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PeopleSoft

PeopleSoft 9.2: Enterprise Components

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PeopleSoft 9.2: Enterprise Components
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Contents

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Chapter 1

Setting Up Pagelets for WorkCenters and Dashboards as a System Administrator

Understanding WorkCenters and Dashboards

WorkCenters are designed for specific roles and provide a central area for users to access key components. They enable users to access various pages and perform daily tasks without leaving the WorkCenter, which reduces the time used to navigate through menus.

WorkCenters are delivered as empty components. The system administrator from your organization is responsible for designing and creating links so that users can view and access specific links and pages.

WorkCenters that are accessed using a mobile device are similar to Classic WorkCenters but are designed using the PeopleSoft Fluid User Interface. Some setup is performed using PeopleSoft Classic pages.

Click to watch a short video about PeopleSoft WorkCenters, for PeopleSoft Classic User Interface.

Click to watch a short video about Configuring WorkCenters: Application Framework, for PeopleSoft Classic User Interface.

Adding a User-Defined Link to the My Work Pagelet for PeopleSoft Classic User Interface

To add a user-defined link to the My Work pagelet in Classic WorkCenters, first create a new filter definition, then create a new Application Class, and finally, add the link to the pagelet.

A series of online help videos demonstrates how to do this by providing an example: how to add a link to the My Work pagelet in the General Ledger WorkCenter.

Step 1: Creating a New Filter Definition

Step 2: Creating a New Application Class for the Criteria

Step 3: Adding the Link to the My Work Pagelet

If your business requires a custom link, contact Oracle technical support for your product.

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Configuring Filter Definitions and Values

This topic discusses how to configure filter definitions and values as a System Administrator.

Pages Used to Configure Filter Definitions and Values

Page Name	***Definition Name***	***Usage***
Configure Filter Definition Page	FSFB_FILTER_FIELDS	Set up filter definitions.
Configure Filter Values Page	FSFB_FILTER_VALUES	Set up filter values.
Filter Values Inquiry Page	EOWC_FLTRVALS_INQ	Understand the correlation between filter fields and its corresponding filter values.
Validate Filters Page	RUN_FSFB_VALCLN	Validate filters.
Delete Filter Values Page	FSFB_DEL_FLTRVALS	Delete Filter values.
Select Filters Page	FSFB_COPY_WIZARD1	Select filter values of a particular user for copying them to one or more users.
Select Roles/Users Page	FSFB_COPY_WIZARD2	Select a role and the corresponding users.
Create Filter Values Page	FSFB_COPY_WIZARD3	Review the selected filters and users, and to create the filter values.

Configure Filter Definition Page

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

Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Filter Definitions

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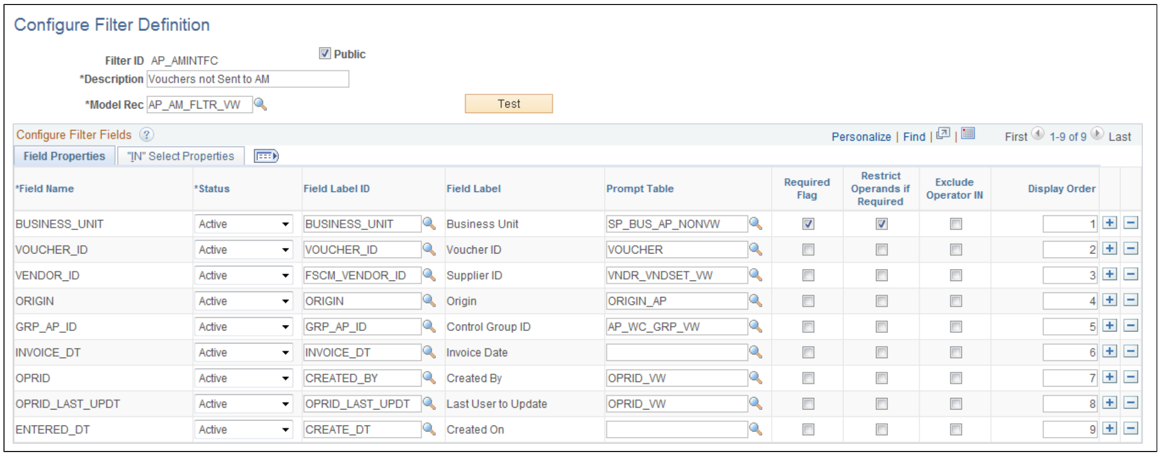
Image: Configure Filter Definition page

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



Note: The data that is entered using this page can also be loaded as an Application Data Set using the Data Migration Workbench. For more information about ADS and the Data Migration Workbench for FSCM applications, see *PeopleSoft Application Fundamentals* documentation, Working with and Personalizing WorkCenters, using the Data Migration Workbench for PeopleSoft WorkCetners.

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

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

Configure Filter Fields

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

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

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For translate *tables*, this field is not available and can't be changes.

Required Flag

Select to indicate that this field must have a value on the Configure Filter Values page.

Restrict Operands if Required

Select to indicate that you want to restrict the operands to "=" (equals) and "in", on the Configure Filter Values page.

Note: If a security controlled view is used, and security by user, role, and permission list are implemented, then you should select Restrict Operands if Required along with Required Flag fields. This enforces that only those values that are in the secured prompt view will be displayed.

Exclude Operator IN

Select to remove the "IN" operator only from the operator drop-down list when setting up filter values on the Configure Filter Values page.

Display Order

Enter a value that indicates the order in which the filter fields are displayed on the Configure Filter Values page.

Filter Security

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

Permission Type

Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the filter criteria.

User/Role/Permission List

Depending on the option selected in the Permission Type field, select user IDs, role names, or permission lists. Individual users that are associated to the option selected have access to edit the filter criteria.

IN Select Properties Tab

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

Search Field Name

Select a field that determines the name of the field that the system uses to retrieve field values.

Search Field Description

Select the name of the field that the system uses to retrieve the value descriptions.

Configure Filter Values Page

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

Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Filter Values

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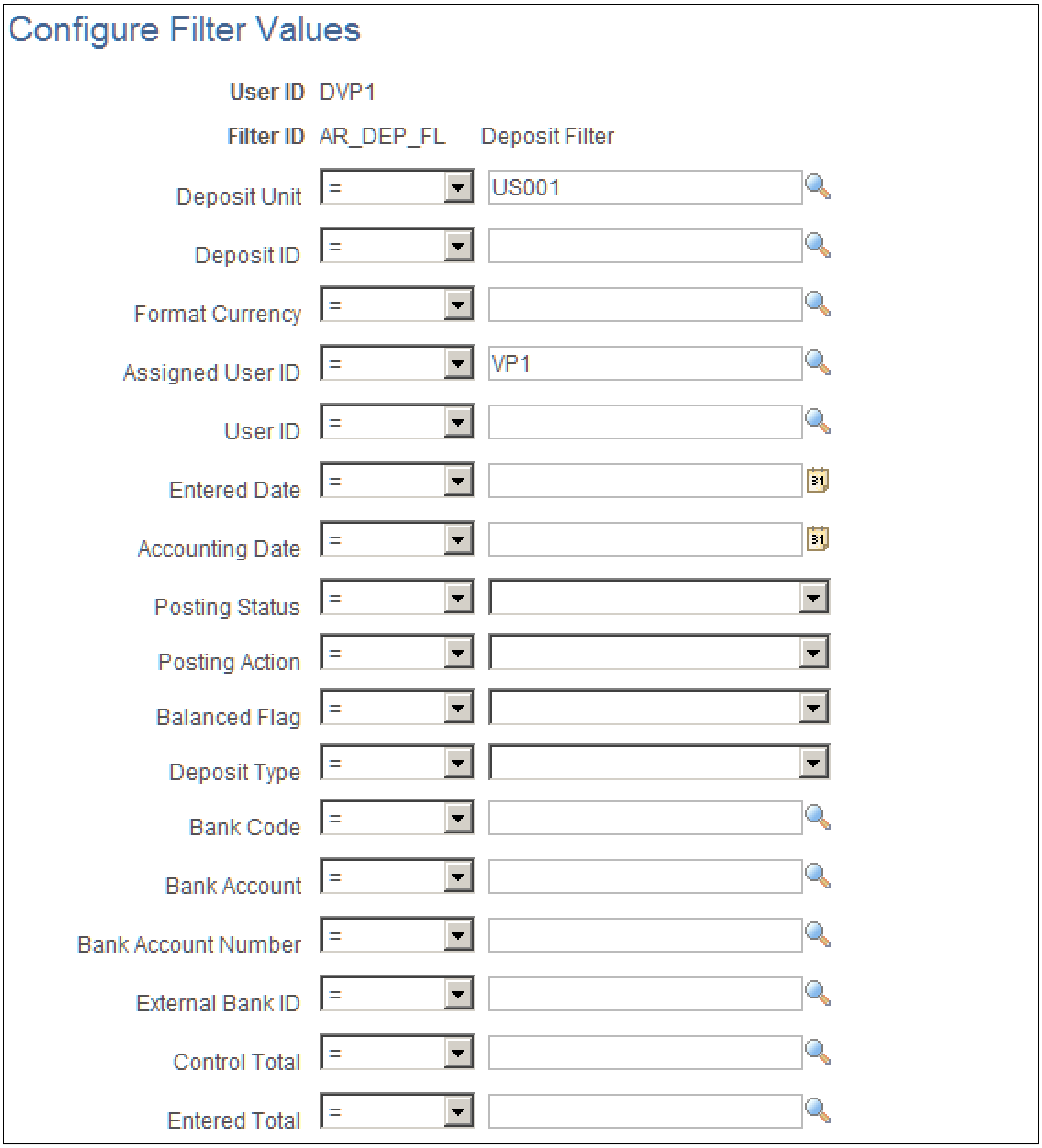
Image: Configure Filter Values page

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



Note: The data that is entered using this page can also be loaded as an Application Data Set using the Data Migration Workbench. For more information about ADS and the Data Migration Workbench for FSCM applications, see *PeopleSoft Application Fundamentals* documentation, Working with and Personalizing WorkCenters, using the Data Migration Workbench for PeopleSoft WorkCetners.

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

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Filter Values Inquiry Page

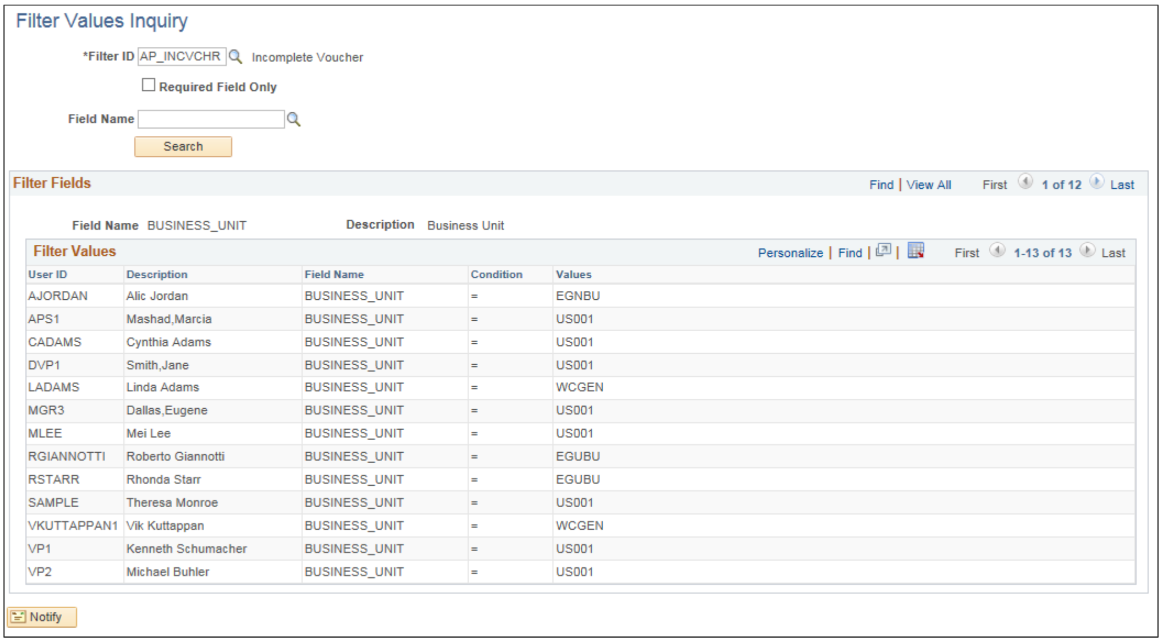
Use the Filter Values Inquiry page (EOWC_FLTRVALS_INQ) to understand the correlation between filter fields and its corresponding filter values for a particular Filter ID.

Navigation

Enterprise Components >WorkCenter/Dashboards >Filter Values Inquiry

Image: Filter Values Inquiry page

This example illustrates the fields and controls on the Filter Values Inquiry page. You can find definitions for the fields and controls later on this page.



Validate Filters Page

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

Navigation

Enterprise Components >WorkCenter/Dashboards >Validate Filters

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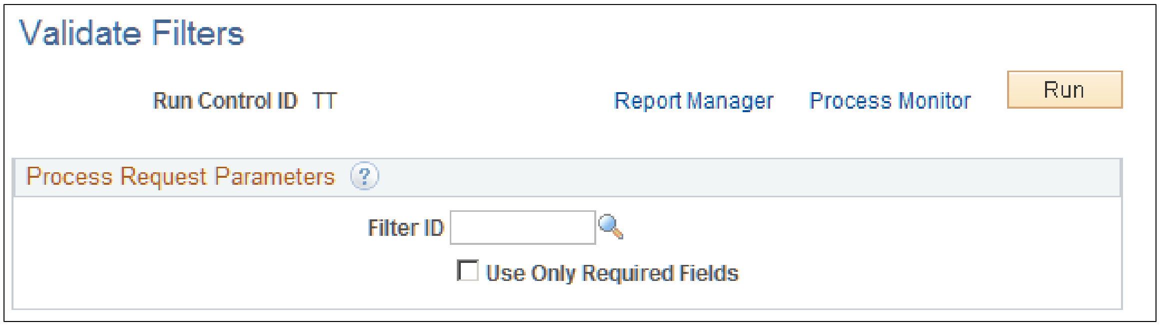
Image: Validate Filters page

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



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

Filter ID

Select a filter ID to test. If you leave this field blank, the system tests all filters.

Use Only Required Fields

Select to indicate that only the fields that are defined as required on the Configure Filter Definition page, are validated by the system.

If this check box is not selected, then the system validates all applicable fields.

Delete Filter Values Page

Use the Delete Filter Values page (FSFB_DEL_FLTRVALS) to select and delete filter values for a user.

Navigation

Enterprise Components >WorkCenter/Dashboards >Delete Filter Values.

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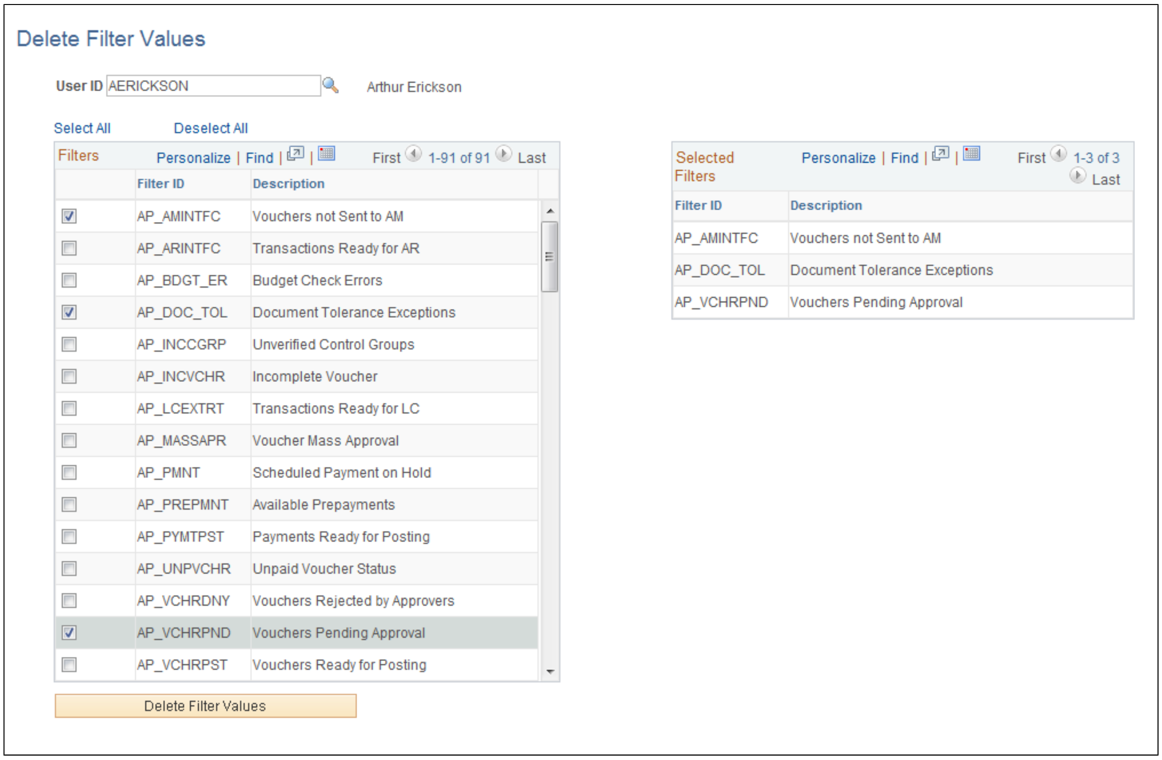
Image: Delete Filter Values page

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



User ID

Select the user for which filter values are to be deleted. The page displays a list of filter values the user has.

Filters

Select one or more filter values to be deleted. Selected filter values are displayed in a grid on the right.

Delete Filter Values

Click the button to delete the selected filter values for the user. After deleting, a confirmation page appears displaying successful deletion of filter values. You can click the *Delete More Filter values* link to go back to *Delete Filter values* and delete more filter values.

Using the Filter Value Copy Wizard

The Filter Value Copy Wizard allows the administrator to set filter values to users by role. Administrators can copy one user's filter values to one or more users. The wizard follows three steps to accomplish this:

1. Select User/Filters to copy, using the Select Filters page
2. Select Role/Users who will be assigned to the filter values, using the Select Role/Users page.
3. Create filter values by reviewing and creating filters, using the Create Filter Values Page

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Select Filters Page

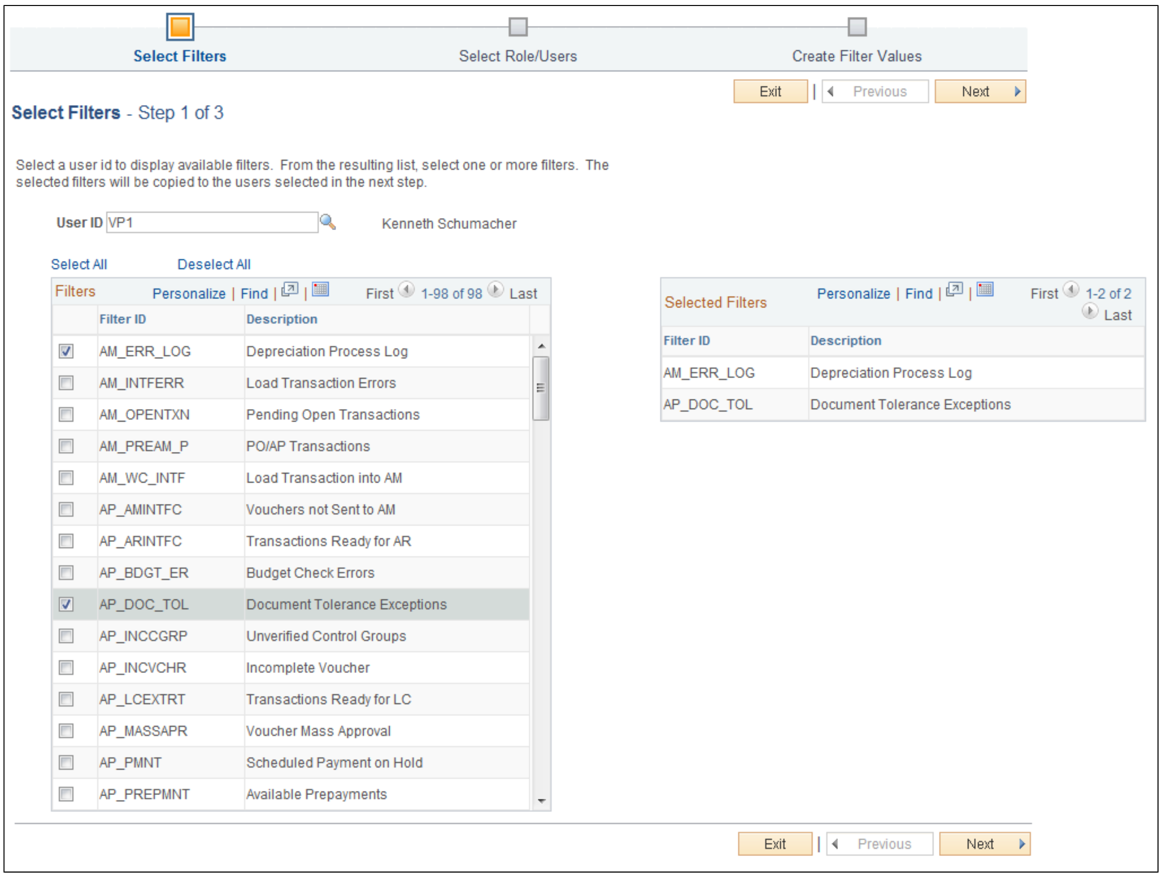
Use the Select Filters page (FSFB_COPY_WIZARD1) to select filter values of a particular user for copying them to one or more users.

Navigation

Enterprise Components >WorkCenter/Dashboards >Filter Value Copy Wizard

Image: Select Filters page

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



User ID	Select a user id to display available filter values for the user.
Filters	Select one or more filter values to be copied to the user(s).
Selected Filters	Displays the list of filter values selected.

Select Roles/Users Page

Use the Select Roles/Users page (FSFB_COPY_WIZARD2) to select a role and the corresponding users.

Navigation

Enterprise Components >WorkCenter/Dashboards >Filter Value Copy Wizard. Select the desired filters on the Select Filters page and click Next.

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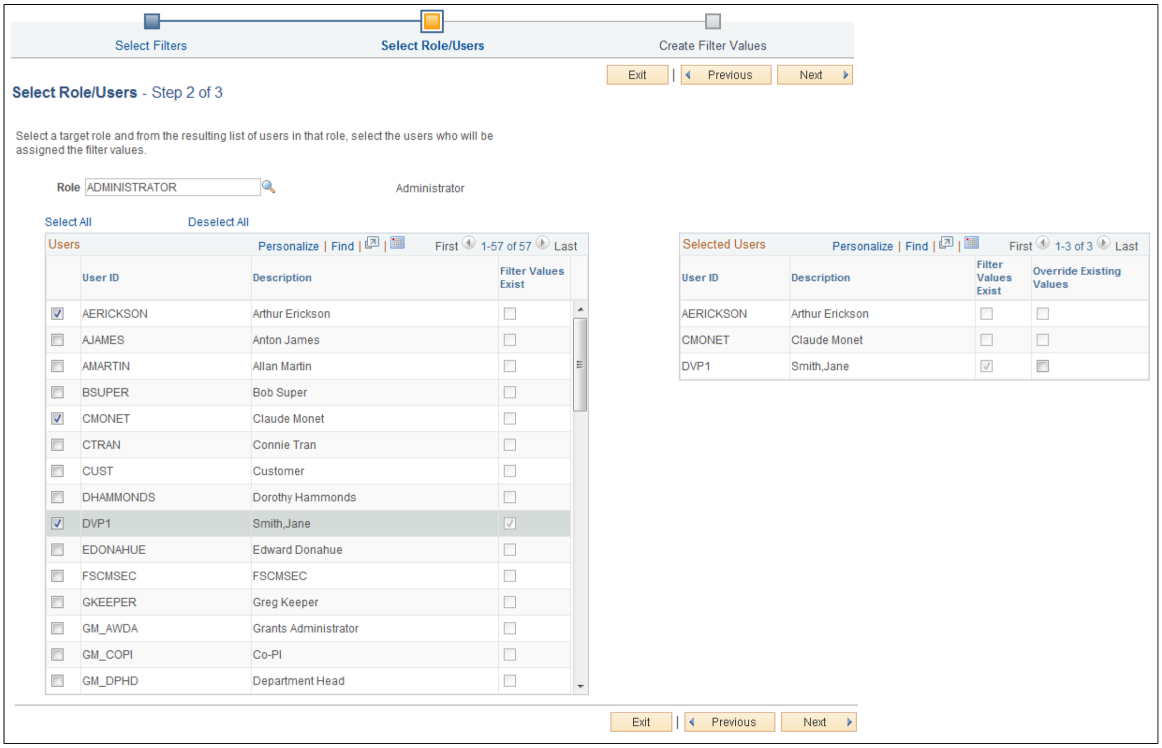
Image: Select Roles/Users page

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



Role

Select a role to display a list of users in that role.

User ID

Select one or more user IDs that will be assigned the filter values selected in the *Select Filters* step. Selected user IDs are displayed in a grid on the right.

Filter Values Exist

The system selects the field to indicate that the user ID has values for one or more of the filters selected in the previous step, *Select Filters*.

Override Existing Values

Select to override one or more existing filter values for the user IDs that have values for the filters selected in the previous step. This field is disabled for the user IDs that do not have any filter values.

Create Filter Values Page

Use the Create Filter Values page (FSFB_COPY_WIZARD3) to review the selected filters and users, and to create the filter values.

Navigation

Enterprise Components >WorkCenter/Dashboards >Filter Value Copy Wizard. Select the desired users on the Select Roles/Users page and click Next.

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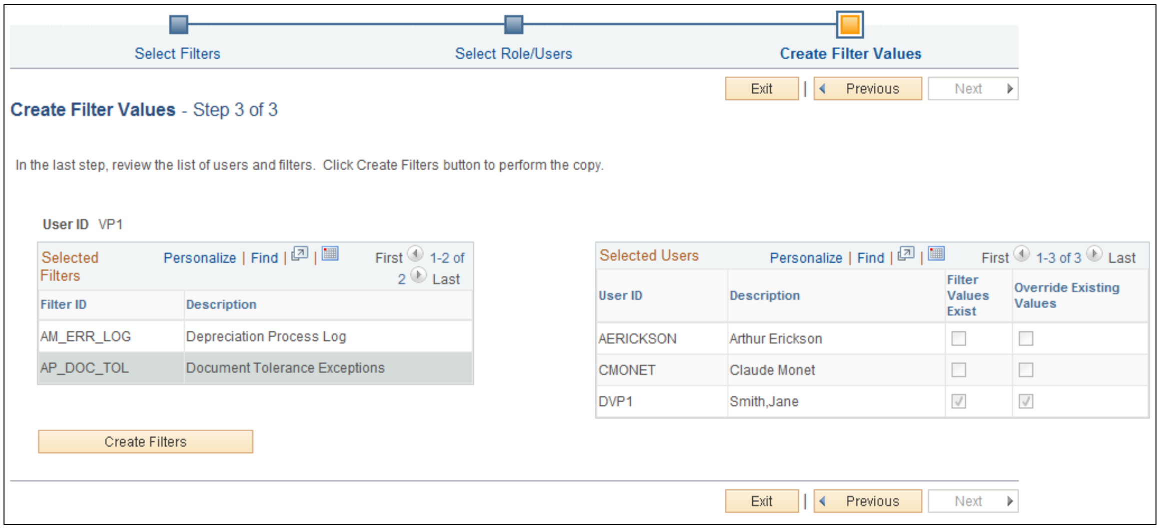
Image: Create Filter Values page

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



Create Filters

Click the button to copy filter values for the selected users. After creating, a confirmation page appears displaying successful creation of filter values. You can click the *Copy More Filter Values* link to go back to *Filter Value Copy Wizard* and copy more filter values.

Configuring Pagelets

This topic discusses how to set up pagelets and group boxes as a System Administrator.

Note: In PeopleSoft Classic, My Work and Links are considered pagelets. In PeopleSoft Fluid, My Work and Links are considered group boxes. Within pagelets and group boxes are collapsible sections, such as Current Work and Exceptions. The name of a page may not follow this standard, because PeopleSoft Classic WorkCenters were created before PeopleSoft Fluid WorkCenters.

Page Used to Configure Pagelets

Page Name	***Definition Name***	***Usage***
Configure Pagelets – WorkCenter/ Dashboard Page	FSPC_ADMIN_MAIN	Define configuration IDs for Classic WorkCenters and Dashboards, and Fluid WorkCenters.
Configure Pagelets - My Work Page	FSPC_ADMIN_MYWORK	Set up My Work links for end users.
Set Up Scope Security Page	EOWC_VIEWBY_SEC	Determine the users who can access the Scope field on the Fluid & Classic <Application> WorkCenter – My Work group box and pagelet.

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Page Name	***Definition Name***	***Usage***
Define My Work Link Page	FSPC_ADM_WRK_SEC	Define the type of link that appears on the My Work pagelet.
Import My Work Link Page	FSPC_MYWORK_PROMPT	Import system defined My Work links.
Configure Pagelets - Links Page	FSPC_ADMIN_LINK	Determine how links appear in a pagelet.
Define Link/Security Page	FSPC_ADMIN_LINK_SEC	Define links and security.
Select a Content Reference Page	FSPC_CRFURL_SELECT	Select a menu item from a tree structure view.
Configure Pagelets – Queries Page	FSPC_ADMIN_QUERY	Determine how query links appear in a group boxpagelet.
Define Link Page	FSPC_ADM_QRY_SEC	Define access to query links.
Configure Pagelets – Reports/Processes Page	FSPC_ADMIN_REPORT	Determine how reports and process links appear on pagelets.

Configure Pagelets – WorkCenter/Dashboard Page

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

Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

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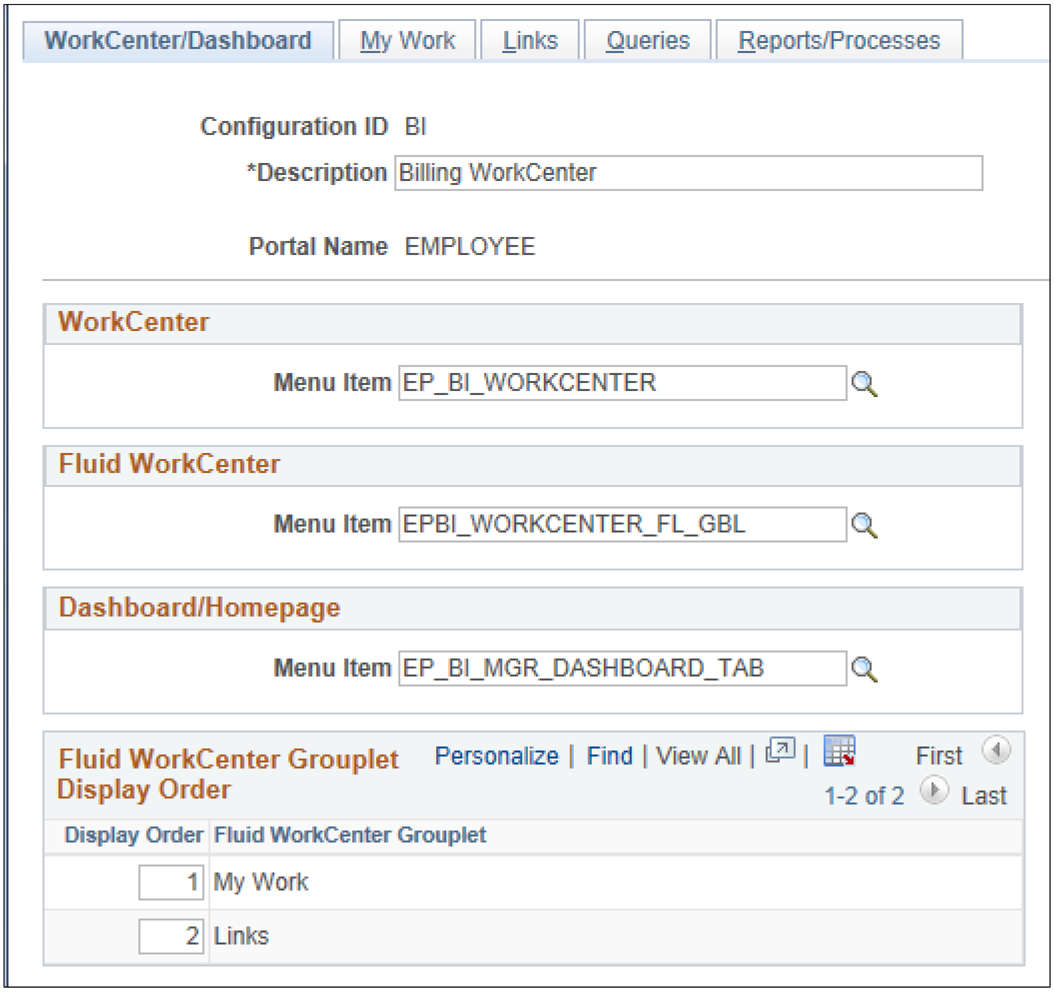
Image: Configure Pagelets – WorkCenter/Dashboard Page

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



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

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

Each menu item cannot be associated with more than one configuration ID:

- Classic WorkCenter menu items are defined in the Manage WorkCenter Pages component.
- Fluid WorkCenter menu items are defined using the PeopleTools Structure and Content page.
- Classic Dashboard menu items are defined in the Portal as Homepage tabs.

Note: The data that is entered using this page can also be loaded as an Application Data Set using the Data Migration Workbench. For more information about ADS and the Data Migration Workbench for FSCM applications, see *PeopleSoft Application Fundamentals* documentation, Working with and Personalizing WorkCenters, Using the Data Migration Workbench for PeopleSoft WorkCetners.

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Fluid WorkCenter Grouplet Display Order

Display Order Enter the order in which you want the Fluid WorkCenter group boxes to appear in the Fluid WorkCenter. LFF only. Your administrator is the only person who can change the order of the group boxe, and it must be performed using this field.

Configure Pagelets - My Work Page

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

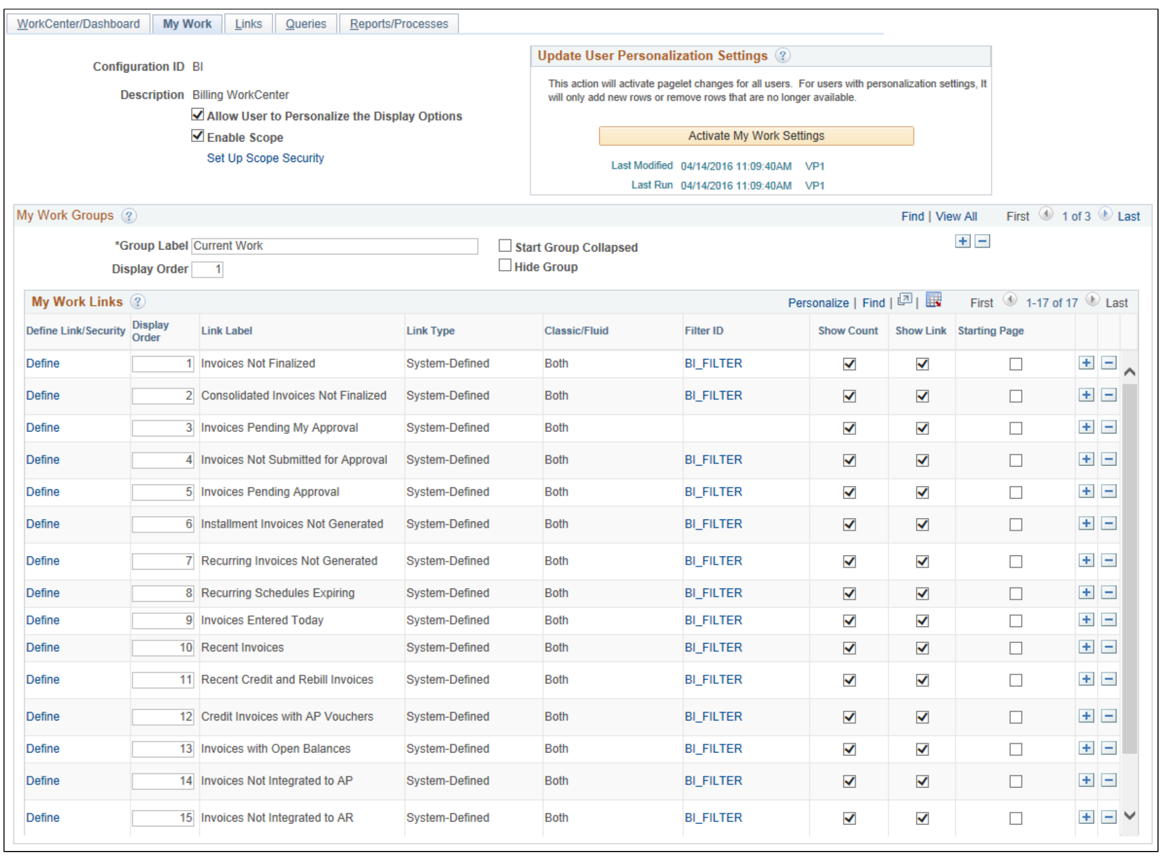
Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

Click the My Work tab.

Image: Configure Pagelets - My Work Page

This example illustrates the fields and controls on the Configure Pagelets - My Work Page.



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

Allow User to Personalize the Display Options Select to indicate that end users who have access to this pagelet or group box, can personalize their display options.

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If this option is selected, an end user has access to the Personalize page for the pagelet.

If this option is not selected, an end user does not have access to the Personalize page for the pagelet. If an end user tries to access the Personalize page, they receive a message that the user personalization is not enabled for the pagelet.

Enable Scope

Select to indicate that certain users have access to the Scope field on the PeopleSoft Classic page let and Fluid <Application> WorkCenter – My Work group box.

When this check box is selected, the Set Up Scope Security link appears.

Set Up Scope Security

Click this link to access the Set Up Scope Security Page .

Note: If you access the Set Up Scope Security page, but don't set up parameters on that page, when you return to the Configure Pagelets – My Work page, the system displays a message in red text saying, "Please set up Scope security".

Update User Personalization Settings

Activate My Work Settings

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

My Work Groups

Group Label

Enter a label heading for the group of links that appear in the grid. Multiple group labels can be added to organize pagelet links into logical groups.

This is not a required field, but should be used if more than five links are listed, and the links can be grouped.

Start Group Collapsed

Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links.

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Display Order

Enter an order in which this group of links should display within the <pagelet> section.

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	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Hide Group	Select to indicate that this group label, and associated links, should not display for an end user. If selected, the end user does not have access to the group label, and associated links, even if they have authorization to personalize their display options.

My Work Links

Define Link/Security	Select to access the Define Link/Security Page.
Display Order	Enter the order in which you want the links to appear within the group. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Classic/Fluid	Displays whether the link is available in Classic, Fluid, or Both.
Filter ID	Select a filter ID for PeopleSoft WorkCenters.
Show Count	Select to display a number in parenthesis at the end of the link. The value of the number indicates how many transactions apply to the link in which the user needs to act upon. Administrators should use caution when selecting this option because it could slow system performance. You should evaluate the show count option on a link by link basis. If you find that one link encounters a performance problem, then you should consider deselecting the Show Count check box for that link. You do not have to be consistent with the Show Count check box from link to link. If you deselect the Show Count check box for a link, then the link remains active if there are transactions to review. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Show Link	Select to indicate that the link is displayed on the pagelet. PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time.

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If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Starting Page

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Set Up Scope Security Page

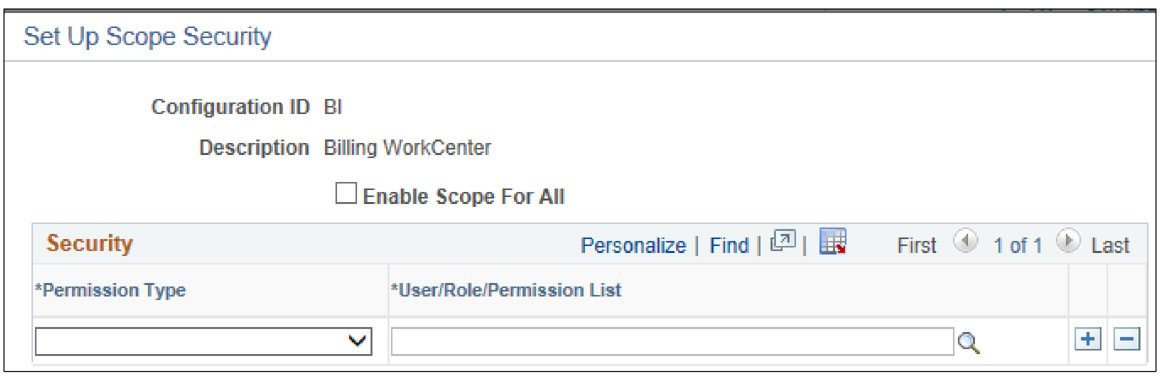
Use the Set Up Scope Security page (EOWC_VIEWBY_SEC) to determine the users who can access the Scope field on the WorkCenter – My Work pagelet.

Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets. Click the My Work tab. Click the Set Up Scope Security link.

Image: Set Up Scope Security Page

This example illustrates the fields and controls on the Set Up Scope Security Page .



Enable Scope for All

Select this check box to indicate that all users have access to the Scope field on the WorkCenter – My Work page.

When you select this check box, the Security section is hidden.

Security

This section displays when the Enable Scope For All check box is not selected.

Permission Type

Select the type of permission. Options include:

- Permission List
- Role
- User

Use this option when you want to restrict access to the Scope field to certain permission lists, roles, or user IDs.

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User/Role/Permission List

Select a particular user ID, role, or permission list that has access to the Scope field on the WorkCenter – My Work pagelet.

The options available in this field are determined by your selection in the Permission Type field.

Define My Work Link Page

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

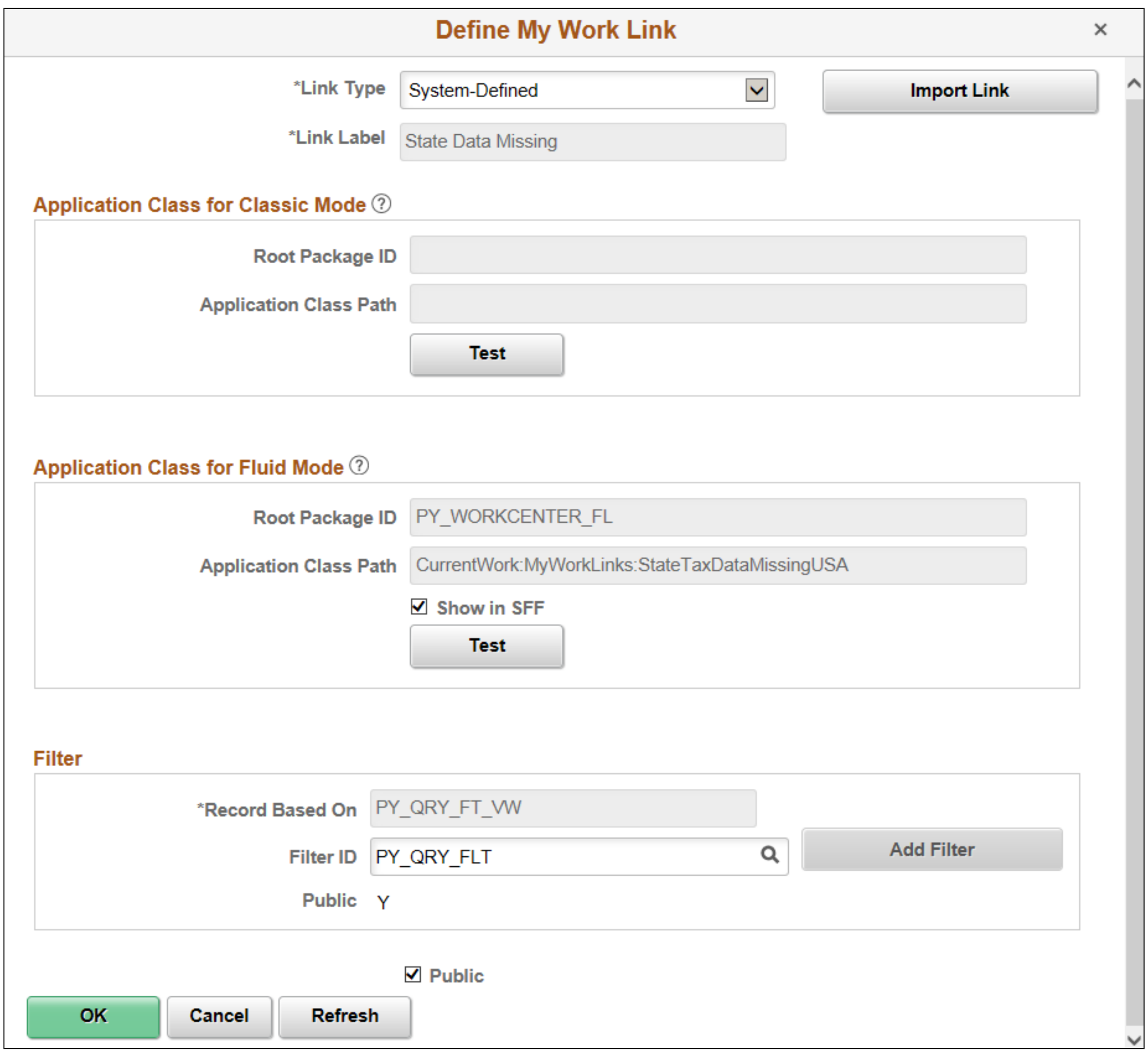
Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

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

Image: Define My Work Link Page

This example illustrates the Define My Work Link Page.



