personalize Your Homepage

Page Name	Object Name	Navigation	Usage
Personalize Content	PORTAL_HPCOMP	Click the Content link on the homepage.	Personalize content by selecting the pagelets that you want to appear on your homepage.
Personalize Layout	PORTAL_HPLAYOUT	Click the Layout link on the homepage.	Personalize and organize the layout of the pagelets on your homepage.

Personalizing Content

Access the Personalize Content page.



Personalize Content page (representative example)

To personalize content on your personal homepage:

1. (Optional). Enter a welcome message.

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

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

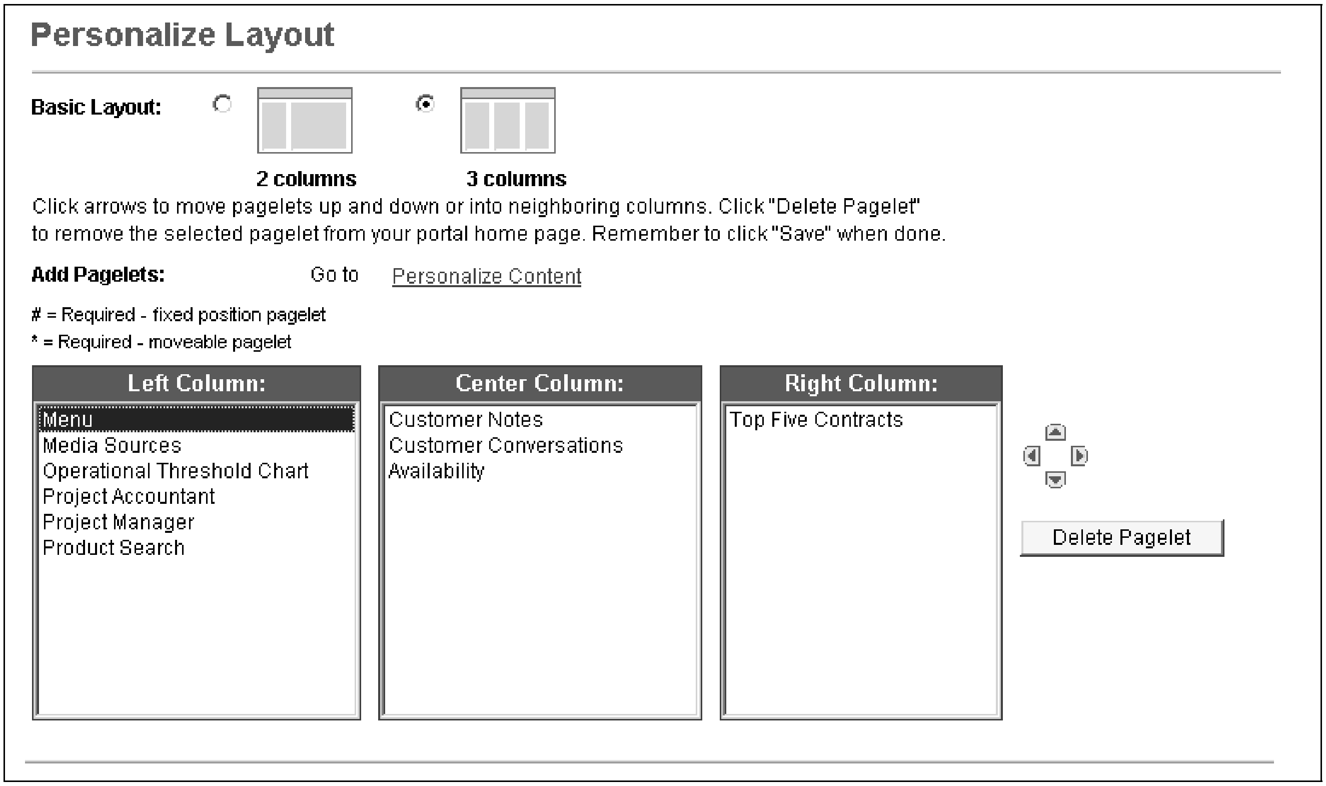
   The available selection of pagelets is preset by the portal administrator. You can preview each pagelet by clicking the pagelet name. A preview of the pagelet opens in another smaller window. If a pagelet is not available to you, text in the pagelet indicates this. Any links in the pagelet are disabled.

3. Click the Save button.

4. Click the Personalize Layout link to arrange how the pagelets appear on your homepage.

Personalizing Layout

Access the Personalize Layout page.



Personalize Layout page (representative example)

Basic Layout

Select to display the pagelets in either two or three columns on the homepage.

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.

Columns

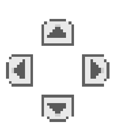
The pagelets selected on the Content page are listed in the column sections.

If the basic layout is two columns, the pagelets are divided into left and right columns. If the basic layout is three columns, the pagelets are divided into left, center, and right columns.

Note. # = Req-fixed position pagelet. * = Required moveable pagelet.

For example, #Signon indicates that the Signon pagelet cannot be moved to a different location on the homepage.

Req-Fix option also prevents the pagelet from being assigned to the right column in a 3-column layout.



Use to position the pagelets. Highlight the desired pagelet, then click the arrows to move the selected pagelet above a pagelet, below a pagelet, to the next column on the right, or the next column on the left.

Delete Pagelet	Highlight the desired pagelet and then click to delete it from the homepage.
Return to Home	Click to view your new choices. From the homepage you can choose to minimize a pagelet or remove it 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. Clicking the remove button opens the Removal Confirmation page for that pagelet. Select *Yes-Remove* or *No-Do Not Remove.*

See Also

Enterprise PeopleTools 8.45 PeopleBook: Internet Technology, "Modifying the Portal Interface"

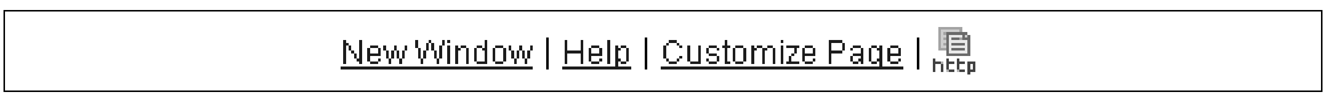
Customizing Pages

This section provides a brief overview of page customization and discusses how to:

- Control initial page display.
- Change the tab order.
- Copy, share, and delete page customization settings.

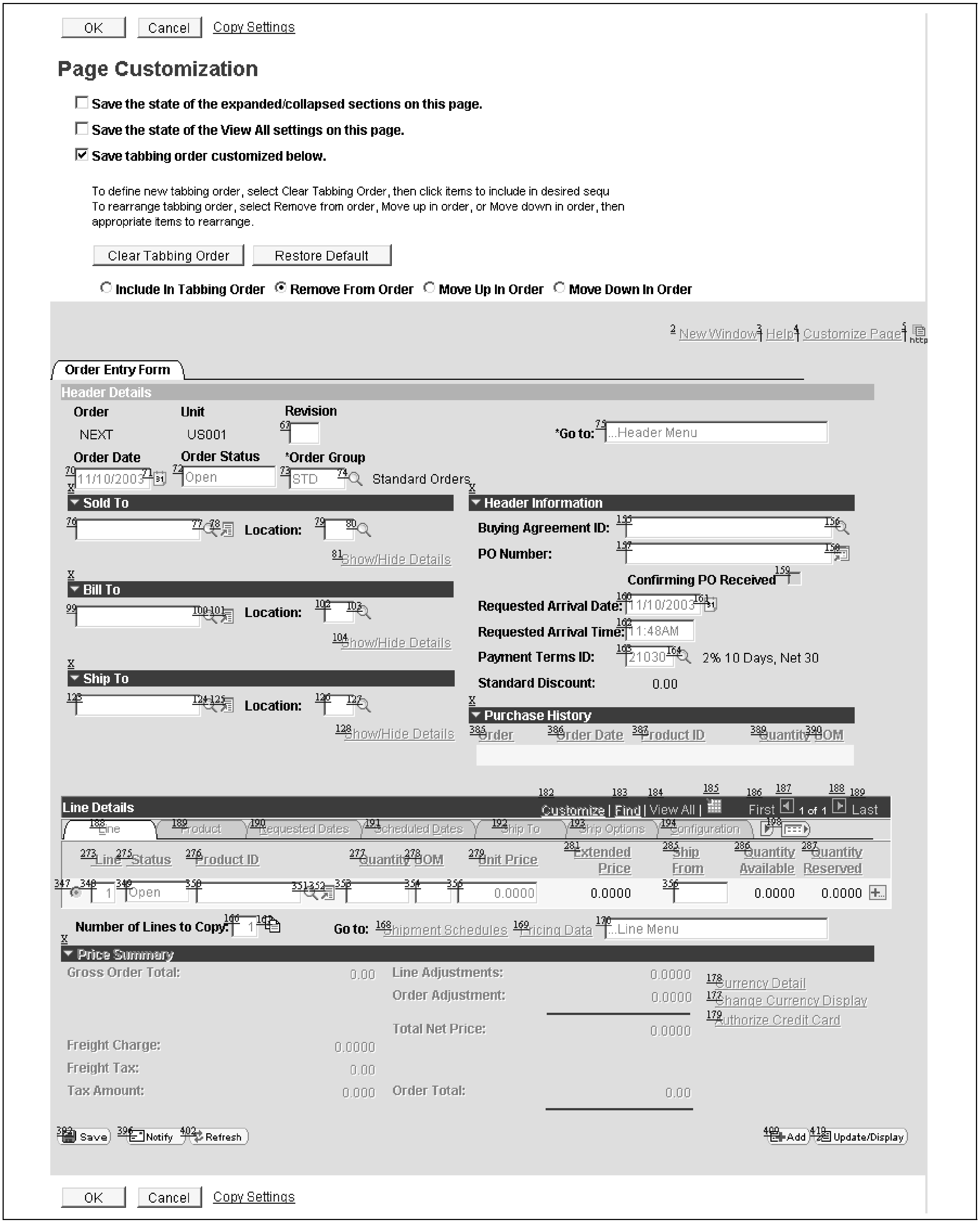
Understanding Page Customization

The page customization feature helps you tailor your transactions to specific business processes and to your personal data entry style. The Customize Page option in the pagebar located just below the navigation header is available for most PeopleSoft Pure Internet Architecture pages.



Pagebar

Select the Customize Page link to open the Page Customization page for the current page.



Customizing a page

Note. The page customization feature can be disabled by your system administrator. This may be necessary if there are concerns about database growth.

Controlling Initial Page Display

The Page Customization page enables you to control how the current page is initially displayed when you open it. There are four settings to control this:

Put this page in front (the current tab) when I come into this component.
Defines the current page as the initial default page for the component. Only one page within a component can be set as the "front" page. Search pages and secondary pages cannot be identified as "front" pages.

This option displays only if the current component for the page contains more than one page based on your security profile. This option is cleared by default.

Save the state of the expanded/collapsed sections on this page.
Provides the ability to personalize the initial display of collapsible sections on the current page. Before selecting Customize Page and then selecting this option, ensure that the collapsible sections on the page display exactly as desired. This option takes a "snapshot" of the current state of the collapsible sections on the page before you choose to customize the page.

The initial display of nested collapsible sections can also be preserved regardless if the parent collapsible section is expanded or not.

This option is cleared by default. When disabled, the initial display of all collapsible sections are determined by the application, unless this option was defined previously.

This option only displays if the current page contains page elements that you can expand or collapse.

Save the state of the View All settings on this page.
Provides the ability to personalize the initial View All display of scroll areas and grids. This option takes a "snapshot" of the current View All status of the grids and scroll areas on the page before you choose to customize the page.

This option is cleared by default. When disabled, the initial View All display is defined by the application, unless the option was defined previously.

This option only displays if the current page contains a grid or scroll area with a View All setting.

Save tabbing order customized below.
Saves the tabbing order that you designate on the current page. You can modify the existing field tabbing order as well as remove page elements from the tabbing order so that the cursor skips those fields as you tab through the page.

Changing the Tab Order

You can personalize and save the tab order for elements within a page so that each time you use that page your customizations apply. Customization of your page is based on the current "snapshot" of the page when you select the Customize Pagelink. The Page Customization page displays an image of the current page to be customized with the current tabbing order represented by small tab order number links that display in the upper-left corner of visible each page element that can be changed. This includes collapsible section buttons and page elements within collapsed sections, as long as the collapsed section is expanded and when the Customize Page option is selected.

The tab numbering of page elements indicates the tabbing order. Page elements assigned smaller numbers come before page elements that are assigned larger numbers.

Note. This numbering may not begin with "one" and may appear to have gaps for page elements that are not currently visible.

Clear Tabbing Order	Click this button to define a completely new tab order. This clears the current tabbing order, replacing the numbers for each tabbable element with an X. The X indicates that no tab sequence number is applied for that field. The user can then assign new tab orders to the page elements.
Restore Default	Removes all existing tab order customizations defined for the page. Restores the original tab order.

The radio button options control how the tab order behaves when you click on a page element.

To change the tab order:

1. Select the Clear tabbing order button to first remove all tab order settings for the page.

   The system replaces each tab order number with an X indicating that the page element is no longer included in the tab order.
2. Select the Include in tabbing order radio button.
3. Select the page elements sequentially in the tab order you want.

   The system numbers each field you select sequentially beginning with one.
4. (Optional) Select the Move up in order or Move down in order radio buttons to adjust the sequential order you have just set, if necessary.

   These options either promote or demote a page element one step in the tab order sequence. The system automatically adjusts all other page element tab order numbers accordingly.

To remove specific fields from the current tab order:

1. Select the Remove from order option.
2. Click each page element that you want to remove from the tab order.

   The tab order number for each element that you click is replaced with an X. At runtime, the system skips this page element as you tab through the page.
3. (Optional) Select the Move up in order or Move down in order radio buttons to adjust the sequential order, if necessary.

   These options either promote or demote a page element one step in the tab order sequence. The system automatically adjusts all other page element tab order numbers accordingly.

To save the new tab order:

1. Make sure the Save current tab order customized below option is selected.
2. Click the OK button.

   The original page displays again with your new tabbing order and other customizations applied.

Tab Order Exclusions

Tabbing order customization applies only to elements within the page, such as edit boxes, grids, drop-down list boxes, push buttons and so on. Elements that cannot be included in the tabbing order customization include:

- Header icons.
- Browser elements.
- Page and related page links.
- HTML areas.
- BAM controls.
- Charts.
- Grid columns that you’ve hidden using the grid customization feature.

  If you choose to unhide a column after you have set the tabbing order customization, you must customize the page again to include that field in the tabbing order.

Collapsible Sections

You must expand all collapsible sections on a page prior to clicking the Customize Page link for page elements in those sections to be available for tab ordering.

Any allowed page elements within a collapsed area are available for tabbing order customization. If this section is collapsed while working in the transaction page after customizing the tabbing order, the system skips the page elements contained in the collapsed area.

Grids and Scroll Areas

Page elements that are within a grid or scroll area might not be numbered consecutively, but will be implemented as a group at runtime following the first page element in the grid or scroll area. For example, if there are four fields on a page, two of which are in a grid, the tabbing sequence will keep the grid fields together, regardless of the tabbing order you specify. If fields A and B are outside the grid, and fields C and D are inside and you set the tabbing order to be A, C, B, and D, the system will automatically revert to an A, C, D and then B tab order. The items within the grid are kept together.

If you select View All from the navigation bar for a grid or scroll area, the complete page tabbing order is cycled through multiple times. For each cycle, you can tab through the additional rows that are displayed until you pass through all rows.

Grid and scroll area navigation bar elements, such as First, Previous, View All, and so on, are included for tabbing order customization.