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

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

Link Type is Events and Notifications Alert

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

Link Type is System-Defined

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

Link Type is User-Defined

Link Label	Enter a label for the link, which appears on the My Work pagelet. (User defined only)
Record Based On	Enter the view name that will be used for defining filter fields for this link.
Filter ID	Select the Filter ID that will be used to filter the data for this link.
Add Filter	Select to add filters if you don't want to use what is already defined.

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Public Displays whether the filter is public. This option is display only.

Public Select to indicate that this is a public link.

Link Type is Workllist

Worklist Name Select the Worklist to be displayed when the link is selected.

Link Label Enter a label for the link, which appears on the My Work pagelet.

Public Select to indicate that this is a public link.

Import My Work Link Page

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

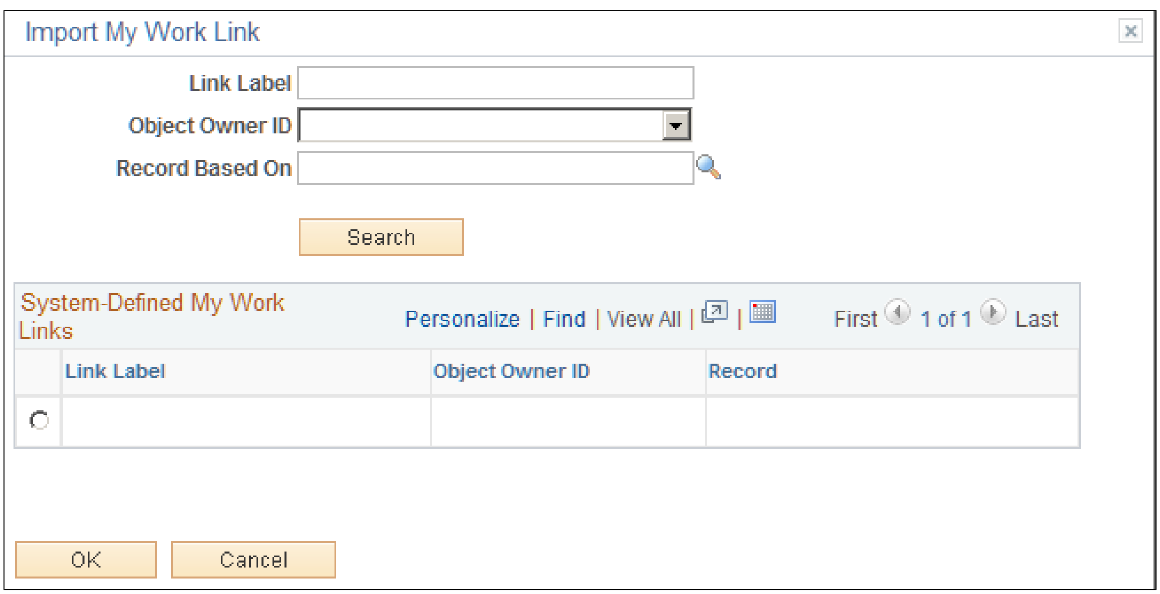
Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

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

Image: Import My Work Link page

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



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

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

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

Configure Pagelets - Links Page

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

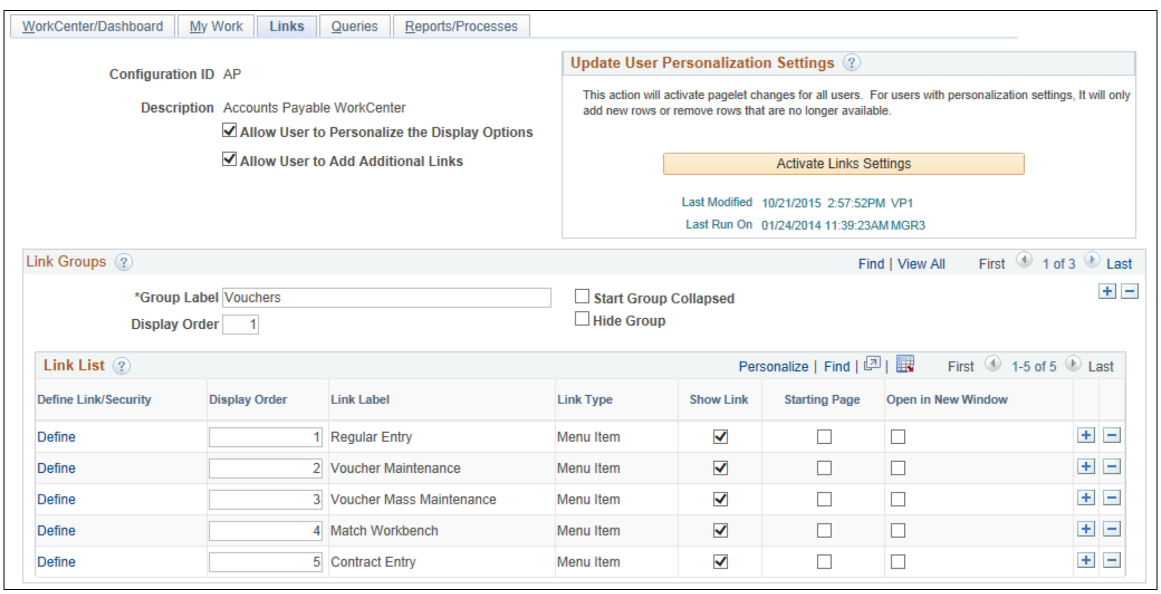
Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

Click the Links tab.

Image: Configure Pagelets – Links page

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



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

Allow User to Personalize the Display Options	Select to indicate that end users who have access to this pagelet can personalize their display options.

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

Update User Personalization Settings

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

Link Groups

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

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Link List

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

Define Link/Security Page

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

Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

Click the Links tab. Click the Define link.

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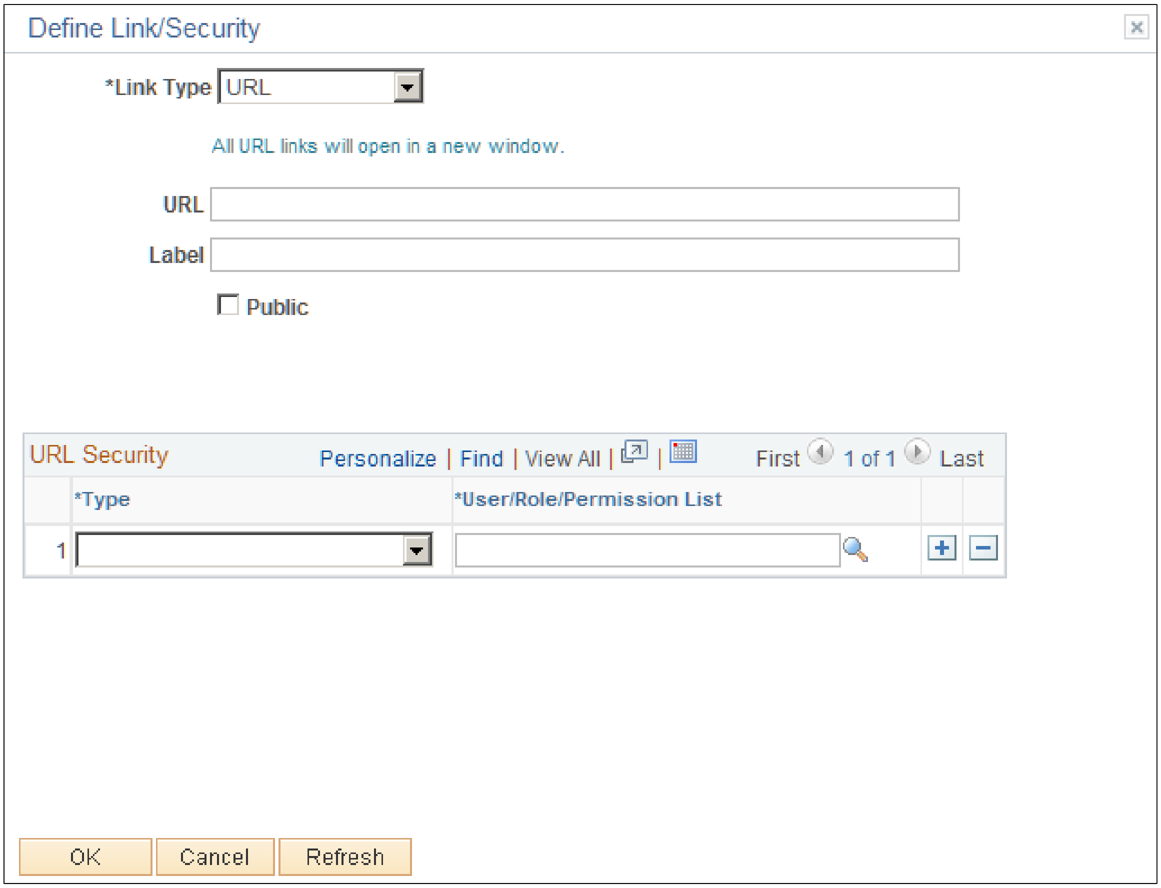
Image: Define Link/Security page

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



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

Link Type	Select *Menu Item* or *URL*.
Select Menu Item	Click to access the Select a Content Reference window where administrators can select menu items from a tree structure to use as a link. Only links to which the end user has permission are displayed. This option appears when *Menu Item* is selected in the Link Type field.
URL and **Label**	Enter the URL address and label description. This option appears when *URL* is selected in the Link Type field.
Public	Select to indicate that end users, who have access to this pagelet in the WorkCenter, have access to this URL. Deselect to define specific users, roles, and permission lists that have access to this URL. The URL Security section displays when this check box is not selected.

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This option appears when *URL* is selected in the Link Type field.

URL Security

Permission Type

Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the link.

User/Role/Permission List

Depending on the option selected in the Permission Type field, select user IDs, role names, or permission lists. Individual users that are associated to the option selected have access to the link.

Configure Pagelets – Queries Page

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

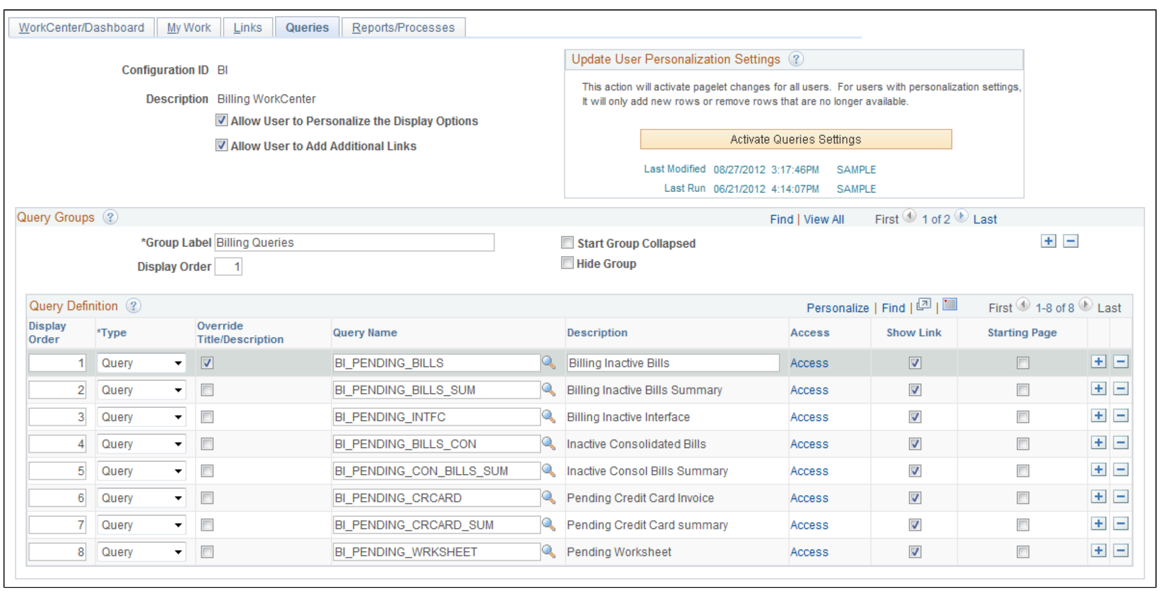
Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

Click the Queries tab.

Image: Configure Pagelets – Queries page

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



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

Allow User to Personalize the Display Options

Select to indicate that end users who have access to this pagelet can personalize their display options.

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

Update User Personalization Settings

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

Query Groups

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

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Query Definition

Display Order	Enter the order in which you want the links to appear within the group.
Type	Select and option that includes: *Query* and *Pivot Grid*. Depending on the option selected in this field, the other fields in this section vary.
Override Description/Title	Select to override the query description, the pivot grid title, and the query label for the user added queries and pivot grids.
Pivot Grid Name	Select the name of a pivot grid. Queries can optionally be displayed as a pivot grid. These columns display only when *Pivot Grid* is selected in the Type field. For more information about setting up Pivot Grids, see *PeopleTools: Pivot Grid*
Query Name	Select from a list of public queries. System administrators can only add public queries.
Access	Click the Access link to access the Define Link window where you can define security access to the query or pivot grid.
Show Link	Select to indicate that the link is displayed on the pagelet. PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Starting Page	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Define Link Page

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

Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

Click the Queries tab. Click the Access link.

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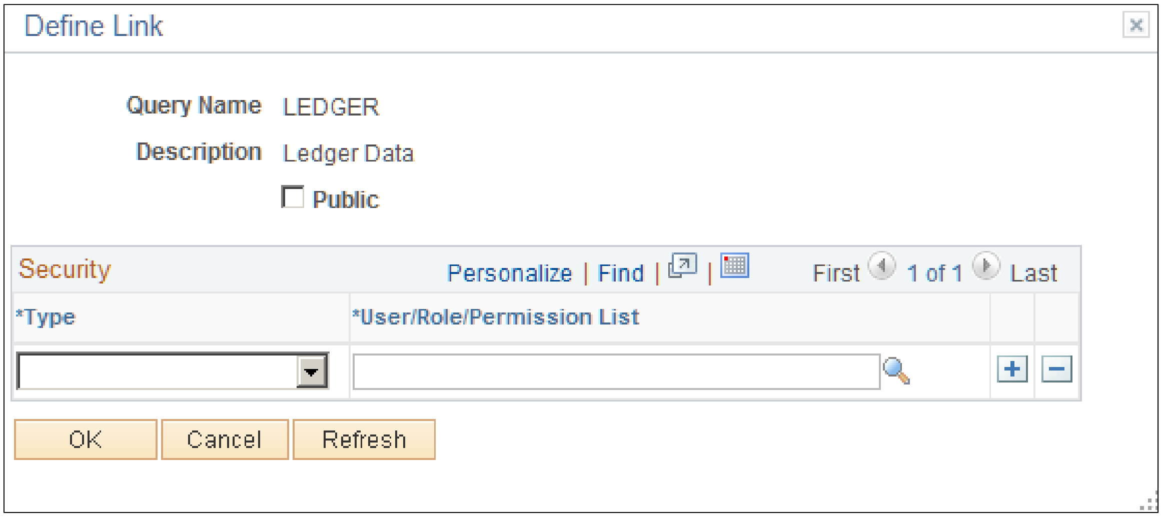
Image: Define Link page

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



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

Public

Select to indicate that end users, who have access to this pagelet in the WorkCenter, have access to this query or pivot grid.

Deselect to define specific users, roles, and permission lists that have access to this link. The Security section displays when this check box is not selected.

Security

Type

Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the link.

User/Role/Permission List

Depending on the option selected in the Permission Type field, select user IDs, role names, or permission lists. Individual users that are associated to the option selected have access to the link.

Configure Pagelets – Reports/Processes Page

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

Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

Select the Reports/Processes tab.

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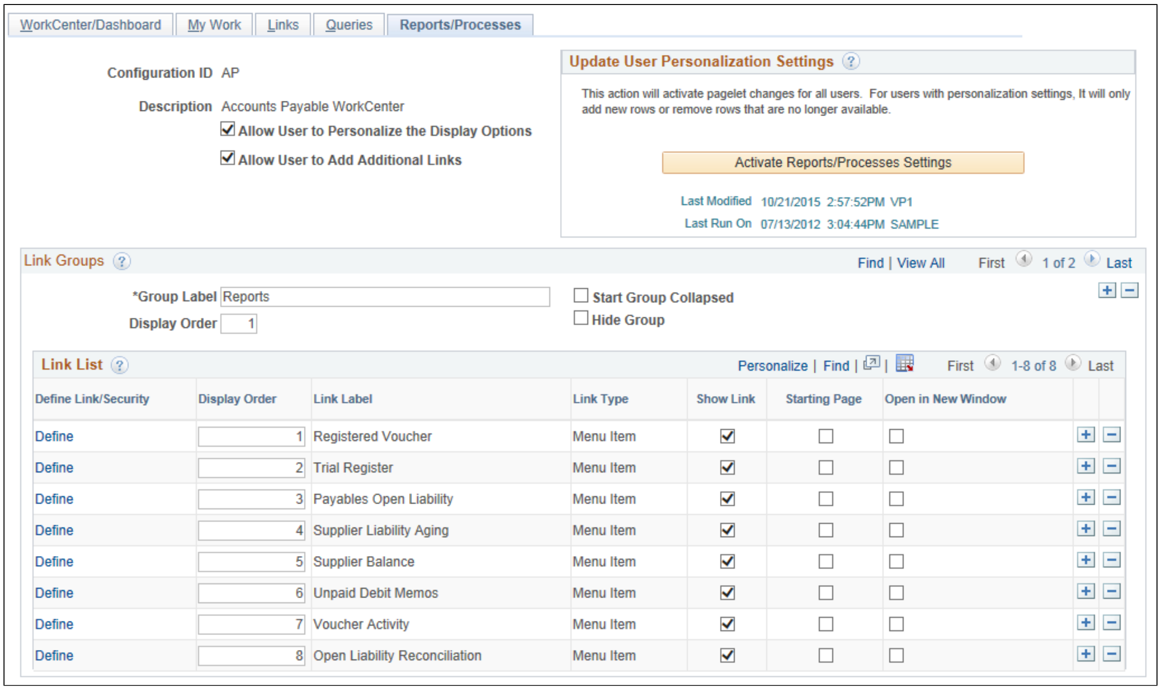
Image: Configure Pagelets – Reports/Processes page

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



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

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

Update User Personalization Settings

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

Link Groups

Group Label

Enter a label heading for the group of links that appear in the <pagelet> Links grid. Multiple group labels can be added to organize <pagelet> links into logical groups.

This is not a required field, but should be used if more than five links are listed, and the links can be grouped.

Start Group Collapsed

Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links.

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Display Order

Enter an order in which this group of links should display within the <pagelet> section.

Hide Group

Select to indicate that this group label, and associated links, should not display for an end user.

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

Link List

Define Link/Security

Click to access the Define Link/Security Page where you can define the type of link as well as additional information related to the link type.

Display Order

Enter the order in which you want the links to appear within the group.

Show Link

Select to indicate that the link is displayed on the pagelet.

PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time.

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Starting Page

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

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Open in New Window	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

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Chapter 2

Using Datasets

Understanding Datasets

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

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

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

Defining Dataset Rules

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

Page Used to Define Dataset Rules

Page Name	*Definition Name*	*Usage*
Dataset Rules Page	EOEC_DATASET	Define the rules that make up a dataset.

Understanding Dataset Rules

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

To use dataset rules and roles:

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

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

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

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

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

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

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

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

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

   Each user ID can have multiple user roles.

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

Dataset Rules Page

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

Navigation

Enterprise Components > Component Configurations > Datasets > Dataset Rules

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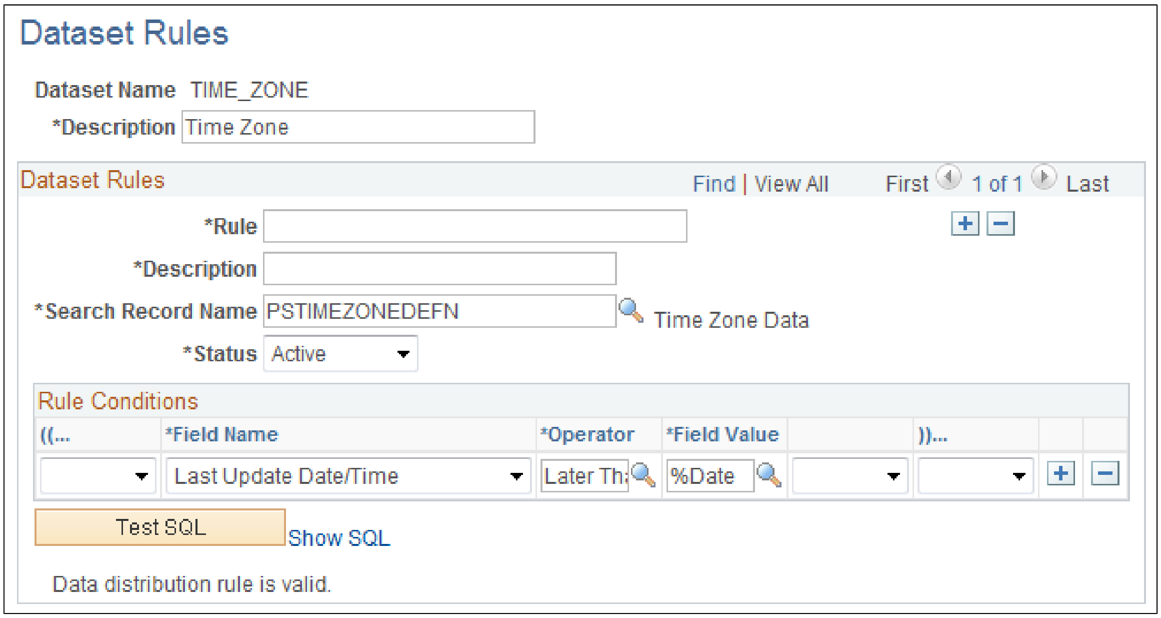
Image: Dataset Rules page

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



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

Dataset Rules

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

Rule Conditions

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

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Show SQL Click to view the SQL statement generated by the rule.

Defining Dataset Roles

This section discusses how to define dataset roles.

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

Page Used to Define Dataset Roles

Page Name	***Definition Name***	***Usage***
Dataset Roles Page	EOEC_MP_ROLE	Define dataset roles that associate existing PeopleTools user roles with dataset rules.

Dataset Roles Page

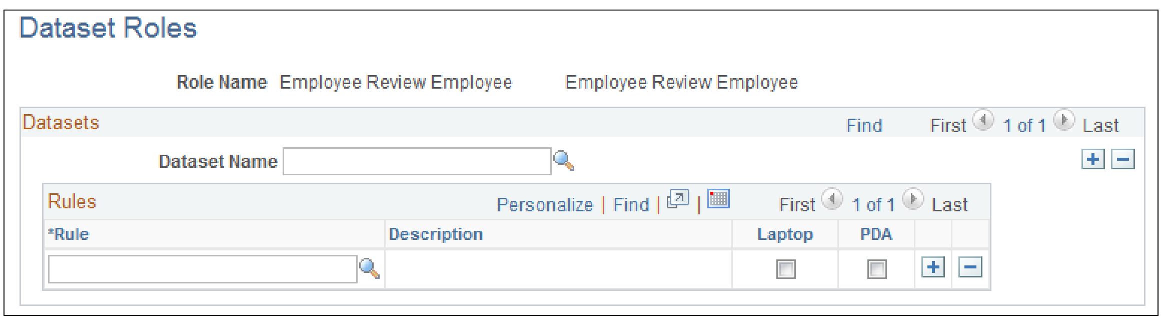
Use the Dataset Roles page (EOEC_MP_ROLE) to define dataset roles that associate existing PeopleTools user roles with dataset rules.

Navigation

Enterprise Components > Component Configurations > Datasets > Dataset Roles

Image: Dataset Roles page

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



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

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

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

Rule Select the component rule.

Laptop and **PDA** Select to display the resulting data on a laptop computer or PDA.

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Note: If you do not select Laptop or PDA, no data from this rule is displayed.

Defining Mobile Data Distribution

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

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

This section provides an overview of mobile data distribution.

Pages Used to Define Mobile Data Distribution

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

Understanding Mobile Data Distribution

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

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

Implementing Mobile Data Distribution

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

For example:

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

See Also

Enterprise PeopleTools 8.49 PeopleBook: Mobile Agent

PeopleTools: PeopleCode Language Reference

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Mobile Data Distribution Page

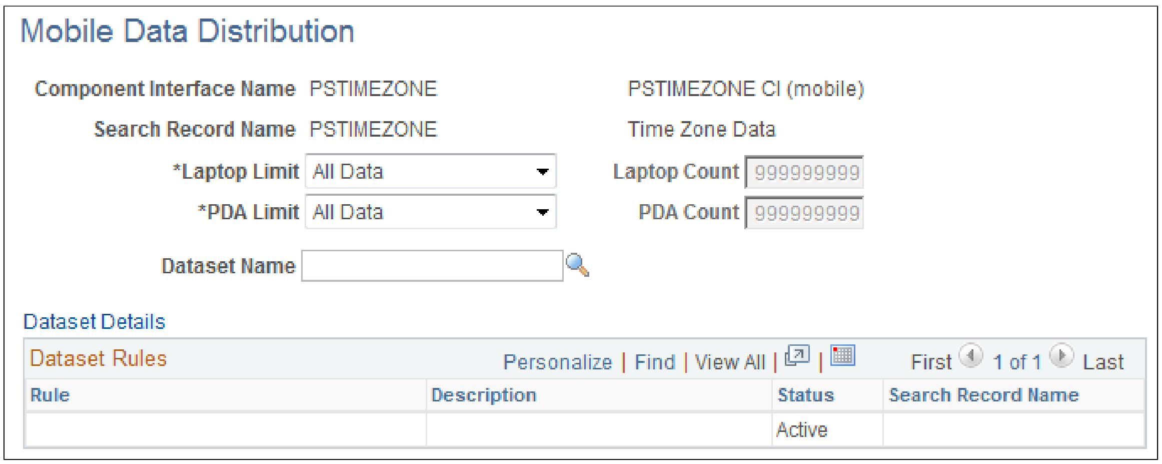
Use the Mobile Data Distribution page (EOEC_MP_RULE) to define data distribution rules for mobile devices based on datasets.

Navigation

Enterprise Components > Component Configurations > Mobile > Mobile Data Distribution

Image: Mobile Data Distribution page

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



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

Laptop Limit

Select the limiting factor for data instances to be downloaded to a laptop computer during synchronization. Select from:

All Data: Select to download all data matching the rule’s conditions.

Limit By Count: Select to download only data matching the rule’s conditions up to the specified count. The count is based on the number of rows returned. Referenced data is also included.

Referenced Data Only: Select to download only data only if it is referenced by another component. You would be more likely to select this option for setup data than for transaction data.

For example, if you have 50,000 products, but the leads you download are related to only 2,000 of the products, select *Referenced Data Only* so that you only download the 2,000 products, instead of the entire set.

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	If *Reference Data Only* is selected for products, downloads do not include products unless other objects such as leads and opportunities that reference products are downloaded.
PDA Limit	Select the limiting factor for data instances to be downloaded to a PDA during synchronization. Select from: *All Data:* All data matching the rule's conditions is downloaded. *Limit By Count:* Only data matching the rule's conditions up to the specified count is downloaded. Referenced data is also included. *Referenced Data Only:* Only data referenced by the component interface is downloaded.
Laptop Count and **PDA Count**	If you select *Limit By Count* in the Laptop Limit field or the PDA Limit field, specify the maximum number of data instances to be downloaded.
Dataset Name	Select the dataset to apply to this mobile data distribution rule.
Dataset Details	Click to access the Dataset Rules page, where you can view and modify the selected dataset definition. See Dataset Rules Page.

The Dataset Rules grid lists rules for the specified dataset.

Mobile User Rules Page

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

Navigation

Enterprise Components > Component Configurations > Mobile > Mobile User Rules

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

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

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Preview Laptop Results and **Preview PDA Results**	Click to preview the data that will be downloaded to a laptop or PDA as a result of this mobile data distribution rule and any limits set for the mobile device on the Mobile Data Distribution page.

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Chapter 3

Formatting Addresses

Understanding Address Formats

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

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

Specifying Address Formats

This section discusses how to specify address formats.

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

Pages Used to Specify Address Formats

Page Name	***Definition Name***	***Usage***
Country Description Page	COUNTRY_DEFN	Define countries to be used throughout the system. This is used mainly for currencies and addresses.
Address Format Page	ADDR_FORMAT_TABLE	Customize fields and field descriptions, so addresses conform to the customary address format of the specified country. Once set, the format appears everywhere the system uses the address subrecord.
Valid Address Page	EO_ADDR_VALIDAT	Add valid combinations of address fields.
State/Province Page	STATE_DEFN	Add or review a state, province, county, or other geopolitical region within a country.

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Country Description Page

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

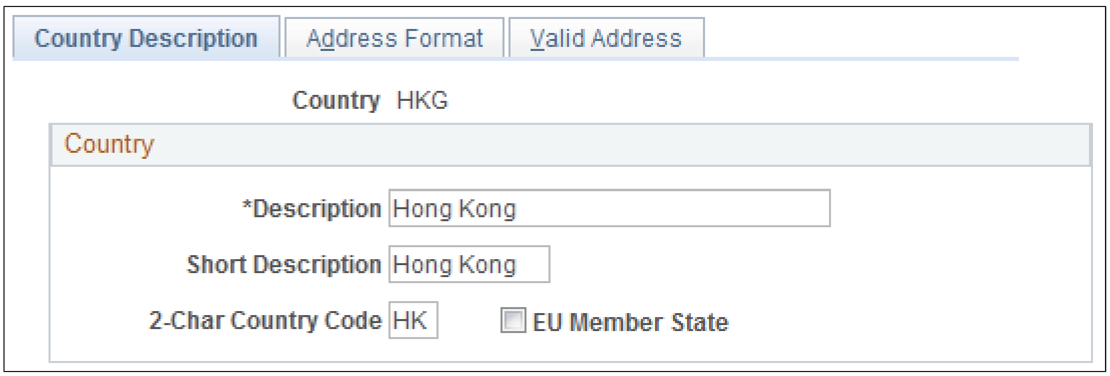
This is used mainly for currencies and addresses.

Navigation

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

Image: Country Description page

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



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

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

Address Format Page

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

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

Navigation

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

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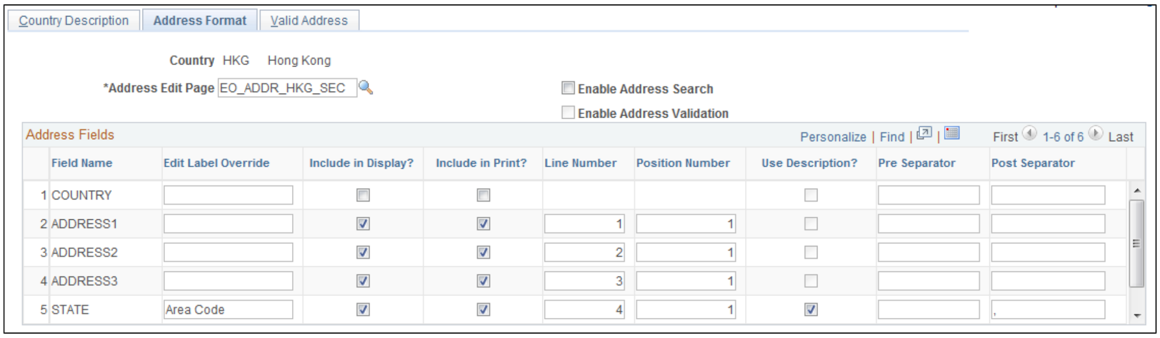
Image: Address Format page

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



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

Address Edit Page

Displays the secondary page used for editing the address. You can create a new secondary page using Application Designer. On the new address secondary page you create, use page fields from the DERIVED_ADDRESS record definition. You then need to add a secondary page control to ADDRESS_SBP pointing to your new secondary page. Once you complete these steps, the secondary page is accessible in this field.

Enable Address Search

Select to enable users to search for a valid value. Selecting this check box enables the Used in Search column and the Valid Address page.

The system default is to leave this check box clear.

Enable Address Validation

Available only when Enable Address Search is selected. Select to ensure validation of all values selected. When selected, users must select a value from the search list. If this check box is clear, users can select from the search list or enter a new value.

The system default is to leave this check box clear.

Search Limit

Enter a numeric value to limit the number of search results.

This option enables you to limit the search results retrieved during Address Search.

Field Name

Displays the field options available for the address page.

Edit Label Override

(Optional) Enter an alternative label for the field. The new label is used when prompting for the field. You can customize address formats so that they conform to the address requirements of each location. For instance, for a U.S. address, you would change the Postal field to read ZIP Code.

Keep in mind the distinctions between county and state:

- *County:* The tertiary geopolitical region within a state; the level after country and state. In the UK, the level of state is

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called a county; you would enter such counties in the State field.

- *State:* The secondary geopolitical region within a country; a state in the U.S., a province in Canada, a county in the UK, and a department in France.

Used in Search Available only when you select the Enable Address Search check box. Select the fields you want users to be able to search on.

Include in Display Select to have the PeopleSoft system include this field when an address appears in read-only mode. Clear this check box for specific fields if your organization wants to display addresses in a format that is different than the appearance of the address during data entry.

Include in Print Select to print the field when printing.

Line Number and **Position Number** Enter the physical location of the fields for displaying and printing. The line number and position number control the field order in the Address Edit page.

The Line Number field specifies the line in which the address field should appear on the page. If there are more than two fields on the same line, then the Position Number field is used to resolve the conflict.

Use Description Select to display the description for the field value. For example, for addresses in Japan, select this option to display the description of the state rather than the state code, since the code is numeric.

Pre Separator and **Post Separator** Enter characters to be used surrounding the address field. For example, in the United States, a comma generally follows the city name, such as in *San Francisco, CA.* In India, there are parentheses around the postal code, for example *(123).*

Valid Address Page

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

Navigation

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

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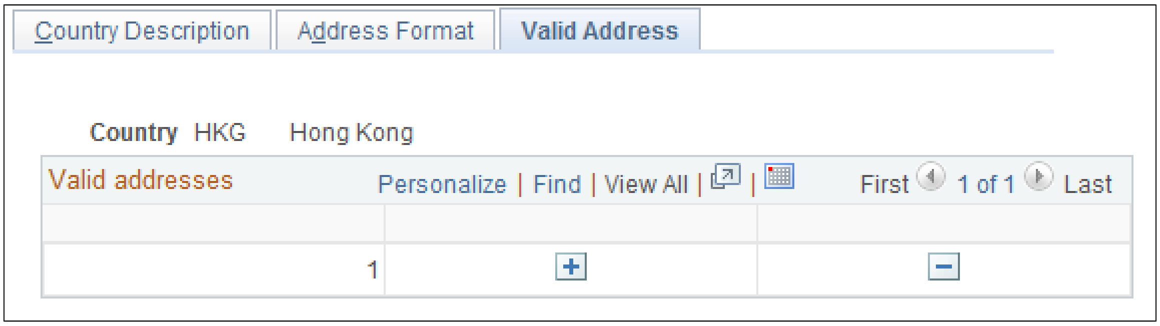
Image: Valid Address page

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



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

State/Province Page

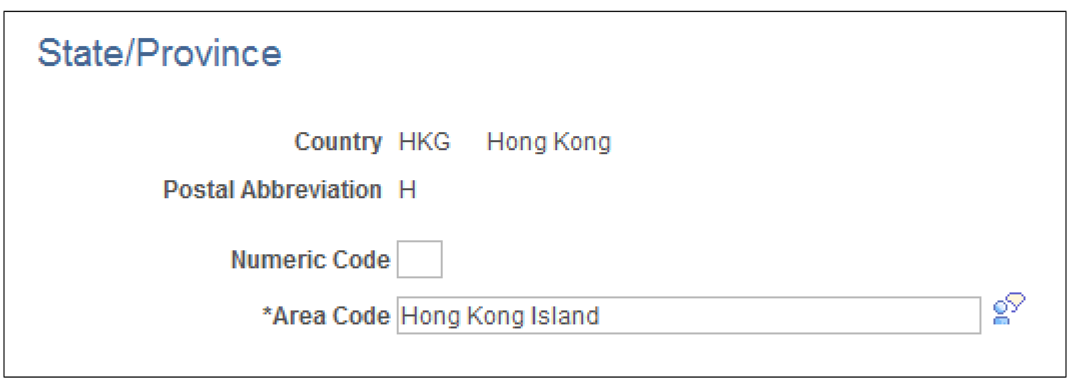
Use the State/Province page (STATE_DEFN) to add or review a state, province, county, or other geopolitical region within a country.

Navigation

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

Image: State/ Province page

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



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

Numeric Code	Enter a two digit numeric code for statistical and reporting purposes.

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Province

The second enterable field, Province in the preceding example, changes depending on the country.

This field has a maximum limitation of 30 characters. Other examples for this field include:

- State—if the country is USA, the field label appears as State.
- Department—if the country is France, the field label appears as Department.
- Community—if the country is Holland, the field label appears as Community.

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Chapter 4

Using the Find Object Navigation Utility

Understanding the Find Object Navigation Utility

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

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

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

Specifying Navigation Path Search Criteria

This section provides an overview of the navigation path search criteria.

Page Used to Specify Navigation Path Search Criteria

Page Name	***Definition Name***	***Usage***
Find Object Navigation Page	EOEC_FIND_NAV	Specify navigation path search criteria.

Understanding Navigation Path Search Criteria

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

Find Object Navigation Page

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

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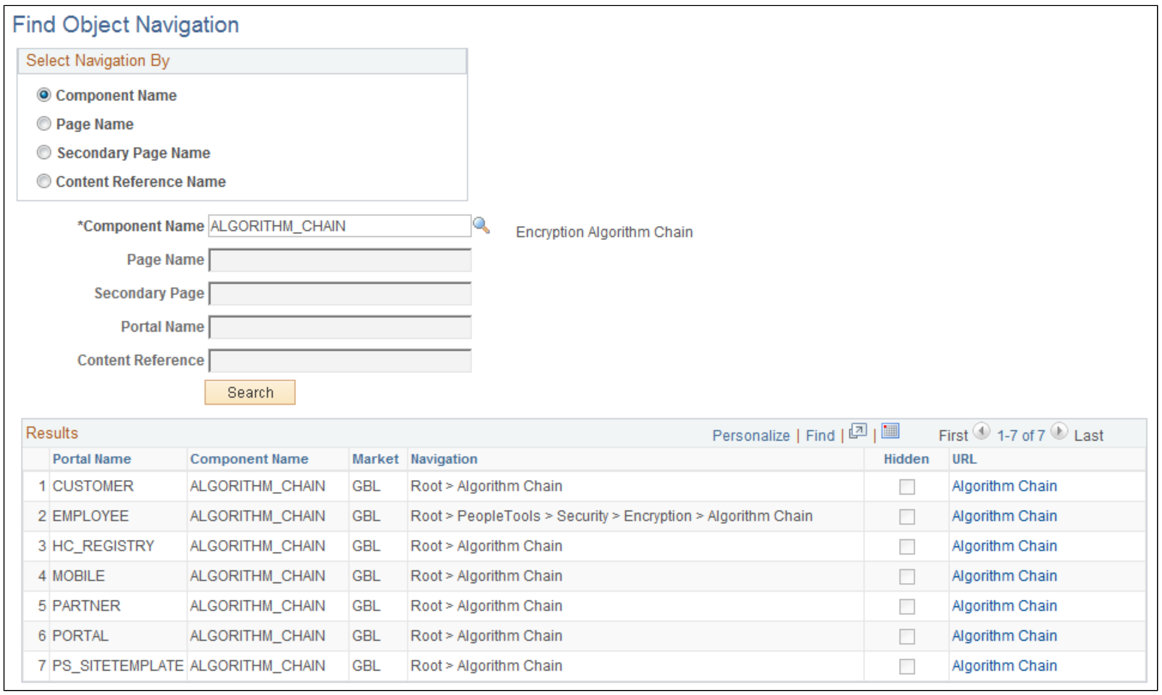
Navigation

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

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

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



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

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

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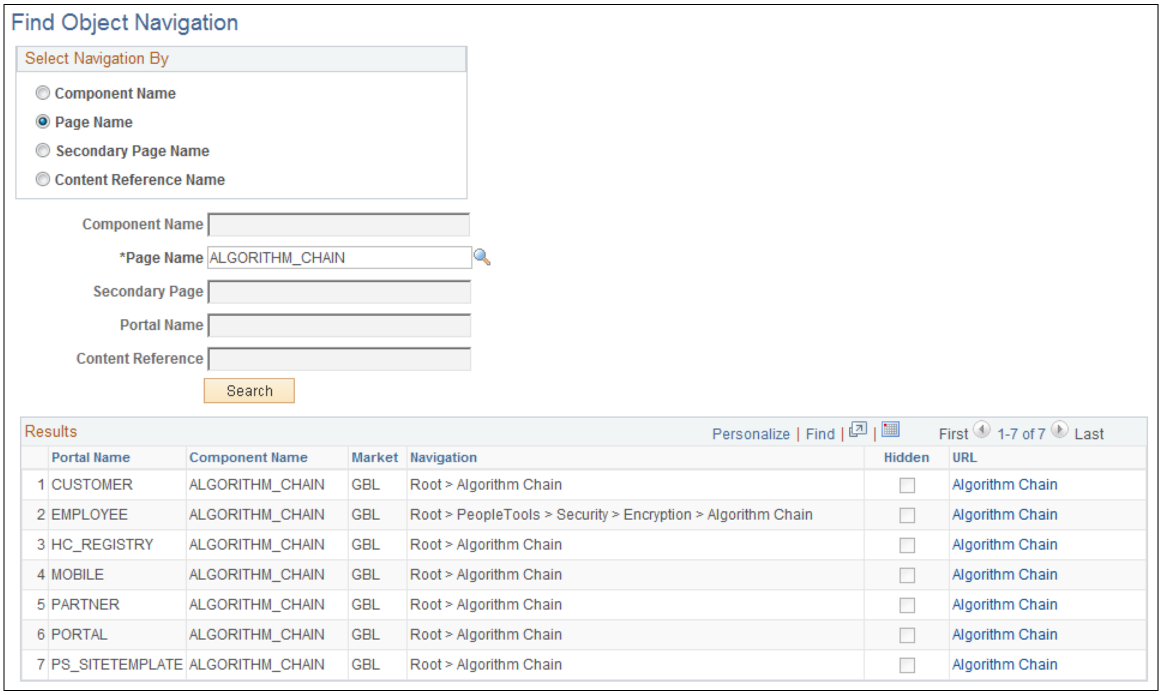
Image: Find Object Navigation page showing search criteria of page name

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



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

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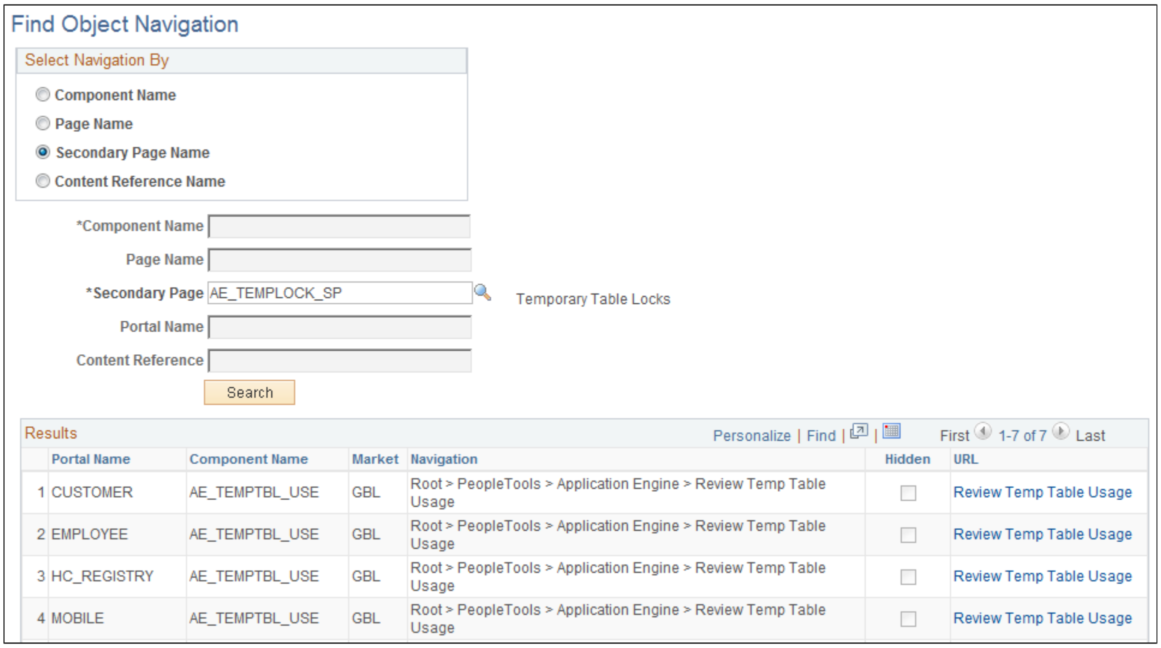
Image: Find Object Navigation page showing search criteria of secondary page name

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



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

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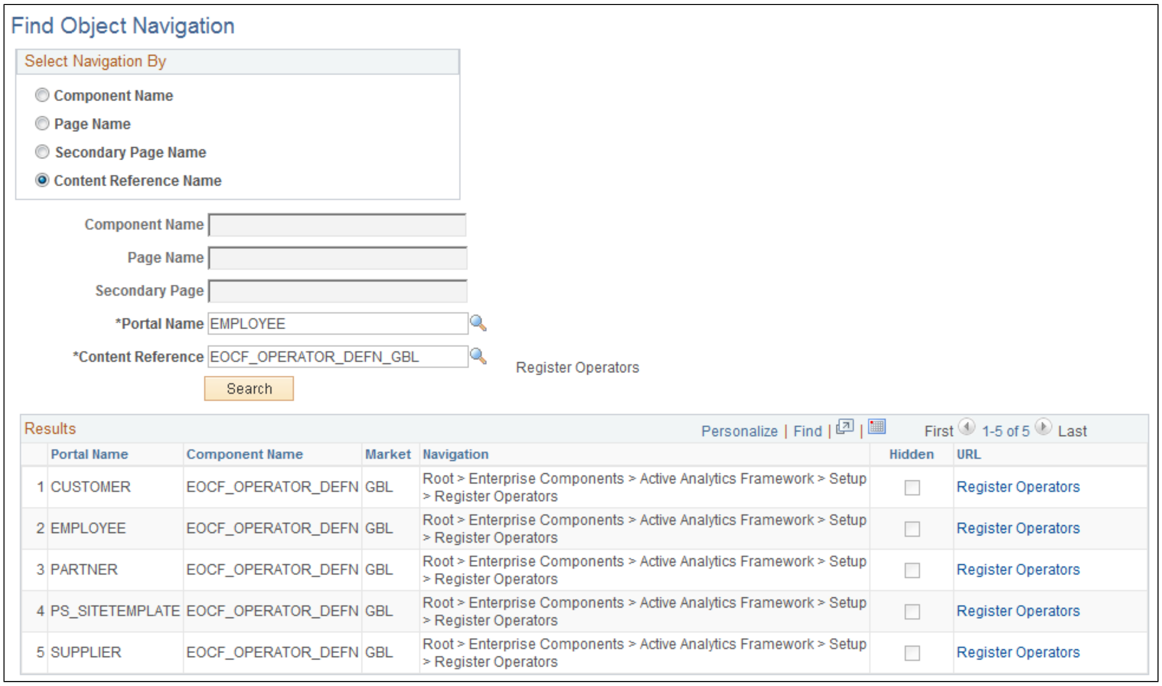
Image: Find Object Navigation page showing search criteria of CREF name and portal name

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



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

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

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Chapter 5

Working With Currencies and Market Rates

Understanding Currencies and Market Rates

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

This section provides overviews of:

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

Understanding Currency and Market Rate Tables

The following tables store currency and market rate data:

- CURRENCY_CD_TBL

  Stores currency code data.
- CURR_QUOTE_PNL

  Stores currency quotation method data.
- RT_INDEX_TBL

  Stores market rate index data.
- RT_TYPE_TBL

  Stores rate type data.
- RT_RATE_TBL

  Stores market rate data.