Copying, Sharing, and Deleting Page Customization Settings

Access the Page Customization page by clicking the Customize Page link in the pagebar for the page you want to customize. The page customization toolbar at the top and bottom of the Page Customization page enables you to save, cancel, copy, share, and delete your page customization settings. The share and delete options display only after the page has been customized and saved.

Page customization toolbar

Copy Settings Navigates to the Copy Settings secondary page enabling you copy the public profiles from other users. A Lookup button enables you to search all available public profiles for that page.

Selecting the OK button on the Copy Settings page copies the settings and returns you to the Page Customization page.

Note. You may need to adjust the tab order numbering if page elements based on your security profile are different from the public profile you are copying.

Share Settings

Opens the Share Settings secondary page where you can choose to allow public sharing of the page customization settings you created. You can choose to make your profile Public or Private. The default setting is private. If you choose to make the customization settings of one page in a component public, all customization settings for all pages in that component will be public.

The Name field is only required if you choose to make your customization settings public. Each user that chooses to share customization settings must have a unique profile name. The profile name you enter is the same for all pages and shared grid customizations across all components. If you modify the profile name, it will be modified for all pages and grid customization settings across all components. Once the first profile name is saved, the Name field is prepopulated when you open the Share Settings page for other pages or grids.

The Name field can be of any string and can be up to 30 characters long. For example OSC_16AR. Alpha characters will be automatically converted to upper case.

Delete Settings

Opens the Delete Settings secondary page where you can delete all page customization settings for the page or component. Select the Delete button to delete the settings for the current page only. Or, select the Delete Settings for All Pages within Component check box to remove all customized settings for the entire component.

Note. If you make changes to any of these pages, you must also click the Save button on the Page Customization page for your changes to take affect.

Changing Your Password

This section discusses how to:

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

Pages Used to Change Your Password

Page Name	Object Name	Navigation	Usage
Change Password	CHANGE_PASSWORD	Click Change My Password at bottom of the menu pagelet or select the Change Password link in the General Profile Information page. Access this page using the My System Profile link in the menu pagelet.	Change your current password.
Change or set up forgotten password help	USER_PSWDHINT	Click the My System Profile link in the menu pagelet to open the General Profile Information page. Click the Change or set up forgotten password help link under the Password heading.	Set up password help to enable the system to email you a new password if you forget your original one.

Changing Your Password

Access the Change Password page. Use 1 to 32 characters to create your password. Your administrator may implement additional password controls that can result in additional requirements for password changes.

To change your password:

1. Select My System Profile from the menu.

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

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

   Remember that passwords are case-sensitive.
5. Enter your new password again in the Confirm Password edit box.
6. Click OK.

Setting Up Forgotten Password Help

If forgotten password help has been set up by your system administrator in PeopleTools Security, you can select a predefined question to answer for security purposes. The system then sends a new password to your email address automatically. Access the General Profile Information page.

To set up password help:

1. Select Change or set up forgotten password help from the Password region.
2. Select a question from the drop-down list box or password hint set by your system administrator.
3. Enter the appropriate response to your question.
4. Click OK to save your entry.

Setting User Personalizations

This section provides an overview of user personalizations and discusses how to:

- Define your user personalizations.
- Set up your system profile.
- Add words to your personal dictionary.

Understanding User Personalizations

PeopleSoft enables you to personalize your application based on your daily needs, style of work, language preference, and so on. Users of PeopleSoft applications include casual users and power users. The casual users are those who use PeopleSoft applications only occasionally, because they are not an integral part of their daily tasks. For example, a casual user might use the PeopleSoft self-service applications only occasionally to maintain their employee information, to enroll in benefits, or other actions.

Power users, on the other hand, use the PeopleSoft system on a regular basis because it is part of their daily job. They might use the PeopleSoft Financials application every day, for example. They do a great deal of data entry—moving quickly from one transaction page to the next, entering data as they go. A power user might be an accounts payable clerk, human resources benefits manager, purchasing manager, or an order entry clerk.

PeopleSoft also understands 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.

Pages Used to Set User Personalizations

Page Name	Object Name	Navigation	Usage
Personalizations	PSUSERPRSNLCAT	Select My Personalizations.	Personalize your application environment using the personalization options that are accessible from this page.
Option Category	PSUSERSELFPRSNL	Click the Personalize Option button located on the Personalizations page.	Modify the personalization options for the personalization category you select.
Personalization Explanation	PSUSEROPTNEXPLN	Click the Explain link location on the Option Category page.	Displays details for the selected option.
General Profile Information	USER_SELF_SERVICE	My System Profile	Change your password, set language preferences, edit your email address, identify an alternate user, and modify workflow attributes.
Spell Check Personal Dictionary	SCPERSONALDICTLANG	My Dictionary	Add words or acronyms to your personal dictionary.

Defining Your Personalizations

The Personalizations page provides the following option categories for which you can personalize your system.

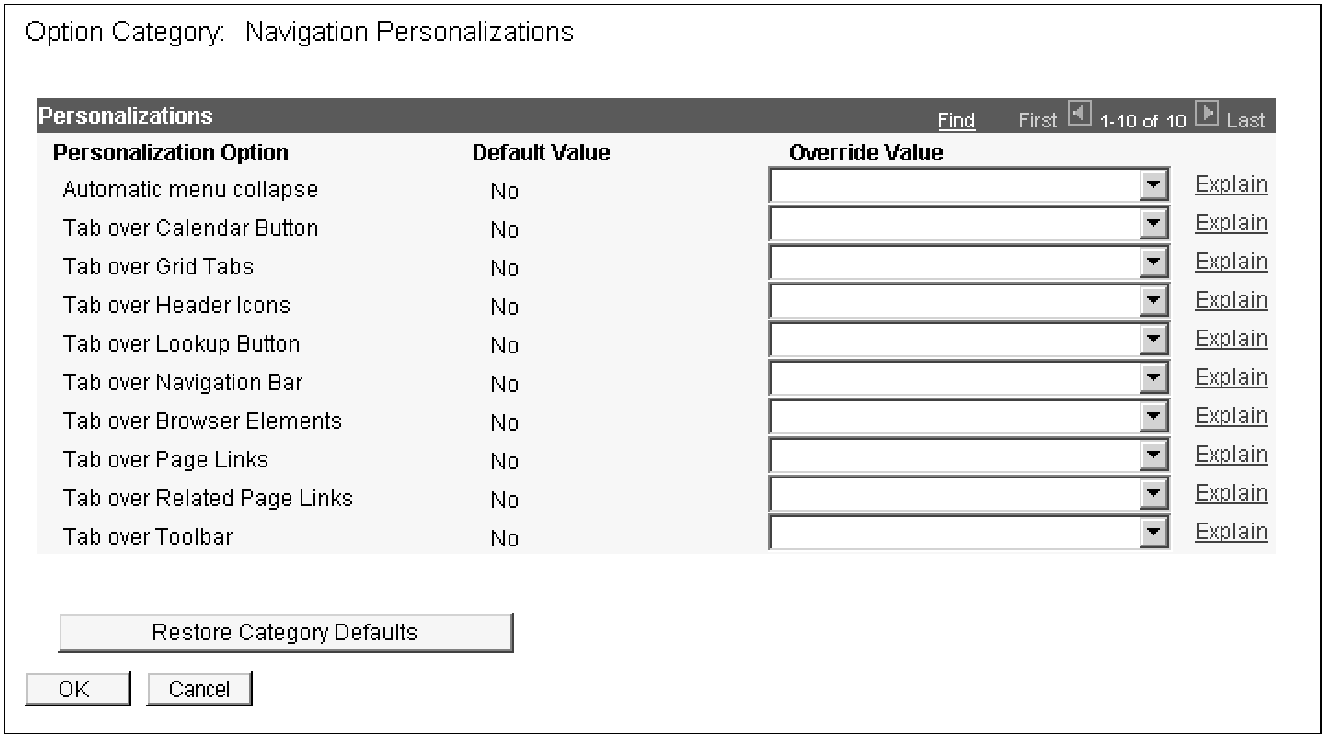
General Options	Offers options for user accessibility features, the length of time the system holds a page in cache, multi language settings, and the spell check dictionary. If you require support for assistive technologies, such as screen readers, you can change the accessibility options. For Multi Language Entry, on pages where multiple language entry is available, you can choose to enter data in the language that you specify in the Data Language drop-down list box. 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 58.
Regional Settings	Select to personalize your date, time, and number formats. Select settings for afternoon and morning designators (AM/PM or am/pm), date format (MM/DD/YY, DD/MM/YY, or YY/MM/DD), a local time zone, and so on.
System & Application Messages	Offers options to control the display of various system messages. When you are familiar with your application, you can disable these messages. Options include a Save Warning and a Save Confirmation message.
Navigation Personalizations	Offers options that allow you to tab over certain unused fields on a page. This means that if you frequently press the TAB key to move around your page, you can skip page elements that you know you will not need to access. For example, you might always prefer to type the date into a date field and then press the TAB key to move quickly 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 press TAB to navigate around your page, your cursor focus never rests on a calendar icon.

Note. Changes to Personalization settings require you to log off and log back on in order to take effect.

Click the Personalize Option button for the category that you want.

Personalize Options

Access the Option Category page for the desired personalization category.

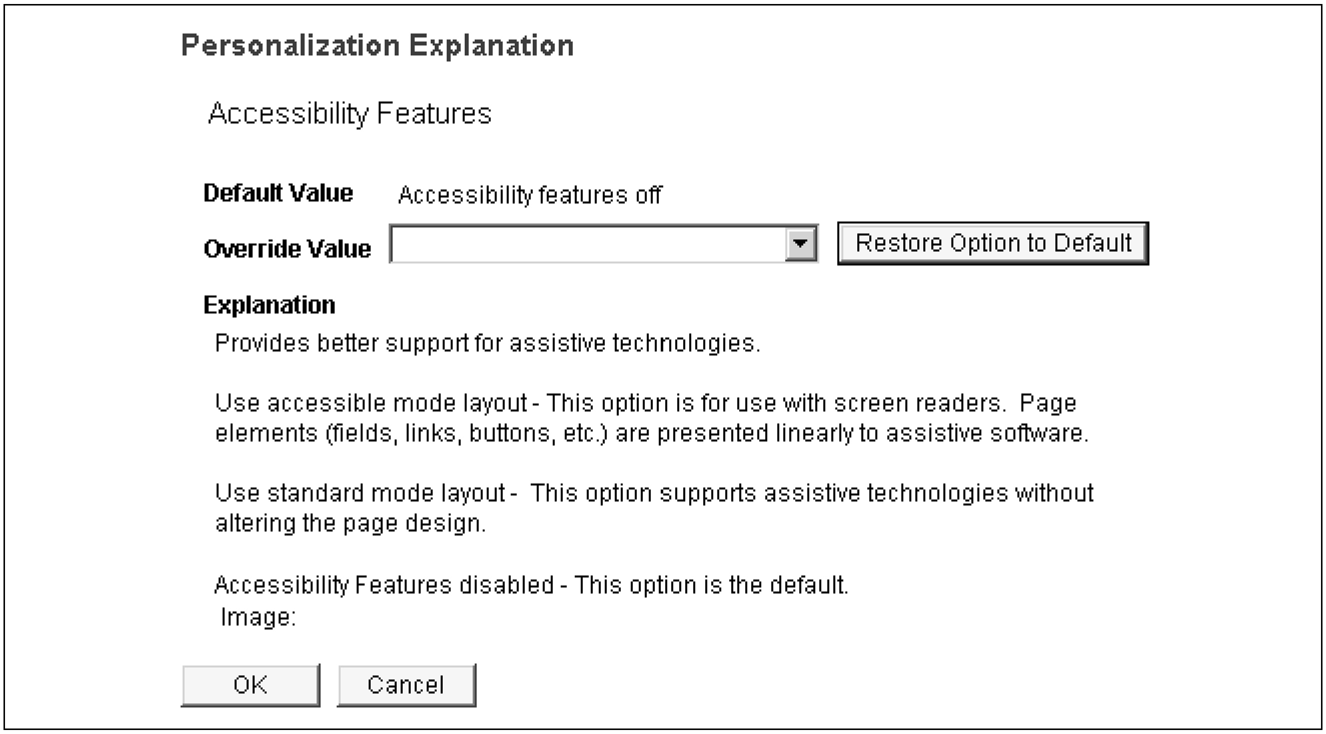


Sample Navigation Personalizations page

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. Click the Explain link at the end of each row for an explanation of the corresponding option.

Personalization Explanations

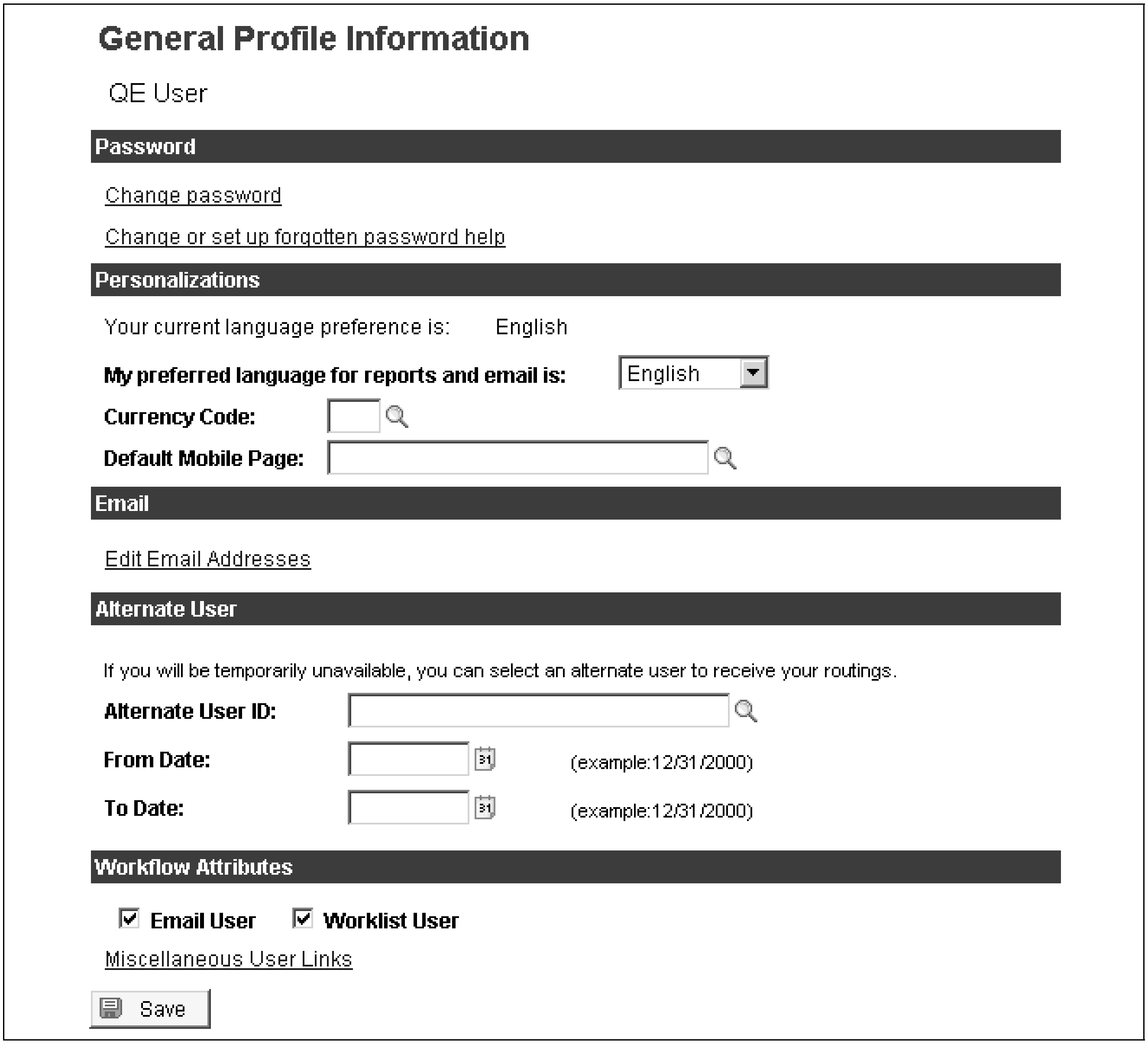
The Personalization Explanation page offers the details for that particular setting. You can select the override value on this page or restore the option to its default value.