Understanding Triangulation

Triangulation is the process by which a conversion between two currencies takes place by way of a third reference currency. This process may be used in hyperinflationary environments, where all conversions

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to the local currency are done by way of a stronger, more stable currency. This process may also be used when a country is undergoing a currency revaluation.

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

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

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

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

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

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

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

Related Links

Calculating Cross, Triangulated, and Reciprocal Rates

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Understanding Conversion Factor Fields and the Visual Rate

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

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

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

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

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

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

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

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

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

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

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Related Links

Defining Currency Quotation Methods

Understanding Application-Specific Requirements for Currency Conversion

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

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

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

See Also

PeopleTools: Global Technology

PeopleTools: PeopleCode Developer's Guide

Defining Currencies

This section discusses how to define currency codes.

Page Used to Define Currency Codes

Page Name	***Definition Name***	***Usage***
Currency Code Page	CURRENCY_CD_TABLE	Define currency codes.

Currency Code Page

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

Navigation

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

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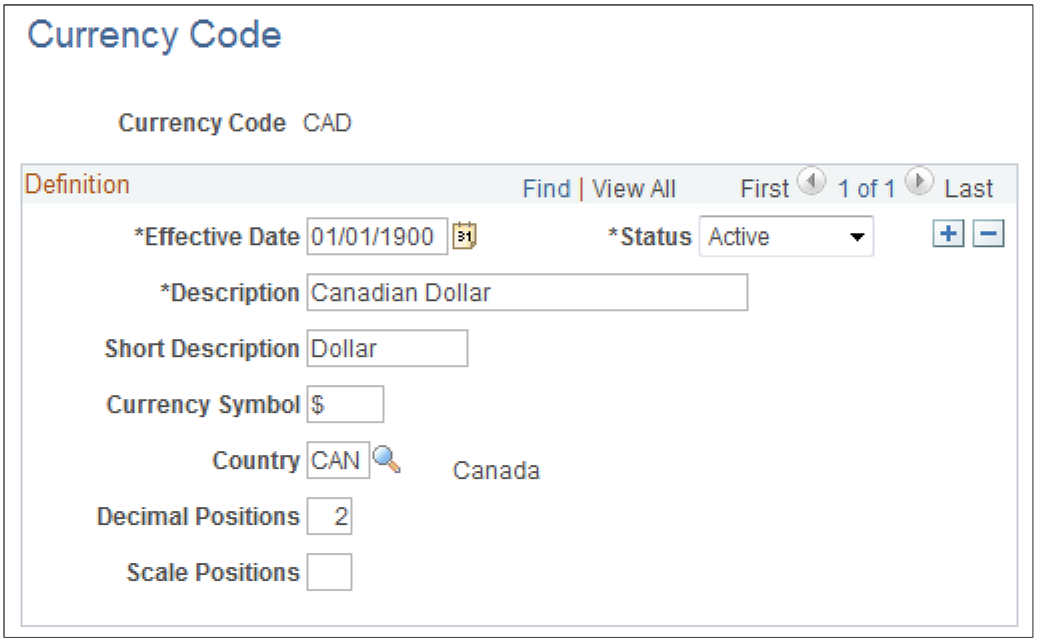
Image: Currency Code page

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



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

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

Status

Indicate whether the currency code is active or inactive. If you inactivate a currency code that is in use, existing transactions are unaffected. However, the currency code is unavailable for future selections.

Some PeopleSoft applications do not allow you to inactivate a currency code that is in use.

Currency Symbol

PeopleSoft applications deliver many currencies with a currency symbol such as $ for Australian dollar (AUD) or £ for British pound (GBP). You can enter new symbols for delivered currencies or for currencies that you might add.

Country

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

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

Decimal Positions

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

Scale Positions

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

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

Defining Currency Quotation Methods

This section discusses how to define currency quotation methods.

Page Used to Define Currency Quotation Methods

Page Name	***Definition Name***	***Usage***
Currency Quotation Method Page	CURR_QUOTE_PNL	Set up and maintain a currency quotation method for each from-currency and to-currency pair.

Currency Quotation Method Page

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

Navigation

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

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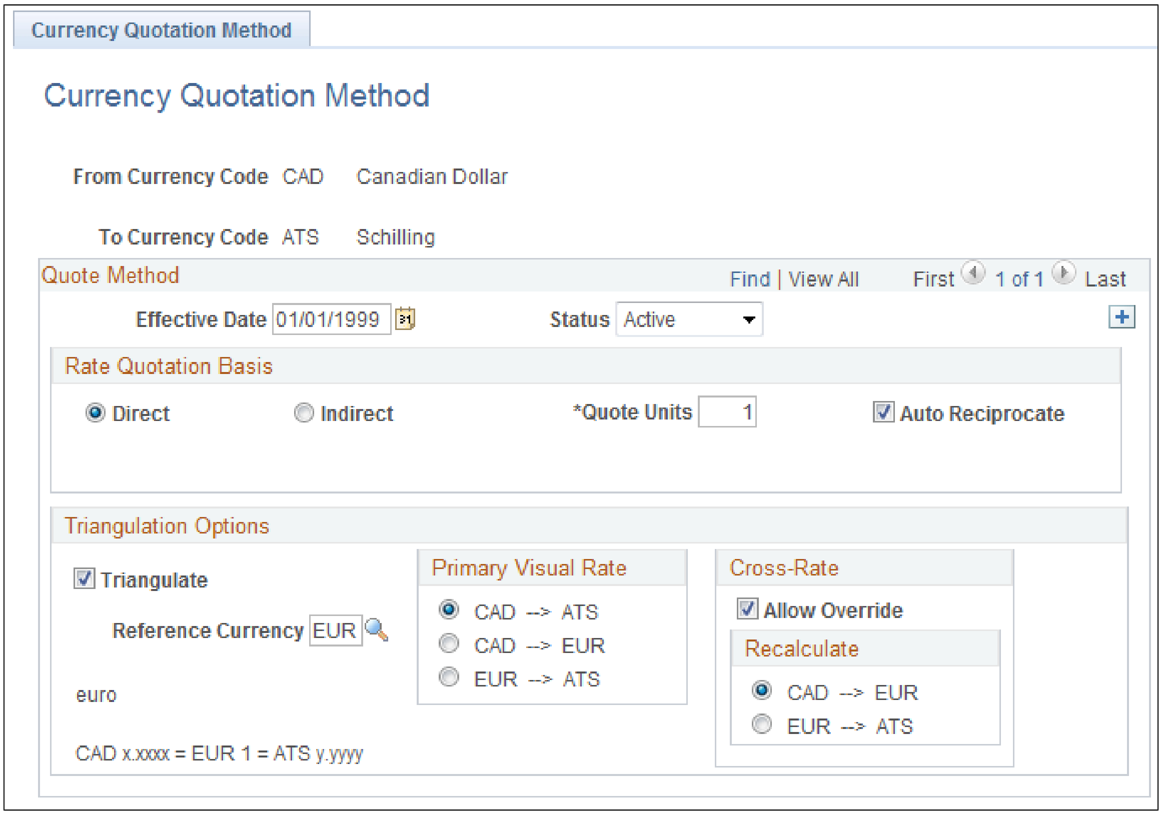
Image: Currency Quotation Method page

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



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

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

See Understanding Conversion Factor Fields and the Visual Rate.

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

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

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

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See Understanding Conversion Factor Fields and the Visual Rate.

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

See Defining Market Rates.

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

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Triangulate

Select to triangulate conversions between this currency pair using a reference currency.

Reference Currency

Enter the reference currency for a triangulated conversion.

Primary Visual Rate

With triangulated currency pairs, there are three exchange rates to consider:

- The rate between the from-currency and the reference currency.
- The rate between the reference currency and the to-currency.
- The calculated cross rate between the from-currency and the to-currency.

Select which of these three rates you want as the primary visual rate. This is the rate that displays on the primary pages and reports. For online applications, other components of the rate can be viewed and modified on the Exchange Rate Detail page.

Allow Override

For triangulated currency pairs, select to enable users to override the cross rates on the Market Rate page and Exchange Rate Detail page.

Recalculate

If the Allow Override option is selected, select to indicate which of the two other rates should be recalculated to bring the triangle back into balance. Because the triangulated rate is initially a calculated rate, if you allow it to be overridden, the rates that are used to initially calculate this rate must be recalculated.

Defining Market Rates

This section discusses how to define market rates.

Pages Used to Define Market Rates

Page Name	***Definition Name***	***Usage***
Market Rate Index Page	RT_INDEX_TBL	Create market rate indexes, which provide a means of organizing market rates in the PeopleSoft system.
Market Rate Type Page	RT_TYPE_TBL	Define rate types that further categorize market rates. Examples of rate types include current, commercial, floating, average, and historical.

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Page Name	***Definition Name***	***Usage***
Market Rate Page	RT_RATE_PNL	Maintain and view market rates. The fields available on the page vary depending on the rate category. This page shows the rate definition for any two currencies.
Market Rate Definition Page	RT_RATE_DEF_TBL	Define tolerance limits for rates and determine what action occurs if a new rate falls outside the tolerance limit. The Market Rate Definition (RT_RATE_DEF_TBL) page shows all of the rate definitions for a rate index.
Rate Definition Page	RT_RATE_DEF_SEC	View market rate definition details, including the maximum variance and error handling definitions specified for the currency pair on the Rate Definition page.
Exchange Rate Detail Page	EXCH_RT_DTL	Access exchange rate detail information.

Market Rate Index Page

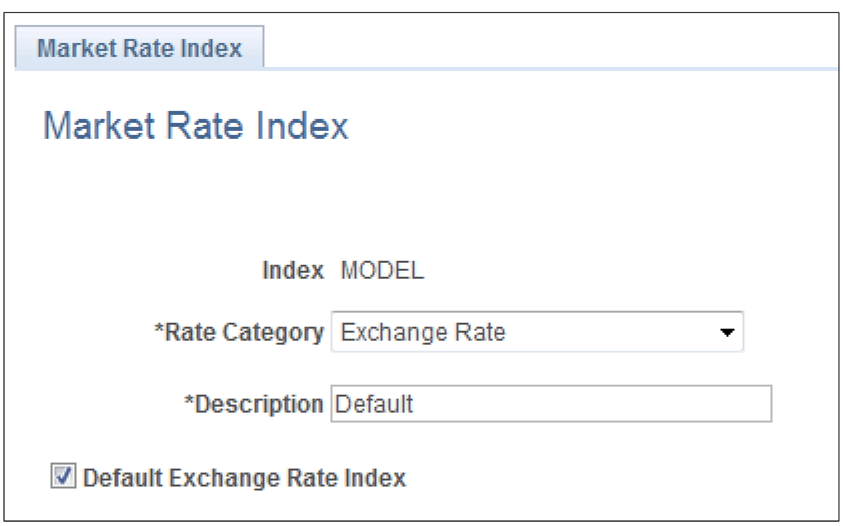
Use the Market Rate Index page (RT_INDEX_TBL) to create market rate indexes, which provide a means of organizing market rates in the PeopleSoft system.

Navigation

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

Image: Market Rate Index page

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



Market rate indexes are stored in the RT_INDEX_TBL table.

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Index

Displays the key term for the highest level of organization for market rates in the application.

Rate Category

Select a general category for the market rate index, such as *Exchange Rate, Commodity Price,* or *Interest Rate.*

Default Exchange Rate Index

Select to indicate that the selected market rate index is the default exchange rate index. This field is available only if:

- The Rate Category field is set to *Exchange Rate.*
- No other index is currently defined as the default exchange rate index.

The Market Rates Index page does not ensure that a default market rate index has been defined. However, if no default has been defined, the Market Rate Default view does not return any data.

The Market Rate Definition Default view (RT_DEF_DFLT _VW) selects rows from the Market Rate Definition table that have a term of zero and an index defined as the default exchange rate index.

Market Rate Type Page

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

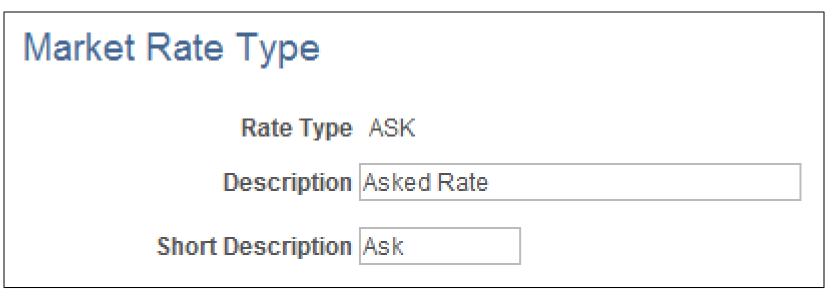
Examples of rate types include current, commercial, floating, average, and historical.

Navigation

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

Image: Market Rate Type page

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



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

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

Market Rate Definition Page

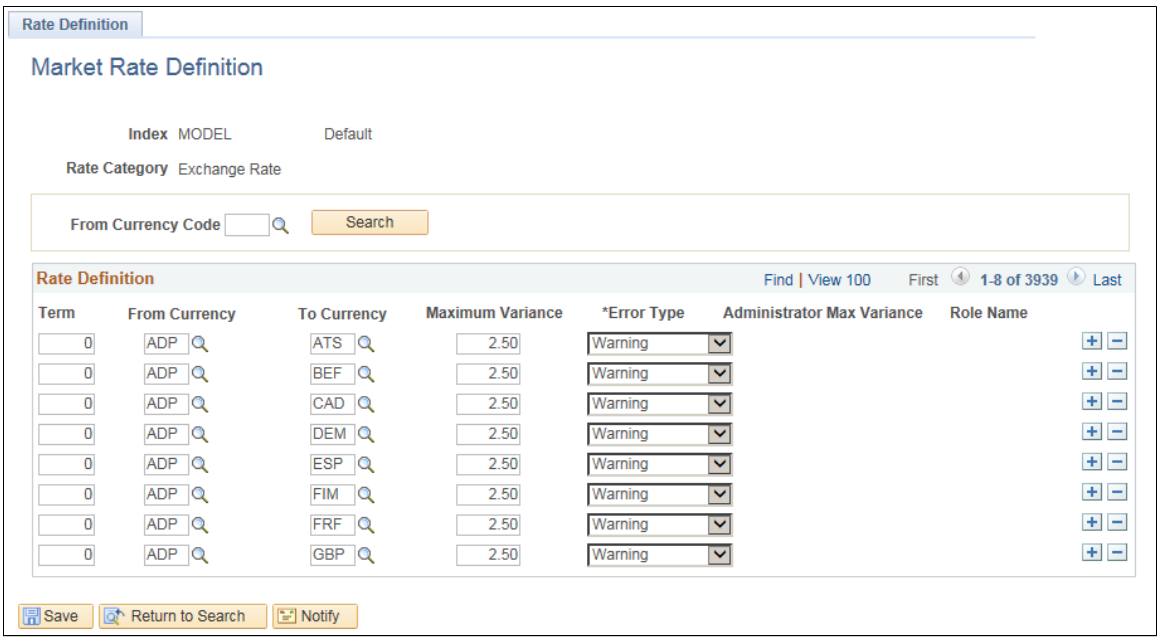
Use the Market Rate Definition page (RT_RATE_DEF_TBL) to define tolerance limits for rates and determine what action occurs if a new rate falls outside the tolerance limit.

Navigation

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

Image: Market Rate Definition page

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



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

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

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

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

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

From Currency Code

Enter the from-currency code with which you want to populate all From Currency fields on the page.

Refresh

Click to populate the From Currency field with the currency you selected in the From Currency Code field.

Rate Definition

Term

Enter the desired term expressed in days. A zero term indicates that the spot rate = zero term. Only PeopleSoft Treasury uses non-zero terms; all other applications must use a zero term for spot rate.

From Currency

In addition to using the From Currency Code field to populate all From Currency field on this page, you can also manually enter the appropriate from-currency. This value is used with its associated To Currency field value as part of an exchange rate pair. When you use triangulation, include a definition row for each of the currency pairs involved in the triangulation.

To Currency

Enter the appropriate to-currency. This value is used with its associated From Currency field value as part of an exchange rate pair.

Maximum Variance

Enter the percentage of variance that is allowed when a user maintains or overrides a market rate. If the change exceeds the tolerance, an error results. The default value is 2.50 (2.5%).

Error Type

Select the type of error that results when the defined maximum variance is exceeded during data entry.

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

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

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

Administrator Max Variance

This field is relevant only when Error Type is Stop. The default Administrator Max Variance is 5%.

Note: Administrators can change the market rates greater than 2.5%. No user is allowed to update rate changes greater than the Administrator Max Variance value.

Role Name

Name of the role,

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Market Rate Page

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

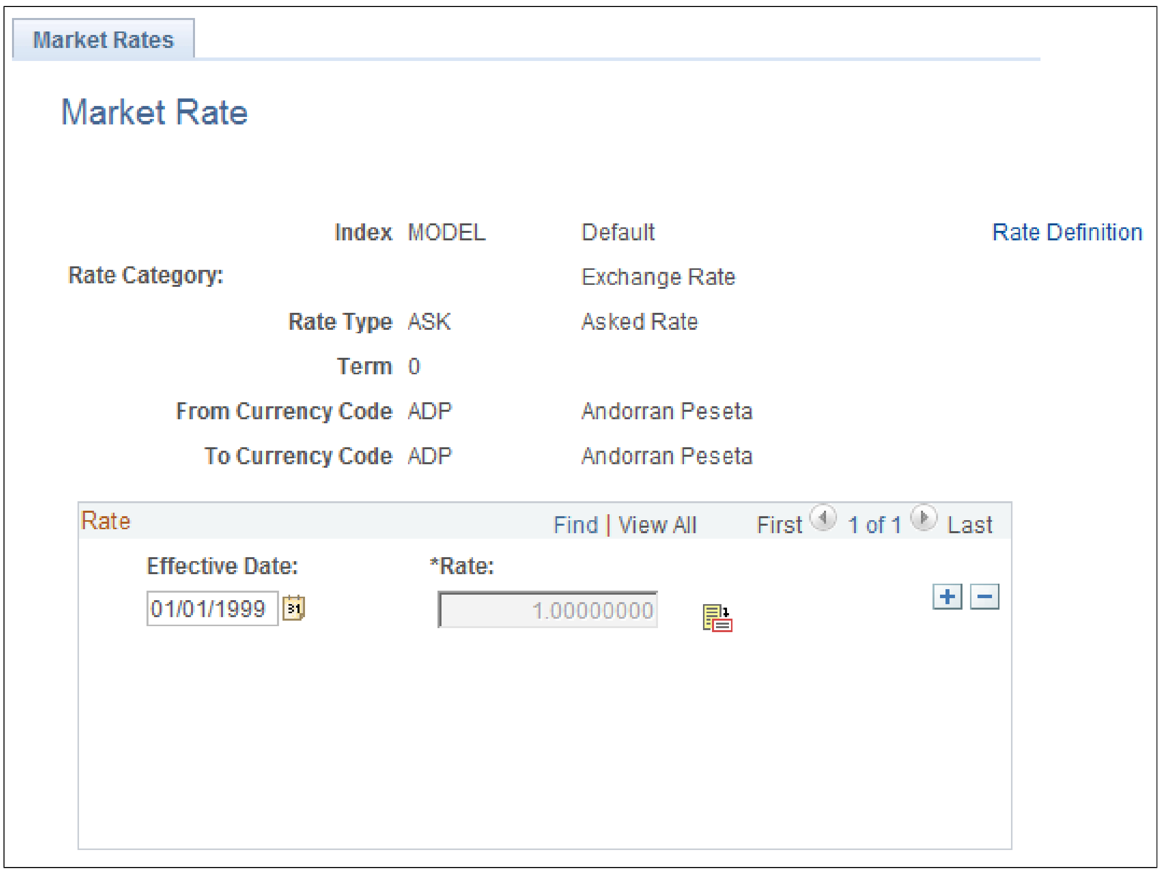
The fields available on the page vary depending on the rate category. This page shows the rate definition for any two currencies.

Navigation

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

Image: Market Rate page

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



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

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

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

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

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

Index

Displays the key term for the highest level of organization for market rates in the application.

Rate Category

Displays the general category for the market rate, such as *Exchange Rate, Commodity Price,* or *Interest Rate.*

Rate Type

Displays the selected rate type for this market rate.

Some examples of rate types are commercial, average, floating and historical.

Term

Displays the entered term.

From Currency Code

Displays the selected currency that you are converting from.

To Currency Code

Displays the selected currency that you are converting to.

Rate Definition

Click to access the Rate Definition page and view market rate definition details, including the maximum variance and error handling definitions specified for the currency pair.

Rate

Effective Date

Enter the date that you are initiating the currency exchange.

Rate

Displays the visual rate. If you are working with a triangulated exchange rate, this field displays the primary visual rate, which is typically the cross rate, but can also be one of the other component rates of the triangle.

During online maintenance of market rates, you don't view or change RATE_MULT and RATE_DIV values directly, but instead access this visual rate, which is calculated by page logic based on RATE_MULT, RATE_DIV, and the currency quotation method defined for the currency pair on the Currency Quotation Method page. The visual rate is stored temporarily on a page work record.

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

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

See Currency Quotation Method Page.

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

Rate Definition Page

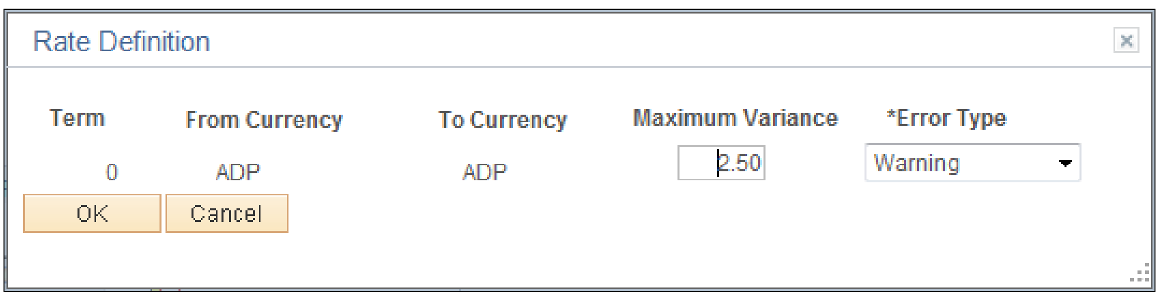
Use the Rate Definition page (RT_RATE_DEF_SEC) to view market rate definition details, including the maximum variance and error handling definitions specified for the currency pair on the Rate Definition page.

Navigation

Click the Rate Definition link on the Market Rate page.

Image: Rate Definition page

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



Exchange Rate Detail Page

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

Navigation

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

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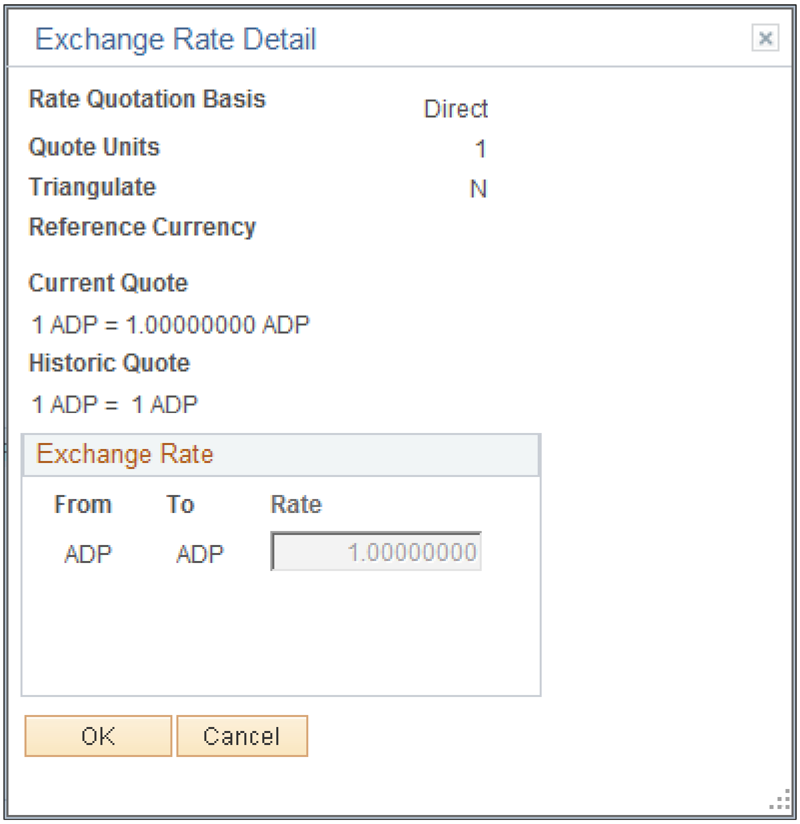
Image: Exchange Rate Detail page

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



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

Rate Quotation Basis

Displays the quotation basis for the exchange rate as defined in the Currency Quotation Method page.

Quote Units

Displays the quote units for the exchange rate as defined in the Currency Quotation Method page.

Triangulate

Displays the triangulation setting for the exchange rate as defined in the Currency Quotation Method page.

Reference Currency

For triangulated exchange rates, displays the reference currency used in the triangulated exchange.

Current Quote

Displays the current exchange rate used to convert the from-currency to the to-currency.

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

1 USD = 1.40000000 CAD

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

1.400000000 CAD = 1 USD

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

1.25 USD = 1 EUR = 6.8 FRF

Historic Quote

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

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

For example, if you are viewing a historical rate where FRF was converted to USD directly using a calculated reciprocal rate of 1 FRF = 0.1470588 USD and the current quotation method for this currency pair is indirect, the conversion function recalculates the visual rate based on indirect quotation, that is 6. 8000001 FRF = 1 USD.

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

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

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

Exchange Rate

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

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Calculating Cross, Triangulated, and Reciprocal Rates

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

Page Used to Run the EOP_RATECALC Process

Page Name	***Definition Name***	***Usage***
Calculate Cross/Reciprocal Rate - Parameters Page	RUN_EO9030	Set run control parameters and run the EOP_RATECALC Application Engine process that calculates cross, triangulated, and reciprocal rates.

Understanding the EOP_RATECALC Process

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

The process performs three functions:

- Generates cross rates for non-triangulated currency pairs.

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

- Generates triangulated rates for triangulated currency pairs.

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

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

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

Calculate Cross/Reciprocal Rate - Parameters Page

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

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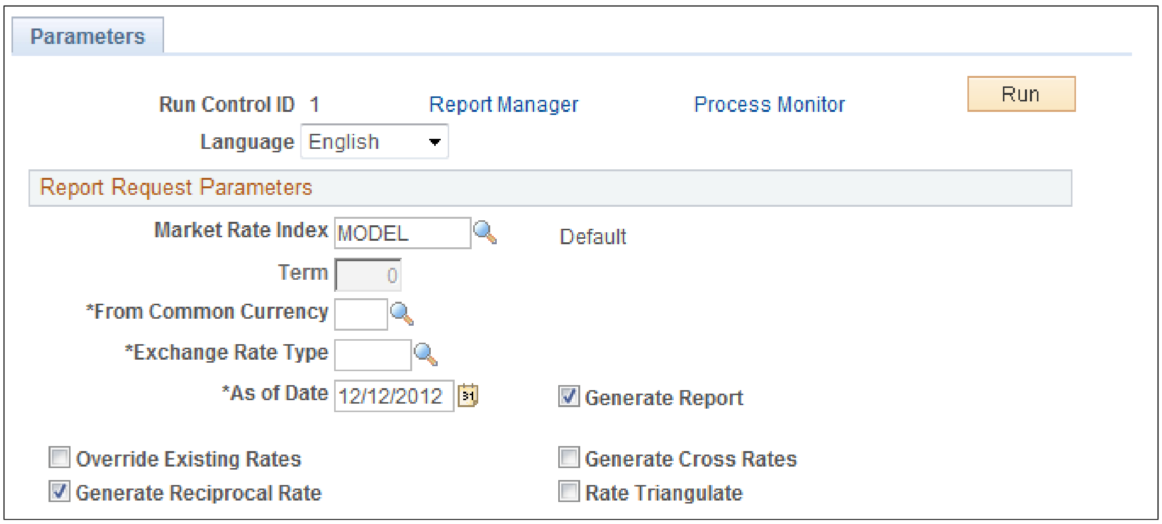
Navigation

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

Image: Cross/Reciprocal Rate - Parameters page

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



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

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

Market Rate Index	Select a market rate index. Applications other than PeopleSoft Treasury should use the default index that you select for the exchange rate.
Term	This value defaults from the value entered on the Market Rate Definition page.
From Common Currency	Select a currency code to calculate a reciprocal rate.
Exchange Rate Type	Select the exchange rate type to use for this calculation.
As of Date	Select the effective date of the newly created exchange rates, which are the output of the process. The as of date also determines the rates used as the basis for the calculations, which are the input of the process.

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The report uses the most current currency quotation method for the currency pair as the input to the process. If the as of date is the current effective rate on the specified date, it can affect triangulation. For example, a USD to EPC (euro participating currency) triangulated rate effective April 1, 2004 might be comprised of the EUR to USD rate also effective April 1, 2004 and the fixed EUR to an EPC rate effective on the date the newly participating EPC officially becomes a euro participating currency.

Generate Report

Select to generate a report that displays the cross, triangulated, and reciprocal rate calculations performed by the process.

Override Existing Rates

Select to have the calculated rates override rates for the exchange rate type, regardless of the as of date.

Generate Reciprocal Rate

Select to calculates reciprocal rates for currency pairs that do not have the Auto Reciprocate option select on the Currency Quotation Method page.

You can select this option alone, or in combination with the Generate Cross Rates and Rate Triangulate options.

This process does not directly manipulate the exchange rates. The system uses numerator and denominator values instead, such that the following is true:

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

Fro example, suppose you want a reciprocal rate between USD and CHF and assume a two-to-one ratio. If the exchange rate for USD to CHF is quoted directly (either using a direct quote method that you selected or using the system default), this rate is stored as RATE_MULT = 2 and RATE_DIV = 1. The rate is represented as 1 USD = 2 CHF, with a visual rate of 2.

In turn, the CHF to USD rate must be indirect. The reciprocal is a simple exchange, storing the rate as RATE_MULT = 1 and RATE_DIV = 2. The visual rate remains 2.

If quote methods are not being used, the CHF to USD rate must be quoted directly (the default), so the reciprocal rate is actually a calculated inverse. This rate is stored as RATE_MULT = 0.5 and RATE_DIV = 1, with a visual rate of 0.5.

In this example between USD and CHF, using a quote method and using a calculated inverse produced the same end result, 1/2 equals 0.5. But in actual practice, the manipulation of exchange rates is a major task and is one of the reasons for establishing the currency quote method.

Generate Cross Rates

Select to automatically generate cross rates. For example, to generate cross currency rates for USD, CAD, and MXP, you enter USD to CAD = 1.473 and USD to MXP = 9.8793. The

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	system automatically generates CAD to MXP = 9.8793/1.473 = 6.7069246. If you choose to generate cross rates, the From Cur (from-currency) and To Cur (to-currency) fields display and you must select a from-currency and a to-currency. You can enter a wild card of % in either or both fields to indicate from all or to all currencies.
Rate Triangulate	Select to convert two currencies through a third currency. Select to convert two currencies through a third currency. If you select Rate Triangulate, the From Cur (from-currency) and To Cur (to-currency) fields display and you must select a from-currency and a to-currency. You can enter a wild card of % in either or both fields to indicate from all or to all currencies.
Quote Method Required	Select to indicate that you want the process to perform selected calculations only if the currency pairs have an existing currency quotation method definition.

Using the Currency Exchange Calculator

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

Page Used to Convert Amounts Using the Currency Exchange Calculator

Page Name	***Definition Name***	***Usage***
Currency Exchange Calculator Page	CURRENCY_EXCHNG_PN	Calculate currency exchange between currencies. This tool enables you to select a rate type other than the base currency, but does not enable you to override the exchange rate.

Currency Exchange Calculator Page

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

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

Navigation

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

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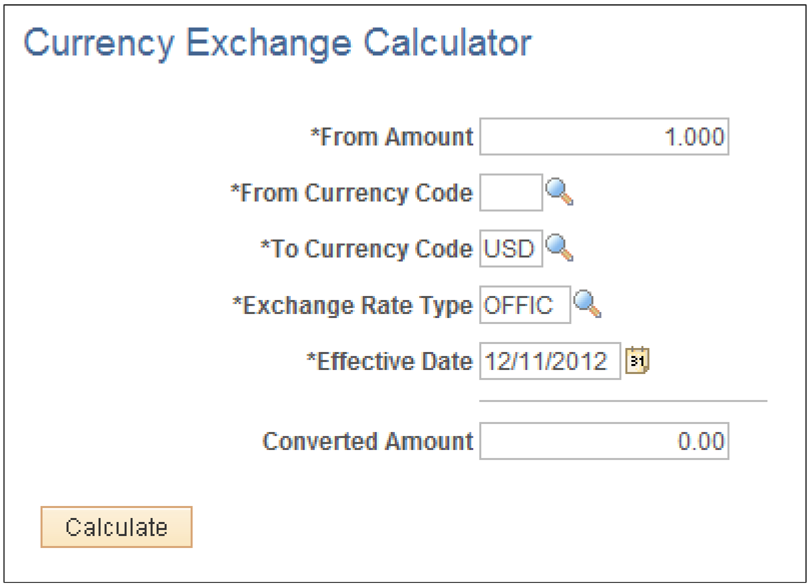
Image: Currency Exchange Calculator page

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



From Amount

The currency exchange is based on the from amount that you enter and the current exchange rate set up on the Market Rate page.

See Defining Market Rates.

From Currency Code

Select the currency code from which to calculate the exchange amount.

To Currency Code

Select the currency code to which to calculate the exchange amount.

Exchange Rate Type

Select the type of exchange rate to use for this calculation.

Converted Amount

Click the Calculate button to calculate the amount and display it in this field.

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Chapter 6

Working With PeopleSoft Forms and Approval Builder

Understanding PeopleSoft Forms and Approval Builder

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

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

Form Design

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

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

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

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

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- Prompt

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

- Code

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

- Section

  Enables you to organize the form into multiple sections.

Form Status

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

The possible status values for a *form* are:

In Design — Indicates a form that is being designed, and is not active.

Activated — Indicates a form that is active and available for form users to complete.

Depending on your user role, you can activate a form using the following pages:

- Design Form: Complete page of the Form Design Wizard component.
- Manage Forms page.

Note: Only the owner of a form or a form administrator can activate/inactivate a form or reassign a form to a new owner.

Inactive — Indicates a form that has been inactivated by either the form's owner or a form administrator. Form administrators or form owners can inactivate forms by using the Manage Forms page. When a form is inactive, form users are not permitted to complete the form.

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

Initial — When a form user accesses an activated form and begins to complete it, the status of the form instance is set to *Initial.*

Pending — When the form user finalizes the form instance and submits it for approval, the status changes to *Pending.*

On Hold — When an approver or reviewer requests more information about a submitted form, the status changes to *On Hold.*

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

Security and Delivered Roles

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

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

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

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

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

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Requirements

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

Related Links

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

Designing Forms

This section describes designing forms using the Form Design Wizard component (FORM_DESIGN_WIZARD).

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

Pages Used to Design Forms

Page Name	***Definition Name***	***Usage***
Design Form - Step 1: Basic Information Page	FORM_DSN_WZR_MAIN	Define a form's basic information.
Design Form - Step 2: Instructions Page	FORM_DSN_WZR_INST	Provide instructions for users that describe how to complete and submit a form.
Design Form - Step 3: Form Fields Page	FORM_DSN_WZR_FLDS	Define the fields that appear on the form.
Form Field Edits Page	FORM_L_FLD_SEC	Define additional requirements for fields.
Design Form - Step 4: Attachment Templates Page	FORM_DSN_WZR_ATCH	Associate file attachments with a form.
Design Form - Step 5: Publish to Menu Page	FORM_DSN_WZR_PRTL	Specify the menu location for a form.
Design Form - Step 6: Approval Process Page	FORM_DSN_WZR_AW	Assign the approval workflow required for a form.
Design Form: Complete Page	FORM_DSN_WZR_DONE	Preview and activate or redesign a form.

Design Form - Step 1: Basic Information Page

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

Navigation

Enterprise Components > Forms > Design a Form

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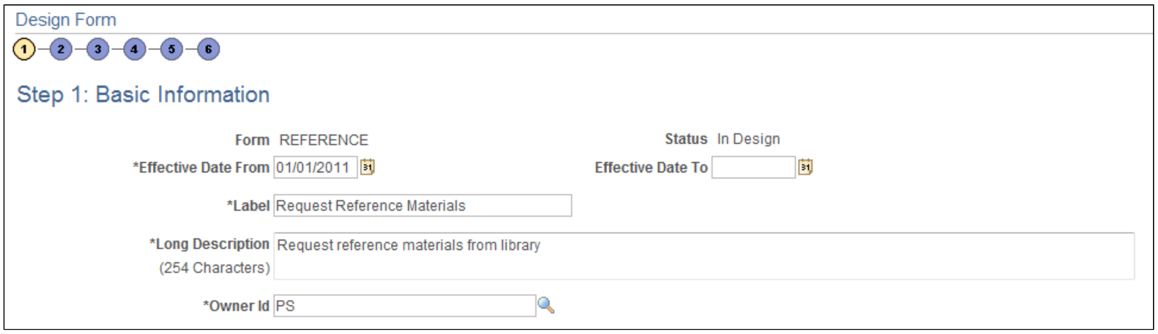
Image: Design Form - Step 1: Basic Information page

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



Form

The unique identifier for the form. You specify this ID when you add a new form.

Status

Lists the current status of the form. The value for this field is automatically assigned. Values are:

- *In Design:* Indicates the form is being designed and has not yet been published.
- *Activated:* Indicates the form's design is complete, and the form has been published.
- *Inactive:* Indicates a form that has been inactivated by either the form's owner or a form administrator.

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

Effective Date From

Enter the date the form is first available for use.

Effective Date To

Enter the date the form expires. Leave this field blank if you intend to use the form indefinitely.

Label

Enter a label for the menu item that users will select to access the form.

Names can contain only alphanumeric and underscore characters.

Long Description

Enter a description for the form. The description appears below the form's label when users access the published form.

Owner Id

Enter the User ID of the person who is the responsible for the form. Only this person can modify the form design.

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Design Form - Step 2: Instructions Page

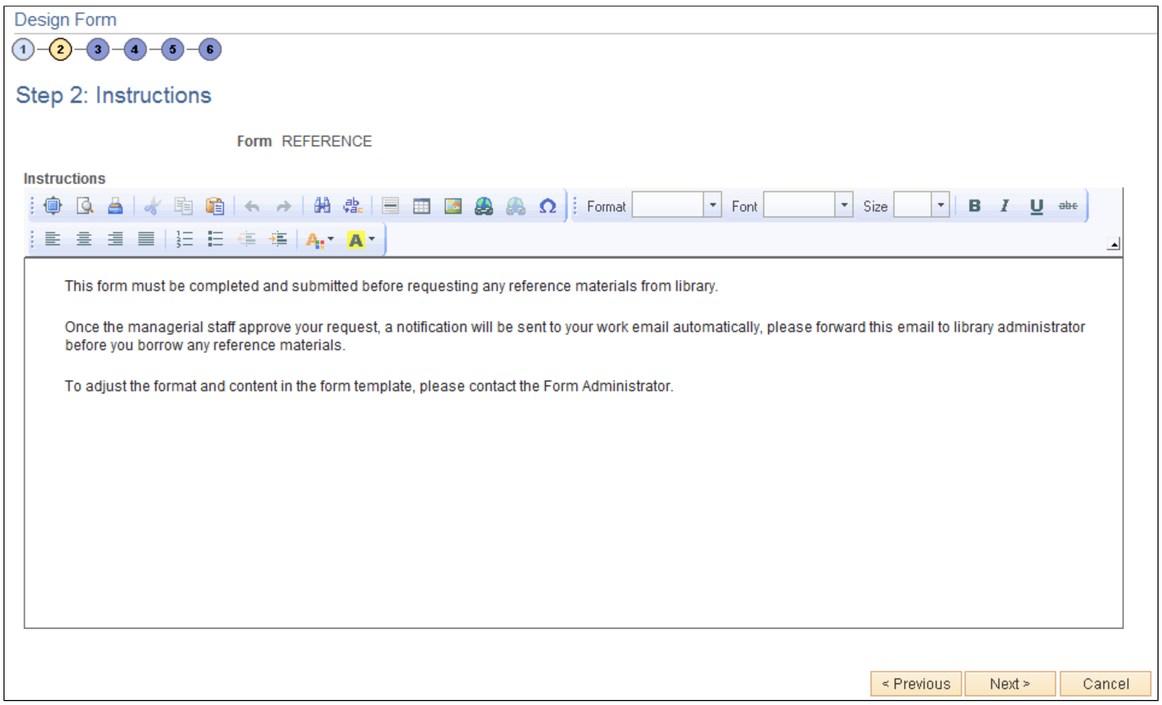
Use the Design Form - Step 2: Instructions page (FORM_DSN_WZR_INST) to provide instructions for users that describe how to complete and submit a form.

Navigation

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

Image: Design Form - Step 2: Instructions page

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



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

Design Form - Step 3: Form Fields Page

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

Navigation

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

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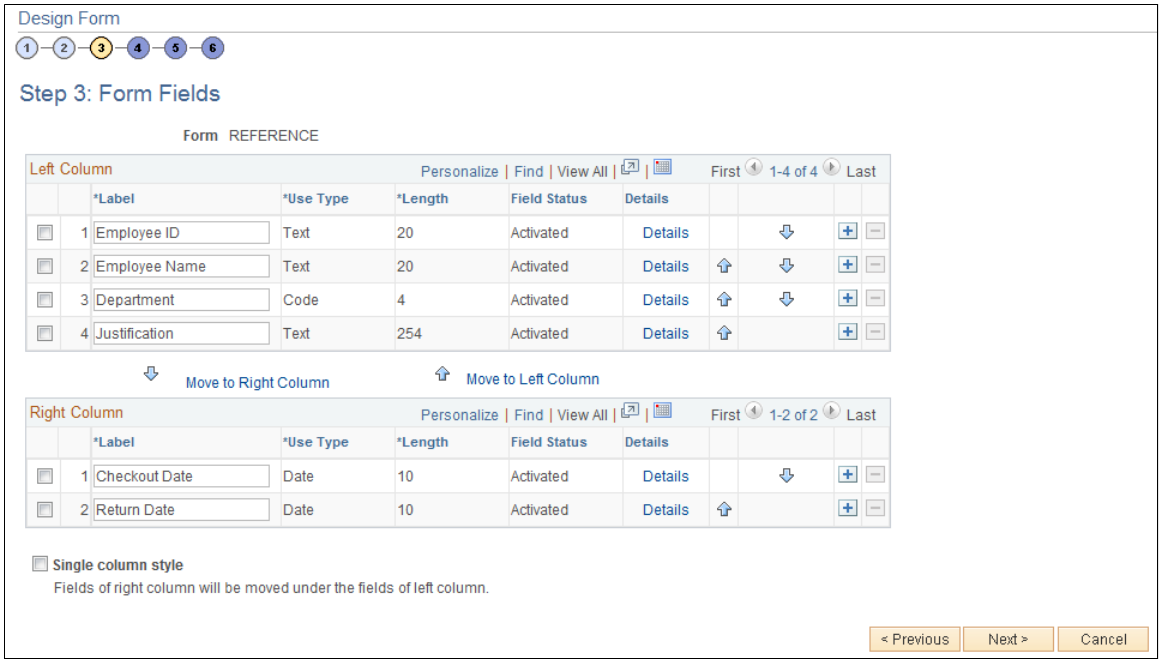
Image: Design Form - Step 3: Form Fields page

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



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

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

Label Enter the label to use for this field.