Personalization Explanation page

Setting Up Your System Profile

Access the General Profile Information page.



General Profile Information page

Password

Click one of the following links, which are self-service options related to passwords:

- Change password.
- Change or set up forgotten password help.

  See Chapter 2, "Setting User Preferences," Changing Your Password, page 26.

Personalizations

This region lists your current language setting and enables 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 to display on pages when you enter currency values.

Note. For more personalizations options, access the My Personalizations page.

Email

Click 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 five addresses.

Alternate User

If you are going 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. Select the alternate user ID and enter the dates during which you want the alternate ID to be active. After that time has passed, your tasks are automatically routed back to you.

Workflow Attributes

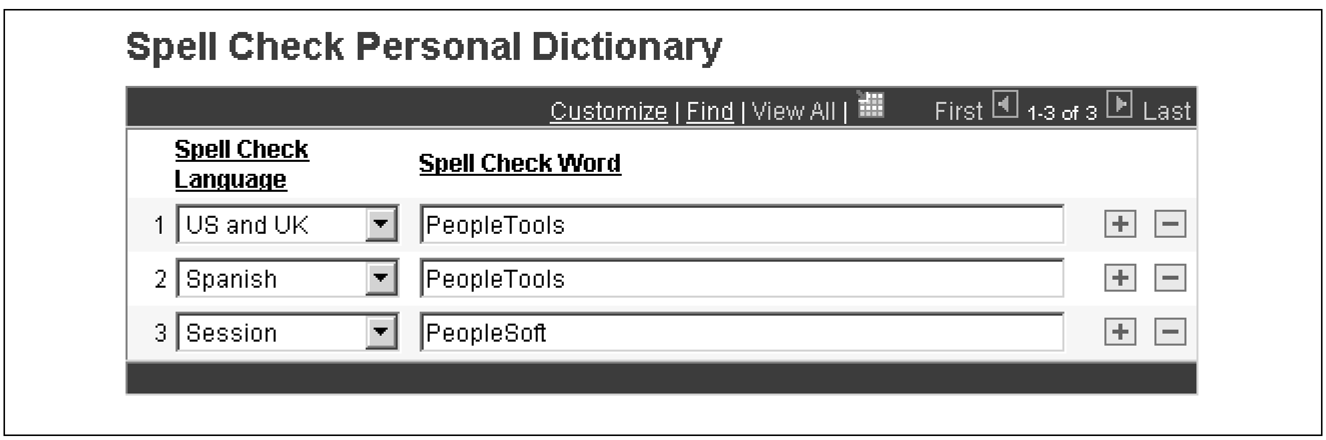
Select one or more check boxes. These settings affect how you receive "ad hoc" workflow routings through your workflow system. An email user receives notifications through email while a worklist user receives notifications through worklists. The options that you select are determined by the way in which 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 Security Links component in PeopleTools Security. Contact your system administrator for more information.

Adding Words to Your Personal Dictionary

Select My Dictionary from the navigation menu to access the Spell Check Personal Dictionary page.



Spell Check Personal Dictionary page

As you use spell check, you find that you might 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 by 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 access it.

Spell Check Language

Select the language dictionary to which you want to add the word. 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 refreshes to the current spell check language.

Spell Check Word Enter the word or abbreviation that 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 validates correct spelling. The system applies the following case-sensitive rules:

- If the added word is all lowercase, such as worklist, then the following are valid:
  - Exact match, all lowercase (worklist).
  - All uppercase (WORKLIST).
  - Initial capitals (Worklist), regardless of the word's position in the sentence.

  Mixed case (WorkList) is incorrect.
- If the added word is all uppercase, such as CRM, then only an exact match is valid.
- If the added word is in initial capitals, such as California, then only an exact match and all uppercase (CALIFORNIA) are valid.
- 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 lowercase.

CHAPTER 3

Using Keys and Search Pages

This chapter provides an overview of keys and search pages and discusses how to use search pages to retrieve data.

Understanding Keys

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 starting date of the course session uniquely identifies enrollment requests.

The fields that identify your data are called *keys* or *key fields.* To display a page, you enter the keys to search for on the search page, so that the system can retrieve the correct row of data. For example, 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 that you are prompted for on a search page. If you run Search by exactly specifying the key fields, the system will always return only one (or no) result. 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 aren't prompted to enter search criteria again. You are prompted for new search keys only when you select a new page outside of the component with a different search record.

Understanding 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.

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, and Correct History. Select the appropriate check box to designate the type of action that you want to perform on your record. If you are unsure, do not select either option. You have the 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. A basic search page offers just one field by which you may perform your search. However, you may designate which field you want to search with by selecting the appropriate field in the Search by drop-down list box. Enter the name in the field, then click the Search button to display the results of your search criteria. Perform a partial search by entering part of a name or description in the Search by field. Similar to the advanced search page, the Include History, Correct History, and Add a New Value options may also be available.

Case Sensitive Select to use the case-sensitive search option.

Using Search Page Buttons

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

Click to process the search. You can select search by criteria and enter characters in the begins with edit box to limit your search (ALT+1).

Click to clear entered text from all fields on the page (without saving) so that you can enter new criteria. If the search key is binary, such as Yes or No, the search field may show as a check box. In that case the Clear button unchecks the check box.

Using Search Pages to Retrieve Data

This section discusses how to:

- Enter and save search criteria.
- Use wildcards to find information.

See Also

Chapter 4, “Working With Pages,” Using Effective Dates, page 41

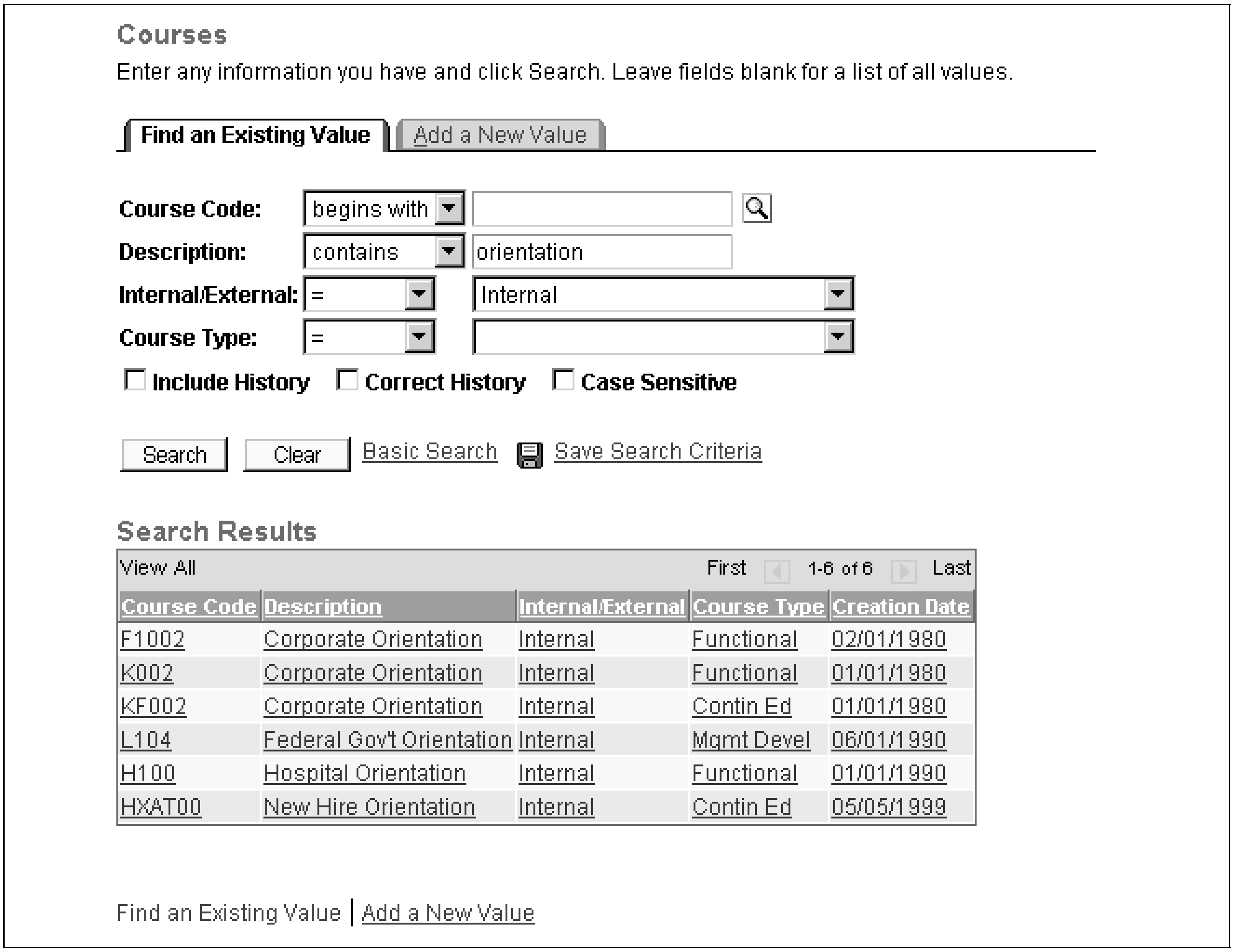
Entering and Saving Search Criteria

This section discusses how to:

- Enter search criteria.
- Use operators.
- Save search criteria.

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 that you requested. Often, however, you don’t have all of the information that you need. 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 one 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 that 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, usually just below the tabs.

Using Operators

Operators enable you to perform searches 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.

Use an operator for more than one field 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 example.

Saving Search Criteria

Click the Save Search Criteria link to save the specifics of your search. You can name the search, review the included values, and save your search. Later, the Use Saved Search drop-down list box appears 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 to Find Information

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

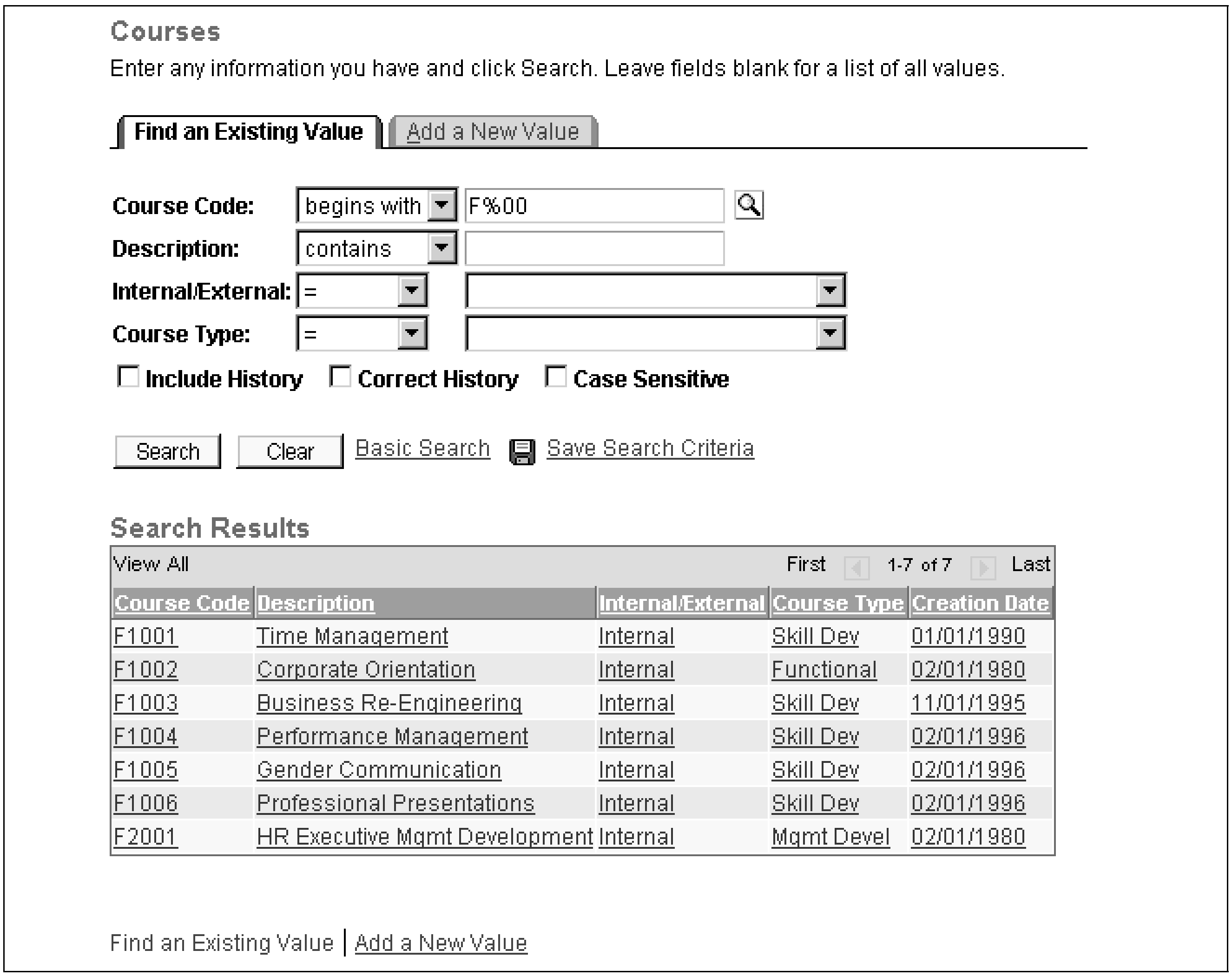
Note. Wildcards only work when used with the Begins With and Contains operators.

The following are the supported standard wildcard features:

Wildcard	Definition
% (percent symbol)	Match one or more characters.
_ (underscore)	Match any single character.
\ (backslash)	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 percent symbol, such as *F%00*, and the system returns a list of courses whose codes match that criterion.



Using wildcards in a search page

CHAPTER 4

Working With Pages

This chapter provides an overview of pages and discusses how to:

- Use effective dates.
- Use aesthetic elements.
- Use functional elements.
- Use data-entry fields.
- Work with grids and scroll areas.
- Use spell check.
- Work with HTML trees.
- Work with field-level prompts and validation.

Understanding Pages

Pages are the primary graphical interface by which you view and alter data in your PeopleSoft system. You can think of pages as representations of rows of data in your database tables. You 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 need to be familiar with effective-dating logic and the various page action options as you work with historic, current, and future data.

Many PeopleSoft components run in deferred processing mode to reduce trips to the server. When deploying some pages in the browser, the user is able to input data with minimal interruption or trips to the server. Each trip to the server results in the page being refreshed on the browser, which may cause the display to flicker. It can also slow down your application. Specifying a component as deferred processing mode results in better performance. If deferred processing mode is specified for a component, then a page within a component, or a field on a page, also performs processing in deferred mode.

It also helps to familiarize yourself with the types of page elements that you encounter on pages and how they work. PeopleSoft uses 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

This section provides an overview of effective dates and discusses how to describe page action options and effective dates.

Understanding 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:

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.

Describing Page Action Options and Effective Dates

The types of actions that 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:

Note. Not all tables are effective-dated. The Include History and Correct History options only appear on pages that access effective-dated tables.

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. **Note.** This option is available only to users with the proper permission.

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 that today is February 1, 2002:

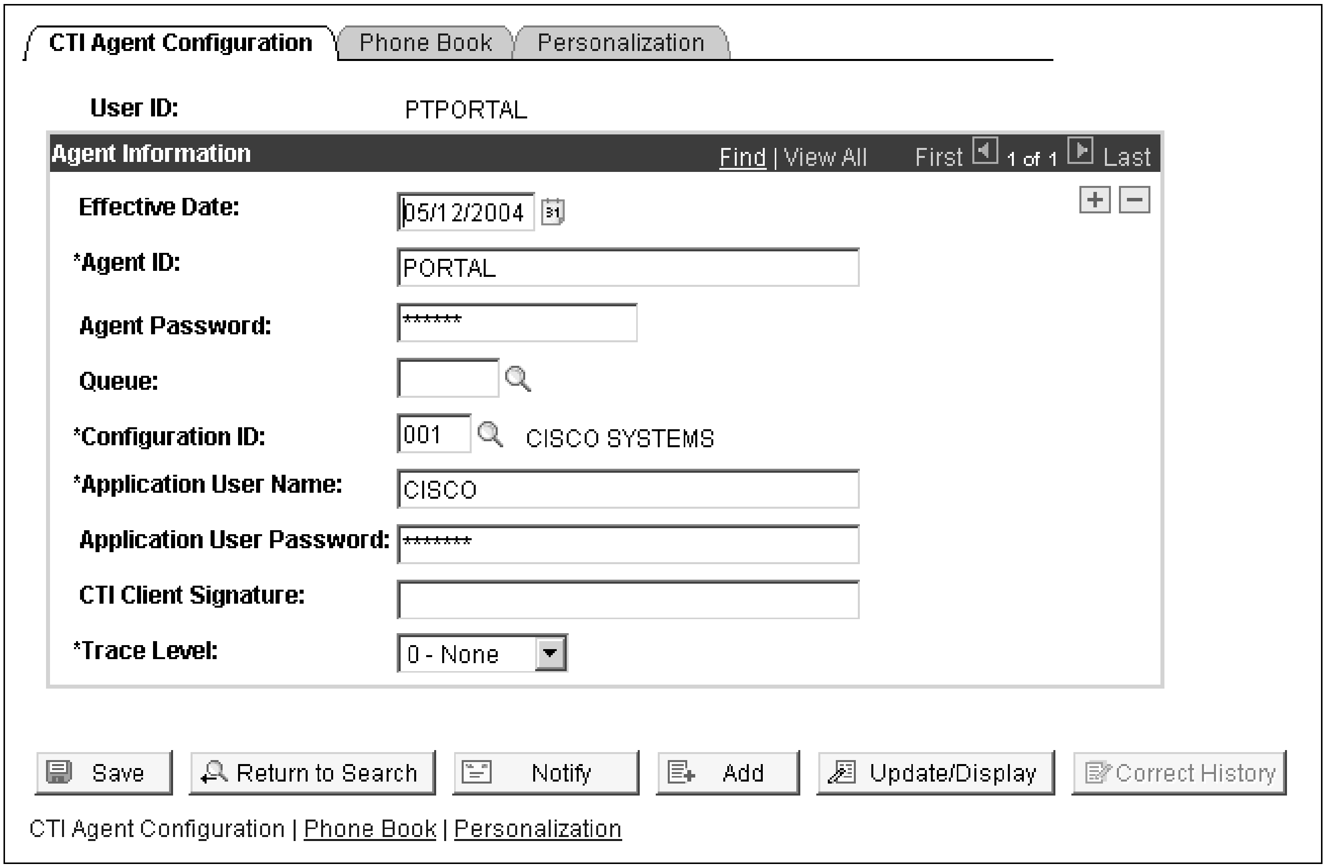
Effective Date	History	Current	Future
Hired: January 1, 1994	X	–	–

Effective Date	History	Current	Future
Transferred: January 1, 1996	X	–	–
Promoted: August 1, 2001	–	X	–
Expected termination: January 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 appear in the toolbar at the bottom right of those pages to which they apply. A shaded button indicates that the page is currently in that mode. For example, the CTI Agent Configuration 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, which is effective-dated August 1, 2001, and the future data, which is effective-dated January 1, 2003 (the employee's promotion and then the employee's termination).

You can also:

- Insert new rows with an effective date later than the date on the current row—after August 1, 2001.
- Change the future-dated row, effective-dated January 1, 2003, and change any additional rows that 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 to view any of Tom Sawyer's job data, from his hire date to the day on which he will be fired. However, 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—that is, any date after August 1, 2001.

Correct History Mode

Select Correct History to access 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, from his hire date to the day on which he will be fired. You can also insert new rows with any effective date.

Note. As you move between the Update/Display, Include History, and Correct History modes, the system prompts you to save your changes if necessary.

Working With Page Elements

This section provides an overview of PeopleSoft page element types and discusses how to use certain data-entry fields.

Understanding PeopleSoft Page Elements

In PeopleSoft applications, there are three types of page elements: aesthetic, functional, and data-entry fields. As you work in your application, while you should be aware of all page element types, you interact mostly with the data-entry type fields.

Aesthetic Page 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.

Functional Page Elements

Functional elements are controls, such as buttons and links, that perform a specific function. Aside from the standard toolbar buttons on the bottom of the page, you may see other 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 that you just entered. You can activate this button by clicking it or by pressing the ENTER key while the element has the focus. Links can also be activated by pressing the ENTER key.

Data-Entry Fields

On pages, there are 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. Understanding how to use each type of data-entry field helps you use the system more efficiently.

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

Check boxes and **Radio buttons**

Selecting a check box or radio button enables an option. Typically, you select one by clicking within it or pressing the space bar when the box is highlighted. Click it again or press the space bar to disable the option.

Check boxes correspond to fields with only two valid values. You can often select more than one check box in a related set. A related set of radio buttons represents a group of mutually exclusive options; typically you can only select one radio button within a related set.

Edit boxes

Enter characters or numbers into an edit box. The character limit is determined by the length of the database field. Edit boxes for fields with prompt tables have a lookup button to the right. Edit boxes with spell check enabled have a spell check button to the right.

See Chapter 4, "Working With Pages," Using Edit Boxes, page 47.

Long edit boxes

Enter longer strings of data, such as comments, into long edit boxes. 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.

Drop-down list boxes

Select a value from a predefined list. Drop-down list boxes look like a data-entry field with a prompt button at one end. Click the prompt button to expand the edit box to display a list of valid values from which you can select a single option.

Images

Insert photos or other images into your PeopleSoft Application. The format of the image that you insert must be the same as the image format defined for that field by the developer in PeopleSoft Application Designer. Acceptable formats include: JPG, BMP, GIF, or DIB. For example, on 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, the system displays an error message.

Grids and **scroll areas**

Serve as containers or organizers for multi-field data entry. Grids display as a mini-spreadsheet within a page. Scroll areas are like grids except the fields are arranged in a free form manner. Both contain rows of data that may contain Add, Multi-Row Insert, or Delete buttons. Most include a navigation bar or footer with multiple control and configuration options.

You can think of all of the fields in each of these controls as belonging to one table in your database. Each time that you add a new row, you are actually adding a new row of data to the database table, each of which shares 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.

See Chapter 4, "Working With Pages," Using Grid and Scroll Area Controls, page 49.

Moving Among Fields

To move among the data-entry fields on a page, press the TAB key or click the field once. Pressing the TAB key moves you one field at a time in a sequence determined in the page definition. Pressing TAB 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. Press SHIFT+TAB to move back rather than forward.

Note. Pressing TAB to move between fields may function differently for power users that have modified page tabbing behavior on 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 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 list boxes or are accompanied by a prompt button to assist you in entering the correct data.

Using Data-Entry Fields

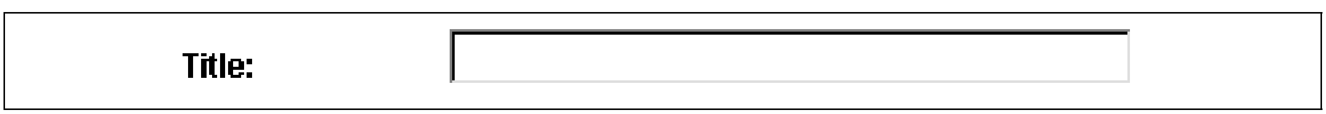
This section discusses how to:

- Use edit boxes.
- Use drop-down list boxes.
- Work with images.

Using Edit Boxes

Move to and highlight an edit box by pressing the TAB key or by double-clicking and highlighting the text. You may type over existing highlighted text. If the text is not highlighted, then you are inserting rather than replacing text.

This example shows an edit box:



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. 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:

- Social security, social insurance, or other government ID numbers.

- Dates.
- Zip codes 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 mm/dd/yy (include zeros); the system automatically changes the display to show a four-digit year.

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

In Interactive mode, 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.

Using Drop-Down List Boxes

To select a single item from the list, scroll until your choice is visible, and then click the item itself. The value that you selected 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, type the letter more than once to cycle through the list. For example, in the following example, first click the down arrow. English is the default value for the language, so if you want to select Greek, type the letter G twice. Alternatively, press the DOWN ARROW key on your keyboard to select the field entry that you want. Once your choice is highlighted, press ENTER.

This example shows a drop-down list box:

Drop-down list box

Working With 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.

This section discusses how to:

- Insert an image.
- Delete an image.

Inserting an Image

You can insert photos into your PeopleSoft database. For example, you may want to store employee photos for company identification badges, or pictures of products for inventory purposes.

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 appears enabling you to search for the image that you want to insert. You can browse for the image from your desktop, your hard drive, or the network.
3. Click the Browse button to search for and select the image you want to insert.
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.

Using Grid and Scroll Area Controls

This section discusses how to:

- Navigate through data.
- Work with grids.
- Work with 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, PeopleSoft uses navigation buttons and links. These buttons or links appear 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.

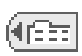
This section discusses how to:

- Navigate by using buttons and links.
- Add rows.
- Delete rows.

- Select rows.
- Find data.

Navigating by Using Buttons and Links

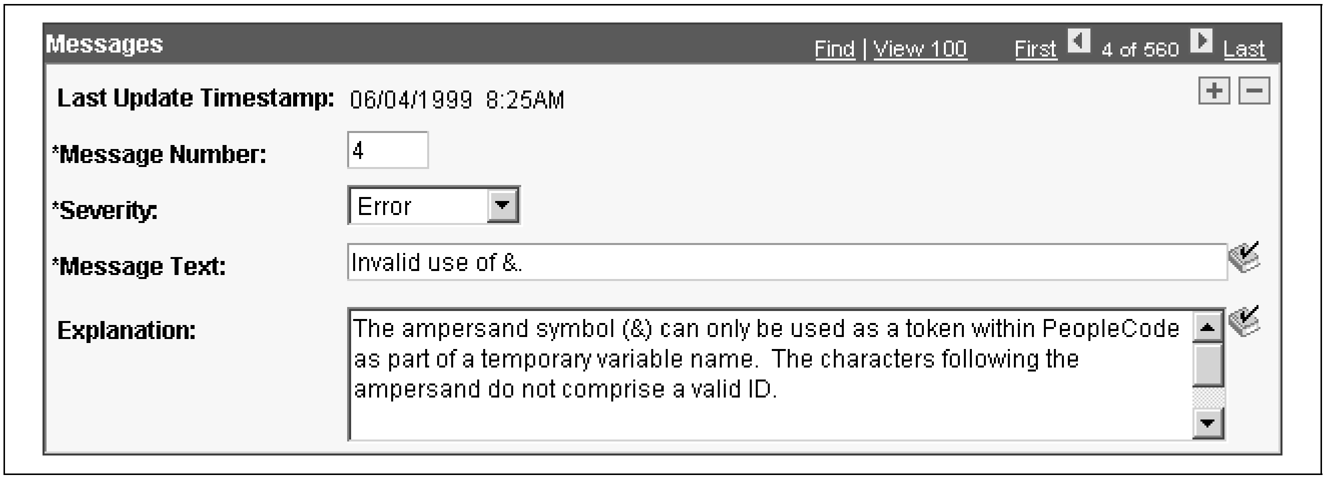
The following table describes the action options that might appear on your grid or scroll area.

	Click to insert a new row after the row for which you click the button.
	Click to insert multiple rows. Specify the number of rows (1 to 99).
	Click to delete the current row of data.
	Click to display the next row of data.
	Click to display the previous row of data.
	In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.
	In a tabbed grid only, click to return the expanded grid to its tabbed state.
Customize	Click to access the customization page for that grid, which enables you to sort by column and reorder, hide, and freeze columns.
	Click to download the contents of a grid to a Microsoft Excel spreadsheet.
View	Click to display 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	Click to find a specific row of data.
First	Click to access the first row of data.
Last	Click to access 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," Using Hot Keys, page 13.

In addition to these links and buttons, there is 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 Message Log scroll area as an example, you can see that it contains 560 total rows of data, displaying just one row at a time. Select View 100 to see the rows in groups of 100 at a time.



Sample scroll area

Adding Rows

Continuing with the Message Log scroll area as our example, if you click the Add button, an empty row is automatically inserted after the current row, and the navigation header shows that there are now 561 rows of data in the table. If you do not insert a new row, any data that 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 that you make don’t take effect until you save the page. If you exit the page without saving, the original data remains intact. Typing over existing data in the effective-dated table can be done only in Correction mode.

You can also add several rows at once to your grid or scroll area by clicking 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 that you are working in controls the availability of this option and therefore it may not always be visible.

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; the system does not save any other changes that you made to the page.

Selecting Rows

For certain grids and scroll areas, you can 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 selecting 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 you need by selecting 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 shaded 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 that 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 displays 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 so that the row that contains the word that 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. 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 for what appears on the current open page only. Thus, it searches field headings, read-only text, and headings in grids, group boxes, and scroll areas only.

Working With Grids

Grids offer several functional benefits that scroll areas do not. This section discusses how to:

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

Selecting Tabs for Multiple Views of a Grid

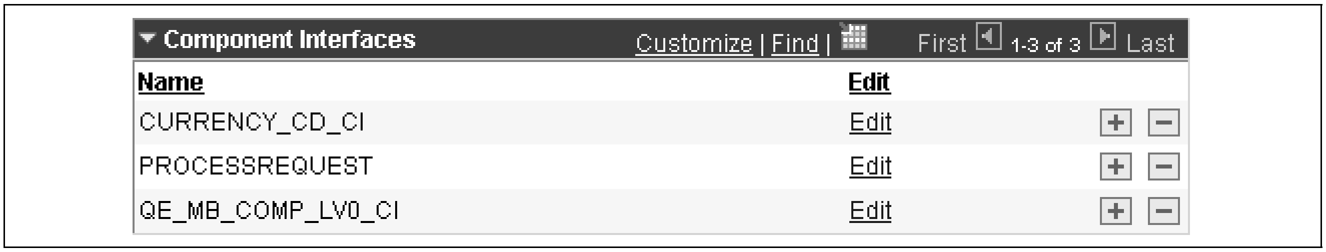
Tabbed grids enable you to view multiple columns of information without scrolling to the right. By clicking the tabs just below the grid navigation bar, you can view the remaining columns of grid data. Alternatively, some grids may have an Expand All button to the right of the tabs, which enables you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

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).