Use Type Select the field type, and field length, if required (depends on the Use Type). Values are:

Code: Use to define a code field that allows the form user to select a response from a list of codes.

Date: Use for dates.

Number: Use for numeric entries (only positive values are allowed).

Prompt: Defines a prompt field that allows the user to select data from existing PeopleSoft database tables.

Section: Use to separate a form into sections. The section can include a header with instructive text, and an HTML editor is provided for you to define the section.

Signed: Use for signed numeric entries (values can be positive or negative).

Text: Use for text entries.

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Time: Use for time entries.

Y/N: Use for yes/no responses.

Length

Select the field length. You can modify this field only for Number, Prompt, Signed, and Text fields; the remaining field types use a preset length.

The syntax for numeric fields is *X.Y*, where the value before the decimal *(X)* is the number of integer digits allowed, the value after the decimal *(Y)* is the number of decimal places allowed.

Field Status

Indicates the status of the field, either *Activated* or *In Design.*

Details

Click to access the Form Fields Details page, where you define additional requirements for the field, including whether the field is required, and edits for the field when a user completes the form.

See Form Field Edits Page.

 and 

Click the arrow icons to reposition a field.

Move to Right Column

Click to move selected fields to the right column.

Move to Left Column

Click to move selected fields to the left column.

Single column style

Select to create a form that contains a single column. Any fields that are defined in the right column will appear under the left column fields when you view the form.

Form Field Edits Page

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

Navigation

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

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

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

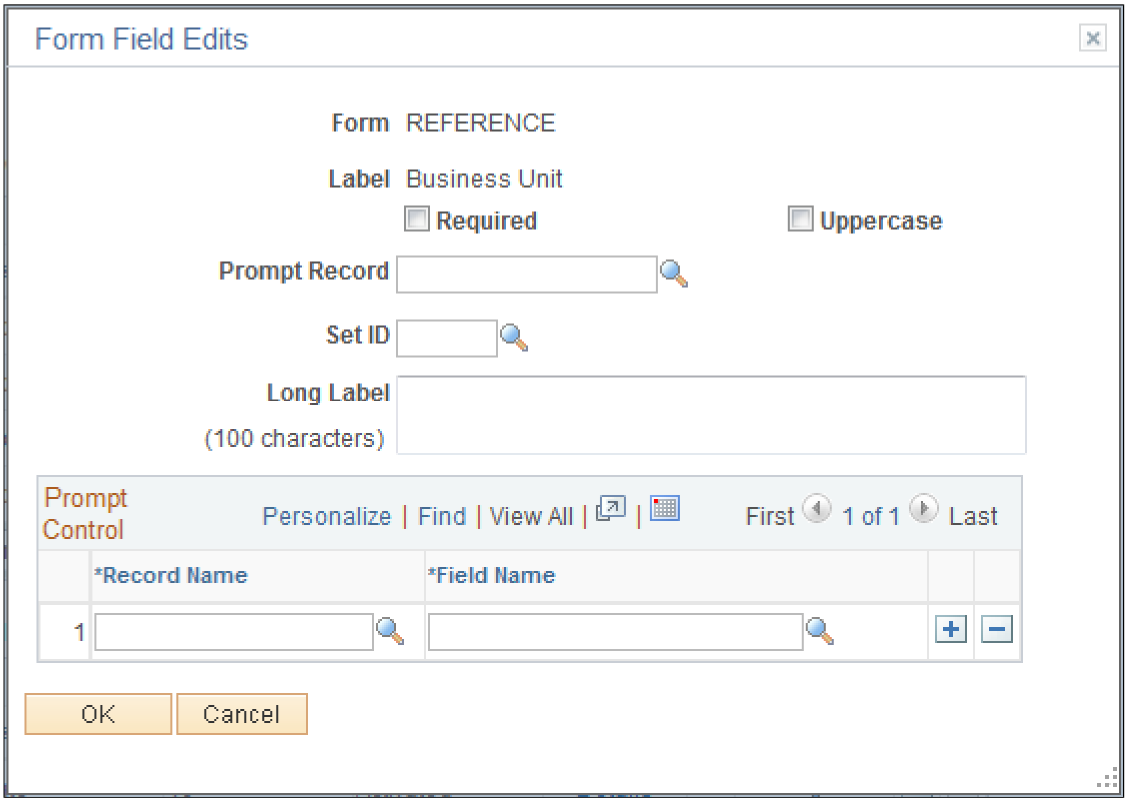
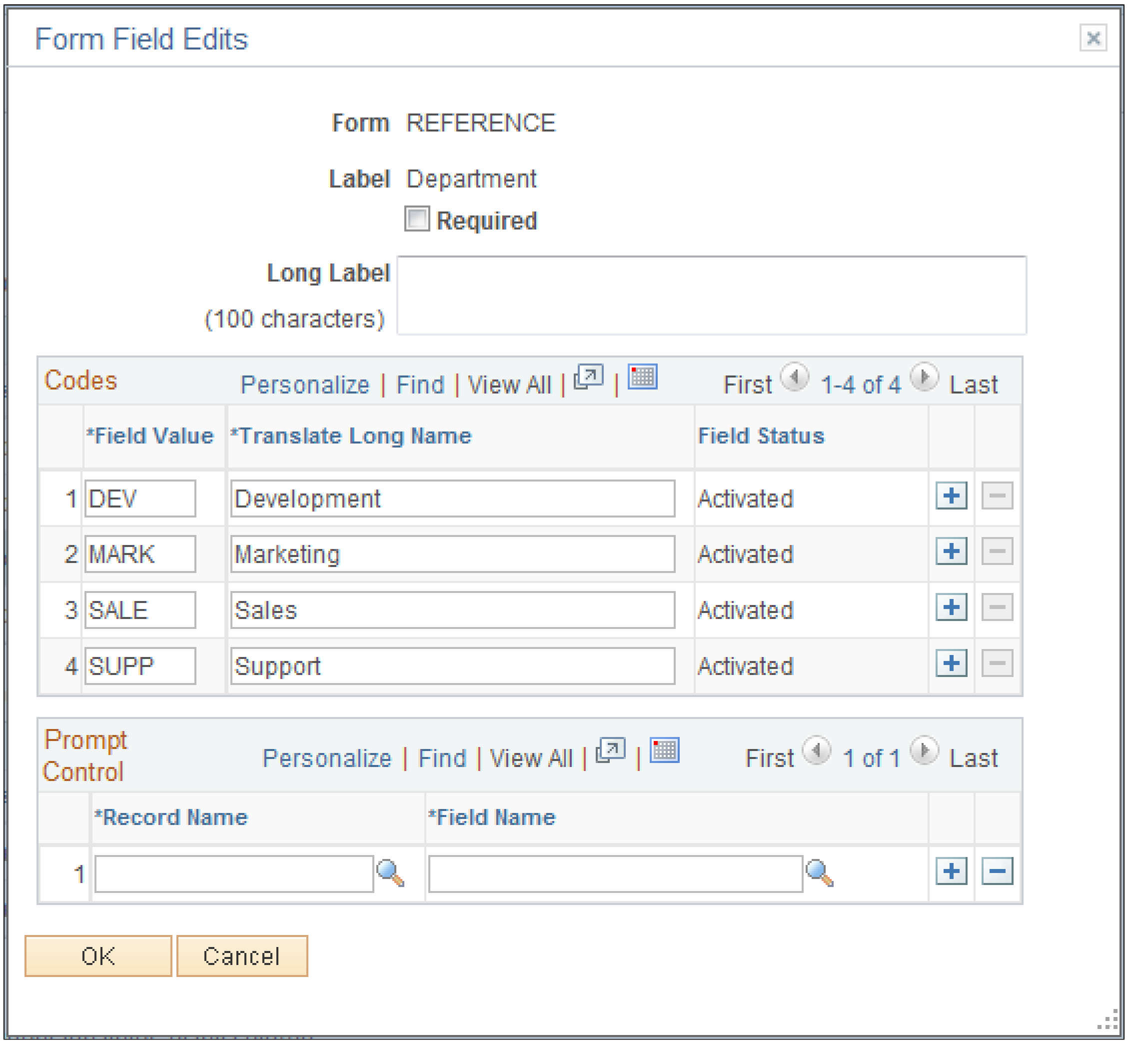


Image: Form Field Edits page displaying an example for a code field

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



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

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

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

Design Form - Step 4: Attachment Templates Page

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

Navigation

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

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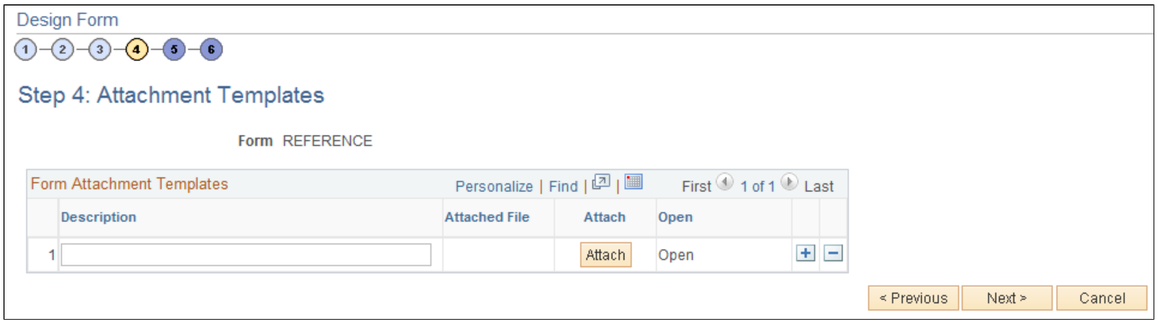
Image: Design Form - Step 4: Attachment Templates page

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



Attach — Click to attach a file. In the window that appears, click the Browse button to navigate to and select the file, then click the Upload button.

Description — Enter a description for the file. If you leave this blank, the file name is used.

Attached File — Displays the file name of the attached file.

Open — Click to open the attached file.

Design Form - Step 5: Publish to Menu Page

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

Navigation

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

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

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

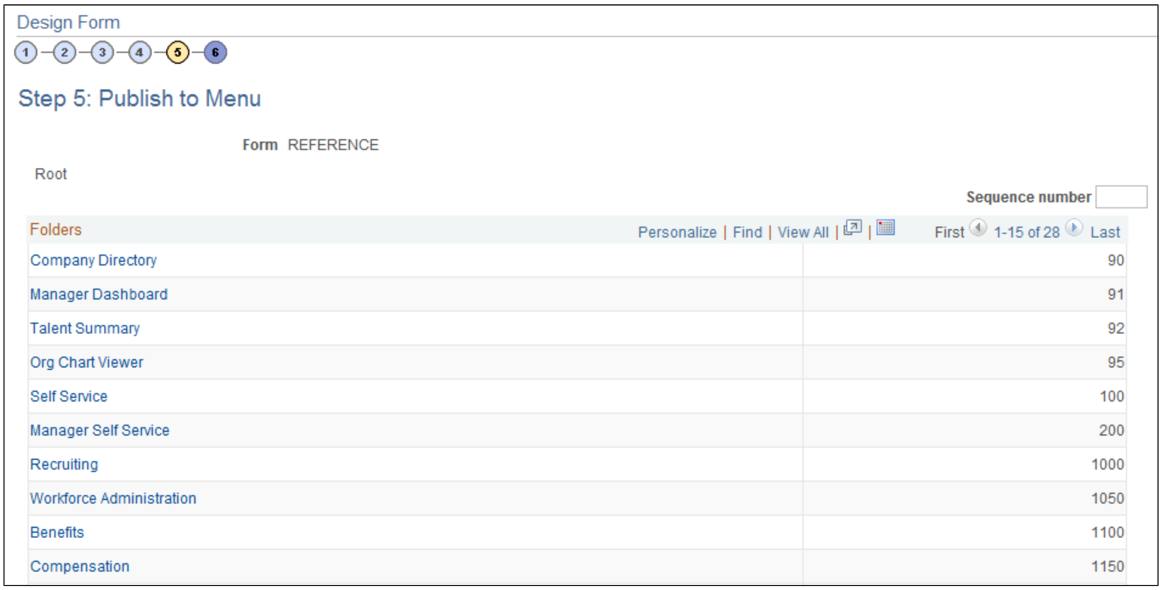
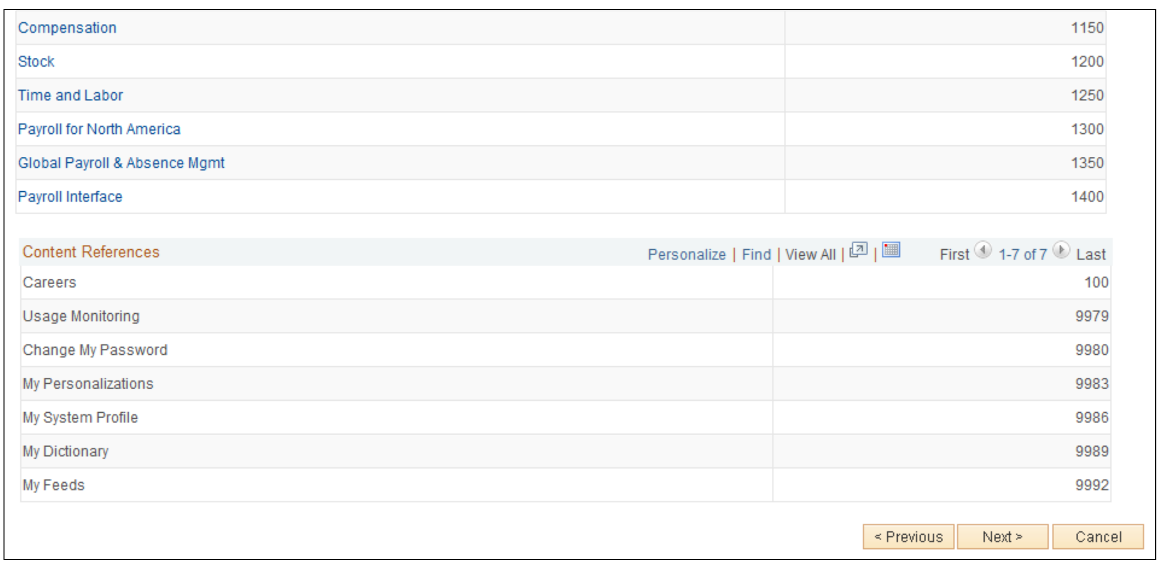


Image: Design Form - Step 5: Publish to Menu page (2 of 2)

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



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

Sequence number	Enter a value to specify the order within the menu that the form will appear. Items appear in ascending order.

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Folders

This grid lists the folders at the currently selected menu level, and their associated sequence number. Click a folder to navigate to that folder level of the menu hierarchy.

Content References

This grid lists the available components at the selected level of the menu hierarchy and their associated sequence number. This is the level at which the form will appear in the menu.

Note: Only the components that your assigned role permits you to access appear in the grid.

Design Form - Step 6: Approval Process Page

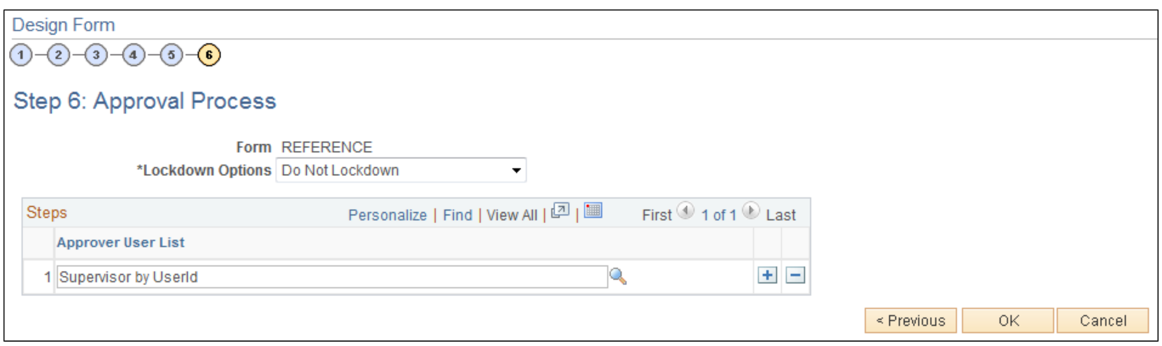
Use the Design Form - Step 6: Approval Process page (FORM_DSN_WZR_AW) to assign the approval workflow required for a form.

Navigation

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

Image: Design Form - Step 6: Approval Process page

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



Lockdown Options

Specify if a form instance can be modified after it has been submitted, and under what conditions. Values are:

- *Do not lockdown:* Select this option to allow changes to be made to the form instance at any time. This option enables users to update a form even after it has been submitted and approved.
- *Lockdown after submit:* Select this option to prevent any changes to the form instance after it has been submitted (the approval status is *Pending,* or *Approved.*)
- *Lockdown after approval:* Select this option to prevent any changes to the form instance after it has been approved (the approval status is *Approved*). Changes can still be made after it has been submitted, up until the time it is approved.

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

Approver User List

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

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

see "Defining Users for Approval Framework" (PeopleSoft 9.2: Approval Framework)

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

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

Design Form: Complete Page

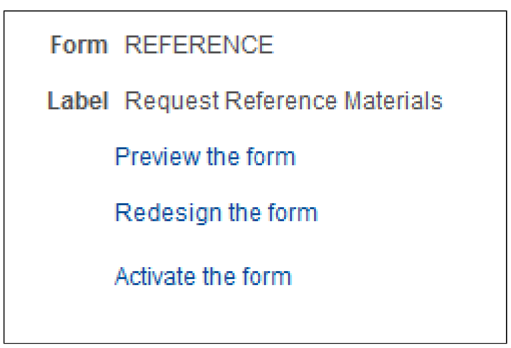
Use the Design Form: Complete page (FORM_DSN_WZR_DONE) to preview and activate or redesign a form.

Navigation

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

Image: Design Form: Complete page

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



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

Preview the form

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

Note: Enable Runtime" is necessary for ‘Preview the form’.

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Redesign the form Click to return to the Form Design Wizard component, where you can continue designing the form.

Activate the form Click to activate and publish the form. A confirmation message appears. The form status updates to *Activated.*

Defining Prompt Records

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

Page Used to Specify Prompt Records

Page Name	*Definition Name*	*Usage*
Define Prompt Records Page	FS_SD_PROMPTREC	Specify records for prompt fields.

Define Prompt Records Page

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

Navigation

Enterprise Components > Forms > Define Prompt Records

Image: Define Prompt Records page

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

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

Managing Forms

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

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Page Used to Manage Forms

Page Name	*Definition Name*	*Usage*
Manage Forms Page	FORM_RPT	Manage forms.

Understanding Form Management

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

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

Manage Forms Page

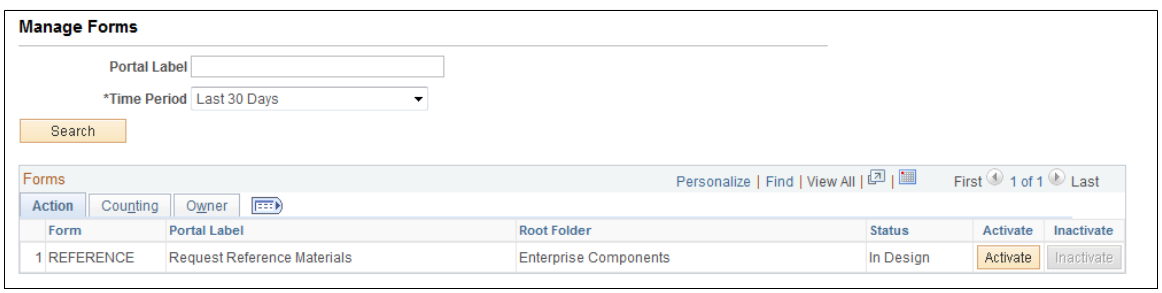
Use the Manage Forms page (FORM_RPT) to manage forms.

Navigation

Enterprise Components > Forms > Manage Forms

Image: Manage Forms page

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



Search Criteria

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

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

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Values are:

- *Custom Time Period*

  Select this option to review forms within a specific date range. Specify the dates by completing the From Date and To Date fields.

- *Last 30 Days*
- *Last 60 Days*
- *Last 90 Days*

Form Fields

These form fields appear on each tab:

Form The Form ID that was defined in the Form Design Wizard component when the form was created.

Portal Label The menu item used for the form. This is the value of the Label field that was specified on the Form Design Wizard: Basic Information page during form design.

Portal Folder The name of the folder the form is published under.

Status The form's current activation status, either *Activated* or *In Design.*

Activating/Inactivating Forms

Select the Action tab to activate or inactivate forms.

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

Inactivate Click this button to inactivate an active form.

Reviewing Form Counts

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

Total Lists the total number of form instances (forms that have been completed by form users).

Initial Lists the number of form instances that have been completed by form users, but have not yet been submitted for approval.

Pending Lists the number of form instances that have been submitted for approval but have not yet been approved, denied, or cancelled.

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Cancelled Lists the number of form instances that have been cancelled.

Approved Lists the number of form instances that have been approved.

Denied Lists the number of form instances that have been denied.

Reassigning Form Ownership

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

Owner ID Lists the current owner. To change ownership, select a new owner from the prompt list.

Change Ownership Click to assign the user listed in Owner ID as the new owner of the form.

Working with Forms

This section describes how to work with forms.

Pages Used to Work with Forms

Page Name	*Definition Name*	*Usage*
Search/Fill a Form Page	FORM_ADD	Search for an existing form instance to update, or complete a new form instance.
Form Page	FORM FORM2	Complete a form instance and submit it for approval.
<Portal label (approval preview)> Page	FORM_APPR_MAP	Preview the approval path for a form.
Instructions Page	FORM_INSTR	Review form instructions if needed.
Attachments Page	FORM_ATCH	Download and upload attachments to the form if needed.
Form Approval Page	FORM_APPR_ACTION	Approve or deny a form.

Search/Fill a Form Page

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

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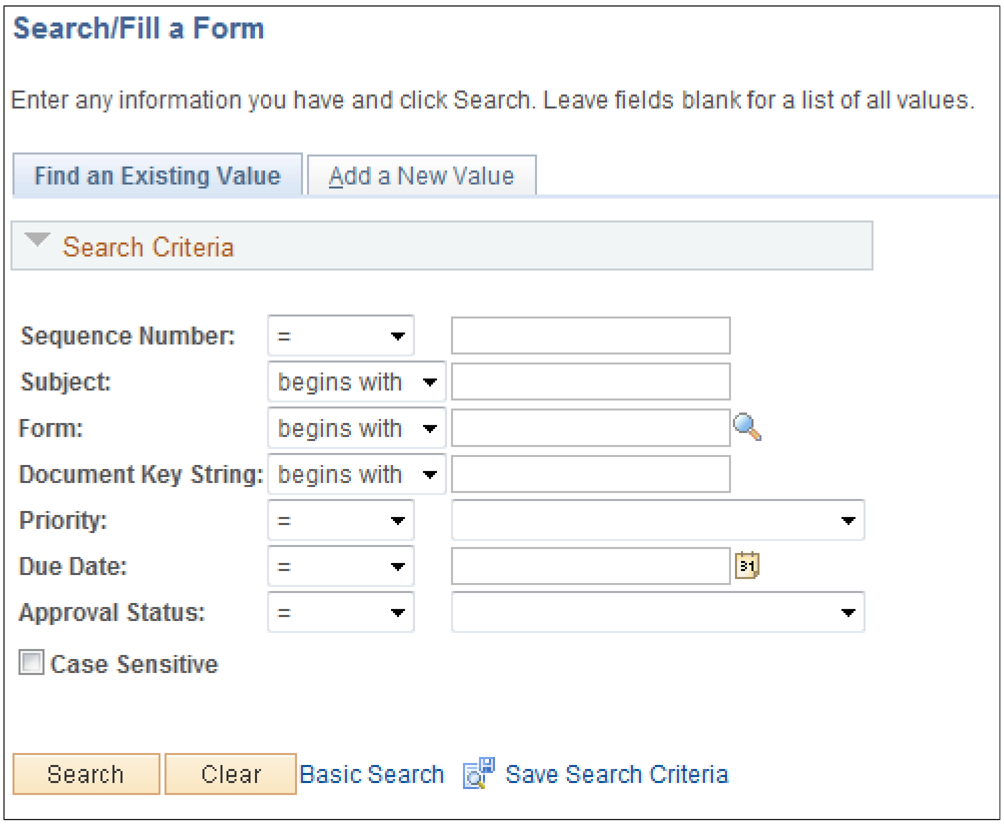
Navigation

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

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

Image: Search/Fill a Form page

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



To find an existing form instance:

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

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

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

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Form Page

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

Navigation

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

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

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

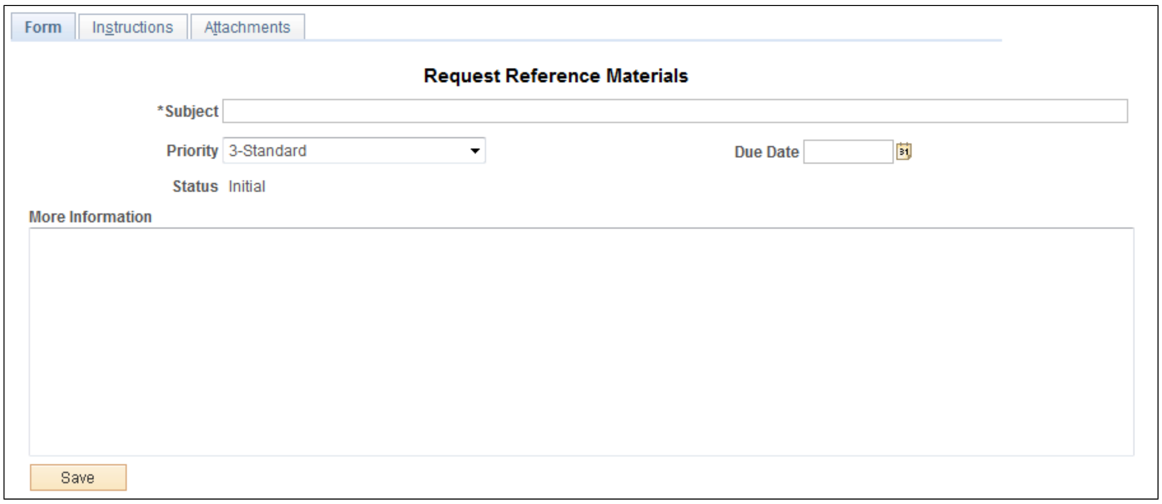

Image: Form page showing a saved form instance that is ready to submit for approval

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

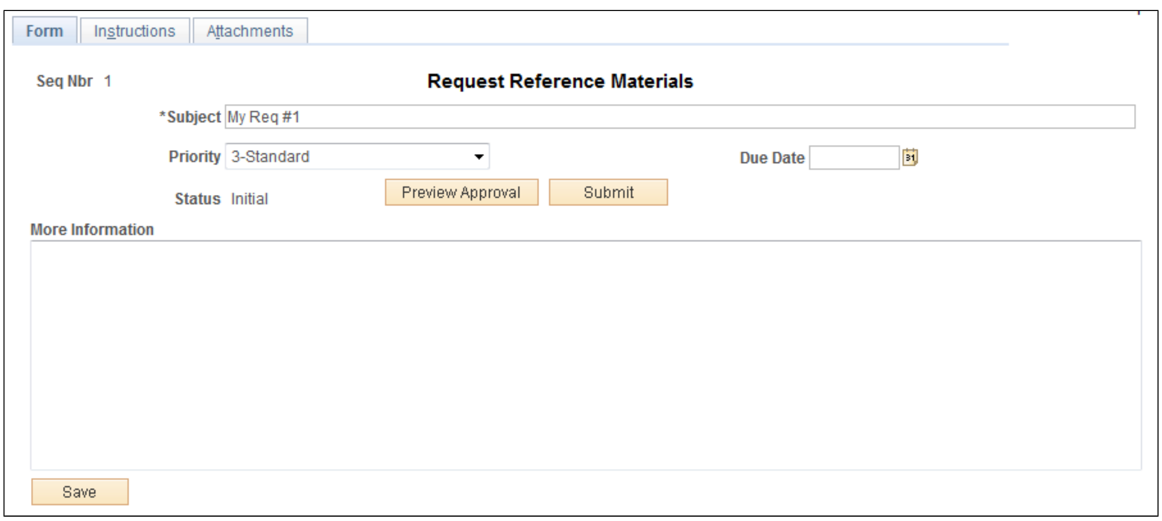

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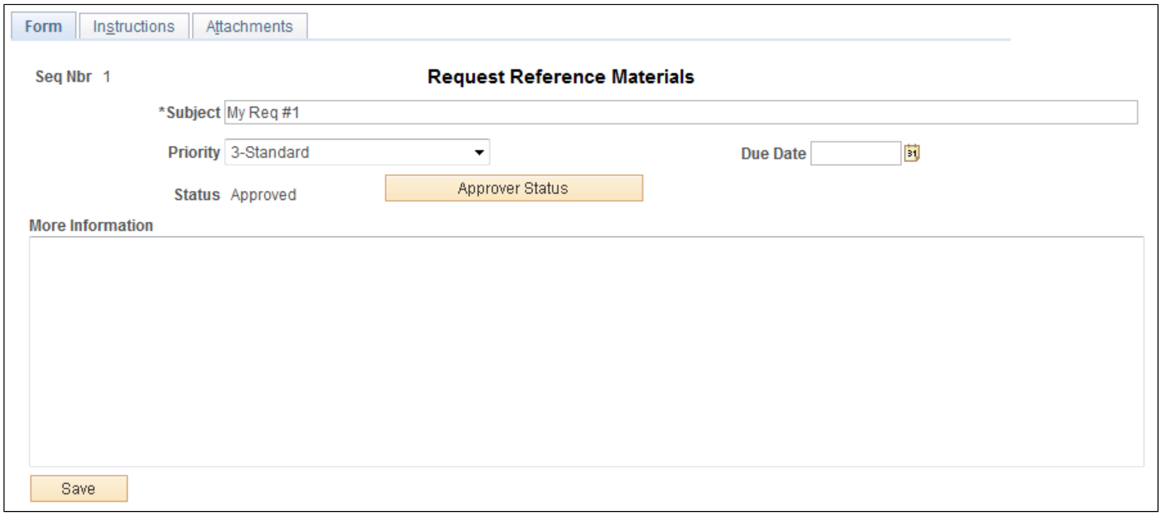
Image: Form page showing a posted integrated form instance

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



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

Seq. Nbr (sequence number)
: The system assigns a unique sequence number to identify each completed form when the form instance is saved.

Subject
: Enter a subject. Form users can search for form instances using the subject field.

Priority
: Select a priority for the form. This field is for informational purposes only.

Status
: Lists the status of the form. This value is automatically assigned.

Due Date
: Specify the date the form is required to be approved or denied. This date is for informational purposes only.

More Information
: Enter additional information for the form.

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

Approver Status
: Click to view the current approval flow for the form.

  Available for forms in Pending status.

Submit
: Click to submit the form for approval.

  Available for forms in Initial or Cancelled status.

Cancel Approval
: Click to cancel the form.

  Available for forms in Pending status. Any pending approvals are canceled.

Preview Approval
: Click to view the approval workflow.

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

Attachments

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

<Portal label (approval preview)> Page

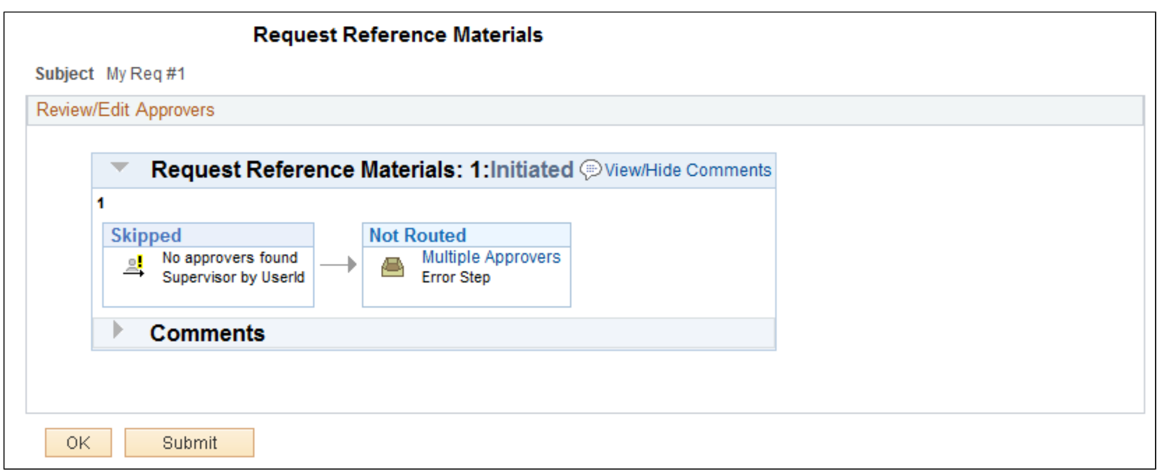
Use the <portal label (approval preview)> page (FORM_APPR_MAP) to preview the approval path for a form.

Navigation

Click the Preview Approval button on the Form page.

Image: <portal label (approval preview)> page

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



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

Click to insert additional approvers after the form has been submitted.

Note: You can only insert ad-hoc approvers.

Related Links

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

Form Approval Page

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

Navigation

Enterprise Components > Forms > Approve/Review a Form

Approvers can also access pending forms from their worklist.

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

Related Links

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

Integrating Forms with PeopleSoft Applications

This section provides an overview of form integration.

Pages Used to Integrate Forms with PeopleSoft Applications

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

Understanding Form Integration

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

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

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

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

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

Integration Framework

The forms integration framework includes the following objects:

Form to CI Collection Mapping Component (EODC_CI_MAP) (Form to Component Interface Collection Mapping Component)	The pages within this component enable you to: • Associate a form with one or more PeopleSoft application component interfaces. • Map form fields to the component interface properties. These mappings serve as input to the forms integration framework, which is used to post the form data to the PeopleSoft transactional tables, and also provides a link from the form to the transactional components. See Form to CI Collection Mapping Page.
Forms Integration Framework Application Classes	These application classes use the form to CI mappings to post form instance data to the PeopleSoft application through the component interface.
Approval Framework	Used to provide notifications and worklist entries for forms.
Security	Once a form is approved, form users with add/update access to the application component that the form is associated with (specified by the component interface it is mapped to) are able to post the form to the PeopleSoft application, using the Save & Post button that is available on the Forms page. After the form has been successfully submitted to the PeopleSoft application, no additional changes to the form are allowed.

Form Integration Implementation Steps

Integrating forms involves the following steps:

1. Determine the component in the PeopleSoft application that you want the form to integrate with.

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2. Create a component interface to use for the integration, following the guidelines provided in the Component Interface Guidelines section that follows.

   See the *Component Interface Guidelines* section in this topic.

3. Design the form using the Form Design Wizard, following the guidelines provided in Form Design Guidelines section that follows.

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

   See the *Form Design Guidelines* section in this topic.

4. Map the form to the component interface properties, using the Form to CI Collection Mapping page.

   See Form to CI Collection Mapping Page.

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

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

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

Component Interface Guidelines

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

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

  Integration may fail if the CI property is set to Read Only
- Remove all unwanted CI Properties so that you expose only those needed for the integration.
- Update the appropriate permission lists (EOFM2000 and EOFM4000, for example) to grant access to the newly created component interfaces.

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

Form Design Guidelines

Keep the following considerations in mind when designing integrated forms:

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

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

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

Form to CI Collection Mapping Page

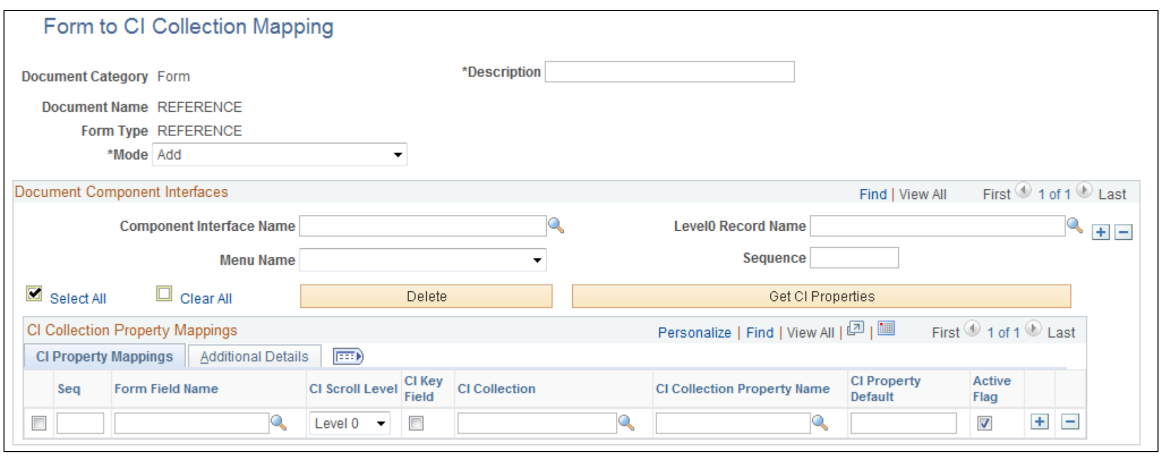
Use the Form to CI Collection Mapping page (EODC_CI_MAP) to map form fields to component interfaces.

Navigation

Enterprise Components > Forms > Form to CI Mapping

Image: Form to CI Collection Mapping page

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



Document Category	Indicates the type of document. Currently, *Form* is the only valid value.
Document Name	Select the form to map.
Description	Enter a description for the mapping.
Form Type	Automatically populates to the same value as Document Name. You cannot edit this field.

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Mode

Select the action allowed to the component when a form instance is saved. For this release, *Add* is the only permitted option.

Document Component Interfaces

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

Component Interface Name

Select the component interface to associate with the form.

Menu Name

Select the name of the registered menu item of the component interface. The value for this field is automatically populated when you specify the component interface name, but if there is more than one menu associated with the CI, then you can select the required one.

When a form user completes an instance of the form, the system transfers them to this menu item when they click Link to Related Component on the form instance.

Level0 Record Name

Select the Level0 record of the component interface to associate with the form.

Sequence

Enter a number to specify the order in which to execute the component interface. When mapping multiple component interfaces to a form, this is especially important if there are data dependencies.

Get CI Properties

Click to populate the CI Collection property Mappings grid with the values for the specified component interface. You can then remove or update any fields as required. Alternatively, you can manually add each row within the CI Collection property Mappings grid.

CI Collection Property Mappings

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

Seq (sequence)

Enter a number to specify the order in which to process the field mapping. Processing order is important because any data in a form that depends on other data must be processed after the data on which it depends is entered.

Form Field Name

Select the name of the form field to map. Only form fields with *Active* status appear in the selection list.

CI Scroll Level

Select the CI component buffer level to map the field to. Three levels are supported.

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

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(the default value currently supports only string values, therefore, it needs to be converted to the appropriate field type (Number or Date)).

Document Form References Page

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

Navigation

Enterprise Components > Forms > Document Form References

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

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

Using Forms in PeopleSoft Fluid User Interface

Use forms to automate processes that include workflow-based approvals. Forms also provide an audit trail for tracking progress. You can design forms based on your business requirements.

Note: Forms designed in the Fluid forms and approval builder are not accessible in the classic version, and vice versa. For more information on classic forms and approval builder, please refer Understanding PeopleSoft Forms and Approval Builder

For more information on Fluid Forms, refer the Video Feature Overview on PeopleSoft Fluid Forms and Approval Builder.

PeopleSoft Fluid Forms and Approval Builder

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Pages Used to Manage Forms

Page Name	***Definition Name***	***Usage***
Design Forms	EOFM_DSN_SRCH_FL	To add a form or view the forms already created
Form Designer	EOFM_DSN_FORM_FL	To create a form or edit an existing form.
My Forms	EOFM_CONTAINER_FL	To view the forms created and fill out a new form.
Add Form	EOFM_FORM_FL	To fill out a new form; or update/view a form already filled out.
Approve/Review Form	EOFM_FORM_FL	To approve or review a form submitted.

Design Forms Page

Use the Design Forms page (EOFM_DSN_SRCH_FL) to create a form or view the forms already created. You can only view forms in Activated or In Design status.

Note: User should have Form Designer role assigned to view the design forms in the Employee Self Service home page.

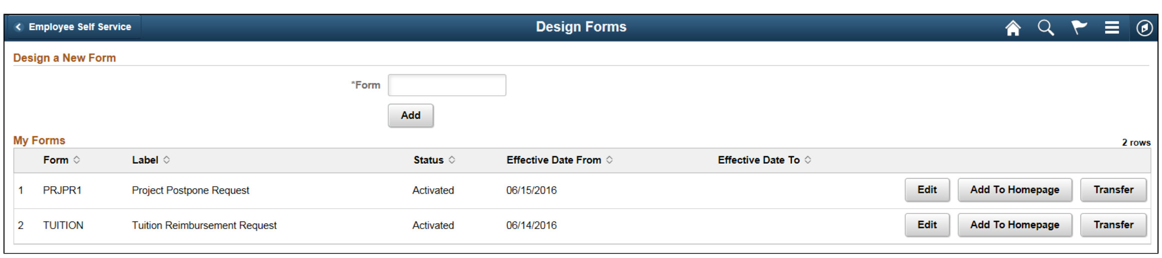
Navigation

Select the Design Forms tile on the home page.

This tile can be placed on any PeopleSoft Fluid Home page. For additional information about how to add a tile to a PeopleSoft Fluid Home page, see *PeopleTools: Application User's Guide*, Working With PeopleSoft Fluid User Interface, Working With Fluid Homepages, Managing Tiles, Adding Tiles to a Fluid Homepage documentation.

Image: Design Forms Page

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



Form Enter a unique value. The form name can contain letters, digits or underscore. System checks if the value is used by an existing form, or any other supplemental data record.

Add and **Edit** Click to display the Form Designer component.

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Add To Homepage

Click to add the selected form to the home page as a tile. You cannot have multiple tiles of the same form on the home page.

Transfer

Click to transfer the ownership of the form to another user.

Note: You can view inactive forms on the designer forms page by selecting Show Inactive Forms option in the Actions list menu.

Form Designer Page

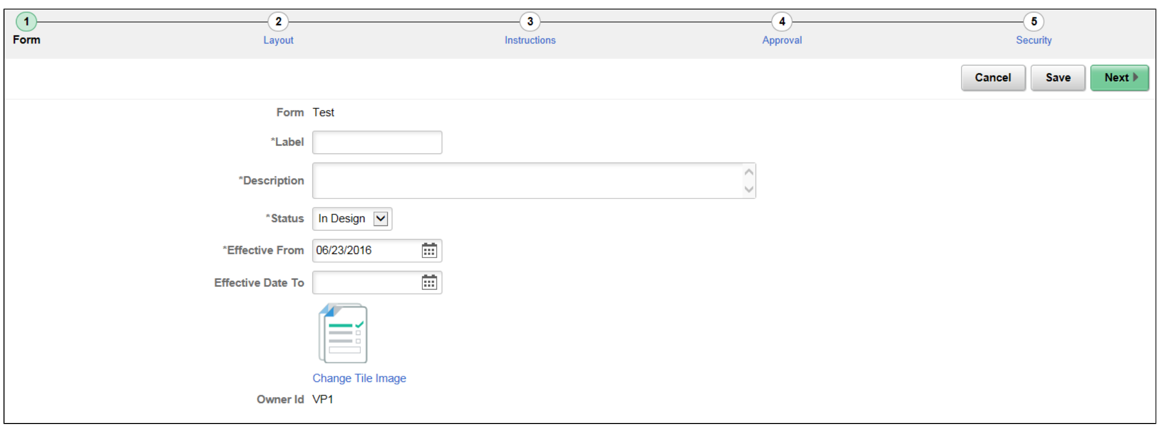
Use the Form Designer page (EOFM_DSN_SRCH_FL) to create a form or edit an existing form.

Navigation

Click Add or Edit button on the Design Forms page.

Image: Form Designer - Form Page

This example illustrates the fields and controls on the Form Designer - Form page. You can find definitions for the fields and controls later on this page.



Label

Enter a name for the design.

Status

The available status options are

- In Design
- Inactivated

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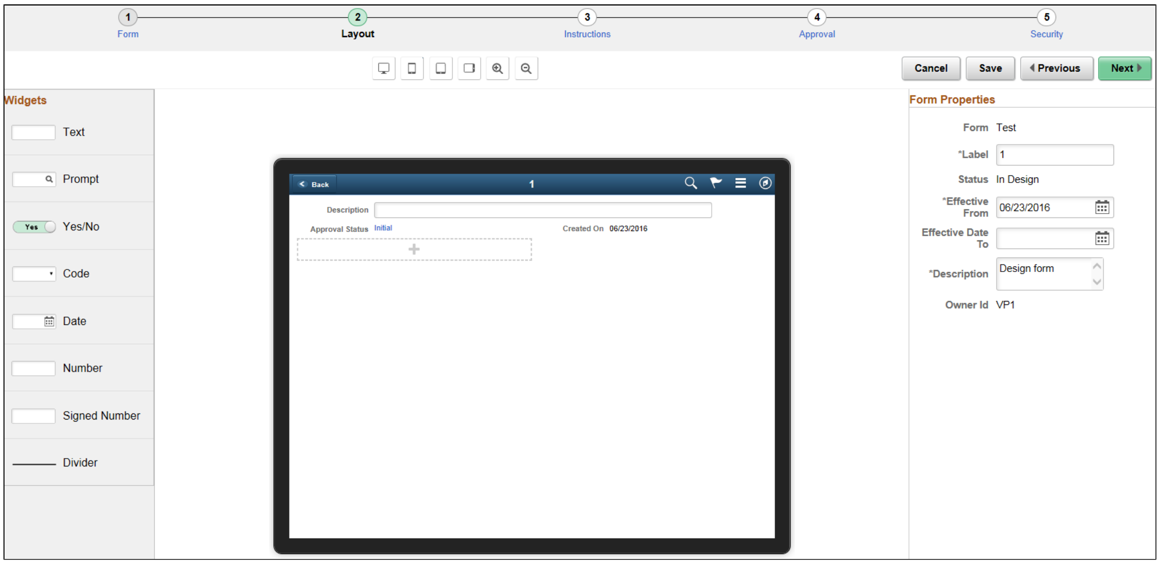
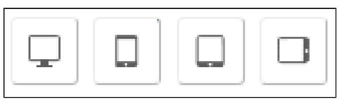
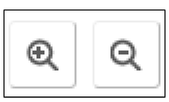
Image: Form Designer - Layout Page

This example illustrates the fields and controls on the Form Designer - Layout page. You can find definitions for the fields and controls later on this page.