These examples show both the collapsed and expanded states of the Component Interfaces grid.

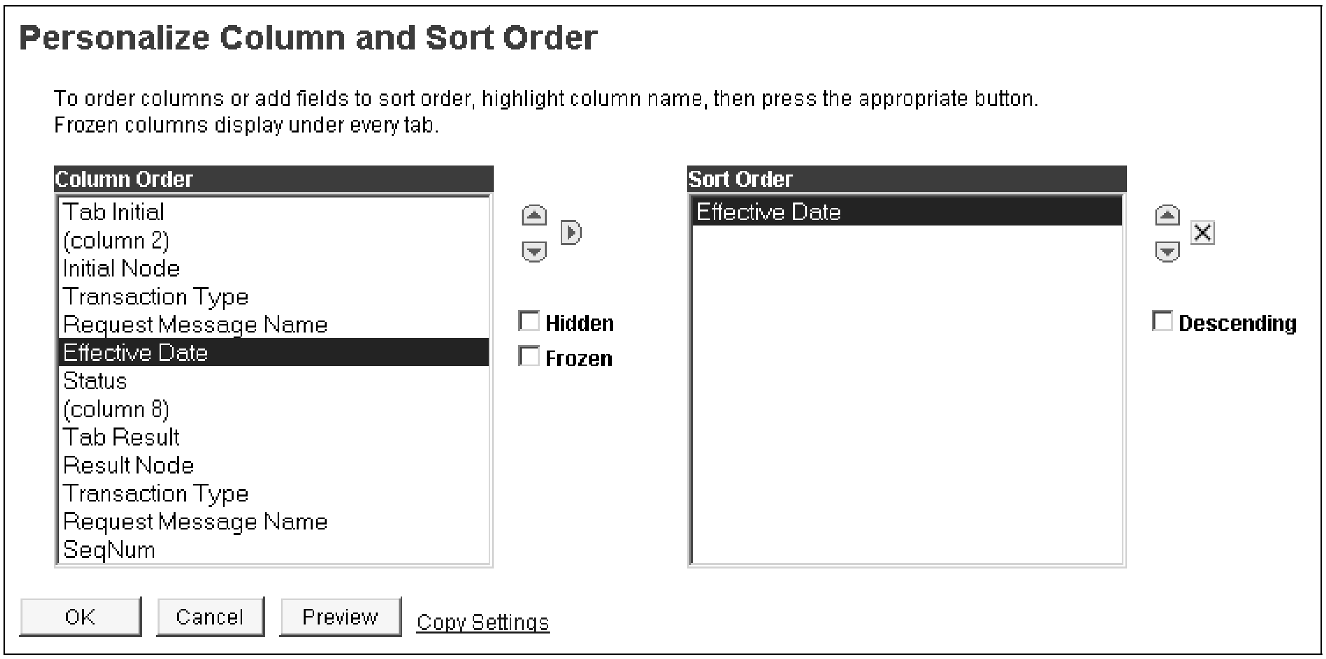
Collapsed grid example



Expanded grid example

Customizing Grids

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 also choose to share your grid customizations with other users or copy another users settings. You control these settings on the Personalize Column and Sort Order page, which is accessed by clicking 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

If there are grid tabs, they remain active so that you can view all sample data. Use the following toolbar buttons to personalize your grid:

OK Click to save your personalizations and return to the transaction page with the changes in effect.

Cancel Click to cancel all personalization settings you may have set, if any, and return to the transaction page.

Preview Click to preview any personalization settings that you make in the display-only grid at the top of the page.

Copy Settings Navigates to the Copy Settings secondary page enabling you to copy the public profiles from other users. A Lookup button enables you to search all available public profiles for that grid.

	Selecting the OK button on the Copy Settings page copies the settings for the profile you select and returns you to the Personalize Column and Sort Order page.
Share Settings	Opens the Share Settings secondary page where you can choose to allow public sharing of the grid customization settings you created. You can choose to make your profile Public or Private. The default setting is private. If you choose to make the customization settings of your grid public, all customization settings for all components will be public. The Name field is only required if you choose to make your customization settings public. Each user that chooses to share customization settings must have a unique profile name. The profile name you enter is the same for all pages and shared grid customizations across all components. If you modify the profile name, it will be modified for all pages and grid customization settings across all components. Once the first profile name is saved, the Name field is prepopulated when you open the Share Settings page for other pages or grids. The Name field can be of any string and can be up to 30 characters long. For example OSC_16AR. Alpha characters will be automatically converted to upper case.
Delete Settings	Opens the Delete Settings secondary page where you can delete all grid customization settings for the current grid. Select the Delete button to delete the settings for the current grid only and restore the default grid settings. Select the Cancel button to retain your settings and return to the grid customization page.

To change the column order:

1. In the Column Order grid of the grid personalization page, select the column that 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 that the system displays at once.

2. Click 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 disables the frozen setting.

3. Repeat steps one and two to move any additional columns.
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 that 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. Select the Hidden check box.

   Note that when you use the find feature in the grid, the system won't search any columns that 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 that you want to freeze.

   A frozen column remains immobile when you use the grid's horizontal scroll bar.

   Note. Any columns that the developer already defined as frozen appear with the Frozen check box selected. You can override this setting by clearing the check box.

   ---

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 disables 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 grid column sort order. When you save the personalization settings, the new sort order remains persistent, meaning that your sort remains every time that you access that grid, even if you sign out of the PeopleSoft system and sign 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 that you want to sort.

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

   - Tab separators.
   - Images.
   - Buttons or links.
   - 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. Click 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 that 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 click 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 (not underlined) for the column that 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 that 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 that 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. Click 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 Microsoft 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 will notice, however, that within a scroll area the fields are randomly arranged rather than set up 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. Insert a new row into the scroll area to insert 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 never want to delete a value; you 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 over time. Then, as employee review time arrives again, you would simply add a new row of data to the table by clicking the Add button rather than by typing over the existing row. When you add a new row, the Eff Date (effective date) field 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 that you are entering doesn’t take effect until later.

Because the system date is at or after the new effective-dated row that you created, the new information becomes the current row. That means that the row that 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 that 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 to insert a row, because the row of data already exists and you don’t want to maintain incorrect information.

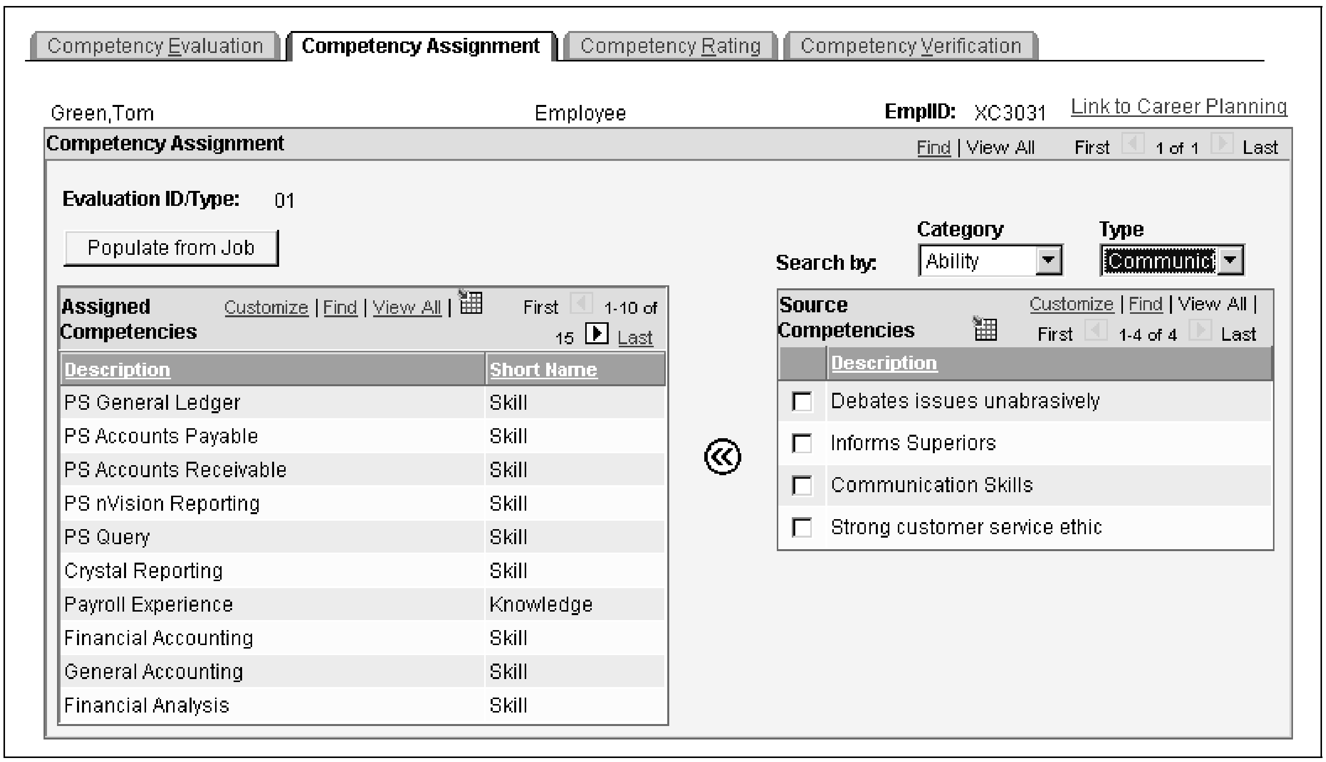
See Also

Chapter 4, "Working With Pages," Using Effective Dates, page 41

Using Multiple Scroll Areas and Grids on a Page

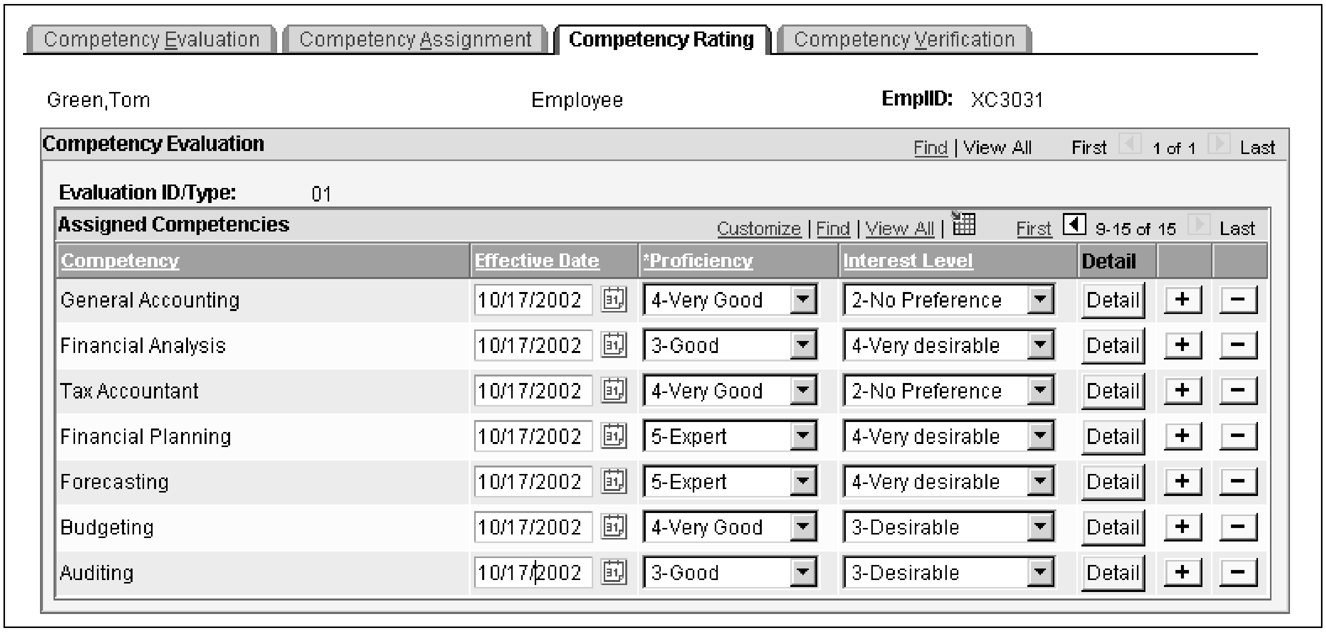
As you work with PeopleSoft applications, you encounter pages that contain multiple scroll areas and grids. These scroll areas and grids may be one on top of the other or side by side, or they may be contained within each other (nested). The fields controlled by one scroll area or grid are associated 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, you select a value from the Category and Type drop-down list boxes to populate the Source Competencies grid. To select the descriptions that 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

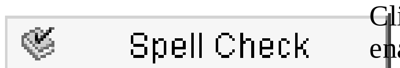
The Evaluation ID/Type fields associated with the outer scroll area refer to the type of evaluation. The fields associated with the Assigned Competencies inner scroll area refer to the specific competencies included in the evaluation.

Another way of looking at nesting is to think of the scroll area and grid as having a parent and 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.

Using Spell Check

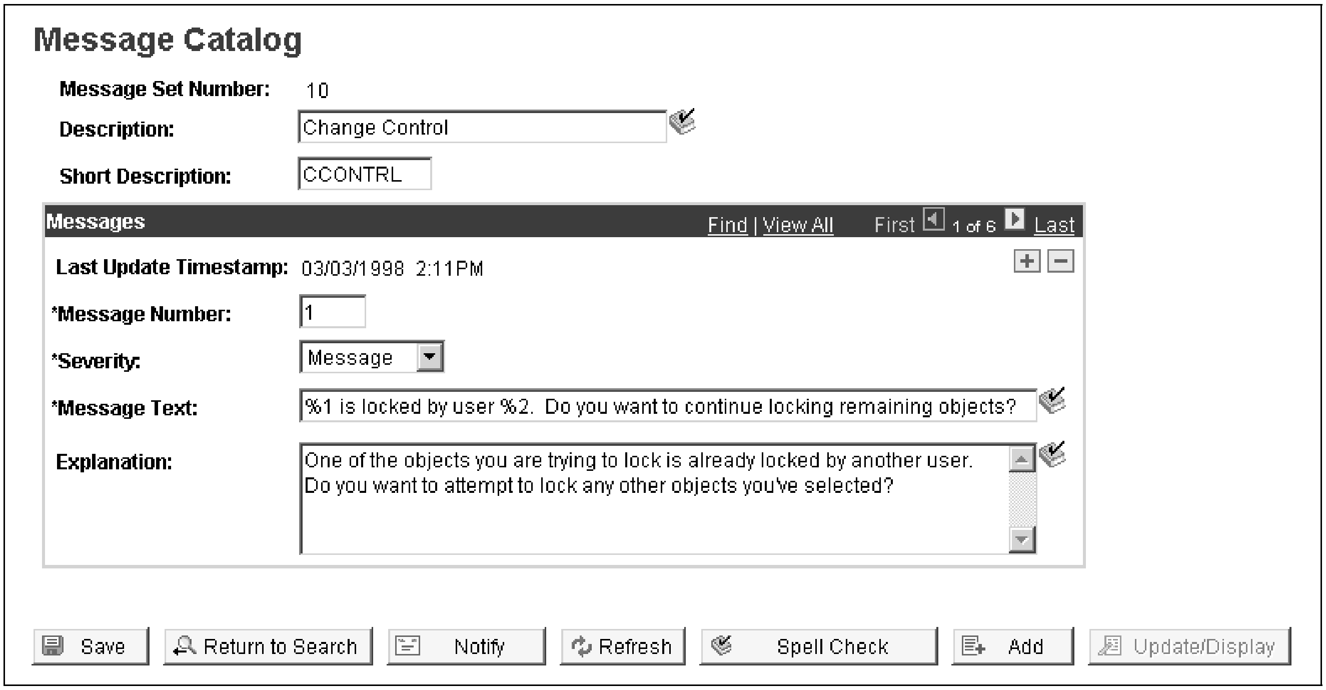
PeopleSoft applications are equipped with a spell check feature that you can use on data entered in edit boxes and long edit boxes. Activate spell check by clicking the spell check icon to the right of those fields where spell check is available or by clicking the spell check toolbar button.