Select the desired form factor from the available options. The options are: Laptop/ Desktop, Phone, Tablet Portrait and Tablet Landscape.



Select to zoom in or zoom out the design form.

Widgets

Drag and drop the desired widget to the design form field.

The widgets available are the following:

- *Text*
- *Prompt*: Allows users to select values from existing PeopleSoft records to complete the field.
- *Yes/No*
- *Code*: Allows users to build a list of values that appear in a drop-down list. Form users can select a value from the list to complete the field.
- *Date*
- *Number*
- *Signed Number*
- *Divider*: Allows users to organize the form into multiple sections.

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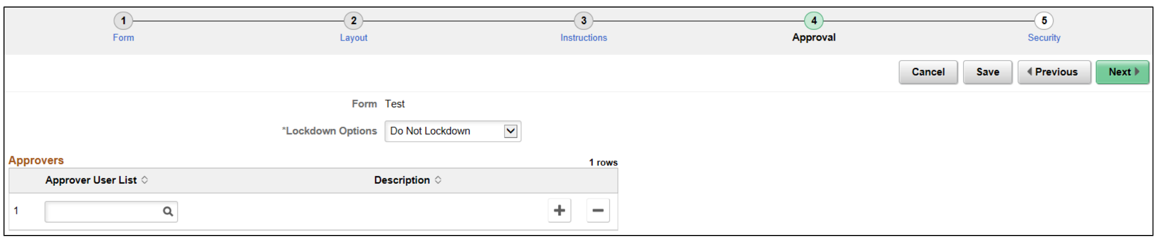
Image: Form Designer - Instructions Page

This example illustrates the fields and controls on the Form Designer - Instructions page.

Image: Form Designer - Approval Page

This example illustrates the fields and controls on the Form Designer - Approval page. You can find definitions for the fields and controls later on this page.



Lockdown Options

Select the lockdown option. The available options are:

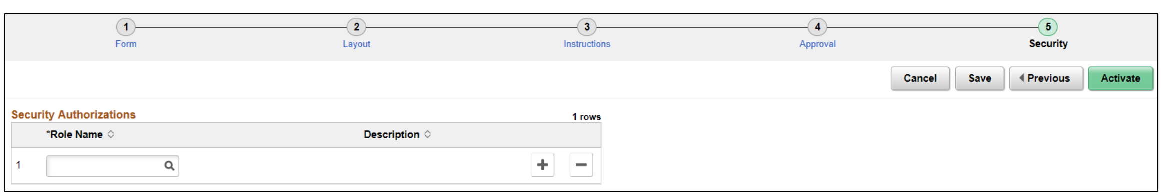
- Do Not Lockdown
- Lockdown After Approval
- Lockdown After Submit

Approver User List

Add an approver. The approver added will be synchronized with the Approval Workflow Engine (AWE) setup.

Image: Form Designer - Security Page

This example illustrates the fields and controls on the Form Designer - Security page. You can find definitions for the fields and controls later on this page.



Role Name

Add a role. The Role added here will be synchronized with the content reference defined in Portal Registry. The form controller will also check this configuration to enforce form level security.

Click to activate the form and the Design Forms page is displayed.

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Related Links

Defining Prompt Records

My Forms Page

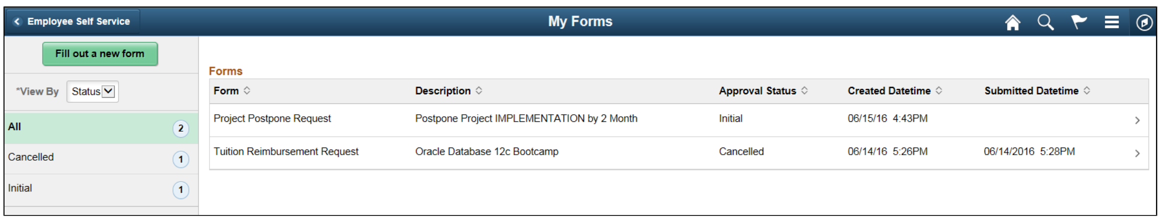
Use the My Forms page (EOFM_CONTAINER_FL) to view the forms created.

Navigation

Select the My Forms tile on the home page.

Image: My Forms Page

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



View By

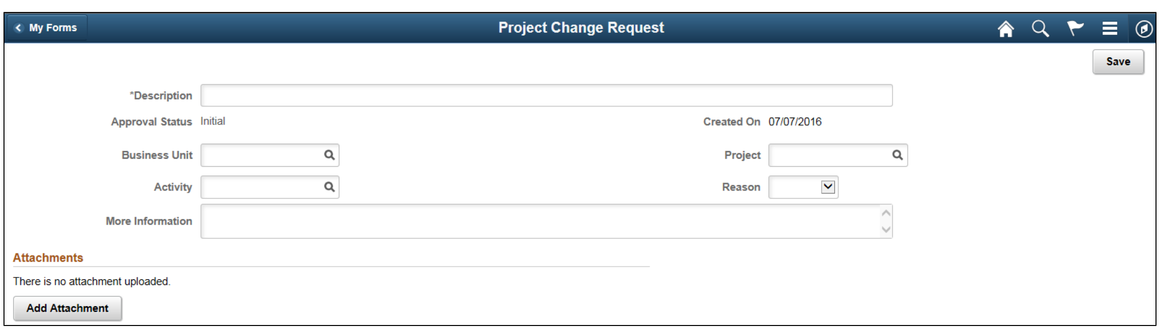
Select to sort the forms by the Approval status or Form names. The available options are: Form and Status.

Fill out a new form

Click to select and fill a form. You can view all the forms you are allowed to access.

Image: Form Page

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



Add Attachment

Click to add an attachment to the form.

Preview Approval

Click to view the approval hierarchy. The Preview Approval button appears only when you save the form.

Submit

Click to submit the form. The Submit button appears only when you save the form.

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Approve Form

Use the Approve form page (EOFM_FORM_FL) to approve or review a form submitted.

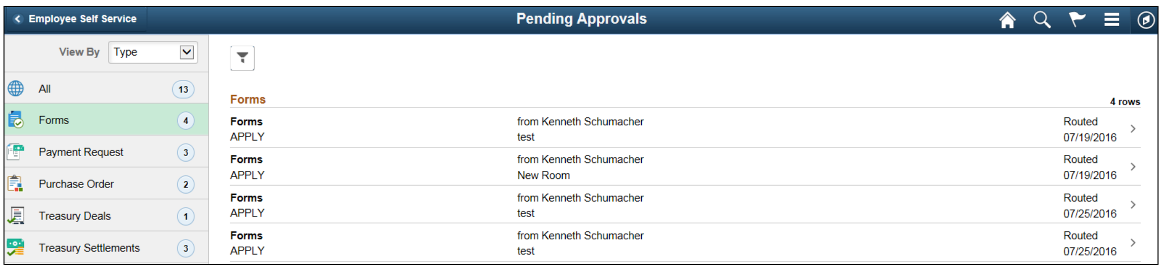
Navigation

Select the Approvals tile on the home page.

Approvers can login and click the Approvals tile on the home page to access the form to be approved. Click the Forms link on the Fluid Approvals page to list the forms to be approved or reviewed.

Image: Fluid Approvals Page

This example illustrates the fields and controls on the Fluid Approvals page.

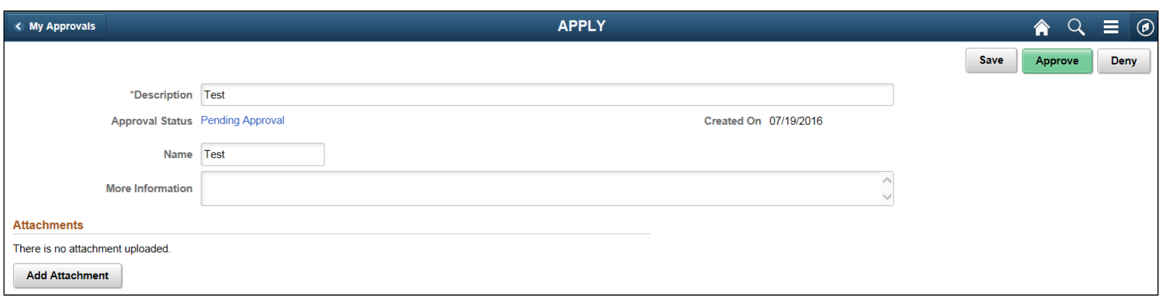


Click the required form link on the Fluid Approvals page to access the form to be approved or reviewed. Click the Approve or Deny button and enter any comments if required to submit the form and complete the approval process.

Note: Only Fluid forms are supported for fluid approvals.

Image: Approval Page

This example illustrates the fields and controls on the Approval page.



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Chapter 7

Configuring Toolbars

Understanding Toolbars

This section discusses:

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

Toolbar Elements

A toolbar contains these parts:

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

Title Area

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

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

See Toolbar Definition - Description Page.

Button Bar

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

- PeopleTools actions

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

- Custom actions

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

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- The Personalize action

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

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

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

See Toolbar Definition - Button Page.

Component-Specific Data

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

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

See Toolbar Definition - Content Page

Toolbar Footer

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

Delivered Toolbars

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

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

Delivered Toolbar Buttons

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

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

Defining Toolbar Buttons

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

Page Used to Define Toolbar Buttons

Page Name	***Definition Name***	***Usage***
Toolbar Button Definition Page	EOTL_TB_BUTTON	Define buttons for a toolbar.

Toolbar Button Definition Page

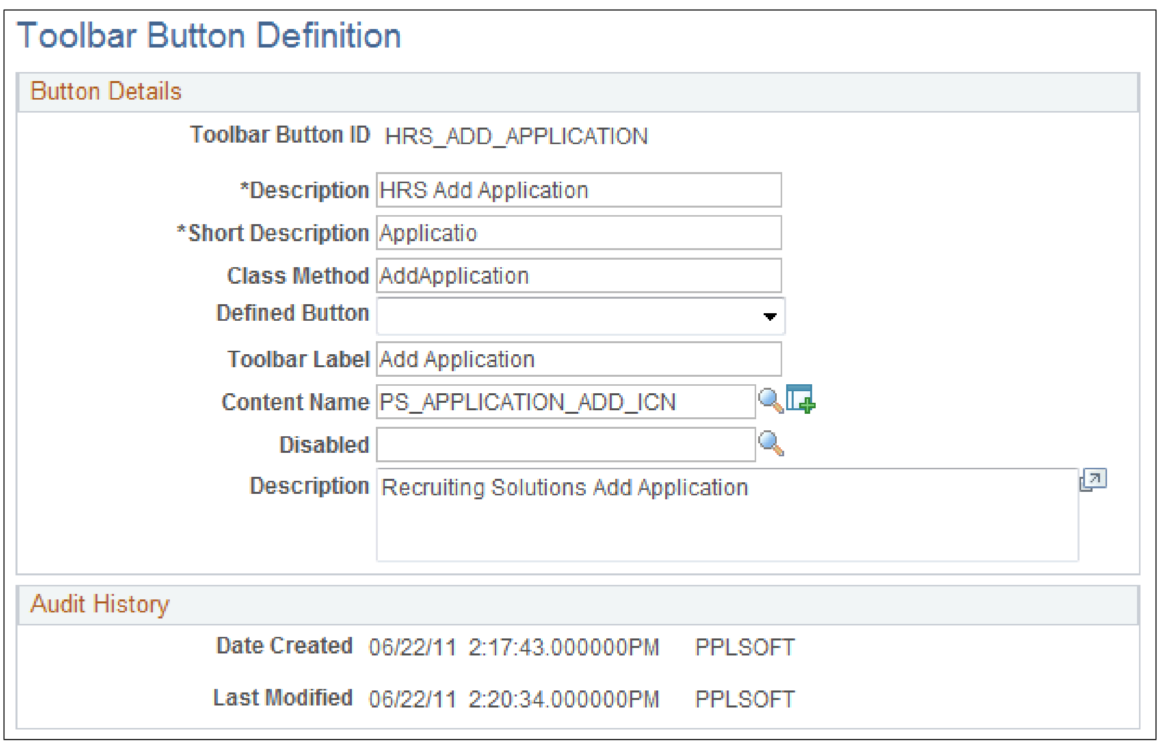
Use the Toolbar Button Definition page (EOTL_TB_BUTTON) to define buttons for a toolbar.

Navigation

Enterprise Components > Component Configurations > Toolbar > Toolbar Button Definition >Toolbar Button Definition

Image: Toolbar Button Definition page

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



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Toolbar Button ID	Displays the unique identifier of the toolbar button. This ID is referenced in PeopleCode to manipulate button properties.
Class Method	Enter the method name of the extended application class, which contains the PeopleCode that executes when a user clicks the button. This value does not contain spaces or special characters. **Note:** If you specify a value in this field, leave the Defined Button field blank.
Defined Button	Select a button value if the button is mapped to a PeopleTools-delivered action. Values are Add, CTI Phone Launch, Correction, Next Page In Component, Next in List, Previous Page In Component, Previous in List, Refresh, Related Links, Return to List, Save, Spell Check, Update/Display, and Update/Display All. These actions are the same as the similarly named PeopleTools buttons that normally appear at the bottom of a page. **Note:** If you specify a value in this field, leave the Class Field field blank.
Toolbar Label	Enter the default button label, which is used as a tool tip for the button at runtime.
Content Name	Select the default icon that appears when the toolbar button is active. Select image definitions from the PeopleSoft image catalog. To use a custom graphic, you must add it to the catalog first.
Disabled	Originally used to specify the default icon that appeared when the toolbar button is inactive. Note that inactive toolbar buttons are now hidden rather than displayed: therefore the Disabled image is not used.
Description	Enter a detailed description, such as usage and comments, about the button.

Configuring Toolbars

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

This section discusses how to configure toolbars.

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Pages Used to Configure Toolbars

Page Name	*Definition Name*	*Usage*
Toolbar Definition - Description Page	EOTL_TOOLBAR_DEFN	Define general toolbar attributes.
Toolbar Definition - Button Page	EOTL_TOOLBAR_BTNS	Configure toolbar buttons.
Toolbar Definition - Content Page	EOTL_TOOLBAR_DISP	Configure component-specific toolbar content.
Toolbar Definition - Focus Fields Page	EOTL_TOOLBAR_FFLD	Specify the default cursor position for pages.

Toolbar Definition - Description Page

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

Navigation

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

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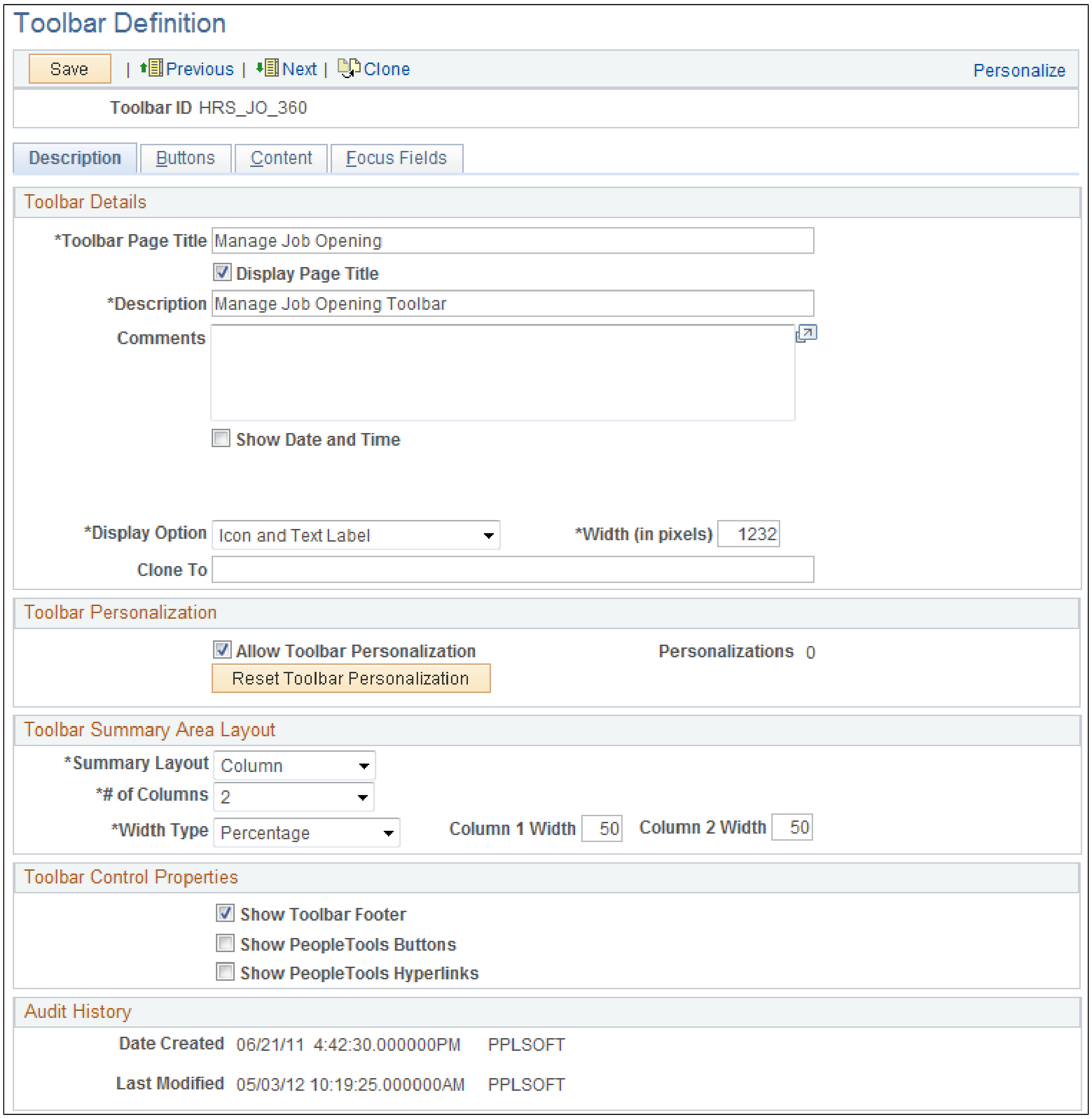
Image: Toolbar Definition - Description page

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



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

Toolbar Details

Toolbar Page Title	Enter a page title that is displayed on the left side of the page above the toolbar buttons. A page title is not a required toolbar element, but it is recommended.
Display Page Title	Select to have the page title displayed. The default state for page title is set to *On*. Page title can be set dynamically through PeopleCode.

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

Toolbar Personalizations

Allow Toolbar Personalization	Select to allow toolbar personalization.
Personalizations	Displays the number of user personalizations that the toolbar currently has. This information helps administrators to evaluate the usability of the current toolbar settings and to determine the impact that updating a toolbar has on users.
Reset Toolbar Personalizations	Click to delete any toolbar personalizations that users performed. When changes to the toolbar functionality occur, administrators can use this button to refresh users' toolbar settings.

Toolbar Summary Area Layout

Summary Layout	Select *Column* or *Row.* The summary information area will be displayed under the button bar only after a customer or contact has been selected. Depending on the application, the

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

Toolbar Control Properties

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

Toolbar Definition - Button Page

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

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

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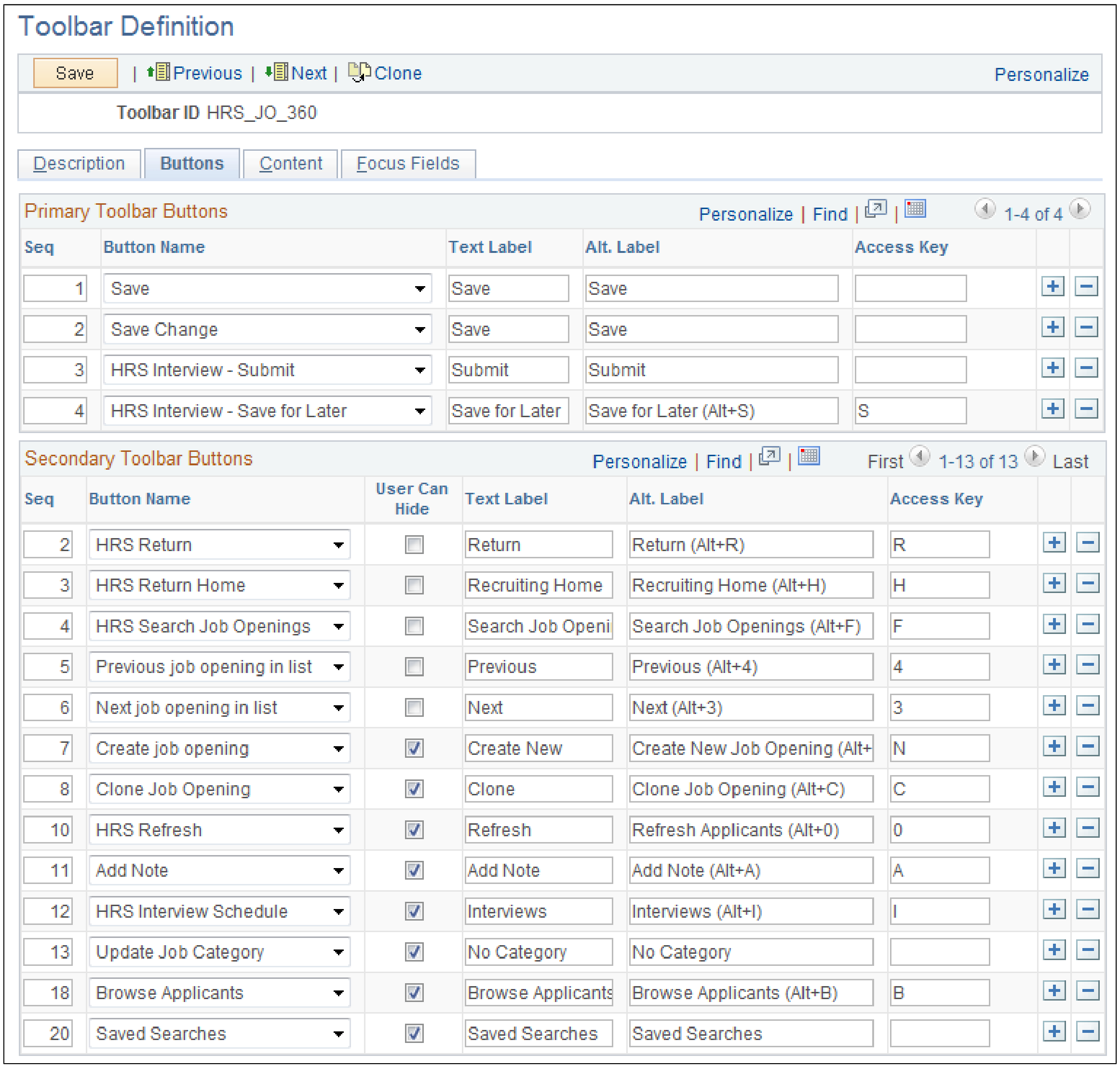
Image: Toolbar Button Definition - Buttons page

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



Seq (sequence)	Enter sequence numbers to determine the order of the toolbar buttons.
Button Name	Select the button to place on the toolbar. Buttons that perform custom actions cannot necessarily be shared between components because these actions can be component-specific. Use the separator image (a vertical line) as needed to group buttons.
User Can Hide	Select to allow users to show or hide the button from the toolbar on the Personalize Toolbar page. You may not want to give users the ability to manipulate the visibility of some basic yet important toolbar functions, such as Save or Add. In this case, clear the check box of these buttons.

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	These buttons become required buttons that users cannot manipulate on the Personalize Toolbar page. They always show up in the toolbar.
Text Label	Specify the text that is displayed on the button (for primary toolbar buttons) or next to the button (for secondary toolbar buttons) if the toolbar is configured to show both button icon and text.
Alt. Label (alternate label)	Enter the text that users can see if they put the mouse over the button.
Access Key	If you enter an access key, the keyboard shortcut Alt + *access key* brings the system focus to the associated button. You must terminate the access key with the enter key to execute the toolbar button function associated with the hotkey. Access key is disabled in toolbar footers.

Toolbar Definition - Content Page

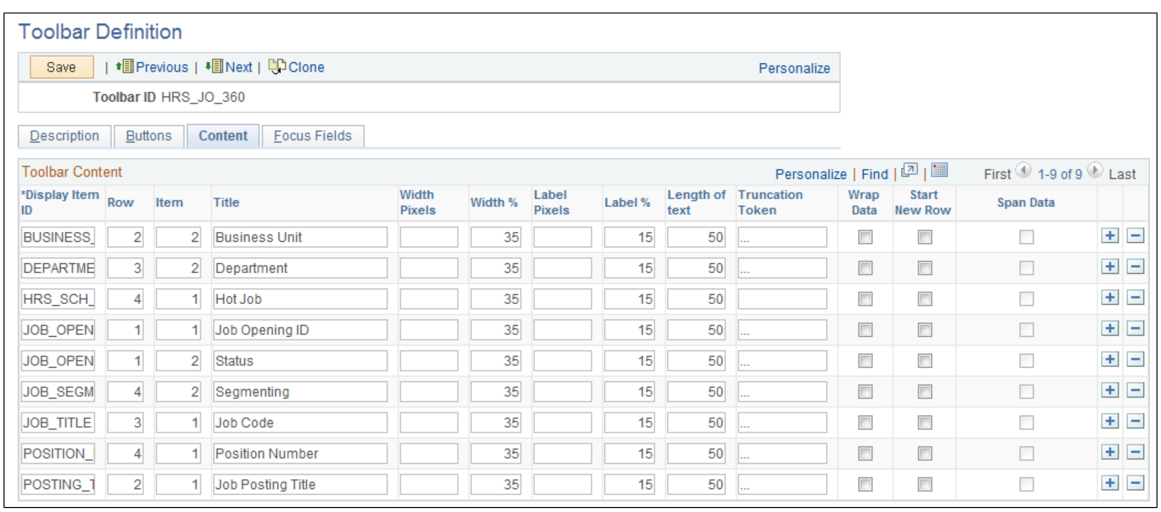
Use the Toolbar Definition - Content page (EOTL_TOOLBAR_DISP) to configure component-specific toolbar content.

Navigation

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

Image: Toolbar Definition - Content page

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



Display Item ID	Enter the ID of the data to appear on the toolbar. The ID and the data that it references come from an array that component PeopleCode populates.

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

Toolbar Definition - Focus Fields Page

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

Navigation

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

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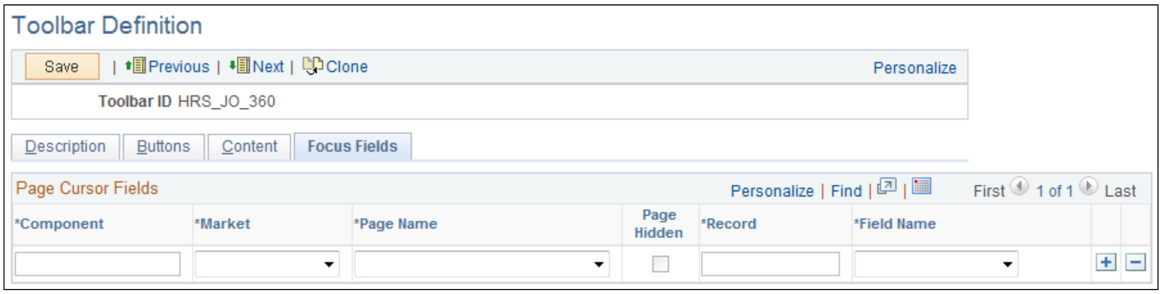
Image: Toolbar Definition - Focus Fields page

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



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

Component, **Market**, and **Page Name**

Enter the component and market of the page in which the selected toolbar definition is referenced. The component you enter determines the drop-down values for page names.

Record and **Field Name**

Enter the record where the focus field resides and the focus field itself. The record you enter determines the drop-down values for field names.

Multiple fields on the same page can be defined. This is useful when you want to set the cursor on a different field when the user enters the page in a different type of transaction mode. The toolbar always puts the cursor to the first editable, available field on the page.

Viewing the Toolbar at Runtime

Access any PeopleSoft page that uses the toolbar.

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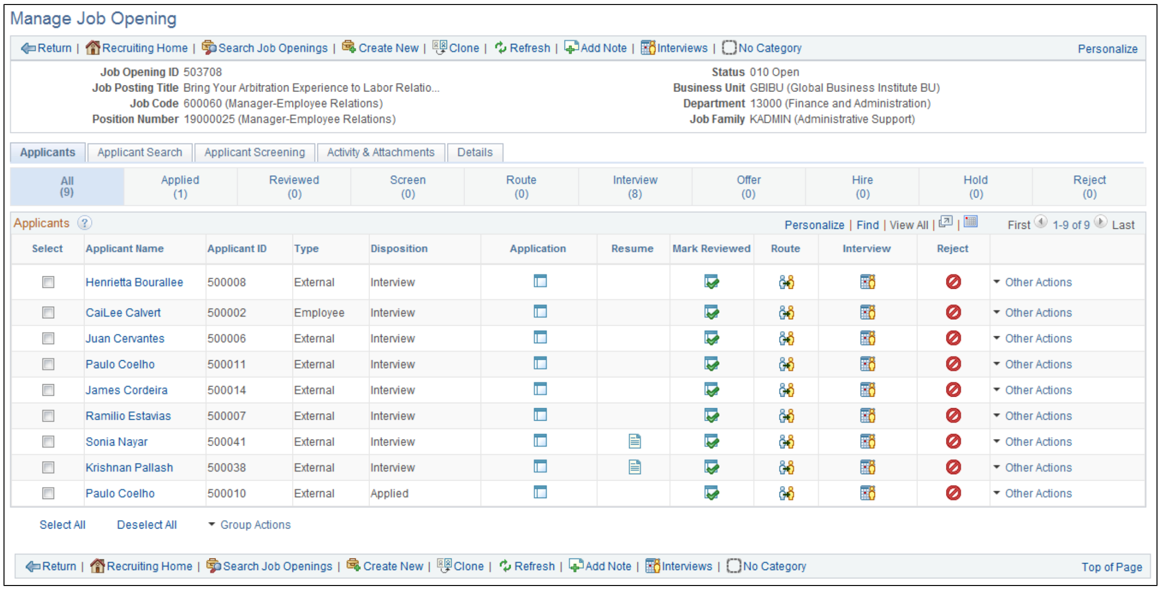
Image: Toolbar used on the Manage Job Opening page (HRS_JO_360)

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



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

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

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

Personalizing Toolbars

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

This section discusses how to set toolbar preferences.

Page Used to Personalize Toolbars

Page Name	***Definition Name***	***Usage***
Personalize Toolbar Page	EOTL_TB_USER_PRSN	Set toolbar preferences.

Personalize Toolbar Page

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

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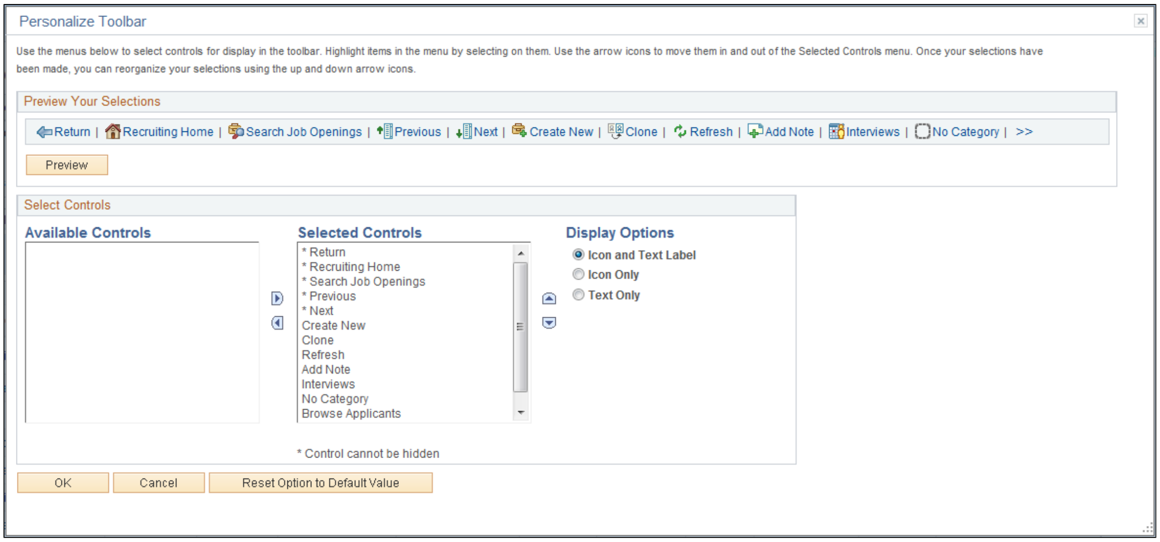
Navigation

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

Image: Personalize Toolbar age

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



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

Select Controls

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

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

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

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Chapter 8

Working with the PeopleSoft Fluid User Interface

Understanding the PeopleSoft Fluid User Interface

This overview discusses the PeopleSoft Fluid User Interface.

The PeopleSoft Fluid User Interface

Oracle's PeopleSoft has two user interfaces

- PeopleSoft Classic User Interface, which was designed to be used on a laptop and desktop. This interface was previously know as PIA (PeopleSoft Internet Architecture).
- PeopleSoft Fluid User Interface, which was designed to be used on mobile devices, but can also be used on a laptop and desktop. Oracle delivers fluid pages for a variety of PeopleSoft self-service transactions across its various modules.

PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

- *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.
- *PeopleTools: Fluid User Interface Developer's Guide*

Fluid Transactions and Conditional Navigation

If a user on a mobile device navigates to a transaction for which a fluid page exists, the fluid page appears regardless of whether the user navigated using a home page tile or the classic menu structure. For example, when users on mobile devices use the classic menu to view their paychecks, the system automatically displays the Pay fluid page rather than the View Self-Service Paycheck classic page. The logic that displays a fluid page when a user navigates from the classic menu is known as conditional navigation. Conditional navigation is also the mechanism that displays the fluid home when users initially access the system on a mobile device.

Note: The user needs to have the appropriate Fluid role to be transferred to the Fluid page. If a user on a desktop or laptop accesses a fluid home page and taps a tile, conditional navigation logic does not redirect the users to a classic page.

Understanding Banners in PeopleSoft Fluid User Interface

A standard banner appears at the top of every fluid page. The banner includes the page title and some standard buttons. They appear differently for phone and tablet devices.

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PeopleSoft Fluid User Interface Banner for Tablets

Image: Example of the page banner for the tablet

This example illustrates the fluid page banner for the tablet.

The banner on the tablet will display the following for all pages:

Back Button	The Back button with text indicates the last page the user was on.
Page Title	This displays the name of the current Fluid User page.
Home Icon	Takes you to your home page.
Search Icon	Enables you to search.
Alerts Icon	Tap to view actions and alerts in a notifications window.
Actions Icon	Tap to see a list of available actions for the current window. Access pages to personalize home page content or sign out.
NavBar Icon	Tap to expand the NavBar window, where you can select window content from options, such as Recent Places, My Favorites, Navigator, My Preferences, and Fluid Home. Tap again to collapse the NavBar window.

PeopleSoft Fluid User Interface Banner for Smartphones

Image: Example of the page banner for the smartphone

This example illustrates the fluid page banner for the smartphone.

The typical banner on a phone displays the following:

Back Button	This is a icon with only an image and takes you to the last page that you were on.
Page Title	This displays the name of the current Fluid User page.
Alerts Icon	Tap to view actions and alerts in a notifications window.
Menu Icon	Tap to access Pending Approvals, History and other Fluid User Interface menu items like Home, About, Sign Out.

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Using the PeopleSoft Fluid User Interface to Work with Approvals

This topic discusses the various mobile approval options in the PeopleSoft Fluid User Interface. The Mobile approval options are displayed as per the configurations set in the Mobile Approval Options component.

Note: To enable a user to receive PeopleSoft Fluid User Interface for approvals, the user should be a member of the Approvals Fluid role. See Mobile Approval Installation document on My Oracle Support (support.oracle.com), note number 1990593.1.

Understanding PeopleSoft Fluid User Interface to Work with Approvals

PeopleSoft Fluid User Interface is designed for users to access PeopleSoft pages using multiple form factors:

- SFF: Small Form Factor, such as smart phones.
- MFF: Medium Form Factor, such as tablets.
- LFF: Large Form Factor, such as some tablets, laptops, and desktops.

Note: PeopleSoft Mobile Approvals uses the Approval Workflow Framework as configured for the specific application. Make sure that the Approval Workflow Framework has been enabled and configured properly for each application before implementing Mobile Approvals for the transactions.

Pages Used to Configure the Mobile Approval Options

Page Name	***Definition Name***	***Usage***
Mobile Approval Options - General Settings Page	HMAP_MBL_TYPE_SET	Configure the general settings for Mobile Approvals.
Mobile Approval Options - Transactions Page	HMAP_MBL_TYPE_SET2	Configure the transaction settings for Mobile Approvals.

Mobile Approval Options - General Settings Page

Use the Mobile Approval Options page (HMAP_MBL_TYPE_SET) to set the general options for mobile approvals.

Navigation

Enterprise Components >Approvals >Approvals >Mobile Approval Options

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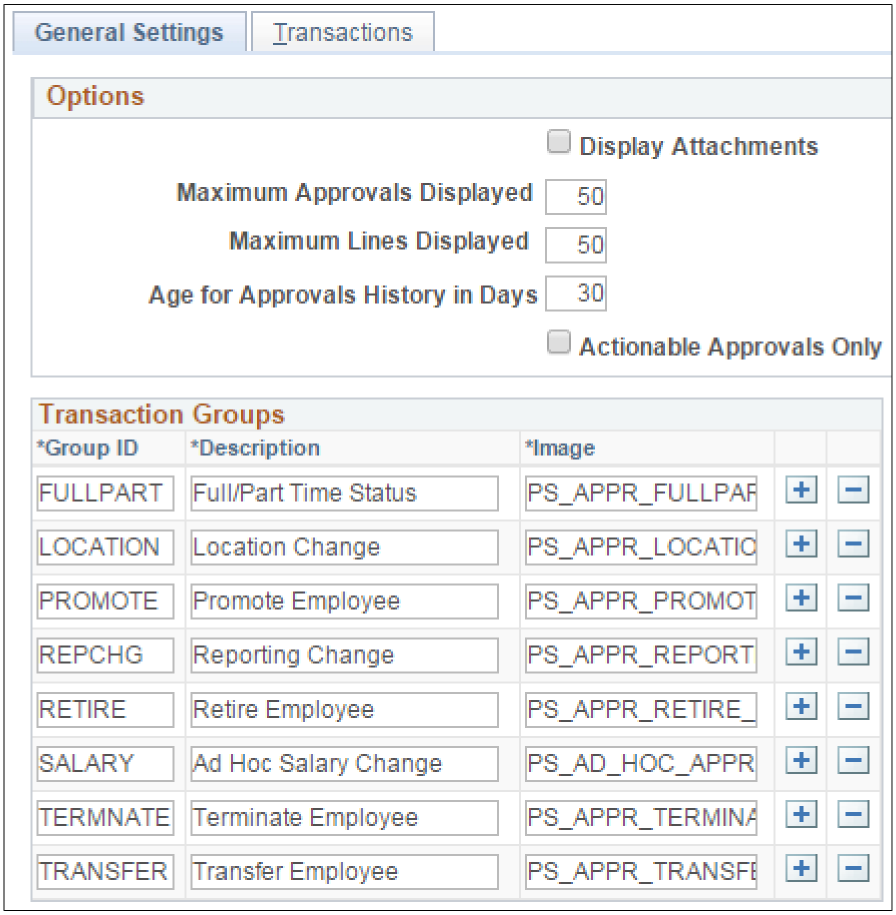
Image: Mobile Approval Options - General Settings page

This example illustrates the fields and controls on the Mobile Approval Options - General Settings page.



Display Attachments

Select to allow, at the enterprise level, approvers to view attachments. If you select this option, you must also select a process scheduler server for the Process Server field with proper distribution node setup.

Note: Attachments are not available for all transactions.

Maximum Approvals Displayed

The maximum number of approvals to be displayed in Mobile Approvals for each transaction type that is activated in the Transactions tab.

Maximum Lines Displayed

The maximum number of approval lines to be displayed for each transaction that contains approvals at the line level.

Age of Approvals History in Days

The number of days prior to today's date to include when displaying approval history.

Actionable Approvals Only

Select to view only those transactions that require your approval action.

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Note: These three approval options (Maximum Approvals Displayed, Maximum Lines Displayed, and Age of Approvals History in Days) can be synchronised between multiple pillars. For example, If you have configured multiple systems, such as HCM and FSCM for mobile approvals, changes made to these options from any one system are propogated to other systems when the Mobile Approval Options page is saved. To do this, enable the service operation HMAP_GEN_OPTIONS in PeopleTools, Integration Broker, Integration Setup, Service Operations.

Group ID	Unique ID for the Transaction group.
Description	Name for the group which is displayed in Mobile Approvals
Image	The image associated with the group to display in Mobile Approvals.

Mobile Approval Options - Transactions Page

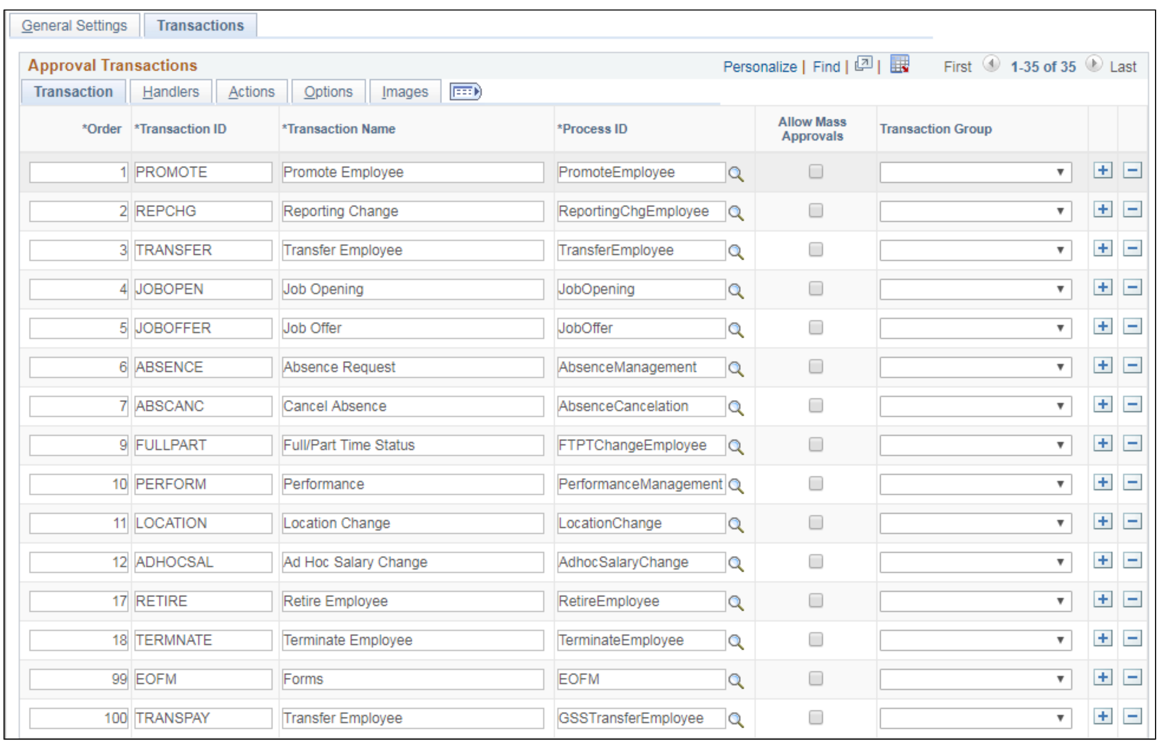
Use the Mobile Approval Options — Transactions page (HMAP_MBL_TYPE_SET2) to set the transaction options for mobile approvals.

Navigation

Enterprise Components >Approvals >Approvals >Mobile Approval Options >Transactions

Image: Mobile Approval Options - Transactions page: Actions tab

This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Transaction tab



*Order	*Transaction ID	*Transaction Name	*Process ID	Allow Mass Approvals	Transaction Group
1	PROMOTE	Promote Employee	PromoteEmployee		
2	REPCHG	Reporting Change	ReportingChgEmployee		
3	TRANSFER	Transfer Employee	TransferEmployee		
4	JOBOPEN	Job Opening	JobOpening		
5	JOBOFFER	Job Offer	JobOffer		
6	ABSENCE	Absence Request	AbsenceManagement		
7	ABSCANC	Cancel Absence	AbsenceCancelation		
9	FULLPART	Full/Part Time Status	FTPTChangeEmployee		
10	PERFORM	Performance	PerformanceManagement		
11	LOCATION	Location Change	LocationChange		
12	ADHOCSAL	Ad Hoc Salary Change	AdhocSalaryChange		
17	RETIRE	Retire Employee	RetireEmployee		
18	TERMNATE	Terminate Employee	TerminateEmployee		
99	EOFM	Forms	EOFM		
100	TRANSPAY	Transfer Employee	GSSTransferEmployee		

Order	Enter a display order for each transaction ID.

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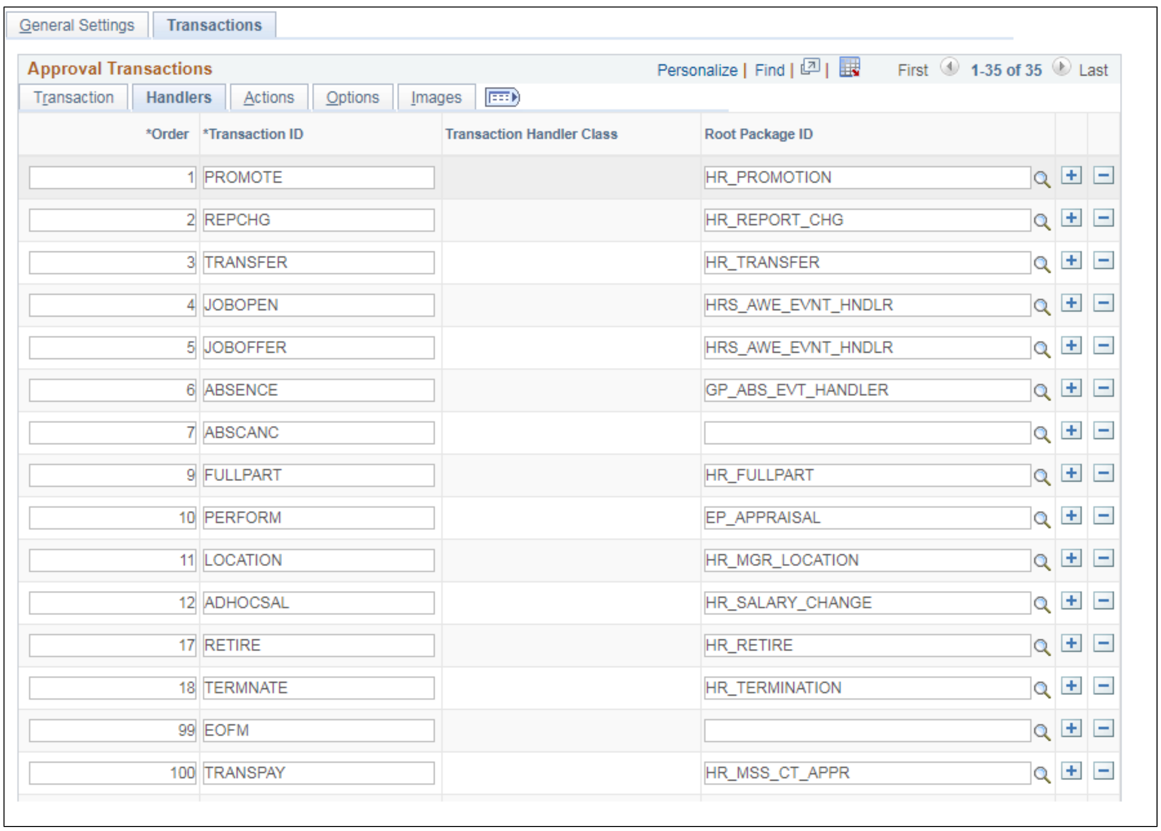
Transaction ID — Select the Transaction ID(s) to enable for the Mobile Approvals application.

Allow Mass Approvals — Indicates whether or not users can select multiple transactions in the list when viewing by type and perform approval action against all of them. Users can allow mass approvals for all or only for some of the transactions in the same transaction group.

Transaction Group — This is an optional field. It allows user to add multiple transactions into a group (as defined on General Settings tab) to display them together in the transaction list.

Image: Mobile Approval Options - Transactions page: Handlers tab

This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Handlers tab.



Root Package ID — The application package that holds the DataHandler, DetailDocuement and SubPage classes for the transaction.

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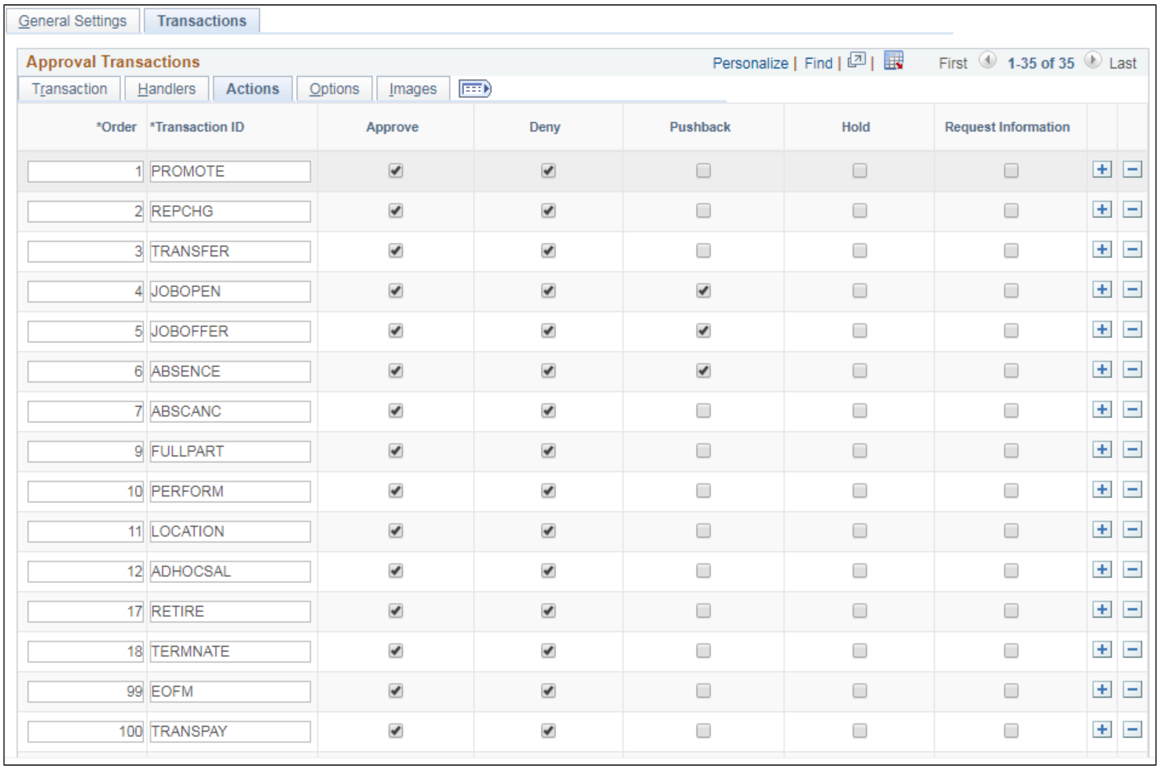
Image: Mobile Approval Options - Transactions page: Actions tab

This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Actions tab.


General Settings | Transactions

Approval Transactions — Personalize | Find | First 1-35 of 35 Last

Transaction | Handlers | Actions | Options | Images

*Order	*Transaction ID	Approve	Deny	Pushback	Hold	Request Information
1	PROMOTE	✔	✔	☐	☐	☐
2	REPCHG	✔	✔	☐	☐	☐
3	TRANSFER	✔	✔	☐	☐	☐
4	JOBOPEN	✔	✔	✔	☐	☐
5	JOBOFFER	✔	✔	✔	☐	☐
6	ABSENCE	✔	✔	✔	☐	☐
7	ABSCANC	✔	✔	☐	☐	☐
9	FULLPART	✔	✔	☐	☐	☐
10	PERFORM	✔	✔	☐	☐	☐
11	LOCATION	✔	✔	☐	☐	☐
12	ADHOCSAL	✔	✔	☐	☐	☐
17	RETIRE	✔	✔	☐	☐	☐
18	TERMNATE	✔	✔	☐	☐	☐
99	EOFM	✔	✔	☐	☐	☐
100	TRANSPAY	✔	✔	☐	☐	☐

Select the approval Actions that are visible as push buttons in mobile approvals in PeopleSoft Fluid User Interface.

Note: The approval transaction handler must support the transaction.

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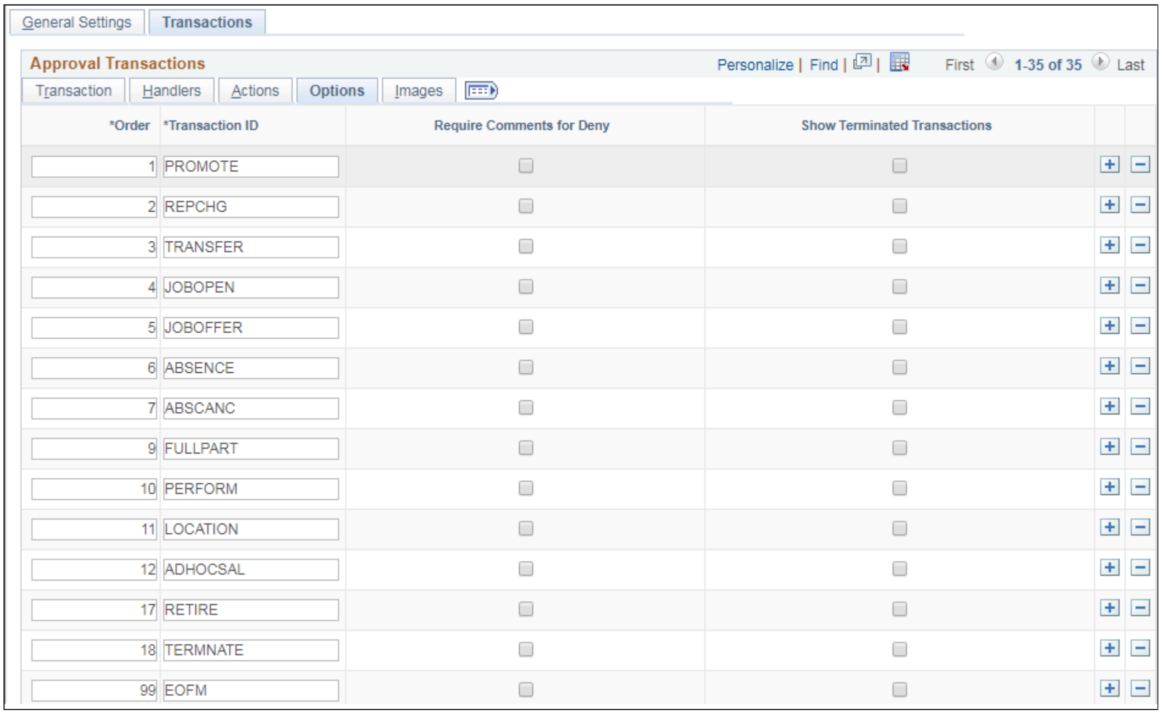
Image: Mobile Approval Options - Transactions page: Options tab

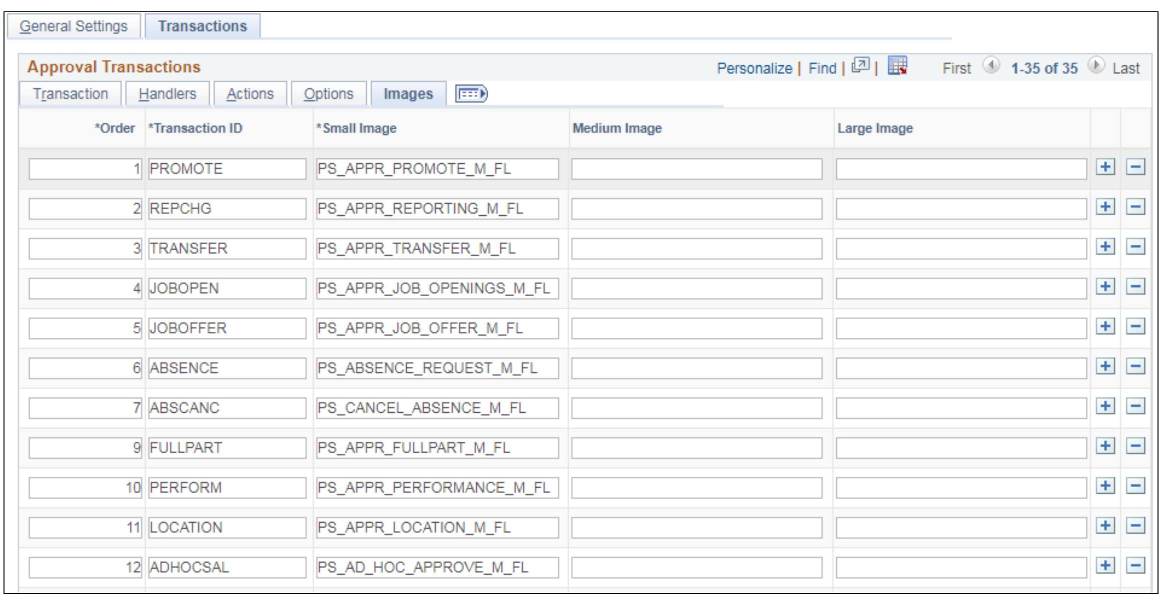
This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Options tab.



Require Comments for Deny	Make it mandatory to enter comments if the action is Deny.
Show Terminated Transactions	Include terminated transactions in the Transaction History.

Image: Mobile Approval Options - Transactions page: Images tab

This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Images tab.



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Small Image field is required by Approvals in PeopleSoft Fluid User Interface. This is the image displayed in the transaction list for the associated transaction.

Pages Used for PeopleSoft Fluid User Interface Mobile Approvlas

Page Name	***Usage***
Approvals Tile	Review pending and historical approval requests that are associated with the logged-in manager.
Pending Approvals Page	Lists pending approval requests requiring the attention of the logged-in manager.
Pending Approvals - <Transaction Details> Page	Review the approval request details, enter a comment, and approve, deny, or push back the request.
Approvals History Page	Lists approvals you have worked on in the past.
Administer Approvals Page	Approval Administrators can view Approvals and take action on pending approvals.

Approvals Tile

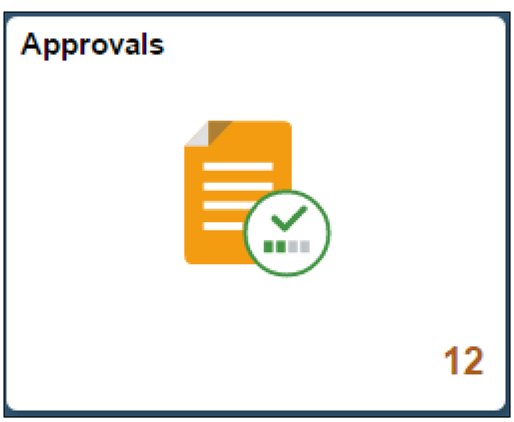
Use the Approvals tile (HMAP_APPR_TILE_FL) to review pending and historical approval requests that are associated with the logged-in manager.

Navigation

Select Fluid Home under the main menu. On the page that appears, select Manager Self Service. The Approvals tile is available on the Manager Self Service landing page. As a manager, you can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

Image: Approvals Tile

This is an example of the Approvals tile that appears on the Manager Self-Service home page.



The tile shows the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

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Pending Approvals Page

Click the Approvals tile to access the Pending Approvals page without using traditional menu navigation to review and approve different transactions.

Navigation

Click the Approvals tile on the Manager Self Service home page.

Image: (Tablet) Pending Approvals page

This example illustrates the fields and controls on the Pending Approvals page for the tablet.

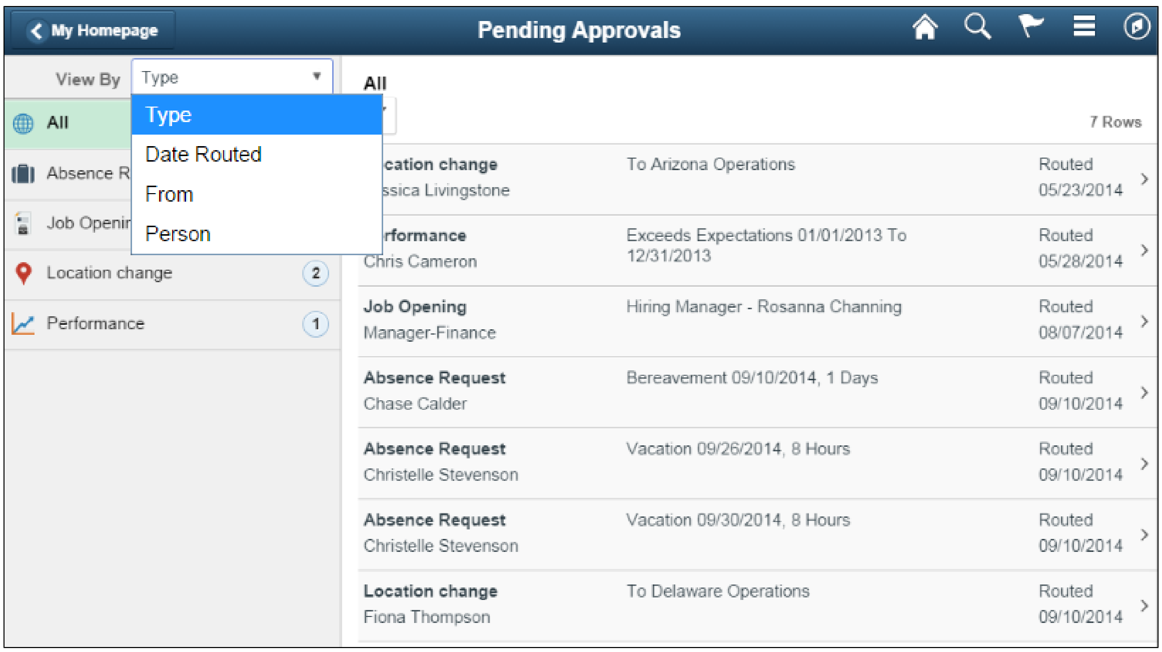

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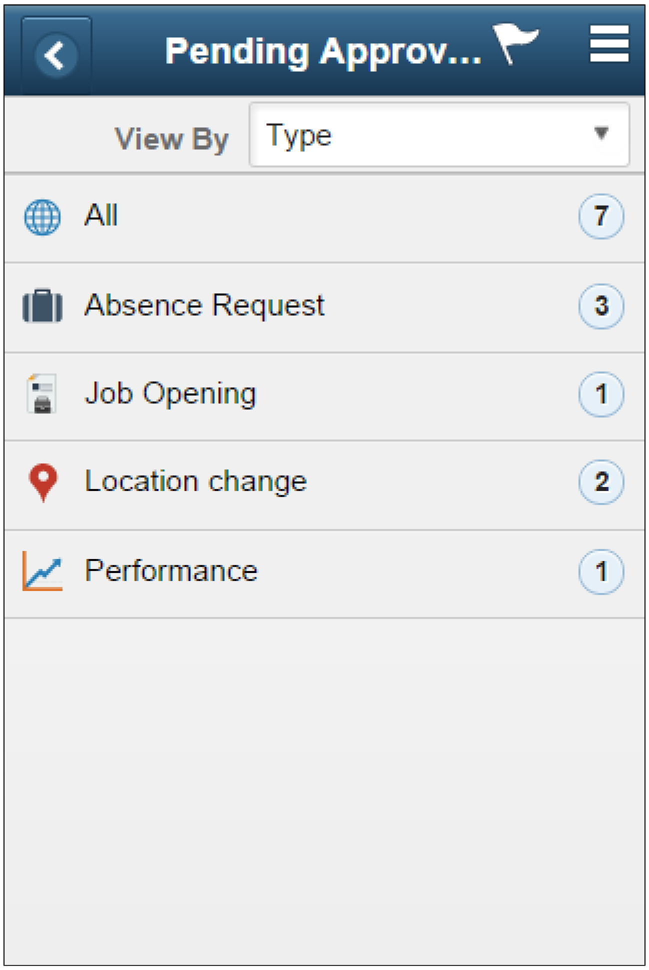
Image: (Smartphone) List of transaction categories on the Pending Approvals page

This example illustrates the list of transaction categories on the Pending Approvals page for the smartphone.



Both Landscape and Portrait views are supported on a tablet. The approvals landing page has two panels in landscape mode and the left panel is locked in place and is not collapsible. The left panel defaults to the Type grouping with the All category selected and the right panel displays all pending approvals in the user's queue sorted by the date/time on which they were received with the oldest one displayed first. The right panel title displays the name of the selected category. The number of rows are displayed at the top-right of the list and a filter button is displayed to the top-left of the list.

In Portrait mode, the left panel is hidden and only the right panel is displayed as a full page. The left panel can be invoked as an overlay. Even though the left panel is hidden, the All category of the Type grouping will be defaulted. The page in portrait mode displays all pending approvals in the approver's queue.

Viewing Pending Approvals Summary

On a Phone, when a user launches Approvals, the user is presented with list of pending approvals grouped by transaction type. The page title will be Pending Approvals. The user can view approvals that are in a Pending status for them.

Pending Approvals can be categorized in 5 views:

1. Type (default view)

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2. Date Received
3. Priority (not available in HCM)
4. Person (not available in FSCM)
5. From

The user can switch between the different groupings by selecting a grouping from the grouping drop-down. Priority and Person grouping are not applicable to all transactions. If none of the transactions in an approver's pending approvals queue has a priority or person associated, the grouping will not be displayed in the drop-down.

When the user clicks on any category on the left panel, the right panel is refreshed with pending approvals for the selected category. The panel title on the right panel reflects the selected category. A user can filter the list of approvals by clicking on the grid filter icon. The Filter window gives the following filter options:

Type	Drop-down displaying transaction types that the user has pending approvals for.
Priority	Drop-down displaying priorities that the user has pending approvals for. One of the values will also be "No Priority Associated". Priority is not available in HCM.
Received	Drop-down displaying the date groupings that the user has pending approvals for – applicable values from This Week, Last Week, 2 Weeks Ago, Older.
From	Drop-down displaying the last sender for each approval. The last sender could be either the last approver in the approval chain or the requestor of the transaction if the current approver is the first approver in the chain.
Person	Drop-down displaying a list of persons that the user has pending approvals for. One of the values may be "No Person Associated" if there are approvals that are not related to a person (example, Job Opening).

Each Pending Approvals row on the right panel will display the information about the approval request in 3 columns.

Column 1	This column displays the Transaction Name and the Object Name for this transaction (Person, Position etc.)
Column 2	This column displays the Transaction Summary and Priority (if applicable).
Column 3	This column displays the date on with the approval was received.

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Pending Approvals - <Transaction Details> Page

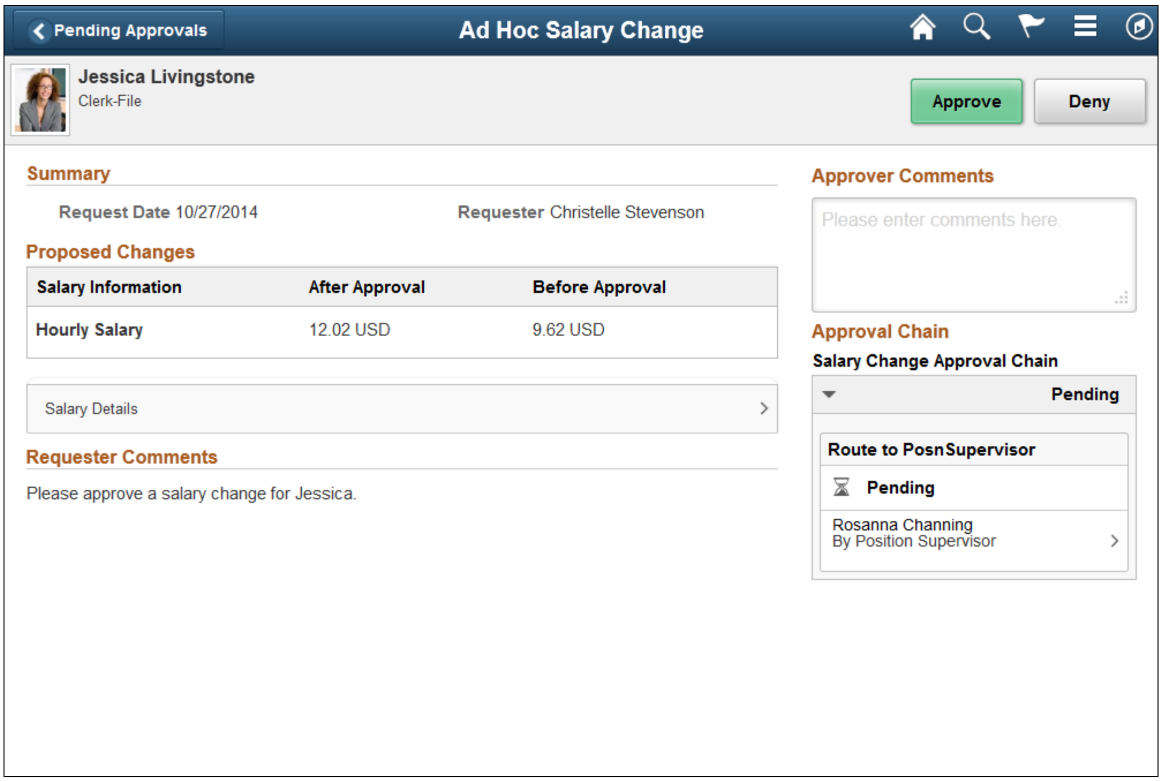
Use the Pending Approval - <Transaction Details> page to review the approval request details, make a comment, and approve, deny or pushback the request.

Navigation

Click an individual approval request transaction from the Pending Approvals page.

Image: Approval Details - <Transaction Details> page

This example illustrates the fields and controls on the Pending Approvals - <Transaction Details> page.



Actions for Pending Approvals

In PeopleSoft Fluid User Interface, you can take five actions on any approvals based on how the transaction has been configured.

1. Approve
2. Deny
3. Pushback
4. Hold
5. Request Information

The applicable action buttons are displayed on the sub-banner to the right.

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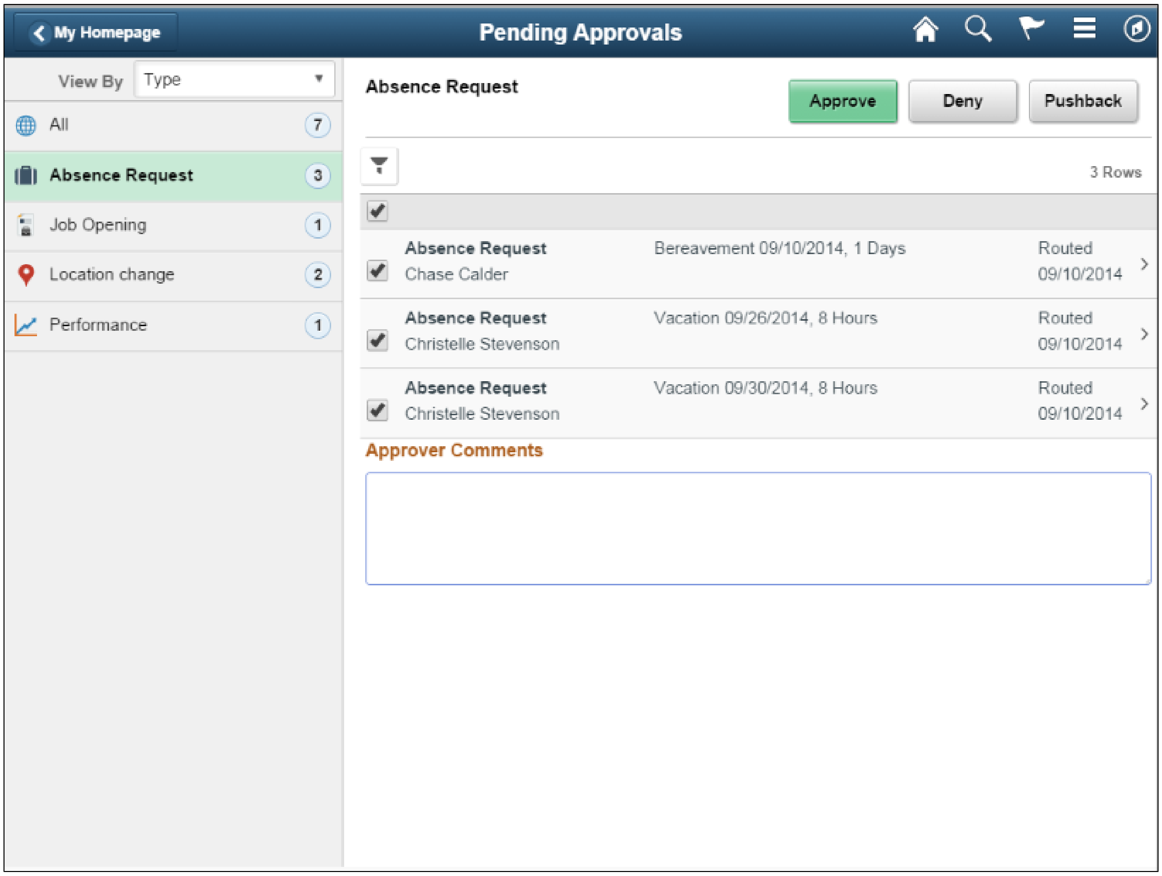
Mass Action for Pending Approvals

Image: Mass action on the Pending Approvals page

This example illustrates the fields and controls on the Pending Approvals page when Mass Approvals is enabled for a transaction category.



Mass approval is available for the following approvals:

- When the user has Type selected in the View By drop-down.
- When the particular transaction has been configured for mass approval.
- When an individual transaction or transaction group has been selected.

When a transaction type that is enabled for mass approvals is selected in the left panel, the approval requests in the right panel is displayed with check boxes in each row. Applicable action buttons are displayed on the top-right of the grid. The approval requests are deselected by default and the approval action buttons are disabled. The action buttons will be enabled only if at least one row is selected. A Select All check box is available above the grid to select all approvals in the grid. The approver can enter comments before taking an approval action. The comments will be applied to all selected requests.

Approvals History Page

A user can view approvals requests that they already worked on by going to Approvals History. The menu icon in the banner displays a list of options which includes Pending Approvals and Approvals History. These serve as a toggle between the Pending Approvals and Approvals History views.

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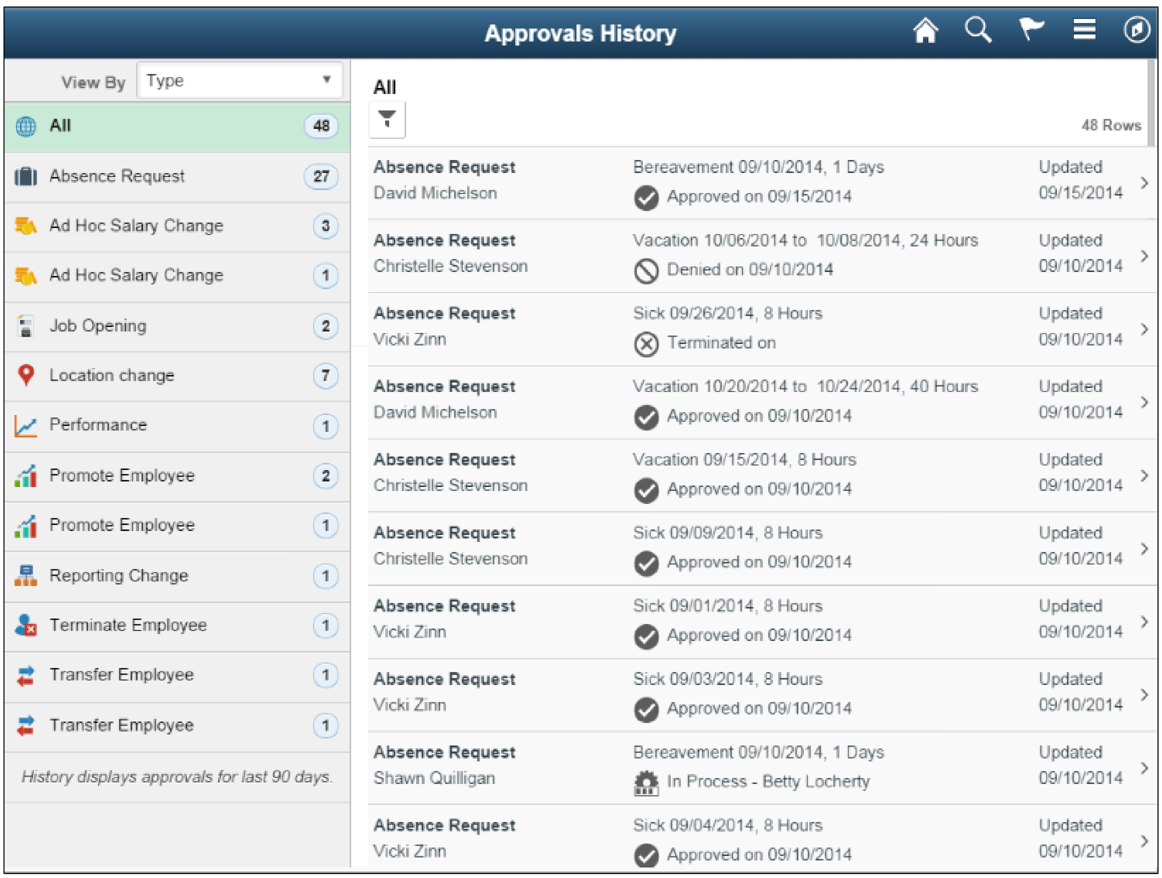
Image: Approvals History Menu

Menu option to view Approvals History.

Image: Approvals History page

This example illustrates the fields and controls on the Approvals History page.



When the user switches to History, the title in the banner changes to Approvals History. Landscape and Portrait behavior will be the same as Pending Approvals. The History view is also displayed using a two-panel layout, similar to Pending Approvals. There are five views by which a user can view historical approvals.

- Type

- Status
- Priority (not available for HCM)
- Person (not available for FSCM)
- From

Priority and Person grouping are not applicable to all transactions. If none of the transactions in an approver's approval history have a priority associated, the Priority grouping will not be displayed in the dropdown. The same holds true for the Person grouping. A configuration is available to administrators to define how far back in time should the history be displayed. The left panel displays a message at the end of the last category indicating the time period for which the history is displayed, example, "History displays approvals for last 90 days." If this configuration has not been set, no such message will be displayed. For more details on the settings, see Mobile Approval Options - Transactions Page

Users can also change the view and design of the Approvals page with the Page Composer Feature. For more details, see Understanding Page Composer

Administer Approvals Page

Approvals administrators can use Administer Approvals to view all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

Access the Administer Approvals page from the menu icon in the banner.

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Image: Administer Approvals Menu Option

Administer Approvals menu option.

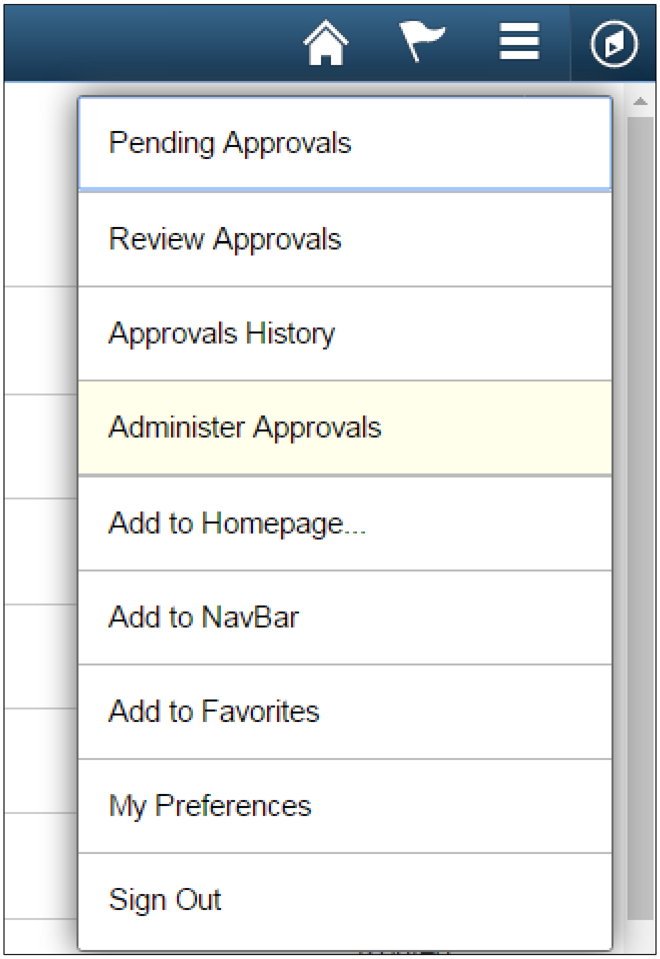
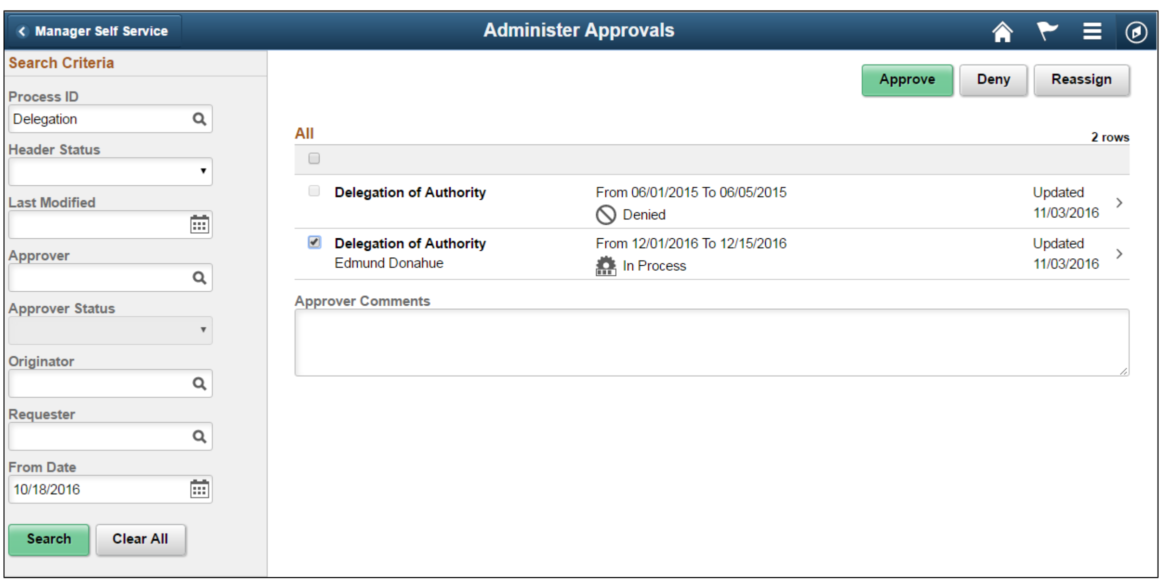


Image: Administer Approvals page

Administer Approvals page



You can view the approvals based on the specified search criteria in the left panel. The search criteria are:

Process ID	Choose the process type of the approval transactions.
Header Status	Current status of the approval transaction.
Last Modified	Last modified date of the approval transaction.
Approver	Choose current approver.
Approver Status	Choose the approval status of the current approver.
Originator	Choose based on the originator of the approval transaction
Requestor	Choose approval transactions from a requestor.
From Date	Choose approvals from a certain date.

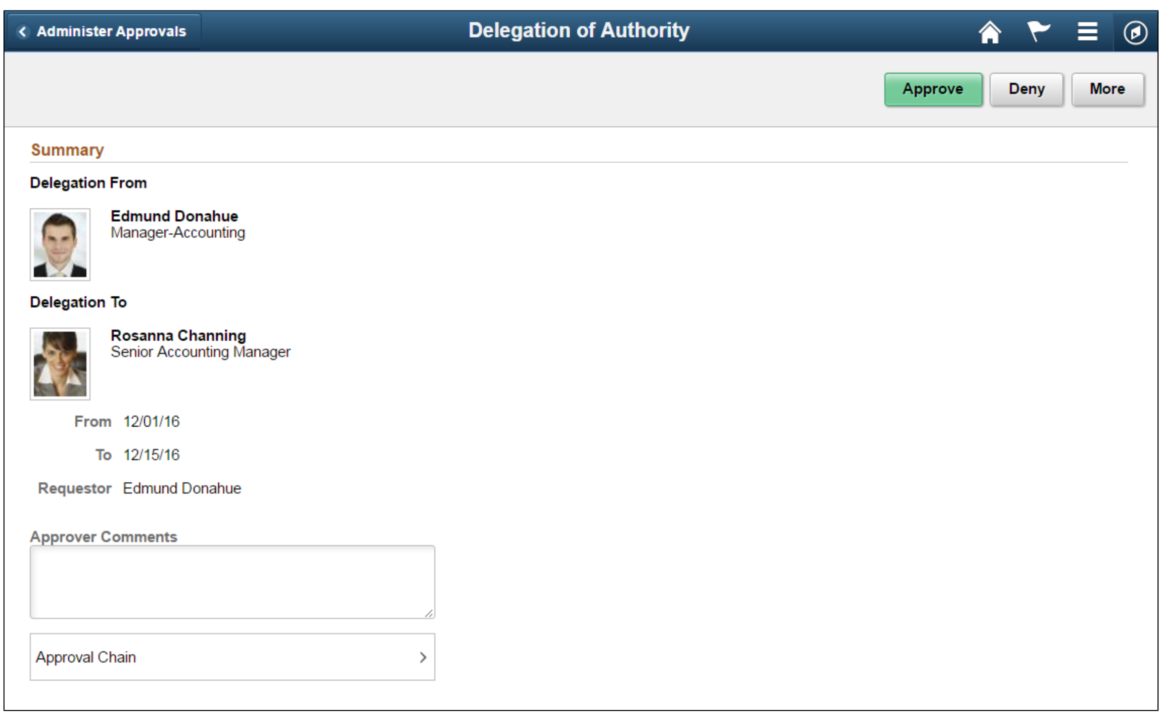
The three approval administration options available for the transactions are:

Approve	Approve the transaction.
Deny	Deny the transaction.
Reassign	Re-assign the transaction.

Click on an individual approval transaction to view the details for that transaction.

Image: Administer Approvals Transaction Details page

Administer Approvals Transaction Details page



For example the Delegation of Authority transaction details page shows the details such as the Delegated Authority, period of delegation, the Requestor and the Approval Chain for this transaction. Approval

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administrators can approve, deny or perform more actions on the approval transaction. The More option includes Reassign, Pushback and Resubmit actions.

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Chapter 9

Using the Comments and Attachments View Framework

Understanding Comments and Attachments View Framework

The Comments and Attachments View Framework enables users to view comments and attachments at a common location or page. This can be configured in PeopleSoft components where comments or attachments or both need to be displayed.

The steps involved in the configuration, setup and registration of the Comments and Attachments View framework are:

1. DataSource View
2. Configuration Setup
3. Configuration ID Mapping
4. Implementation

DataSource View

The DataSource View should be an SQL query to fetch Comments (or) Attachments (or) both for a transaction. The Query/View has to be with proper keys on each level (Transaction, Comments and Attachments)

Configuration Setup

Configuration ID needs to be setup to use the framework. Based on the Query/View created, appropriate fields appear in the configuration setup. For details on Configuration Setup, see CAVF Configuration Setup Page

Configuration ID Mapping

Configuration ID Mapping setup used for calling Configuration ID dynamically in PeopleCode event. For more details, see CAVF Configuration ID Component Mapping Page

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Implementation

Configuring and Implementing the Comments and Attachments View Framework

Pages Used to Configure and Implement the Comments and Attachments View Framework

Page Name	***Definition Name***	***Usage***
CAVF Configuration Setup Page	EOATT_CONFIG_DTLS	Set up the Comments and Attachments View configuration.
CAVF Configuration ID Component Mapping Page	EOATT_MAPCO_PG	Configure the transaction page and to specify where to display the comments and attachments.
CAVF Configuration ID Page Composer Mapping Page	EOATT_MAPPC_PG	Configure the Page Composer page where the Comments and Attachments View framework is to be used

CAVF Configuration Setup Page

Use the CAVF Configuration Setup page (EOATT_CONFIG_DTLS) to create a unique Configuration ID and to configure the comments and attachments.