Click to activate spell check for the corresponding field. If there are no spelling errors, the following message appears: No misspellings found. You can activate spell check by pressing ALT+5 when the cursor is in the field, also.



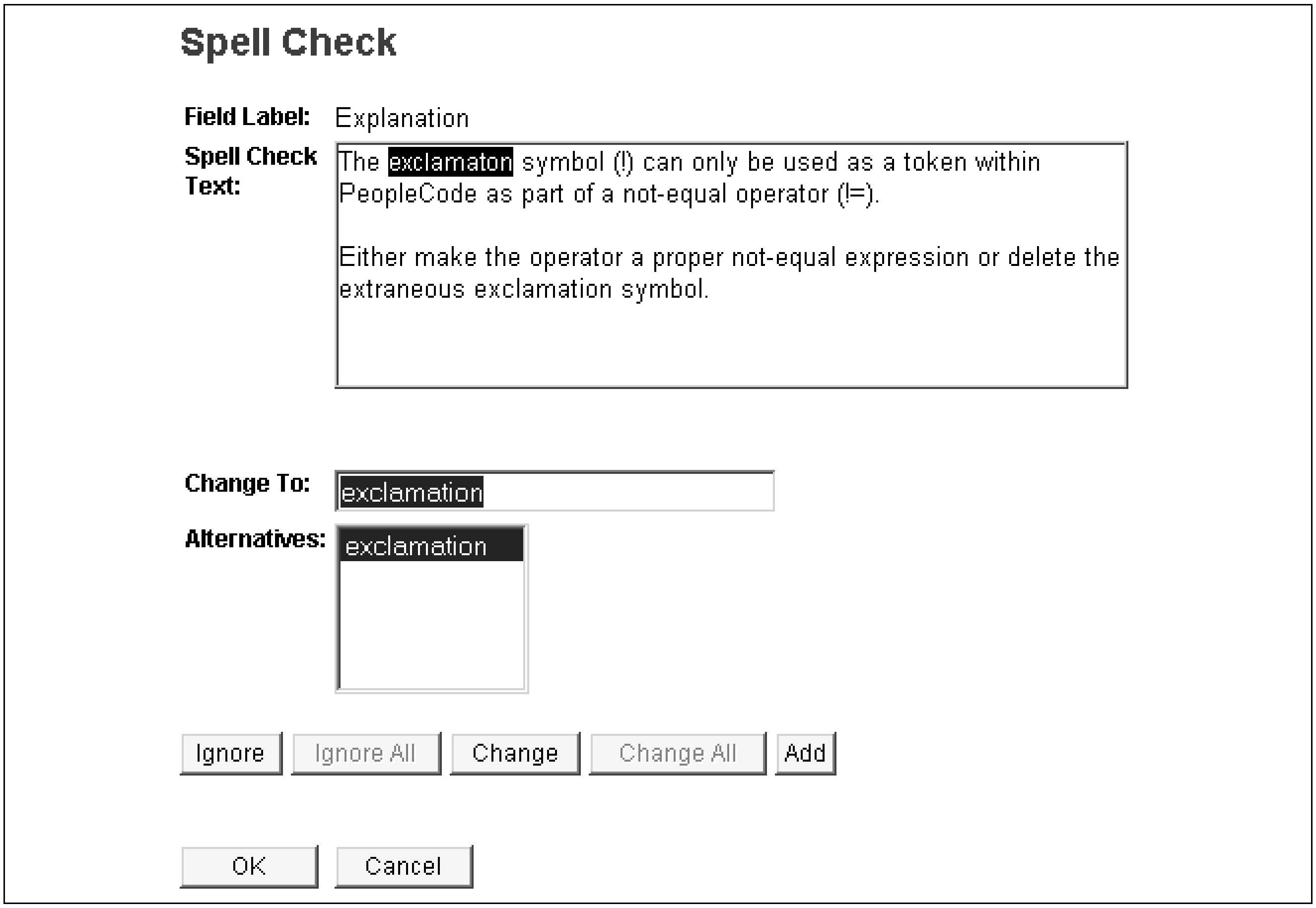
Click to activate spell check for all fields in the component that have been enabled for spell check, regardless of whether those fields have changed. The system checks each field and then proceeds to the next spell check field until all fields in the component have been checked. If there are no errors,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

In the following example, spell check is available for the Description, Message Text, and Explanation fields.



Spell check icons

The spell check button opens the Spell Check page. This page displays the errors in the text and offers a list of alternatives if applicable. You can choose to ignore the occurrence, ignore all occurrences, change the spelling, change the spelling for all occurrences of the word, or add the word to the current language dictionary.



Spell Check page

Field Label

Displays the field label text of the field currently being checked.

Spell Check Text

Displays all of 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 by 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 click the Change or Change All buttons to verify the correct spelling.

If the system does not find any alternative spellings, the Change To field is 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

Click to leave the current spelling as is and locate the next misspelled word.

Ignore All

Click to leave the current spelling as is for all text in the field that exactly matches the original text. This action is case-sensitive; only exact matches are ignored.

Change Click to correct the error to the value that appears in the Change To field. 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 Click to correct all occurrences of the error with the value in the Change To field. 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 are changed.

Add Click to add the highlighted misspelled word (as is) to your 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," Adding Words to Your Personal Dictionary, page 32.

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 its contents and you have not already run spell check 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.

Using Foreign Language Dictionaries

Spell check supports 17 languages. The default spell check dictionary is based on your current sign in language. When you signed in to your PeopleSoft application, if you selected French as your sign in language, your dictionary when using the spell check is also in French. You can change your language dictionary on the My Personalizations page. The language personalization, SCLANG (checking spelling Language), uses by default the Universal Language Code that is already set for your system by your system administrator.

To change language dictionaries:

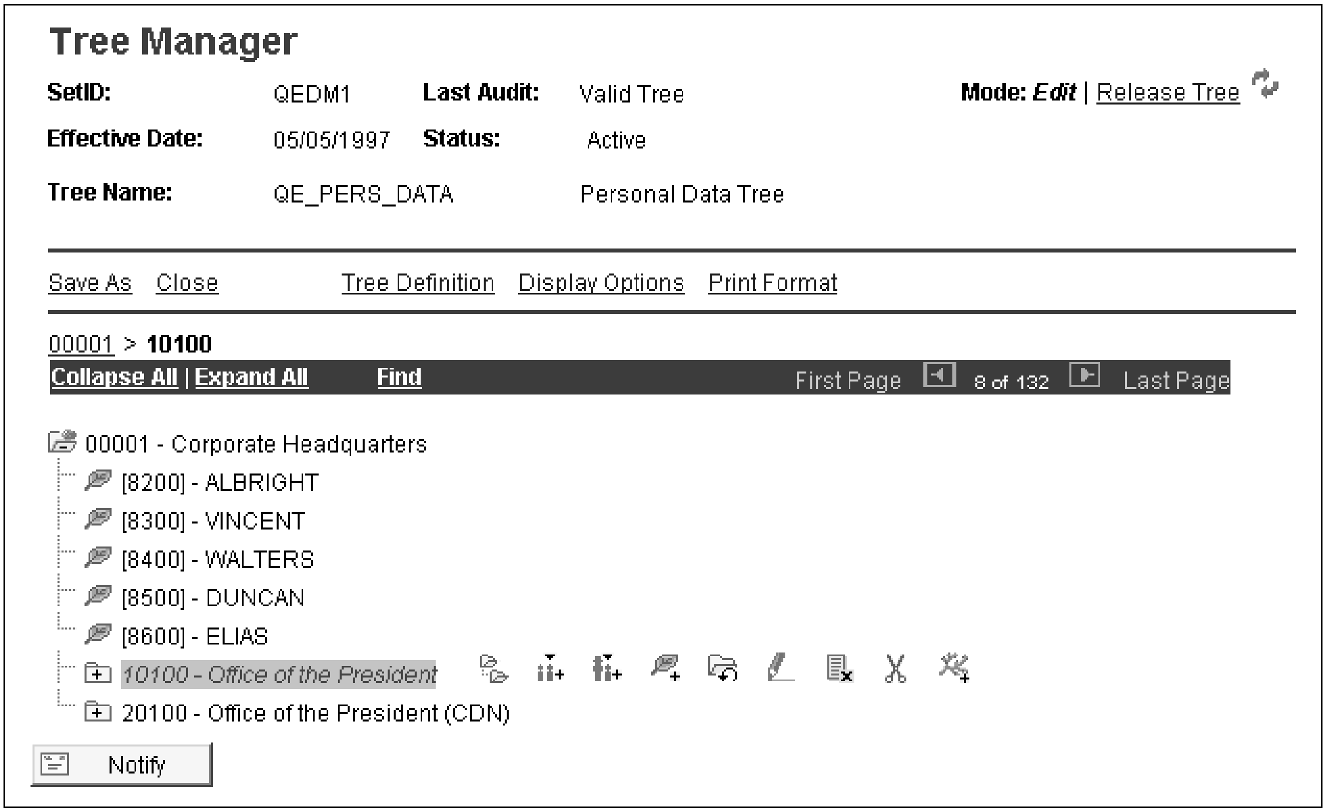
1. Select My Personalizations from the navigation menu.
2. Click the Personalize Option button for the General Options personalization category.
3. Enter the language dictionary that you want in the Override Value edit box for Spell Check Dictionary.
4. Click OK.

   Only one dictionary can be used per sign in session. To change language dictionaries again, make the change in My Personalizations and then sign out of the system before proceeding. To return to having your default spell check dictionary selected automatically based on your current sign in language, remove your override value or set it to *Use Session Language.*

Working With HTML Trees

When talking about trees, PeopleSoft uses 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 and a sibling of Human Resources, Controllers, and Retail Services.



Sample HTML tree

Click the yellow folders with + (plus) signs to expand another level. The leaves 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 by using the navigational bar (the horizontal bar at the top of the tree) and the navigation path, as shown in the previous example. 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 and 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, navigation paths 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. These navigation paths 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 C10100 and C10100 is the parent node of C10900.

The maximum number of navigation paths displayed is seven. When you exceed that number, the system removes the earlier ancestor nodes.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Tree Manager, “Using PeopleSoft Tree Manager”

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Tree Manager, “Using PeopleSoft Tree Manager,” Navigating PeopleSoft Tree Manager

Working With Field-Level Prompts and Validation

This section provides an overview of field-level prompts and validation and discusses how to:

- Use look-up prompts.
- Use calendar prompts.

Understanding Prompts and Validation

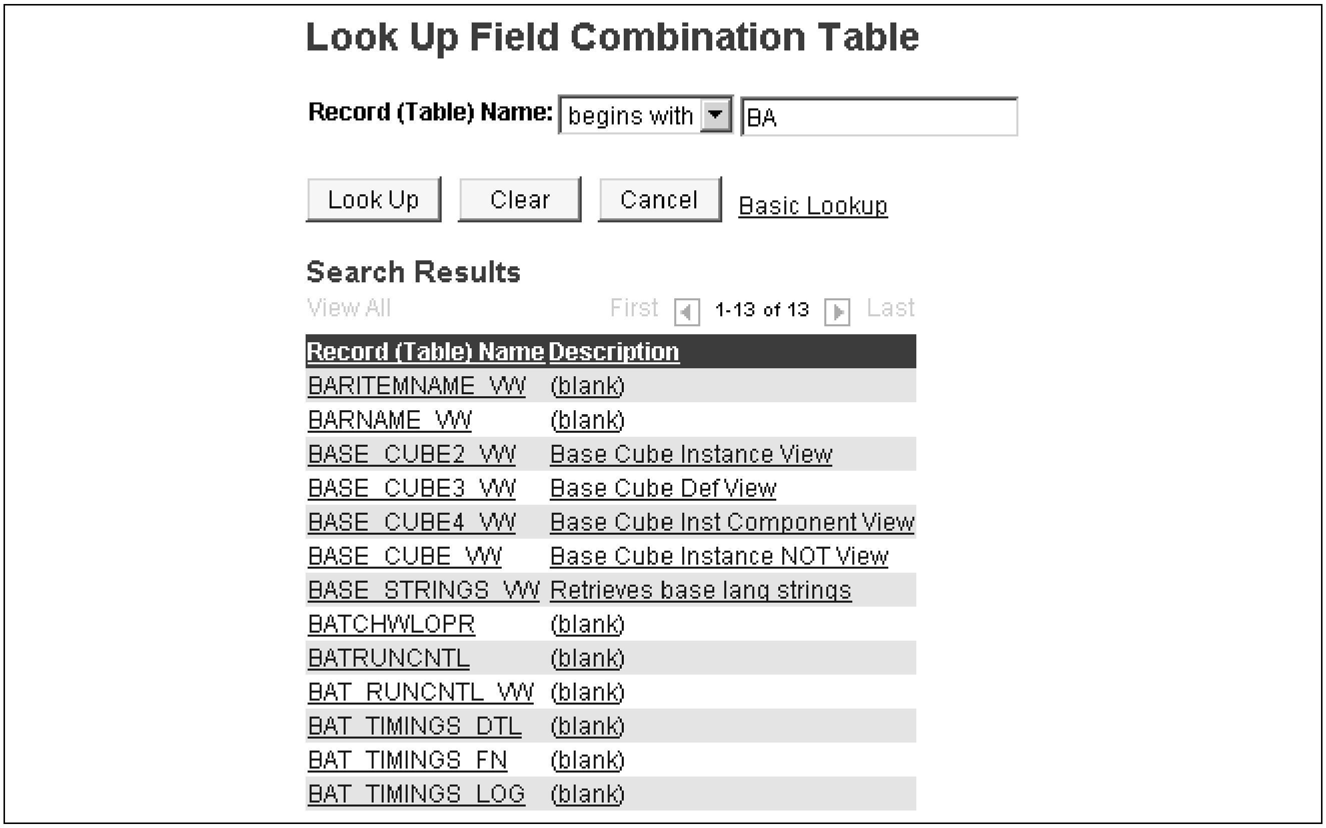
Some edit box fields are linked to database prompt tables, which store values for information shared across your organization, such as department IDs, country codes, and state codes. They’re called prompt or lookup tables because you can prompt the system to give you a list of values from which you can select the correct value. In many cases, fields are defined so that the system edits or validates the values that 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 tables appear as edit boxes on your screen with a lookup button to the right.

	Click to open the Look Up page for the current field.
	Click to open 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.

Using Look-Up Prompts

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 drop-down list box can help make a search more specific. As with a search page, use the Advanced Look Up page to enter additional criteria by which to search. When you find the field value that you need in the Search Results grid, click the link to automatically populate 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 previous example. Search Results is populated with all the choices available to you based on the partial value that you entered.