Navigation

Enterprise Components >CA View Framework > CAVF Configuration Setup

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Image: CAVF Configuration Setup screenshot 1 of 2

CAVF Configuration Setup screenshot 1 of 2

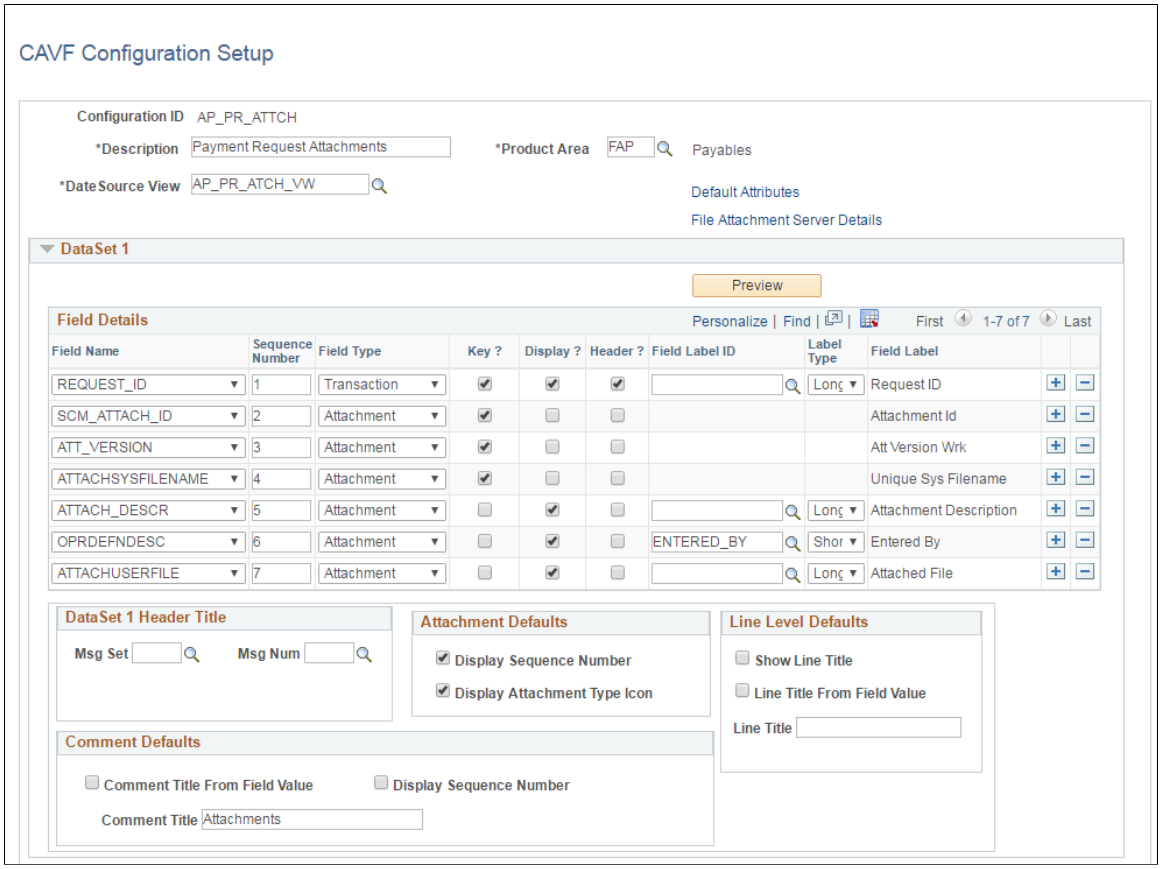
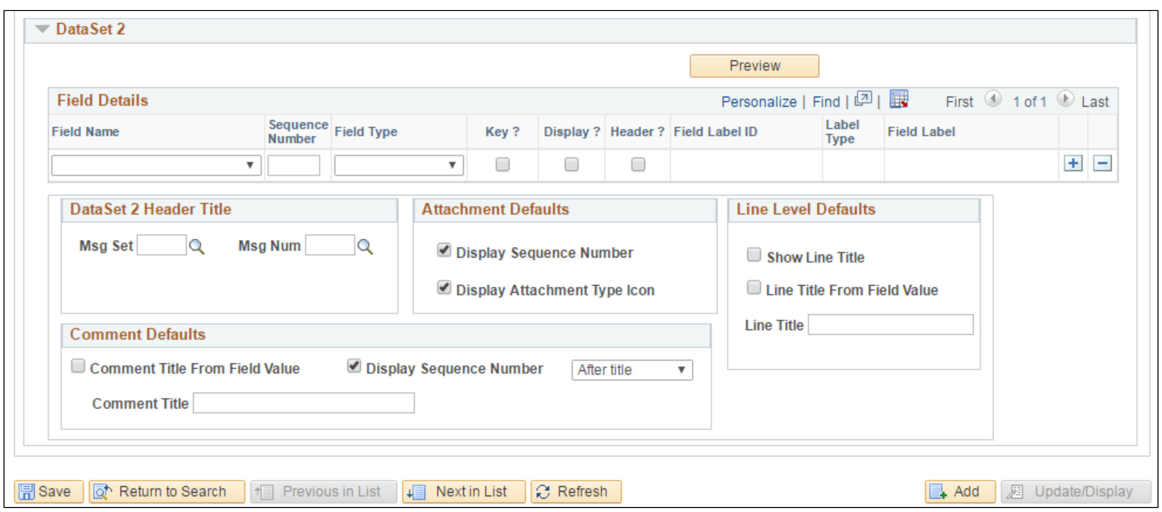


Image: CAVF Configuration Setup screenshot 2 of 2

CAVF Configuration Setup screenshot 2 of 2



The fields and description are mentioned below in this page.

Configuration ID Unique ID for the configuration.

Description Description of the configuration.

Product

Product Information.

Data Source View

The query that drives the framework.

Default Attributes

Set up the UI related defaults. If this is left blank, the values will be picked up from the framework defaults.

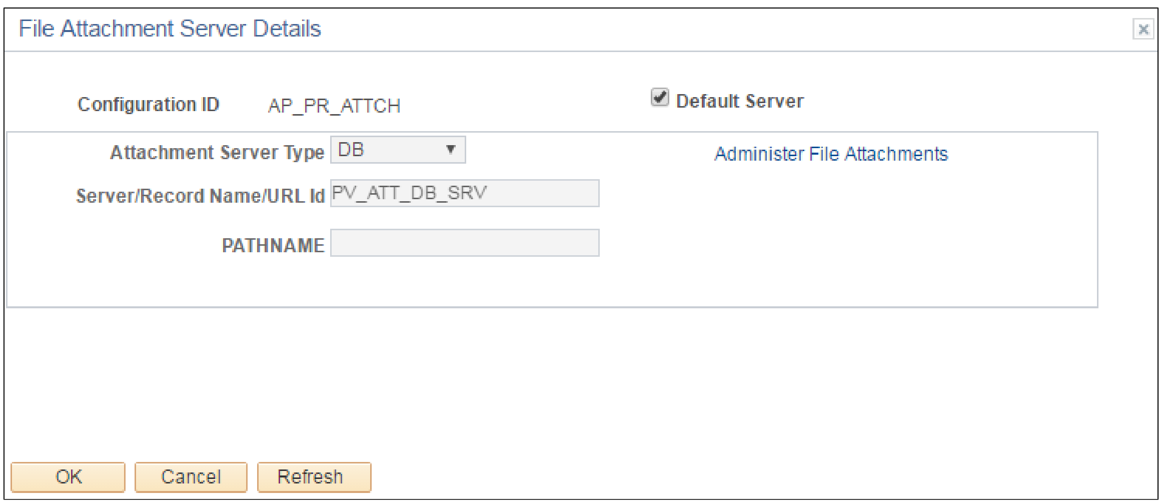
File Attachment Server Details

Enter the details of the file server for the attachments for a configuration ID. For more details see the section on File Attachment Server Details in this page.

File Attachment Server Details

Image: File Attachment Server Details

File Attachment Server Details



Configuration ID

CAVF Configuration Setup ID.

Default Server

For PeopleSoft FSCM, this checkbox needs to be ticked for the system to take in the default server and path.

If this is unchecked, provide the details in the below fields.

Attachment Server Type

Choose the type of file server. Available types are DB, FTP and URL.

Server/Record Name/Url Id

specify the server name or record name or URL.

PATHNAME

specify the path details from where to pick the attachments.

Administer File Attachments

Use this link to manage the file servers. Users can add or make changes to existing file servers.

Data Set 1

Field Name

Field names for the attachment.

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Sequence Number	sequence number for the fields. This determines the order in which they are displayed **Note:** The attachment file should be given the last sequence.
Field Type	Type of field. Available types are Transaction, Attachment and Comment.
Key	Check this option if it is a Key Field. **Note:** In Attachment Field Type, keep only one Key Filed and it should be ATTACHSYSFILENAME
Display	Choose whether or not to display this field. **Note:** For the Comments Field Type, the display field that stores the actual comments should be given the maximum sequence. For the Attachments Field Type, the display field that is shown as the attachment link should be given the maximum sequence.
Header	Choose which field data to be the header. Only the Transaction Field Type should be made the header.
Filed Label ID	ID of the Field Label.
Label Type	Choose whether to display long or short label.
Field Label	this is automatically populated based on the Field Label ID.
Msg Set	The Message Set for the DataSet 1 Header Title.
Msg Num	The Message Number for the DataSet 1 Header Title.
Display Sequence Number	Choose whether to display the sequence number of the attachment.
Display Attachment Type Icon	Choose whether to display icon against each attachment.
Show Line Title	Choose whether to show line title.
Line Title From Field Value	Choose whether to show the Field value as Line Title.
Line Title	Specify a custom Line Title.
Comment Title From Field Value	Choose whether to show the Field value as Comment Title.
Display Sequence Number	Choose whether to display the sequence number of the comment.
Comment Title	Specify a custom Comment Title.
Preview	Preview the configuration. See below for more information on the preview page.

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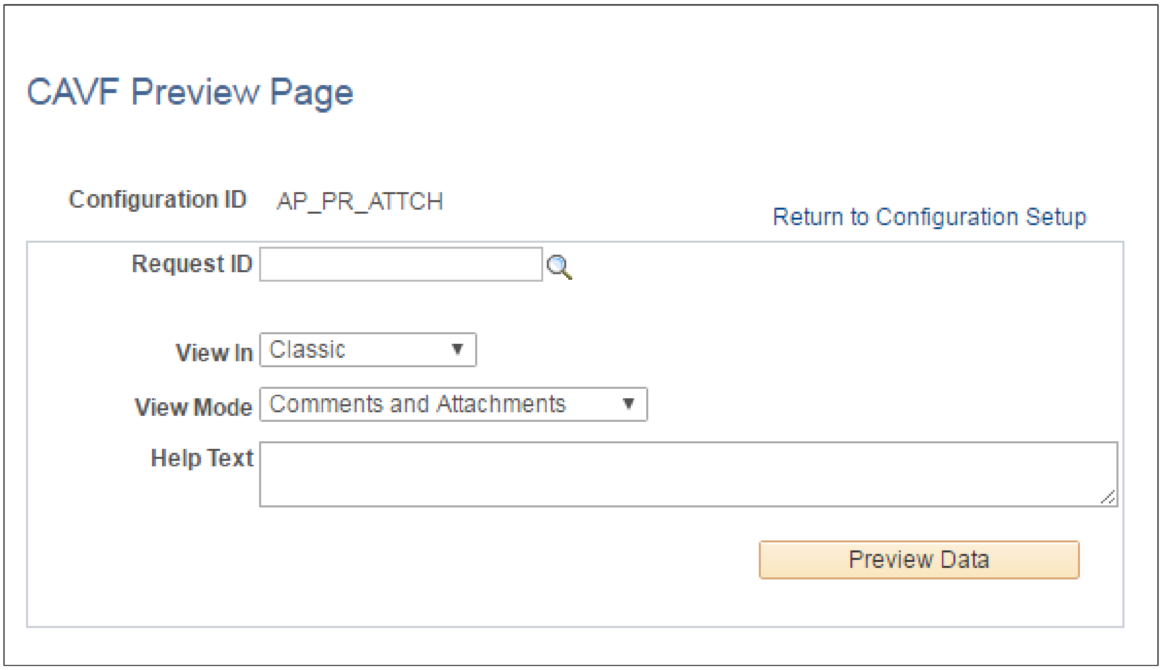
Image: CAVF Preview Page

CAVF Preview Page



Configuration ID	CAVF Configuration ID.
<Transaction Key>	A maximum of five transaction level keys are displayed. The label for the field is displayed as per the default label set for the transaction keys.
View In	Select to view in Classic or Fluid mode.
View Mode	Select View Mode. either Comments or Attachments or Both to view in the Details (Comments/Attachments View) page.
Help Text	This is an optional field. It is the summary text for the transaction, which will is displayed on the top of the Details page.
Preview Data	Transfers to the Comments/Attachments View page.

Data Set 2

The usage of Data Set 2 is same as Data Set 1. Users can use this set to configure a type different from what is configured in Data Set 1. For example, if Attachments were configured in Data Set 1, Comments can be configured in Data Set 2.

CAVF Configuration ID Component Mapping Page

Use the CAVF Configuration ID Component Mapping page (EOATT_MAPCO_PG) to configure the transaction page and to specify where to display the comments and attachments.

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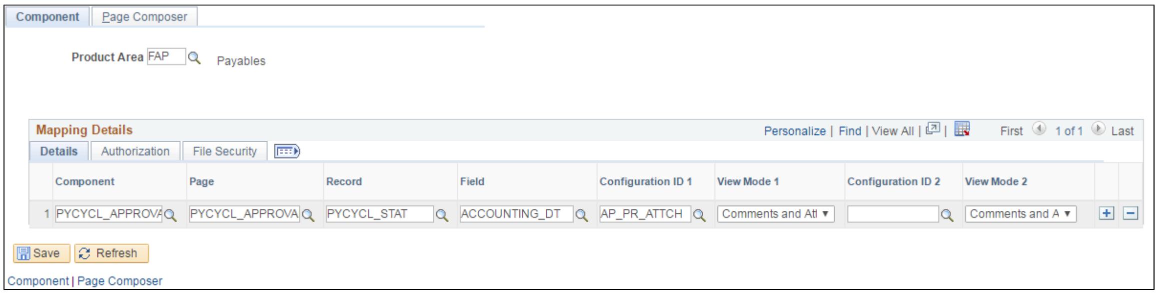
Navigation

Enterprise Components >CA View Framework > CAVF Configuration ID Mapping

(choose the Component tab).

Image: CAVF Configuration ID Mapping of Component.

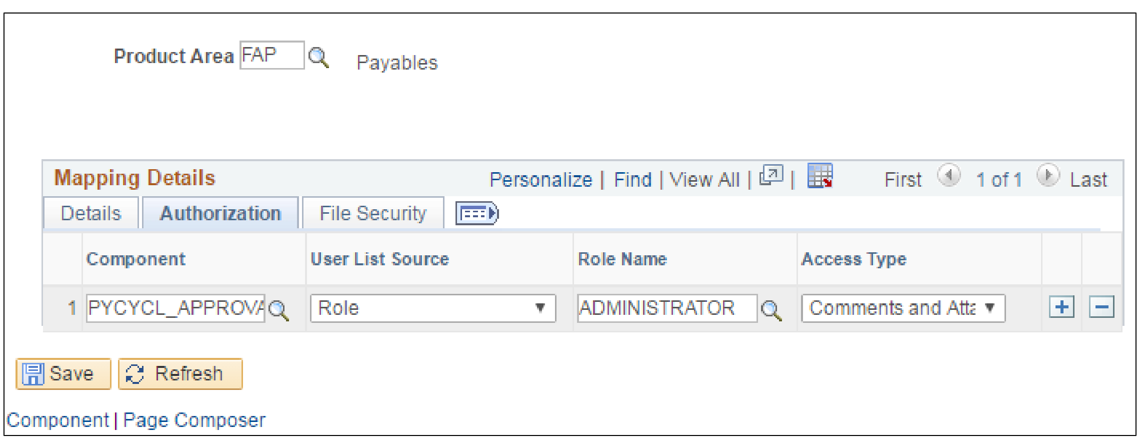
CAVF Configuration ID Mapping of Component.



Product Area	Select the Product Area.
Component	Select the Component within the selected Product Area.
Page	Select the Page associated with the Component.
Record	Select the record in the Page.
Field	Select the Field in the Record.
Configuration ID 1	Select the Configuration ID of Data Set 1.
View Mode 1	Select the Data Set 1 View Mode.
Configuration ID 2	Select the Configuration ID of Data Set 2.
View Mode 2	Select the Data Set 2 View Mode.

Image: CAVF Component Mapping Authorization

CAVF Component Mapping Authorization

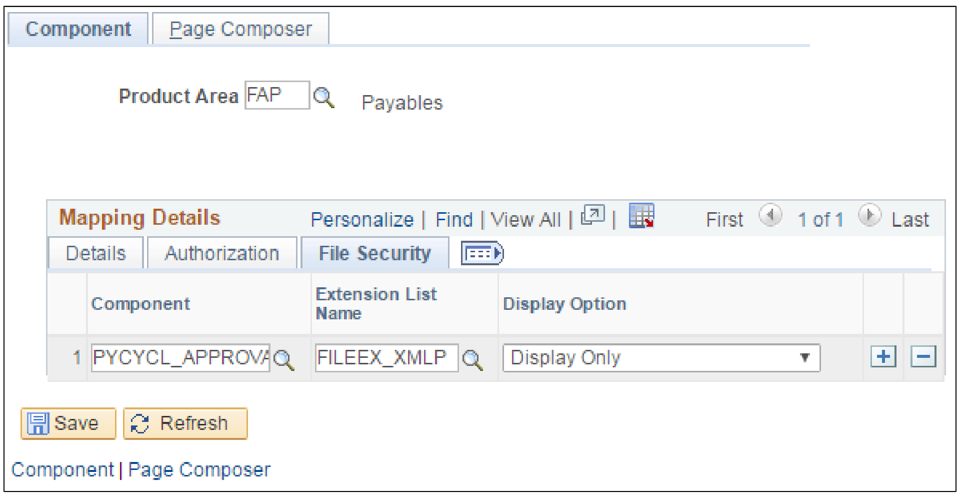


Component	Select the Component.

User List Source	Select the User List Source. Available options are Application Class, Query, Role, SQL Definition.
Application Class/Query/Role/SQL Definition	Select the appropriate Class/Query/Role or Definition.
Access type	Select the Attachment Type. Available types are Attachments, Comments, Comments and Attachments.

Image: CAVF Mapping File Securing

CAVF Mapping File Securing



Component	Name of the Component.
Extension List Name	File extension list name.
Display Option	Choose to display or hide.

CAVF Configuration ID Page Composer Mapping Page

Use the CAVF Configuration ID Page Composer Mapping page (EOATT_MAPPC_PG) to configure the Page Composer page where the Comments and Attachments View framework is to be used.

Navigation

Enterprise Components >CA View Framework > CAVF Configuration ID Mapping

(choose the Page Composer tab).

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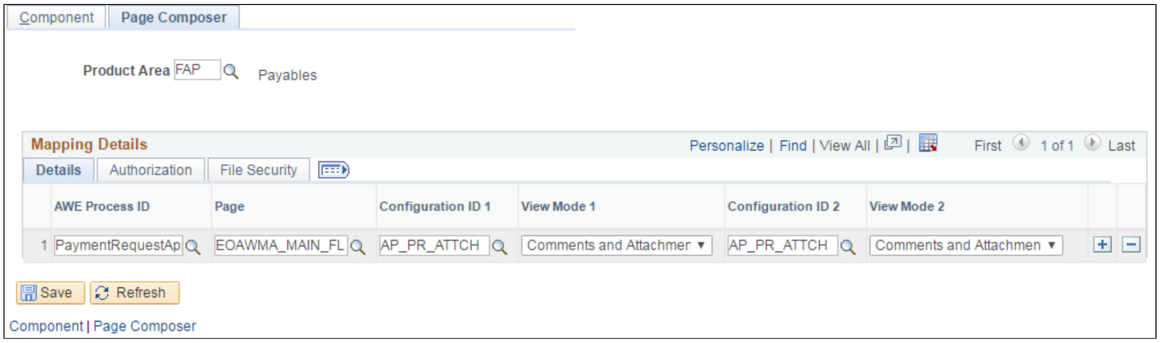
Image: CAVF Mapping to Page Composer — Details

CAVF Mapping to Page Composer — Details



AWE Process ID — Select the Approval Process ID associated to the Product Area.

Page — Select the Page Composer page where the Comments and Attachments View framework is being used.

Configuration ID 1 — Select the Configuration ID of Data Set 1.

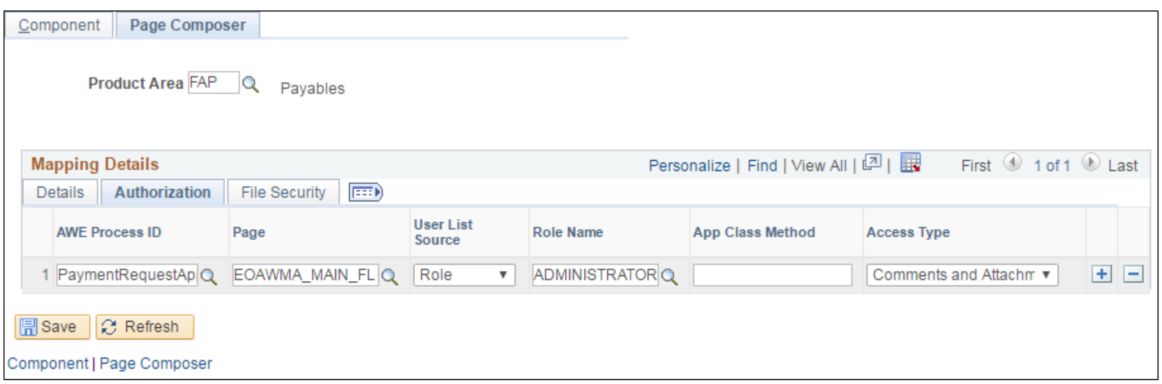
View Mode 1 — Select the Data Set 1 View Mode.

Configuration ID 2 — Select the Configuration ID of Data Set 2.

View Mode 2 — Select the Data Set 2 View Mode.

Image: CAVF mapping to Page Composer Authorization

CAVF mapping to Page Composer Authorization



AWE Process ID — Select the Approval Process ID associated to the Product Area.

Page — Select the Page Composer page where the Comments and Attachments View framework is being used.

Use List Source — Select the User List Source. Available options are Application Class, Query, Role, SQL Definition.

> **Note:** If Application Class is selected an additional Field called Application Class Path also need to be filled.

Role Name — Select the Role.

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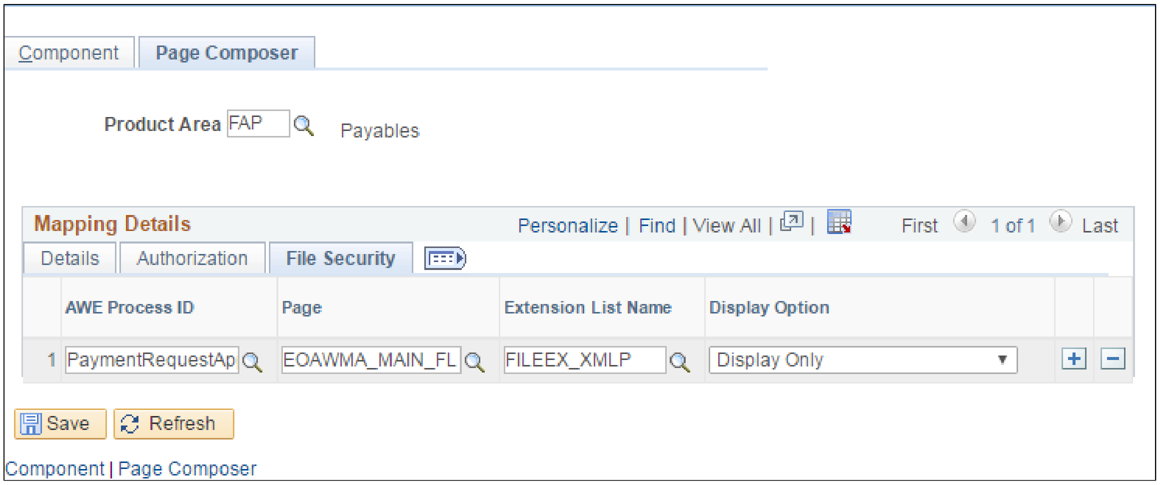
App Class method Select the Application Class method.

Access Type Select the Attachment Type. Available types are Attachments, Comments, Comments and Attachments.

Image: CAVF Mapping to Page Composer File Security

CAVF Mapping to Page Composer File Security.



AWE Process ID Select the Approval Process ID associated to the Product Area.

Page Select the Page Composer page where the Comments and Attachments View framework is being used.

Extension List name Select the file extension list name. The File Extensions List ID is defined at PeopleTools, Utilities, Administration, Administer File Processing, File Extension List.

Display Option Choose to display or hide.

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Chapter 10

Page Composer

Understanding Page Composer

The Page Composer feature enables users to design their own Fluid Application Pages to make it more in line with the business needs. The feature allows users to design pages for different form factors and to include fields and tabs using the registered components delivered with the feature. It is metadata driven so the users can modify the styling and layout of select areas on component pages without having to code or customize delivered PeopleSoft application pages

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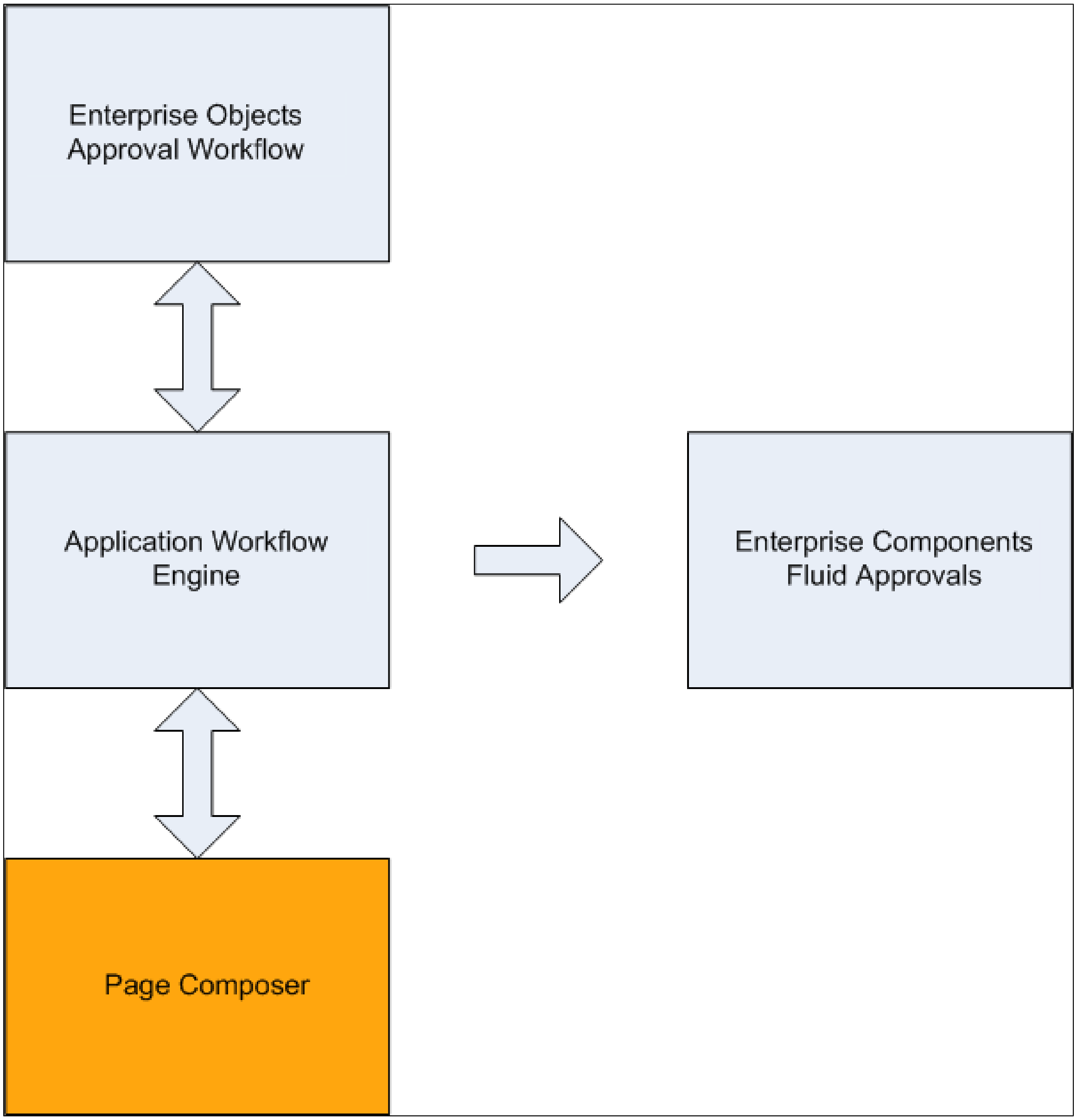
Image: Page Composer

Page Composer design



Using Page Composer

Page Composer gives users the flexibility to edit the design of the Fluid Approval pages based on the available page components that are already registered for Page Composer. Users can design the existing placement of the fields in the fluid approval pages and can also add buttons and links in line with specific business requirements.

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Pages Used to Configure Pages Using Page Composer

Page Name	*Definition Name*	*Usage*
Page Composer Page	EOPC_MAIN_FL	Create page compositions.

Page Composer Page

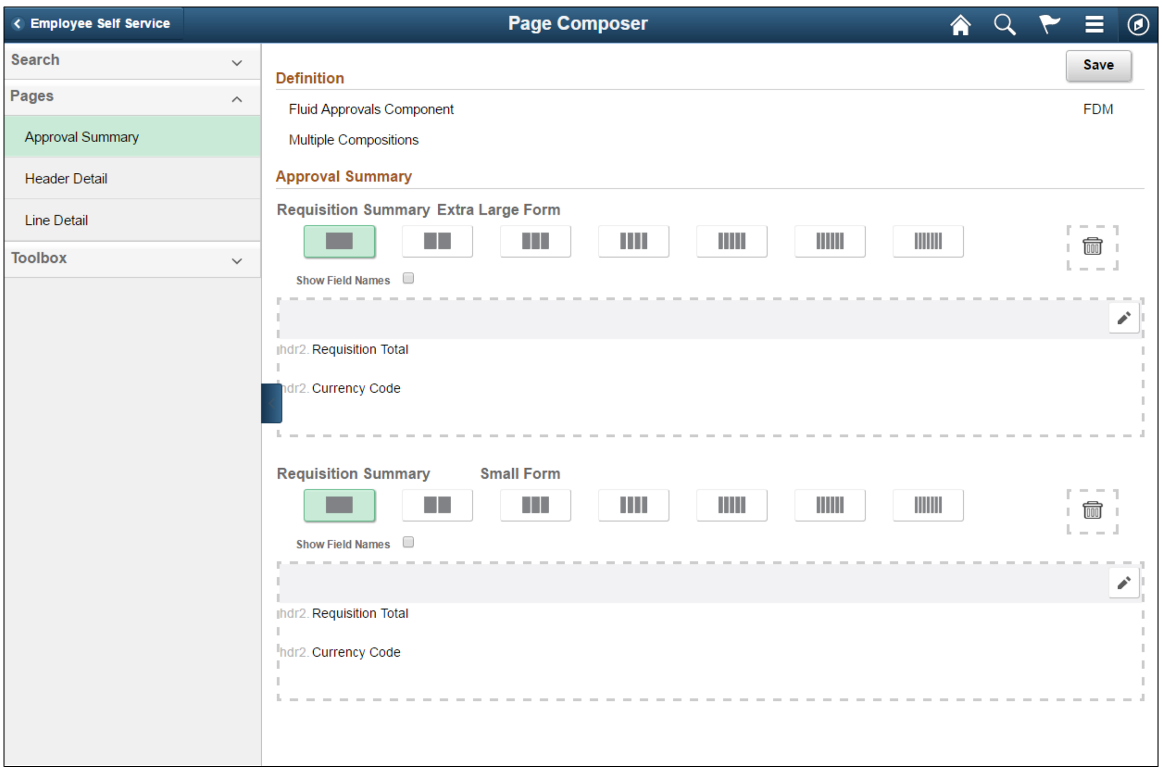
Use the Page Composer page (EOPC_MAIN_FL) to create page compositions..

Navigation

Enterprise Components >Page Composer > Page Composer

Image: Page Composer Main Page

Page Composer Main Page



The Page Composer main page consists of the left and right panel. Use the Search field in the left panel to search for the definitions.

Note: Only Fluid Approvals definition is available in Page Composer.

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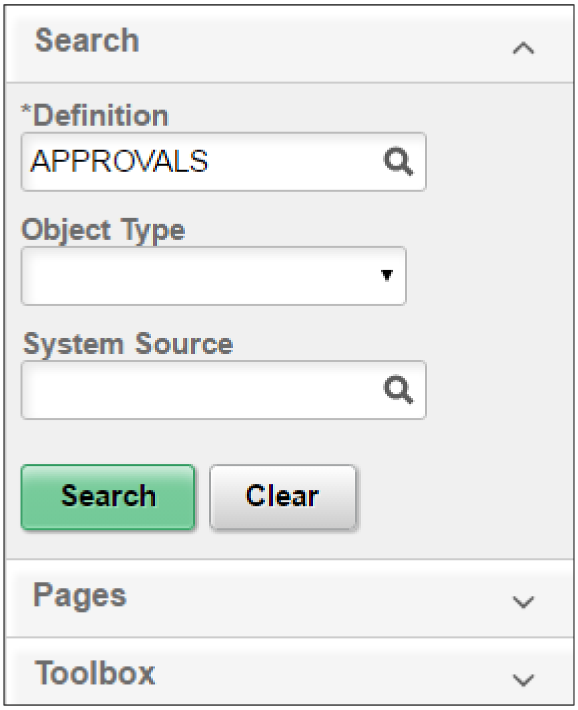
Search

Image: Search panel

Search panel



Definition	Search from the list of available definitions. Currently, only the Approvals definition is available.
Object Type	Search based on the Object Type from the list. Listed object types are Component, Email HTML Page, Email Rich Text HTML, Stand-Alone HTML Area. Currently users can compose only Component.
System Source	Search based on the system source.

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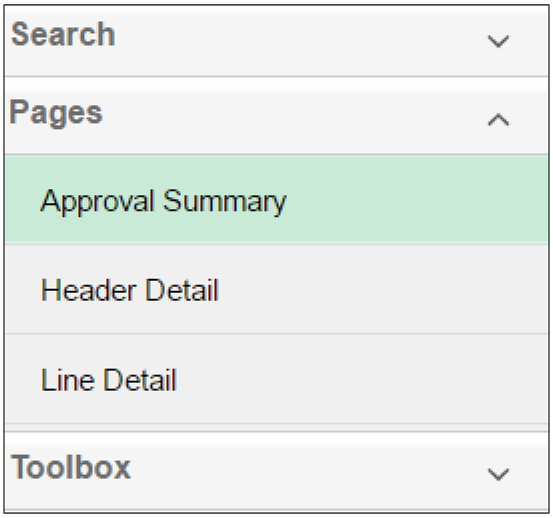
Pages

Image: Pages panel

Pages panel



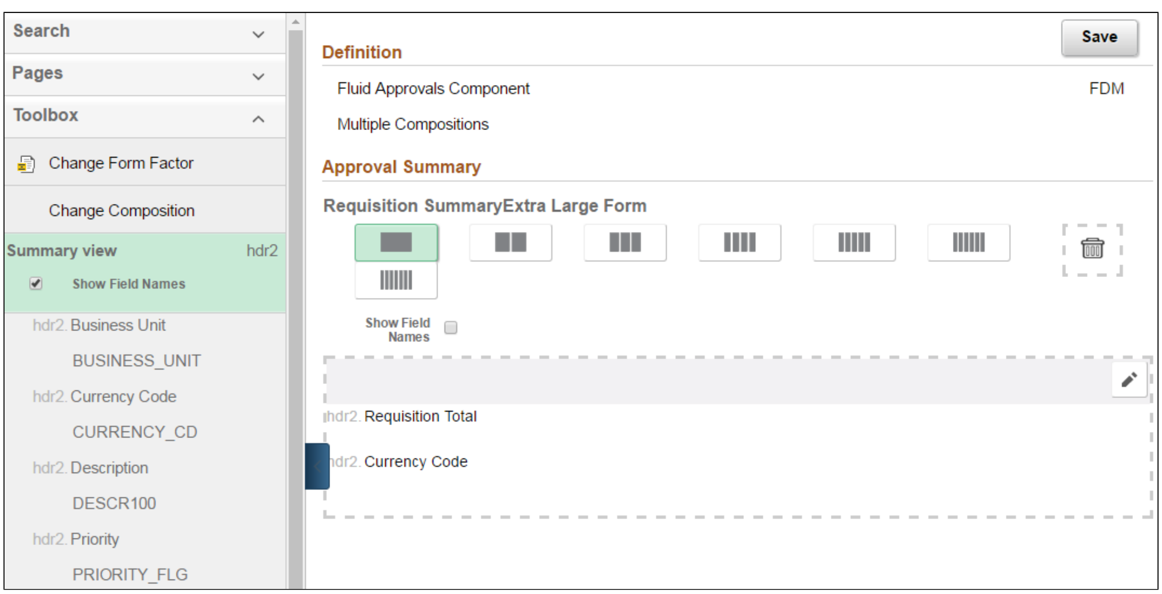
The Page Composer allows users to compose and configure the view of three sections in the Fluid approval pages.

- Approval Summary
- Header Detail
- Line Detail

Toolbox

Image: Toolbox panel

Toolbox panel



Use the Toolbox panel to configure the different sections in the Fluid Approval page.

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Change Form Factor

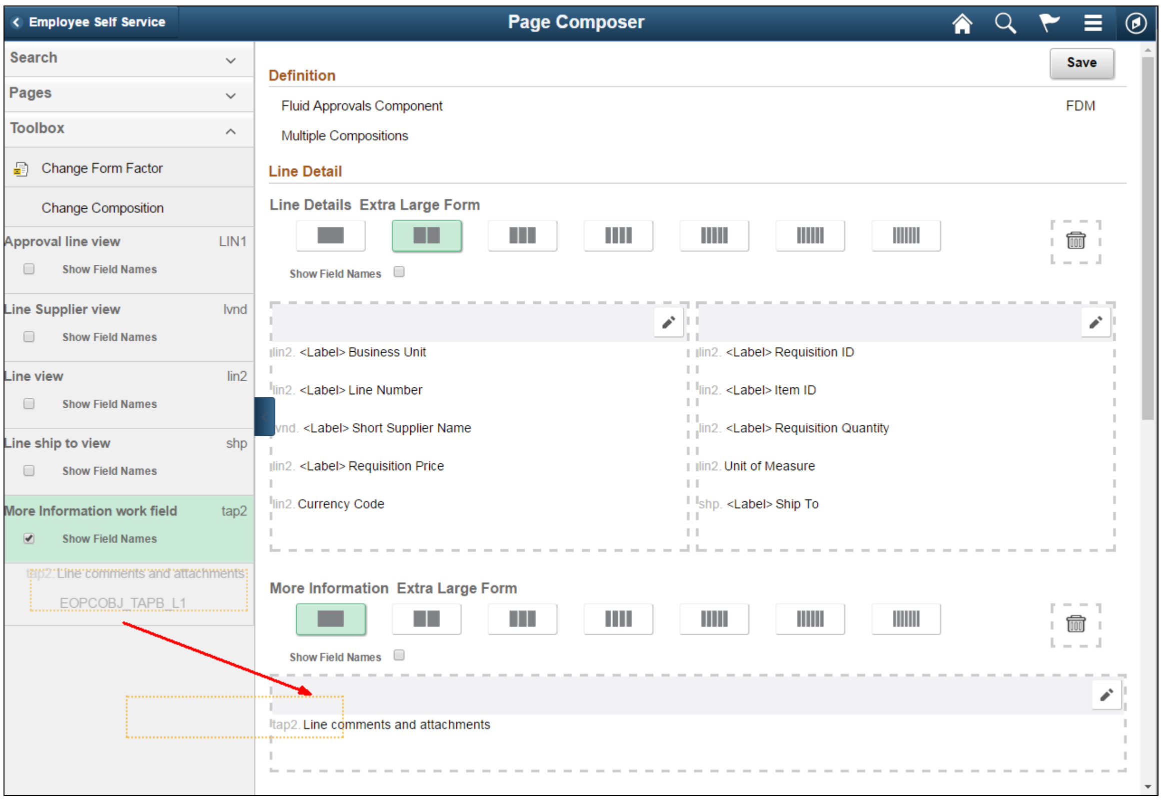
Change the form factor. Available form factors are Large, Medium , Small and X-Large.

Change Composition

Change the composition of the form. The Change Composition tool allows users to access the records already registered in Page Composer and to view the fields available under each record. Users can then simply drag and drop the relevant Fields to the Summary, Header or Line details area of the form to compose the particular fluid approval page.

Image: Drag and Drop Fields

Drag and Drop the fields to page sections.



Registering Components in Page Composer

The Developer Registration page of Page Composer has a list of registered components. Users cannot add new components for registration. Existing components can be edited for your business needs. the components registered and the changes made to them are then available in the Toolbox panel in Page Composer.

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Pages Used to Register Components in Page Composer

Page Name	***Definition Name***	***Usage***
Registration Page	EOPC_DEVREG_FL	Use and edit the components available in the Registration page for Page Composer.

Registration Page

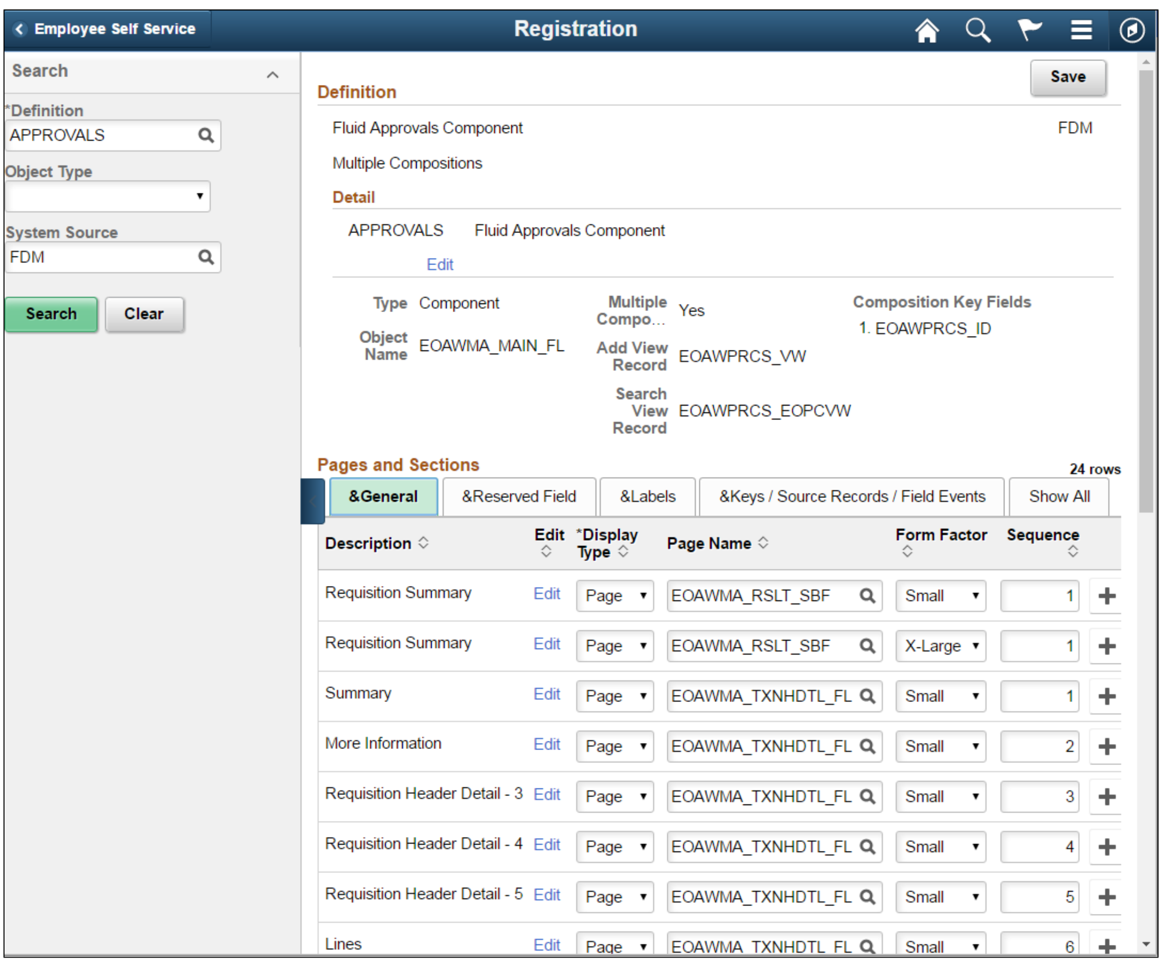
Use the Registration page (EOPC_DEVREG_FL) to view and edit the records available for Page Composer.

Navigation

Enterprise Components > Page Composer Administrator > Developer Registration.

Image: Page Composer Registration page

Page used to Register Page Composer transactions.



The Approvals definition the only definition currently registered for Page Composer. Use the Search pane to search for the Approval transactions that are registered to AWE

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Definition	Name of the definition.
Detail	Description of the definition.
Type	Object type of the definition.
Object Name	Name of the object.
Multiple Composition	Whether it is multiple composition. A multiple composition is a definition that allows multiple types of data compositions in the base object (e.g component).
Add View Record	This record is used as the prompt view to add new compositions to the definition.
Search View Record	This view is used when searching for compositions in Page Composition registration and Page Composer.
Composition Key Fileds	This is the Field Name of the cross reference record and is required only in case of multiple compositions. **Note:** For Approvals, the value is taken from the cross reference table from AWE Transaction Registry.
Description	Name of the page.
Edit	Edit the page name.
Display Type	Display Type. Currently only the display type Page is available.
Page Name	Content reference of the page.
Form Factor	The form factor for the page to support different devices. Available form factors are Small, Medium, Large and X-Large. A page needs to be registered for each form factor.
Sequence	Enter the sequence in which this section should be displayed on the Page Composer Composition page.