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

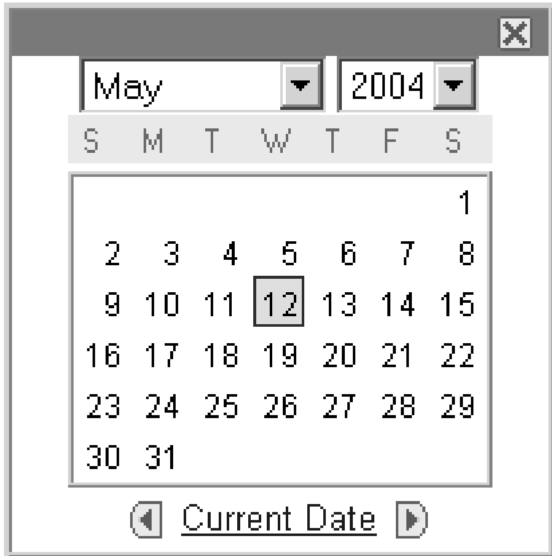
See Also

Chapter 3, “Using Keys and Search Pages,” Using Search Pages to Retrieve Data, page 36

Using 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 entering *today* in the date field. Press TAB to exit the field; the current date appears. This feature can also use languages specific to the locale.

This example shows the calendar prompt window that displays when you click the prompt button:



Calendar prompt window

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.

CHAPTER 5

Working With Processes and Reports

This chapter provides an overview of PeopleSoft processes and reports and discusses 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 also run 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

There are four major steps required to run a standard report. Using these steps, you can produce many types of reports.

This section discusses how to:

1. Select reports.
2. Specify report parameters.

3. Specify where and when to run reports.
4. Select output types and set report distribution.

Selecting Reports

To run a report, select it from the appropriate menu in your PeopleSoft application. Many applications have a report menu that lists 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 immediately 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 that you run a report, you create (and save) a run control with those settings. The next time that you run the report, you select the run control, and the system fills in the settings.

Run Control IDs

Each run control that you create receives a unique run control ID. These IDs are product-specific. Refer to your PeopleSoft product documentation for details on the run control IDs that 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 that you're about to define. If you're in Update/Display mode, enter an existing run control ID, or click 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:

1. Select the required PeopleSoft application menu item—for example, Process Financial Information, Maintain Ledgers.
2. Select Report, and then click the required report name.

   When you select a report name, you can choose from these two actions:

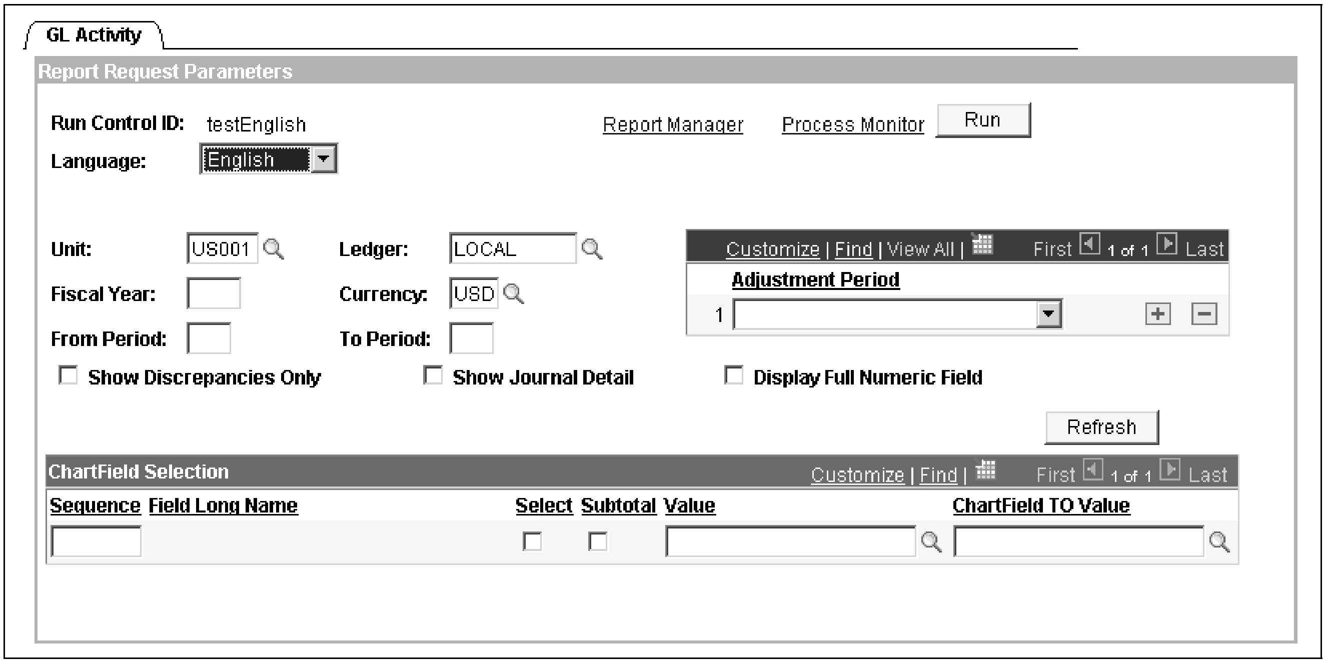
   • Add a new run control ID.

   • Select an existing run control ID.

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

Specifying Report Parameters

You can run off-line processes from pages in your PeopleSoft application in a variety of ways. The way in which you use the processes depends on the application. Access 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 of the General Ledger Activity report.



General Ledger Activity page

If you selected an existing run control ID, the values in this page reflect the settings from the selected run control; if you added a new value, or if you're using an HCM 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; the Process Scheduler Request page appears.

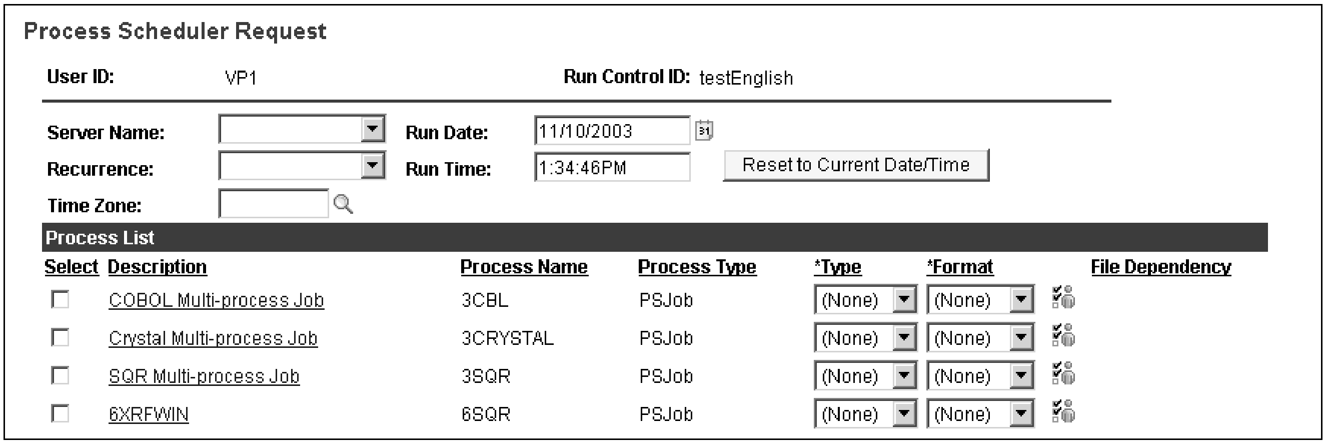
Note. PeopleSoft HCM applications don't save run control information for reports that you've successfully run. Enter the parameters each time that you run a report.

Specifying Where and When to Run Reports

You submit a process request from the Process Scheduler Request page. This page displays the options that you have selected for a particular process request and which processes are available for you to submit. Select the options that you want to use in running your process, and select the check box for each process that you want to run. Click OK to queue 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. For example, if you are in the human resources department, you probably 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, select the check box for each process that you want to run.



Process Scheduler Request page

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests".

Selecting Output Formats and Setting Report Distribution

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

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

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

Process Type	Output Type	Output Format	Default
Data Mover	WINDOW	TXT	TXT
OTHER	NONE	NONE	NONE

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

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests,” Selecting Output Types and Formats.

Report Distribution

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

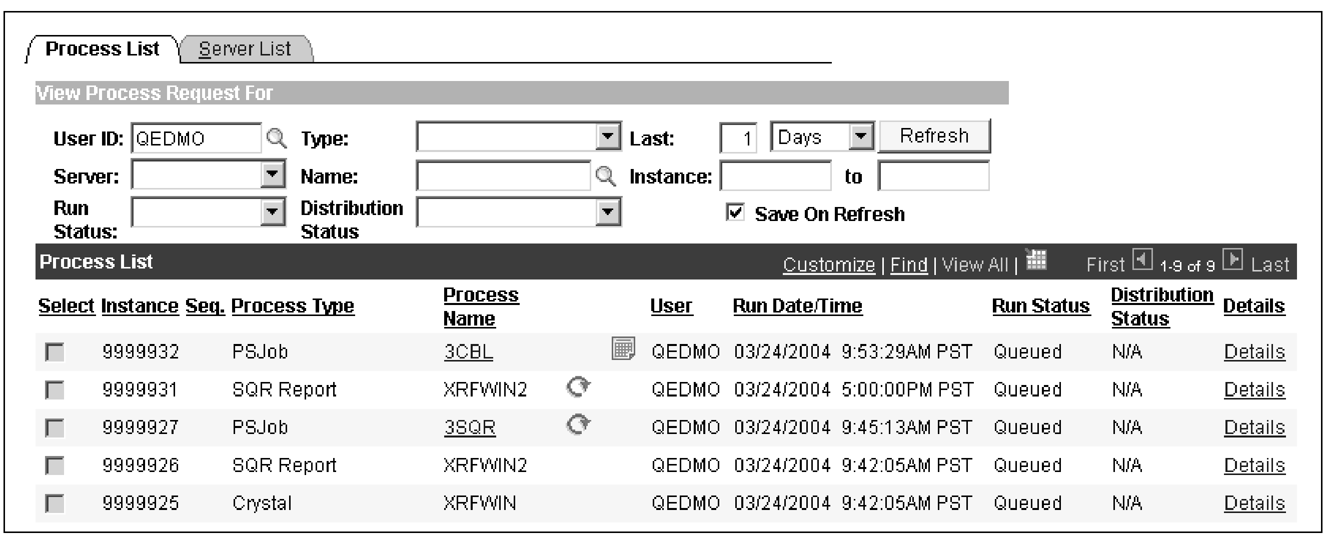
You can add users or roles to the distribution list by adding a row and entering the pertinent information. You can also use this page to add someone who would not normally have the proper security to view this output.

Note. If you are entering a list of email addresses, insert a semicolon between each address.

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests,” Setting Report Distribution.

Checking the Status of Reports

When you click OK on the Process Scheduler Request page, the system returns you to your application page.



Checking process status with Process Monitor

To check the status of your report:

1. Click 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 is *Initiated* or *Processing,* the report is still running. If the run status is *Success,* the system has finished running the report.

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 the report's information from Process Monitor. Click Details to display the options for canceling or holding a request.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler, "Using Process Monitor"

Viewing Reports in Report Manager

Report Manager is like your own personal "in box" of reports and processes to which you have access. 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.

   The report appears in Adobe Acrobat (.pdf) format.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler, "Using Report Manager"

CHAPTER 6

Using Workflow

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

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

Understanding Workflow

Many of the tasks that 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 multiuser 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

Enterprise PeopleTools 8.45 PeopleBook: Workflow Technology, “Introducing PeopleSoft Workflow”

Sending and Receiving Notifications

This section discusses how to:

- Send notifications.
- Use worklists to receive notifications.

Page Used for Sending and Receiving Notifications

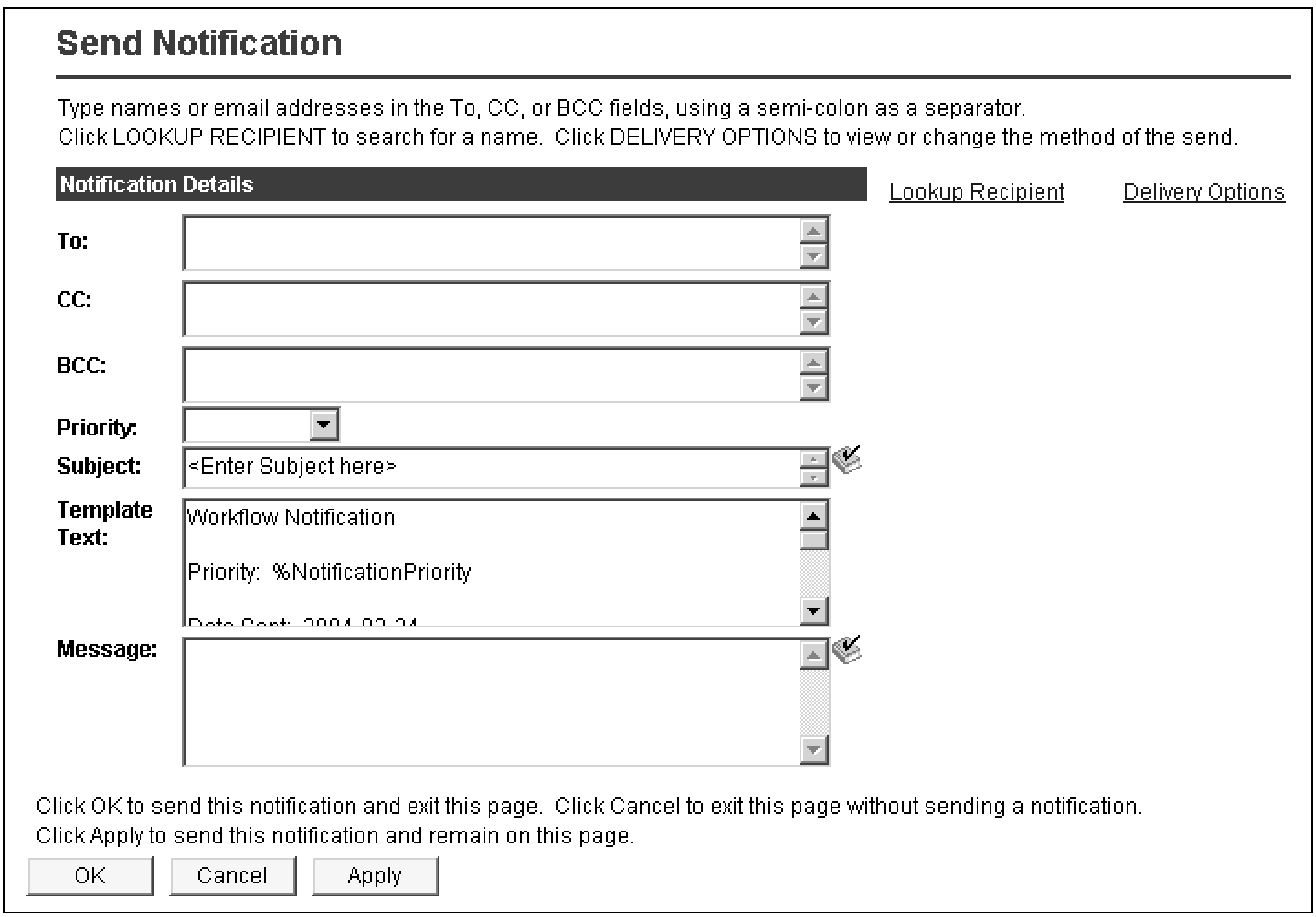
Page Name	Object Name	Navigation	Usage
Send Notification	PT_WF_NOTIFY	Click the Notify button in the toolbar at the bottom of any transaction page.	Use to enter a personal message and send an email or worklist notification to an individual or group when an event has occurred that requires the notification of others.
Worklist	WORKLIST	Select Worklist, Worklist from the menu pagelet or select Worklist from the universal navigation header.	Use to view and work from an organized list of the work items awaiting your attention.

Sending Notifications

The system sends notifications automatically as 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, notifications can be sent by way of worklist or by email.

Access the Send Notification page.



Send Notification page

To	Enter the user names or email addresses of those who need 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)	Enter the names or email addresses of CC recipients, who are made publicly aware of the notification.
BCC (blind carbon copy)	Enter the names or email addresses of BCC recipients, who are made aware of this notification privately.
Priority	Select a priority level for the notification: low, medium, or high. This priority is reflected in the notification only if the %NotificationPriority variable is in the template text.
Subject	Enter the topic or a brief description of the notification. The subject value may appear by default from a template, but you can edit it.
Template Text	Displays the template text, which is based on a predefined notification template. The text in this field is sent in the language of the recipient. However, the notification template has to be defined with template text for each language.
Message	Enter your own comments to the notification. The message text is sent in the language of the sender.
Lookup Recipient	Click to access the Lookup Address page. Enter the first characters of a recipient and click Search to receive a list of people who match your search. To use someone as a recipient, select the check box for the type of recipient (To ,cc, bcc) and click Add to Recipient List.
Delivery Options	The check boxes are populated based on the delivery options that are defined in the recipient's user profile. The Worklist check box is unavailable for external email addresses.

See Also

Enterprise PeopleTools 8.45 PeopleBook: Workflow Technology, "Administering PeopleSoft Workflow," Setting Notification Options

Using Worklists to Receive 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 will perform the necessary work.

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 that you need. This enables you to bypass any other navigational structure and work directly from the worklist.

This section discusses how to:

- View a worklist.
- Perform work.
- Reassign a worklist.

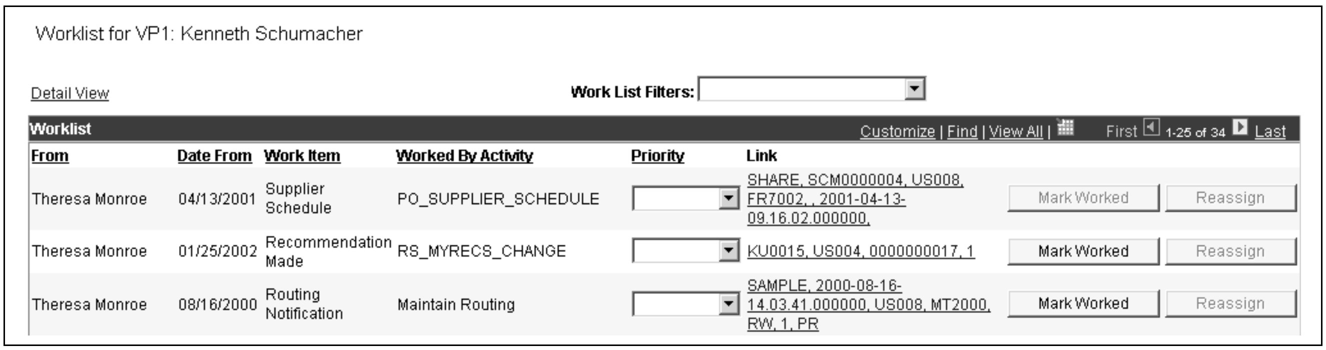
- View worklist details.

Viewing a 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.
- Perform the indicated work.
- Reassign work items.

Access the Worklist page. The Worklist grid is customizable. You can define the sorting and customize the columns in the grid.



Worklist page

Work List Filters

Enables you to select a worklist to view. You can only view worklists to which you are assigned. The system maintains the filter you have selected until you sign out of the PeopleSoft system.

Note. If you complete all of your work items in a worklist and mark them as "worked" during your current PeopleSoft session, the system displays Invalid Value. This is because the worklist is empty; it contains no more work items.

From

Displays who triggered the work item.

Date From

Displays when the work item was triggered.

Work Item

Displays the work items, which are the types of activities that 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

Displays 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

Click a link to access the target page—the page where you work the item. The target page is specific to the type of work that you’re doing. For example, the link for an expense approval item accesses the page where you can review and approve expense reports.

Note. You cannot perform a sort on this column.

Mark Worked	Click to remove an item from your worklist without actually accessing the target page. You shouldn't use this option unless the item is a simple notification and no additional work is required.
Reassign	Click to forward the item to another user and remove 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 Work

To work an item on its target page, click Link on the Worklist page for the item that 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 check box. 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.

Viewing Worklist Details

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

To view worklist details, select Worklist, Worklist Details.

In addition to the fields and buttons that are on the Worklist page, the Worklist Details page includes additional details about each item. To view these details click the Detail View link at the top of the page.

Timed Out Dttm (timed out date and time)	Displays the date and time when the item will time out if it isn't already worked.
Previous User	Displays the user whose action triggered this item.

Selected Dttm (selected date and time)	Displays the date and time when you first selected this item (to work the item).
Comment	Displays 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	Displays a unique identifier for each item of the same type.
Transaction	Displays 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 in your worklist contain 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 Worklist Timeout 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 about the item, or reassign the item to another user.

CHAPTER 7

Using PeopleSoft Navigator

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

- Access PeopleSoft Navigator.
- Work with PeopleSoft Navigator.

Understanding PeopleSoft Navigator

PeopleSoft offers multiple navigation methods for accessing application pages. 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:

- Advantages of PeopleSoft Navigator.
- The PeopleSoft Navigator hierarchy.
- Workflow processing.

Advantages of PeopleSoft Navigator

Navigation is organized around areas of functionality; PeopleSoft Navigator maps are organized procedurally. For example, the delivered navigation hierarchy for PeopleSoft Human Resources Management 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 that you make on 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

Enterprise PeopleTools 8.45 PeopleBook: Workflow Technology, "Introducing PeopleSoft Workflow"

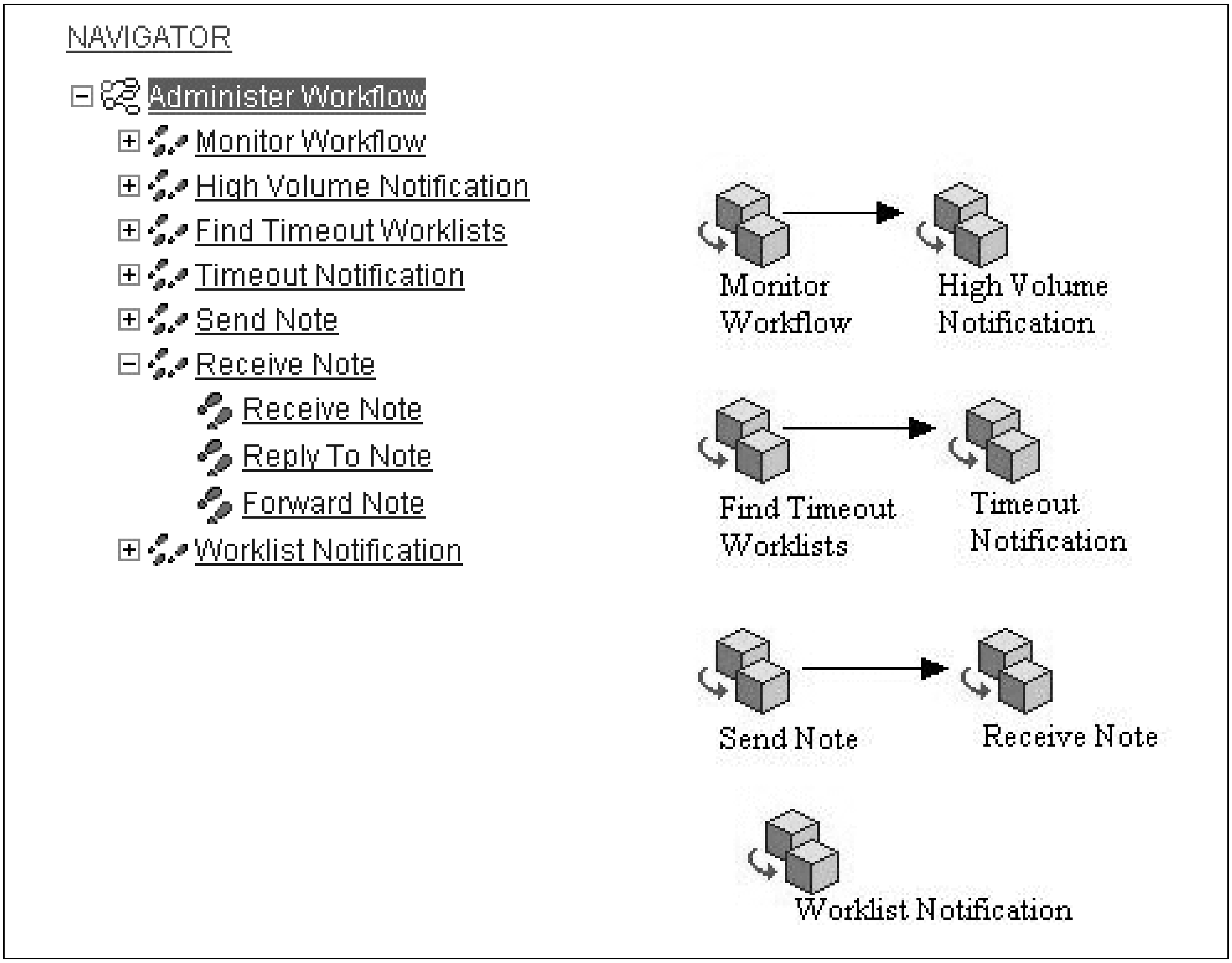
Enterprise PeopleTools 8.45 PeopleBook: Workflow Technology, "Building Workflow Maps"

The PeopleSoft Navigator Hierarchy

PeopleSoft Navigator maps are organized hierarchically, enabling you to navigate 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, does not contain maps. Steps are elements within activities and represent the level at which the user interacts directly with application pages.

This example shows the PeopleSoft Navigator hierarchy:



PeopleSoft Navigator hierarchy

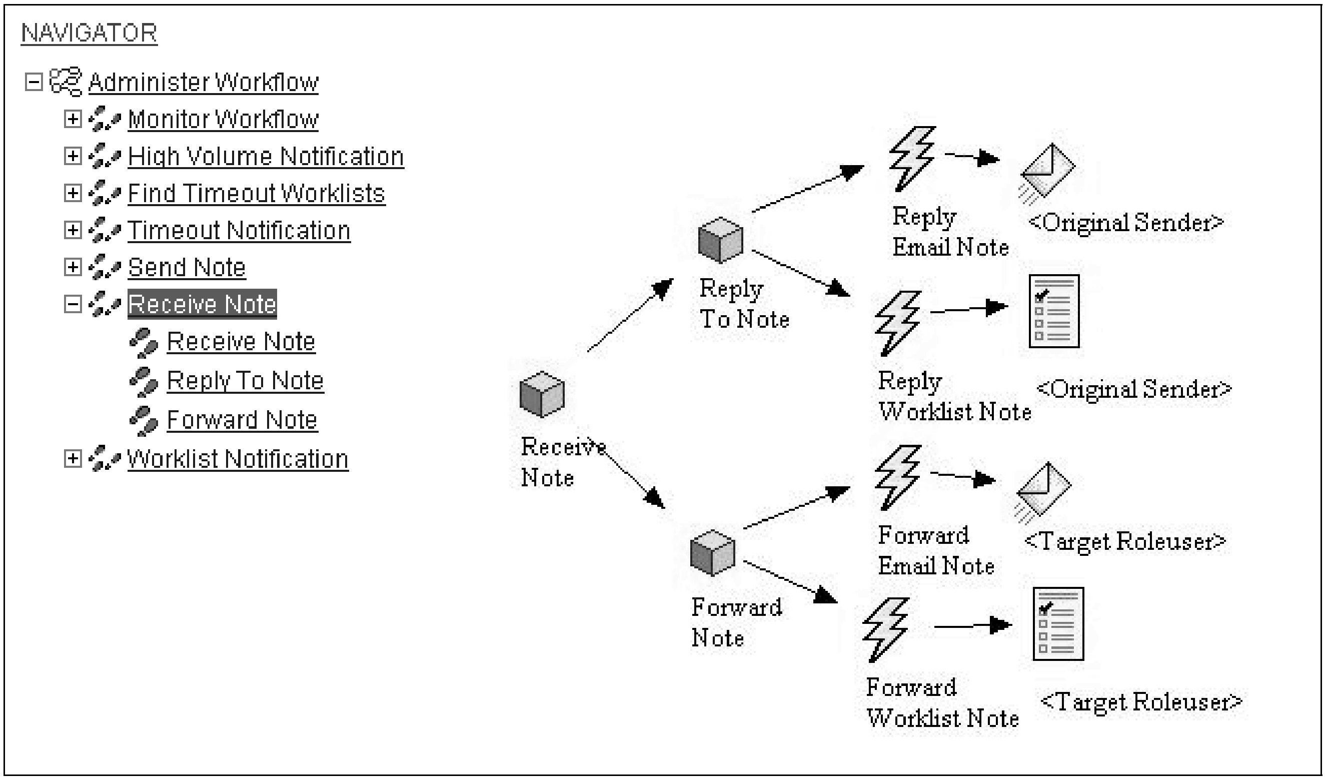
See Also

Enterprise PeopleTools 8.45 PeopleBook: Workflow Technology, “Building Workflow Maps,” Understanding Map Hierarchies

Workflow Processing

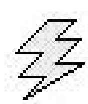
Some PeopleSoft Navigator maps incorporate a visual representation of associated workflow processing. The icons associated with workflow processing appear only in the maps, not in the PeopleSoft Navigator tree. These icons merely provide information.

This diagram shows some of the icons associated with workflow processing:

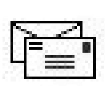


Map with workflow icons

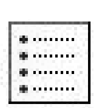
Some of the icons that you are likely to see include:



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

Enterprise PeopleTools 8.45 PeopleBook: Workflow Technology, "Building Workflow Maps," Understanding Workflow Maps

Accessing PeopleSoft Navigator

To access PeopleSoft Navigator, select Worklist, Navigator. 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.

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

Working With PeopleSoft Navigator

This section discusses how to:

- Navigate the map hierarchy.
- Navigate to a page.
- Navigate to the next page in an activity.

Navigating the Map Hierarchy

You can navigate 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 by using the following actions:

- To select a tree node and simultaneously expand it, click either the node or the plus sign that appears next to the node.
- To collapse a tree node, click the minus sign that appears 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. You therefore may need to go through a search page before accessing the transaction.

All of 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.

APPENDIX A

ISO Country and Currency Codes

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

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook." Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa'anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

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.

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

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

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

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

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

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement — In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

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

alternate account — A feature in PeopleSoft 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.

AR specialist — Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan — In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule — In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

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

attribute/value pair — In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

authentication server — A server that is set up to verify users of the system.

base time period — In PeopleSoft Business Planning, the lowest level time period in a calendar.

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.

book — In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

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

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

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

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

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

business event — In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	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).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
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.

collection rule — In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

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.

condition — In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog — Used to configure an external system with PeopleSoft. 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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table — Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost 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.

current learning — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition — In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements — Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset — A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method

In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type

In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree

In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing

A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree

A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table

A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft 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 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.

elimination set

In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event

In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization

In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event

A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects 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.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft 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.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
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	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).
	In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
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.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).
	In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file — Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group — In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components — In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment — In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping — You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section — In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

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 — In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

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 addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task — In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

	laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft 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 a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
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 context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
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.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product 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.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
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.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

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

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

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

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

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

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

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.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

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

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

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.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

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.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

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.

trace usage
In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation
In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state
In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table
A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree
The graphical hierarchy in PeopleSoft 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.

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.

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.

VAT exception
Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt
Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration
Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension
Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

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

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
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.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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