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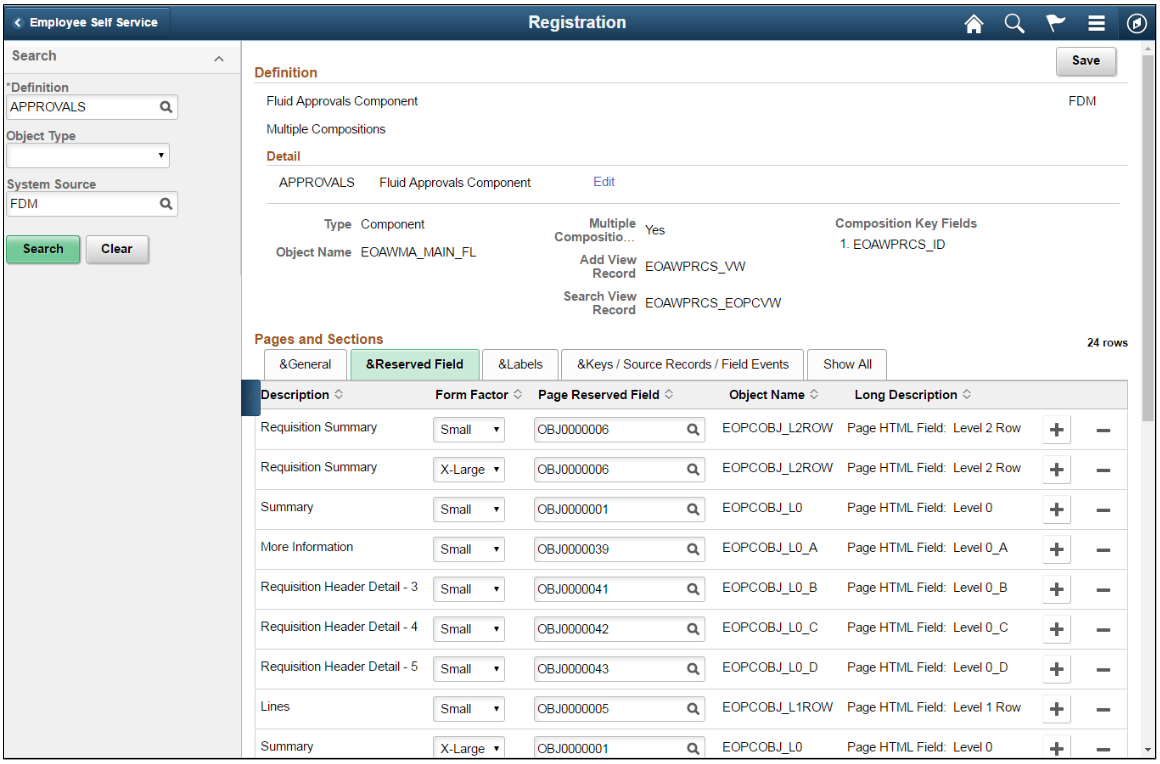
Image: Page Composer Registration Reserved Field

Page Composer Registration Reserved Field.



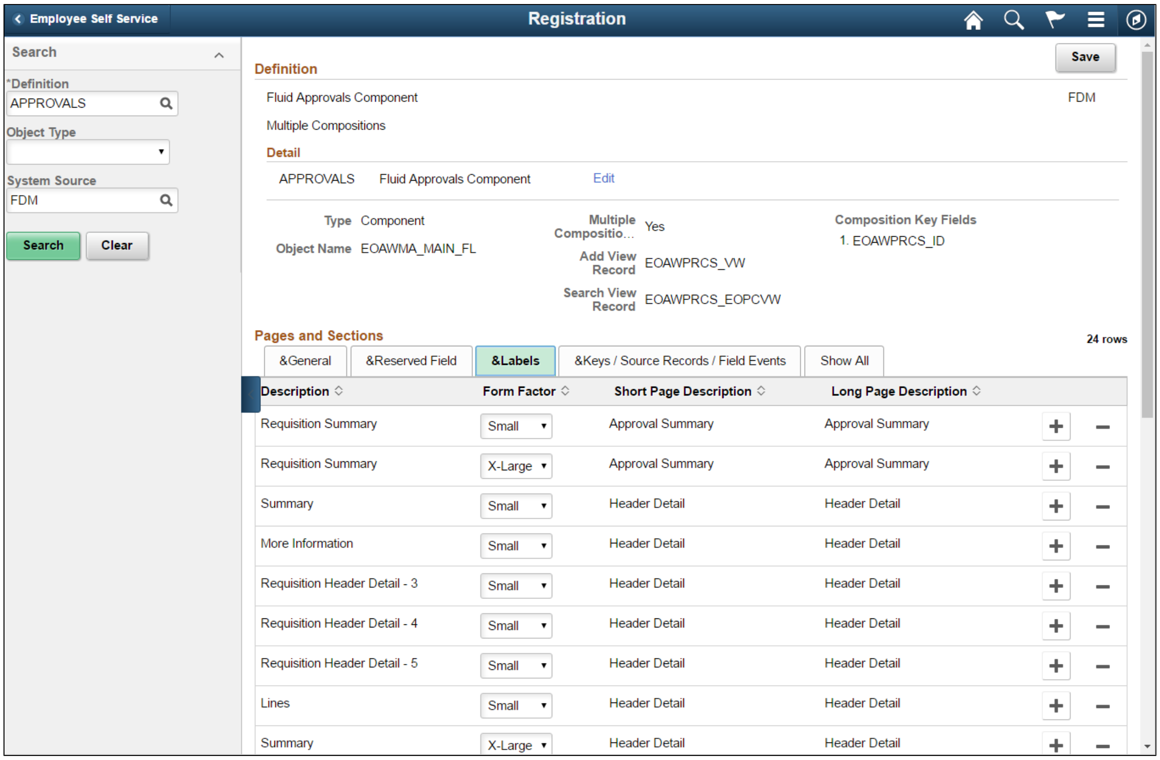
Page Reserved Field

Object Name PeopleTools Component name.

Long Description

Image: Page Composer Registration Labels

Page Composer Registration Labels.



Short Page Description	Short Page Description.
Long Page Description	Long Page Description.

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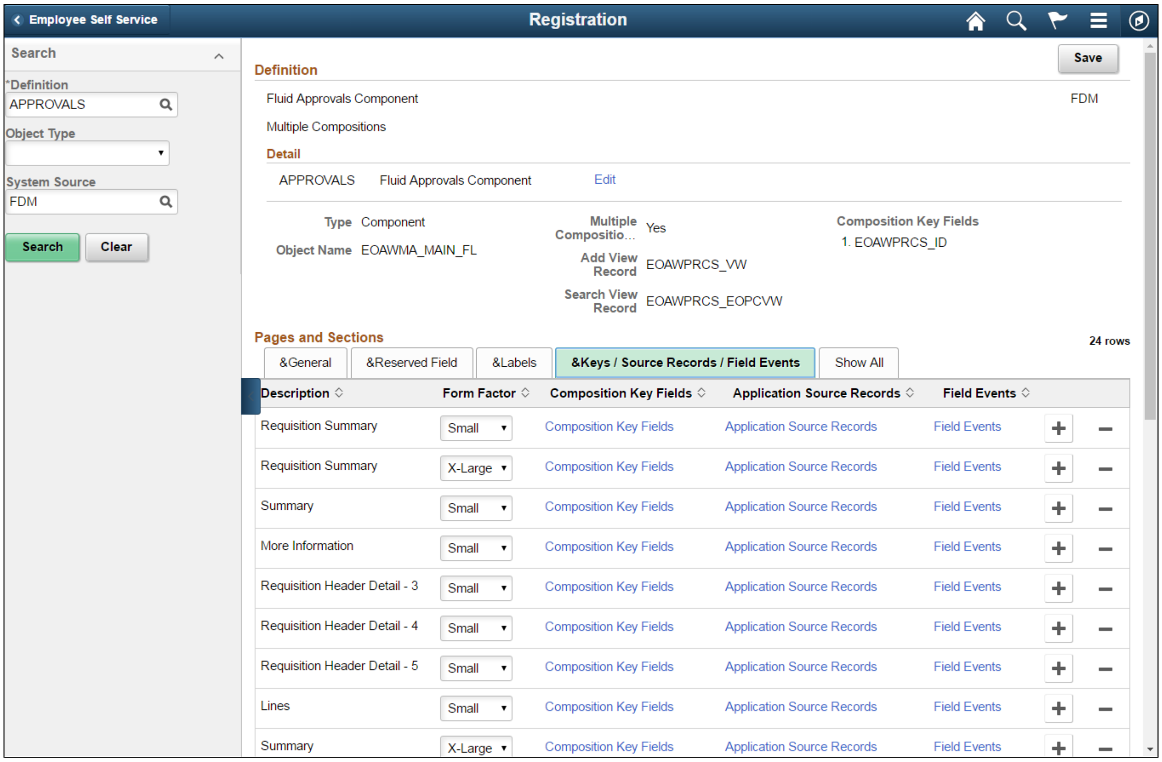
Image: Page Composer Registration Keys/Source Records/Field Events

Page Composer Registration Keys/Source Records/Field Events.



Composition Key Fields	Enter Composition Key Field.
Application Source Records	Add an Application Source Record for the Approval page in Page Composer.
Field Events	Field Events for the desired page section and form factor.

Application Source Records

Application Source Records are displayed in the left-hand panel on the Page Composer page. The fields defined in these record are the list available to the users to drag and drop to the page.

For Approvals, use the AWE Transaction Registry records to determine the required key structure of the application source records.

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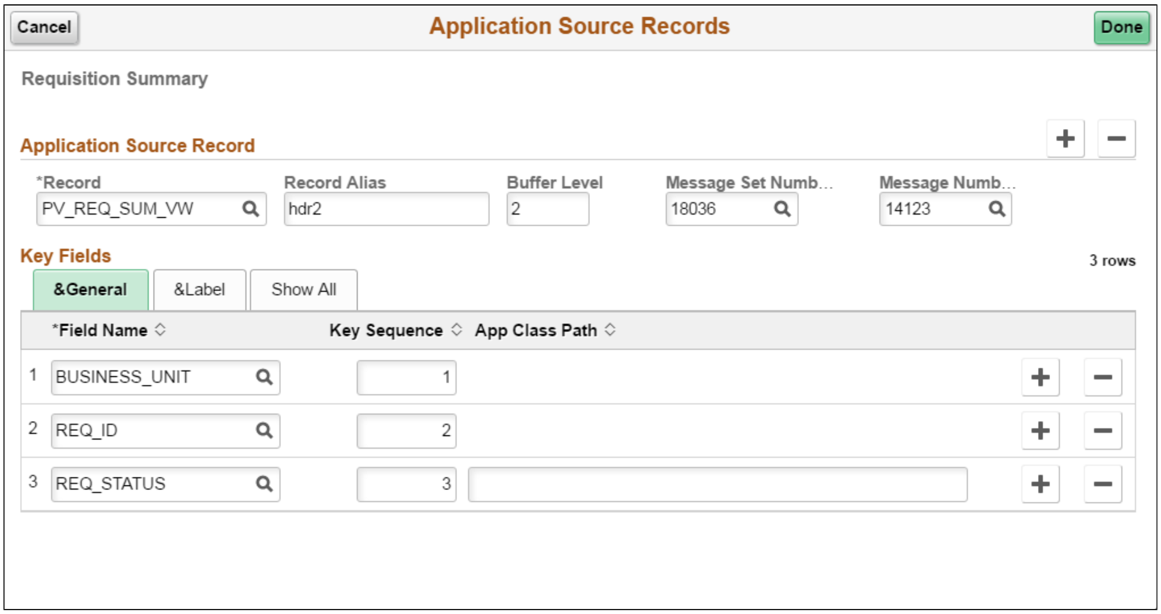
Image: Application Source Records

Application Source Records.



Record	This record is used to display the drag-from fields in the left-hand panel of the Page Composer page.
Record Alias	Enter a 1 to 4 character alias name for the record.
Buffer Level	The Buffer Level of the Page Composer reserved filed base component.
Message Set Number	Enter the Message Set Number for the Record Label.
Message Number	Enter the Message Number for the Record Label.
Field Name	The Field Name in the Record
Key Sequence	Search Key Field sequence.
App Class Path	Enter the full path name of the application class method. This is used only for the app class reserved field.

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Chapter 11

Page and Field Configurator

Understanding Page and Field Configurator

PeopleSoft Page and Field Configurator feature enables the users to configure certain properties of pages and fields of classic pages based on their business requirements. It allows the users to define multiple configuration for a component based on different user roles or user list. User can define multiple criteria based on the component fields and selectively apply the configuration at run time if the criteria is satisfied based on the run time values.

Using this feature, a user can hide a field/page, change label of a field, add default value to a field, make the field/page read only, or mark the field as mandatory without having to customize delivered application pages. It also permits the user to verify the configuration against the underlying page metadata and flag out if any errors exist.

Note: The configuration can be applied only to a registered component in the system. Secondary pages and other modal pages or components could not be controlled using the configuration.

Using Page and Field Configurator

Page and Field Configurator gives users the flexibility to configure fields and pages in any component without having to customize delivered application pages or fields.

To configure any component using Page and Field Configurator, use the Page Configuration (EOCC_CONFIGURE), User Lists (EOCC_CONFIG_USER) and Map to Portal registry (EOCC_MAP_EVENT) pages.

Pages Used to Configure Pages Using Page and Field Configurator

Page Name	***Definition Name***	***Usage***
Page Configuration Page	EOCC_CONFIGURE	Use this page to capture the page and field configuration and criteria.
User List Page	EOCC_CONFIG_USER	Use this page to capture the list of users to which the configuration defined in the Page Configuration page should be applied to.
Map to Portal Registry Page	EOCC_MAP_EVENT	Use this page to map the configuration to the Portal Registry.

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Page Name	Definition Name	Usage
Validate Page Configurations Page	EOCC_CONFIG	Use this page to verify the validity of the configurations defined using the Page Configuration page.

Understanding How to Configure a Page using Page and Field Configurator

As a user, there are three steps to be completed to configure a page using Page and Field Configurator:

1. Define the page and field changes to be made in the selected component using the Define Configuration page.
2. Define the list of users to whom the configuration needs to be applied using the User List page.
3. Map the configurations to the corresponding portal registry entries using the Map Configuration to Portal Registry page.

First step is to select the page to be configured, identify the specific field and capture the criteria. Next is to define the user list which identifies the users to which the new configuration is applicable. The final step is to map the configuration to the portal registry. The configuration defined in this component will become effective only if the services defined by the utility are mapped to the corresponding portal registry entries.

Page Configuration Page

Use the Page Configuration page (EOCC_CONFIGURE) to define the changes needed for the component.

Navigation

Enterprise Components >Page and Field Configuration > Page and Field Configurator >Page Configuration

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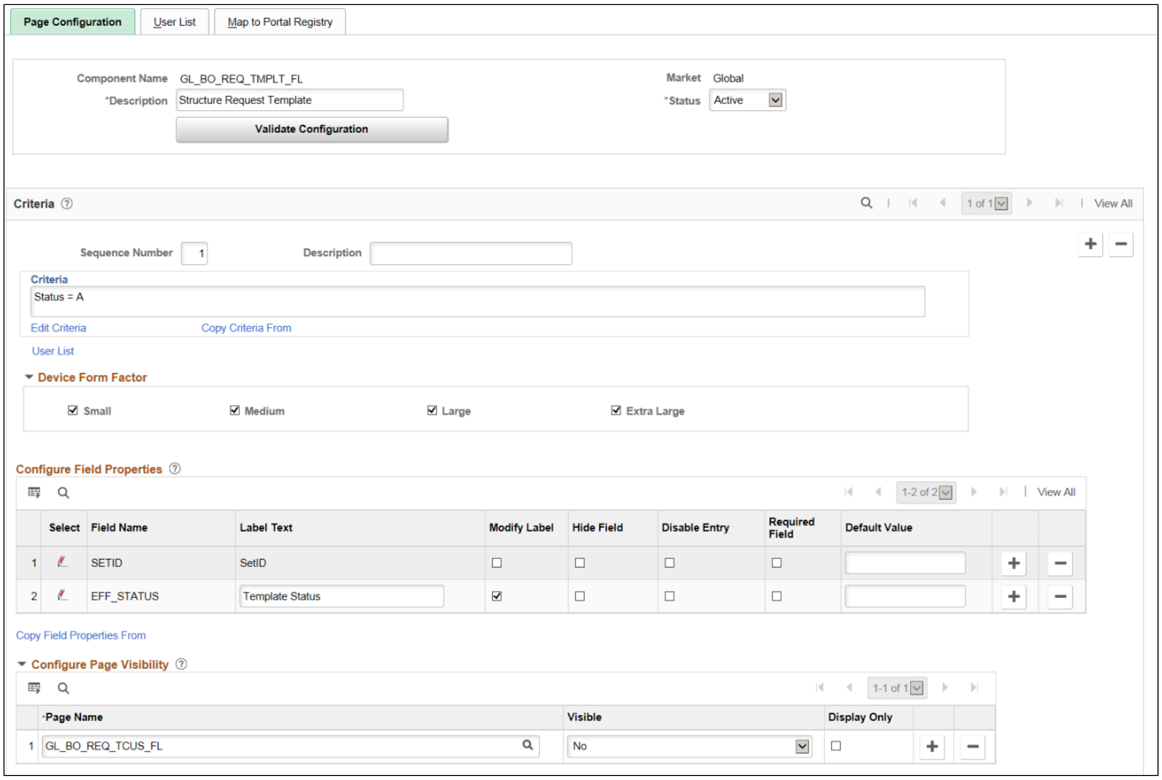
Image: Page Configuration page

This example illustrates the fields and controls on the Page Configuration page.



Component Name Displays the name of the component as selected by the user.

Description Enter an appropriate description.

Market Displays the market for which the configuration is defined as selected by the user.

Status Select the status of the configuration.

Validate Configuration You can use the Validate Configuration button to verify the configuration against the underlying page metadata and identify if any errors exist.

Criteria

You can associate criteria with each configuration. In this section, you can capture the criteria for the component with sequence number.

Sequence Number Enter the Sequence number for the configuration.

Multiple configurations can be defined for same component and the sequence number is given to distinguish these configurations.

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Note: At the application run time, if the transactions satisfies more than one criteria defined in the configuration, then the criteria with lowest Sequence Number is selected for execution and the rest of the criteria and related configuration are ignored.

Description

Enter an appropriate description.

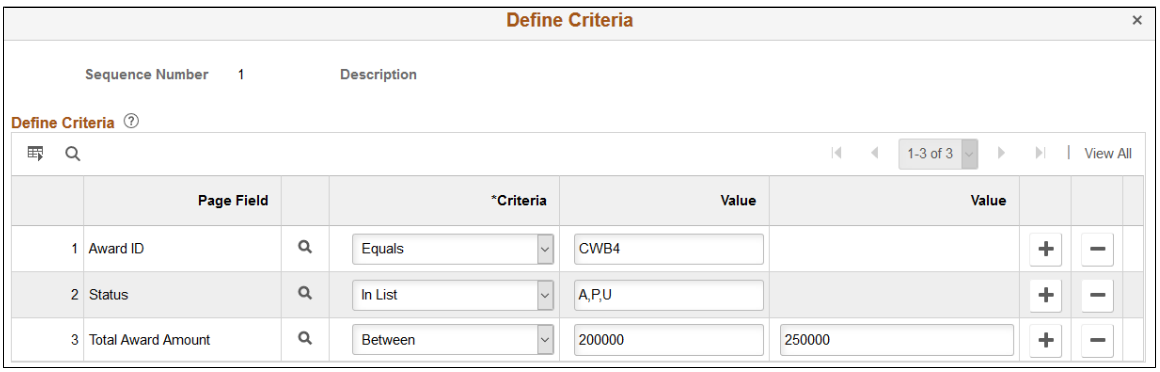
Criteria

Displays the criteria defined by the user using the Define Criteria or Edit Criteria hyperlink in a readable format.

When you create a new configuration, Define Criteria link will be displayed on the page. On clicking the link you can select the fields available on the level zero of the component, an operator, and enter a value to be compared at the run time, per Sequence Number.

Image: Define Criteria page

This example illustrates the Define Criteria page.



For existing record, Edit Criteria link will appear where you can edit the criteria details. You can add a new row to add more than one condition (Field, Criteria and Value combination) for the same sequence level.

You can define criteria based on page name and field name. Once you select the page field, select the condition and enter the required value.

Note: While defining the criteria, the selected field should contain a value either from defaults or from existing transaction data. If criteria is configured on work record fields where data is populated dynamically, then at the time of criteria evaluation (Post Build event) if the system does not finds a value for the field, the criteria would fail and the configuration will not get applied.
At the run time of the component, the criteria will be evaluated only once at the time of component load. Any change in the field values selected for criteria evaluation thereafter will not result in re-evaluation of criteria.

Copy Criteria From

You can use this link and select a sequence number from which you can copy the criteria.

User List

Click the link to open the User List page. Use this page to quickly create corresponding sequence level user list for the configuration. For more information see,User List Page.

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Device Form Factor

Device Form Factor section is used to select the form factor for which the criteria is applicable. If you select all the check boxes it indicates that irrespective of the form factor the selected criteria is applied.

Note: This feature is applicable only for fluid components.

Configure Field Properties

The Configure Field Properties section is used to capture the field level changes that need to be made for a component.

Select

Click the icon to open Select Field page. You can use this page to select an existing field from the component.

Note: You can select only the field made visible in the application designer for configuring in the utility. Radio buttons and non-data entry fields will not be available for selection in the list.
Be cautious while selecting fields on a grid or scroll area which can contain large volume of data as it could result in the performance degradation of the component.

Field Name

Based on the selected field, name of field is displayed.

Label Text

Label of the field is displayed based on your selection.

Note: This field is enabled only if 'Modify Label' check box is selected.

Modify Label

Select the check box if you need to modify the label.

Hide Field

Select the check box if you need to hide the field.

Note: You can only hide the fields which are made visible in the application designer. The fields made invisible in application designer cannot be made visible via configuration.

Disable Entry

Select the check box if you need to make the field as read-only.

Note: You can disable a field only if it is by default editable in the application designer. The field which is already disabled in application designer or people code could not be made editable using the configuration.

Required Field

Select the check box if you need to make the field as mandatory.

Note: You can make a field mandatory which is not configured as required in the application designer. The field which is made as required in application designer or people code could not be made Not-Required by using the configuration.

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Default Value

Enter a value if you need to add a default value for the field.

Note: The default value will be applied only when the component is open in Add mode or when a new row is inserted. The system will not do any check on the value entered on this field except for the basic format check.
Be cautious while entering the default value as a non-acceptable value throws an error at run time of the selected component.

Copy Field Properties From

You can use this link and select a sequence number from which you can copy the field properties.

Configure Page Visibility

The Configure Page Visibility section is used to hide or unhide the page as a whole in the component. It also has the capability to make a page as display only.

Page Name

Select the page that needs to be configured.

Visible

Select from the following options:

- Yes – Select Yes to configure the page as visible. You can override the page visibility defined in the component.
- No – Select No to hide the page. If a page is selected as invisible then in run time, the hyperlink at the bottom and page tab at the top of the component will not display that page.

Note: If all the pages of a component are selected as invisible either via the configuration or via the Application Designer or through a combination of both, then the system may behave unexpectedly as there should be at least one page visible for the component.

Display Only

Select the check box to make the selected page as read only at the component run time.

Note: A page which is already Display Only in Application Designer or PeopleCode could not be made editable by using the configuration.

System prompts you with a warning, if you have made any field as Required Field in the configuration and if the page where the field appears is configured as Display Only or Invisible.

Page Visibility feature is supported for all classic components and selected fluid components. Only the fluid components with left panel and side page with group box of type" Page Tab" are supported. For more information on side pages, refer the product information *PeopleTools: Providing Left Navigation Using PT_SIDE_PAGETABS*

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User List Page

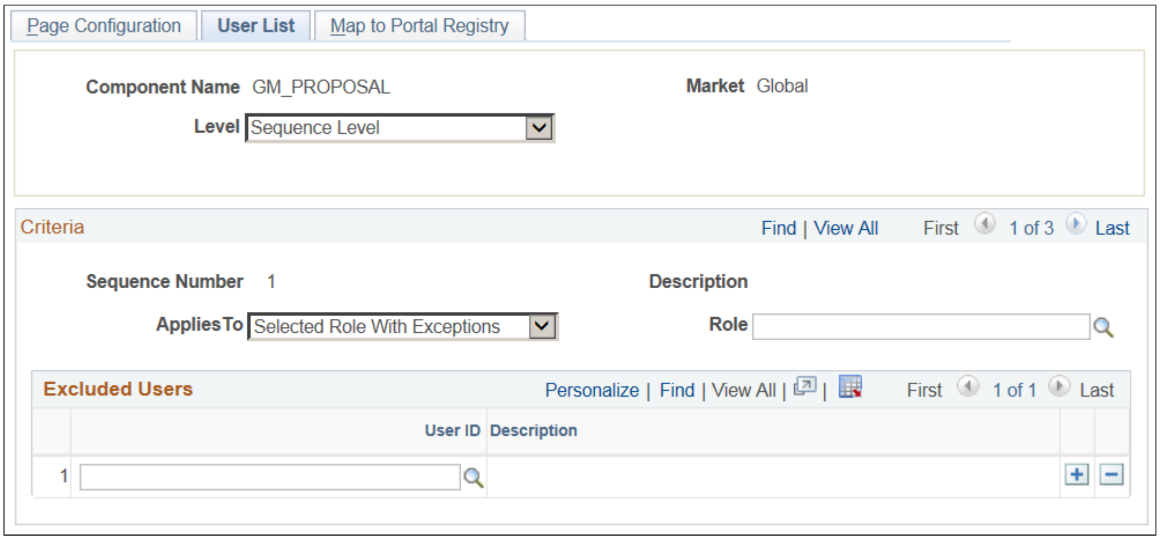
Use the User List page (EOCC_CONFIG_USER) to define the list of users to whom the configuration needs to be applied. You can create user list at Header Level where one user list covers the entire component or, at Sequence Level, where separate user list is defined for each sequence number.

Navigation

Enterprise Components, Page and Field Configuration, Page and Field Configurator, User List

Image: User List page

This example illustrates the fields and controls on the User List page.



Level

The user list can be applied either on the Header Level or on the Sequence Level.

- Header Level - Select this option if you need to define only one user list for the entire component (for all the Sequence Numbers).
- Sequence Level - Select this option if you need to define separate user list for each sequence number. On selecting this option "Criteria' section appears on the page to capture sequence level user list criteria.

Applies To

Select from the following options:

- All Users With Exceptions – Select this option if you want to make the configuration applicable to all the users in the system. On selecting this option, 'Excluded Users' section appears where you can add any exception User ID.
- Selected Role with Exceptions – Select this option if you want to make the configuration applicable to all the users having the role defined on the field Role. On selecting this option, 'Excluded Users' section appears where you can add any exception User ID.

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- Selected Users – Select this option if you want to make the configuration applicable only to specific User IDs. On selecting this option, 'User List' section appears where you can add the User IDs to which the configuration needs to be applied.

Role

Select the role to which the configuration needs to be applied.

Note: This field is visible only when you opt 'Selected Role with Exceptions" in 'Applies To' field.

User ID

Select the User ID of the users to which the configuration needs to be applied if 'Applies To' is selected as 'Selected Users'.

When the 'Applies To' is selected as 'All Users with Exception' or 'Selected Role with Exception', the User ID will correspond to the User to which this configuration need not be applied to.

Note: When the 'Applies To' is selected as 'Selected Users', the grid Excluded Users will be replaced with User List grid.

Map to Portal Registry Page

Use the Map to Portal Registry page (EOCC_MAP_EVENT) to map the configurations to Portal Registry. The defined configuration will be effective only when the Services defined by the utility is mapped to the corresponding portal registry entries.

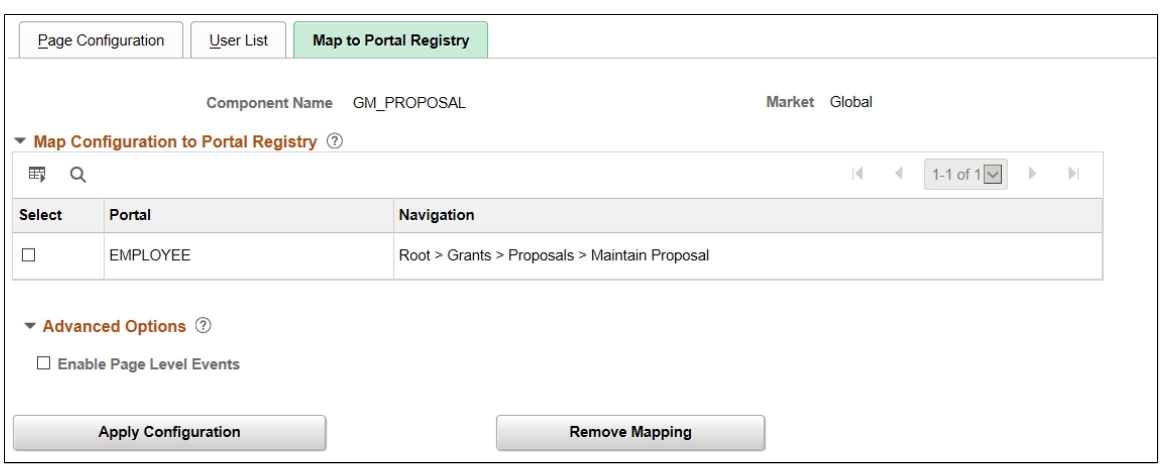
Note: Access to this page is restricted based on the access to People Tools Events Mapping component.

Navigation

Enterprise Components, Page and Field Configuration, Page and Field Configurator, Map to Portal Registry

Image: Map to Portal Registry

This example illustrates the fields and controls on the Map to Portal Registry page.



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Select	Select the required portal registry entries to map the configuration.
Enable Page Level Events	Select this checkbox to enable mapping of Page and Field Configurator to Page Activate people code events. Once the page level events are enabled, the field configurations defined in the Page Configuration tab will preside over any application delivered Page Activate event people code. **Note:** By default this will be enabled for fluid components.
Apply Configuration	Once you have selected the portal registry for mapping, click Apply Configuration button. If it is an existing configuration, system re- creates the configuration after removing the existing one. The system issues appropriate warning message to notify the user about the same.
Remove Mapping	Use this button to clear the Event Mapping configurations defined earlier.
Review/Editing Mapping	Click this link to review/edit the mappings generated by the Page and Field Configurator in the Event Mapping page delivered by People Tools. For more information on Editing the Event Mapping, see Configuring the Event Mapping Manually **Note:** The Review/Editing Mapping link will be visible only if the Page and Field Configurator services are mapped to the corresponding portal entry.

At the time of page save, if any potential errors in configurations are detected, the system will issue a warning message to the user stating the reason. However it is left to the user to take the final action to proceed with the configuration.

Note: During the process of mapping the configurations, if the system faces any exceptions, the system prompts the user to generate the Event Mapping manually.
If any changes are made to the configuration, the Page and Field Configurator services need to be mapped again to the portal entry using the Apply Configuration push button.

Validate Page Configurations Page

Use the Validate Page Configurations page (EOCC_CONFIG) to verify the validity of the configurations defined using the Page Configuration page. This component can be used to verify the validity of the configurations after any system update or application of fix or patch. Any changes to the page or page field meta data of the fields and pages selected in Page and Field Configuration will be reported as validation error.

Navigation

Enterprise Components, Page and Field Configuration, Validate Page Configurations

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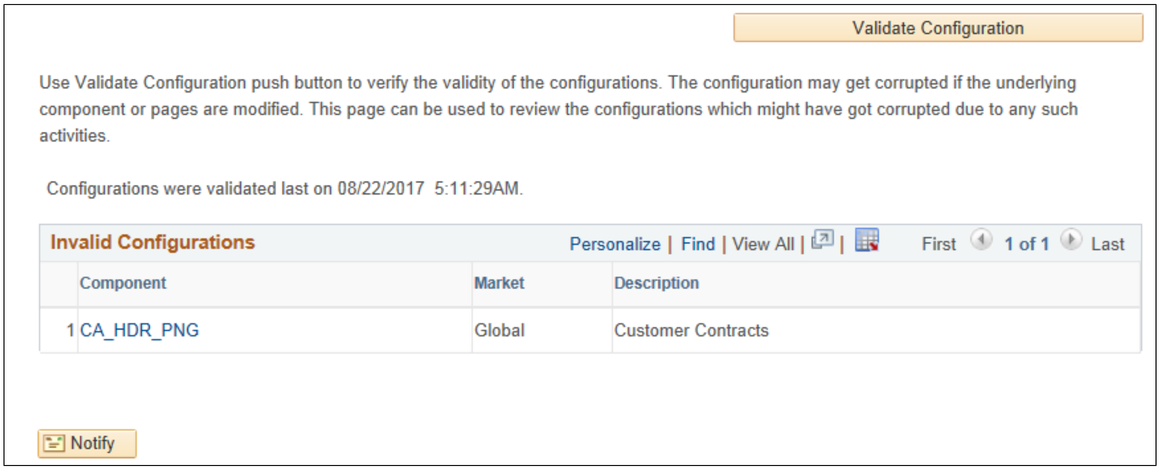
Image: Validate Page Configurations page

This example illustrates the Validate Page Configurations page.



The Component listed in the Invalid Configuration section is a hyper link. Click the link to directly open the corresponding configuration.

Moving Configuration from One Database to Another

The page and field configuration can be exported as ADS (Application Data Set) zip files and can be imported back to the desired database. The data set definition EOCC_CONFIGURATION can be used to export the configuration defined in one environment to another.

Note: The Data Set EOCC_CONFIGURATION will contain only the Page and Field related configurations. Any Event Mapping related configurations needs to be exported/imported separately using the corresponding ADS definitions. Alternatively, users can use the Apply Configuration push button on the "Map to Portal Registry" page to generate the Event Mapping configuration on the target environment."

See the product documentation for:

- *PeopleTools: Copying and Comparing ADS Projects*
- *PeopleTools: Upgrading or Copying Related Content Data Using ADS Definitions*

Configuring the Event Mapping Manually

This topic discuss on configuring the event mapping manually if the Apply Configuration push button on the Map to Portal Registry fails to map the events automatically.

The configuration can be mapped to each of the registered entity of the component using the “Event mapping” page (Main Menu> PeopleTools> Portal> Related Content Service> Manage Related Content Service). For more information on the fields and controls on the Event Mapping page, see *Mapping Application Class PeopleCode to Component Events* in PeopleTools documentation.

Note: You may need to map the services manually only if you have other Services already mapped to the Component or if the system prompts you to do so. In all other cases you could map the services for the configuration using the “Apply Configuration” push button.

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To map the events manually, follow the below guidelines:

- Map the service EOCC_POSTBUILD to the PostBuild event (Component Level Event Mapping grid) of the component.
- Map the service EOCC_SAVEPRECHANGE to the SavePreChange event (Component Level Event Mapping grid) of the component.
- For all the fields selected in the configuration residing on a scroll level greater than zero of the component (the fields on the grids and scroll areas), map the services EOCC_ROWINIT and EOCC_ROWINSERT to the Component Records (Component Record Level Event Mapping grid) RowInt and RowInsert events respectively.
- For fields residing on scroll levels greater than 1 of the component, map the service EOCC_ROWINIT to the RowInit event on the Component Record (Component Record Level Event Mapping grid) for the primary records of its parent level up to level 1.

  For example, if there is a component with four levels having primary records Record0, Record1, Record2, and Record3 respectively. For a configuration of any field on the Level 3, the RowInit events of its parent record Record2 and Record1 needs to be configured in addition to the RowInit and RowInsert events of the Record3.
- The RowInit and RowInsert events should be mapped to the primary record of the scroll area. For example if the related display field in a grid is configured in the utility, the services need to be mapped to the grid's primary record. It should not be mapped to the related field's record.
- If the PeopleTools version is 8.55 instead of using the services EOCC_ROWINIT and EOCC_ROWINSERT directly, the services should be cloned for each instance and the cloned instance should be used. The services can be cloned from the Define Related Content Service (Main Menu> PeopleTools> Portal> Related Content Service). The services can be cloned to any new names such as EOCC_ROWINIT_1, EOCC_ROWINIT_2 etc.
- To override the page level peoplecode, map the service EOCC_PAGEACTIVATE to the Page Activate Event (Component Page Level Event Mapping grid) for the required pages.
- Select the Processing Sequence as "Post Process" for all the service configurations.

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Chapter 12

Data Privacy Framework

Understanding Data Privacy

PeopleSoft Data Privacy Framework provide pages for identifying and maintaining Personally Identifiable and sensitive information. Personally Identifiable Information (PII) is any information that directly or indirectly helps to determine the identity of an individual. A common example for PII is a person's name. Examples for sensitive information include Ethnicity or Compensation Rate. PeopleSoft captures many data elements that can be considered PII, Sensitive or both.

The framework helps in the following ways

- Maintain Category/Classification setup data and their Data Privacy attributes
- Maintain Data Privacy Attributes for PeopleSoft Application Record Fields that store Sensitive and Personally Identifiable data
- Generate and View references for Components at Record Field Level and Component Record Field level.

Maintaining Data Privacy Attributes

Data Privacy Attributes are parameters used to group Records and fields storing Personally Identifiable and Sensitive Information. Data Privacy Attributes used in PeopleSoft System are:

- Category
- Classification
- Personal Identifier
- Sensitive

The following video provides an overview of Data Privacy Framework:

Image Highlights, PeopleSoft HCM Update Image 27: Data Privacy Enhancements — Sensitive Data Setup

Pages Used in Data Privacy Framework

Page Name	Definition Name	Usage
Maintain Category Page	EODP_CTGRY_DTLS_FL	View and maintain categories.

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Page Name	***Definition Name***	***Usage***
Maintain Classification Page	EODP_CLSFCN_FL	View and maintain classifications.
Maintain Data Privacy Settings Page	EODP_RECFLD_MNT_FL	Maintain Data Privacy mappings for PeopleSoft Records and Fields.
Select Reference Type Page	EODP_GENPARM_SCF	Select to refresh or update references.
References Last Run Page	EODP_RF_LSTRUN_SCF	View the timestamps for the references which were last updated for each Reference type.
View Reference Page — Component/ Page Tab	EODP_VIEW_REF_FL	View Components/Pages where Record Fields configured in Maintain Data Privacy Settings page are used.
Component Page Details for Standard page	EODP_COMP_REF_SCF	View more details of the reference used.
View Reference Page — Query Tab	EODP_VIEW_REF_FL	View Queries where Record Fields configured in Maintain Data Privacy Settings are used.
Query Details Modal	EODP_QRY_REF_SCF	Shows the details of connected query search result
View Reference Page — Reports Tab	EODP_VIEW_REF_FL	View Reports of type Business Intelligence Publisher (BIP) and Structured Query Report (SQR) where Record Fields configured in Maintain Data Privacy Settings are used..
BIP Report Details Modal	EODP_REPT_DTL_SCF	View BIP Report details based on the selected Query type.
SQR Report Details Modal	EODP_SQR_DTL_SCF	View the details of SQR programs. This also includes SQR Run Control Component and Navigation information
View Reference Page — Search Tab	EODP_VIEW_REF_FL	View Search Definitions and Search Categories where Record Fields configured in Maintain Data Privacy Settings are used.
Search Details Modal	EODP_SRCH_DTL_SCF	View details of Search Definition such as Query information, and whether the search is used as a component keyword search or global search.
View Reference Page — Analytics Tab	EODP_VIEW_REF_FL	View pivot grid reference to Records and Fields configured in Maintain Data Privacy Settings page.
Pivot Grid Details Modal	EODP_PIVOT_DTL_SCF	View pivot grid details such as Query information and publish options for pivot grids.

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Page Name	***Definition Name***	***Usage***
View Reference Page — Integration Tab	EODP_VIEW_REF_FL	Lists the Services and Service Operations using messages that reference Record Fields configured in Maintain Data Privacy Settings page.
Integration Details Modal	EODP_IB_REF_SCF	View the details of Integration Broker messages. These are details such as message Information and Integration group references.

Maintain Category Page

Use the Maintain Category page (EODP_CTGRY_DTLS_FL) to view, modify or add a new category value.

Navigation

Enterprise Components >Data Privacy Framework > Maintain Category

Using the search page on the left panel, you can search for Categories or add new Categories. Additional facets and filters are provided to refine search results.

Categories are used to functionally group information captured in PeopleSoft System. For example, Category- Contact Details is used to identify all Record Fields storing Contact information such as Phone Number, Email ID or Fax. Classifications are used to sub-categorize this information into more specific groups. Classifications for Category- Contact Details include Business Email, Personal Phone and Instant Messaging Address.

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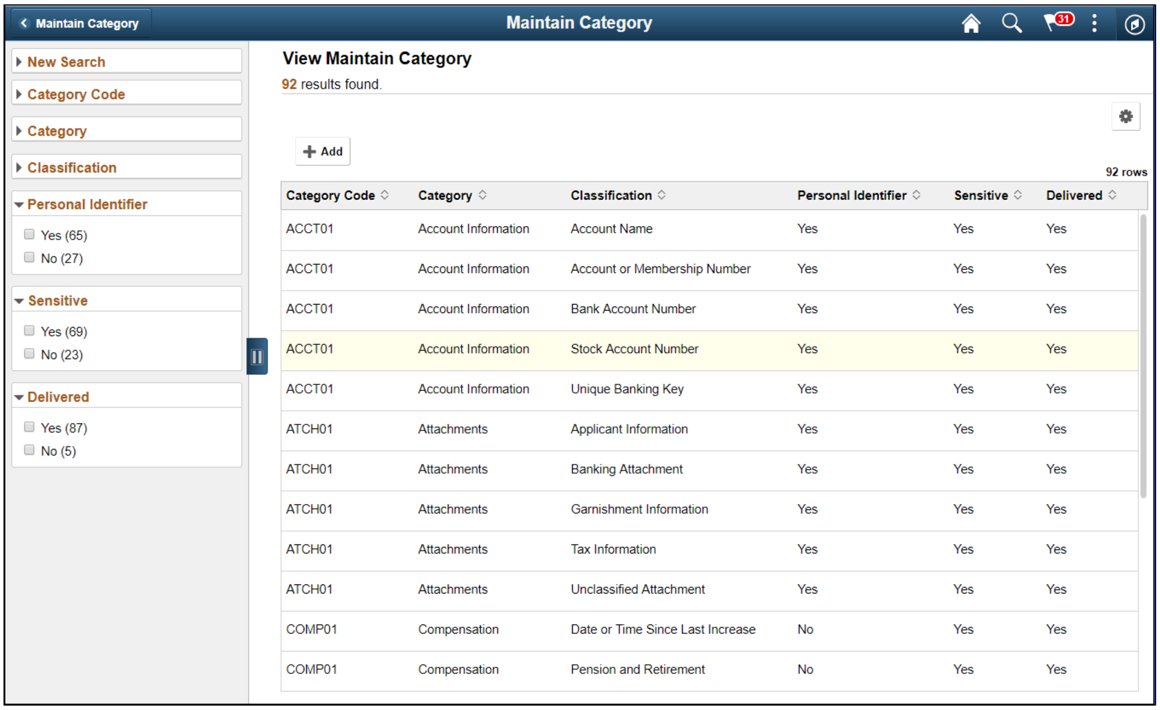
Image: Search for Maintain Category Page

This initial page for View Maintain Category is used to search the classifications and categories and add a new one as needed.

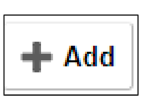


Note: System Data is delivered for Categories and Classifications. System data cannot be deleted, but it can be modified or new data added. Also the Categories being referenced in the Maintain Data Privacy Settings cannot be deleted.

The left panel lists the facets for component real time search and other options as listed:

- Category Code
- Category
- Classification
- Personal Identifier
- Sensitive
- Delivered

The search right panel lists all delivered categories and any categories that you have added. Delivered flag is turned on for all the Categories which are delivered as System data.



Select to add a new category.

You can enter Category Code and Category Name to the modal and Add to create a new category.

This opens the Maintain Category Page.

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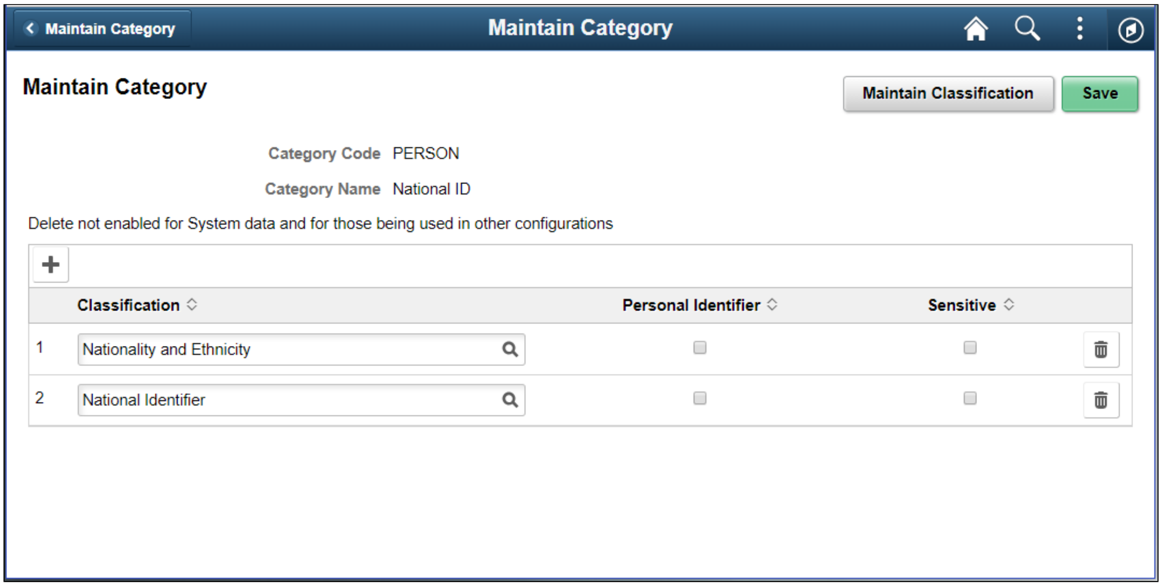
Image: Maintain Category Page

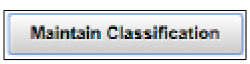
The Maintain Categories page lists Classifications mapped to a Category. System data and Classifications being used in Maintain Data Privacy Settings cannot be deleted from this page.

This example illustrates the fields and controls of Maintain Category page.



Select to add a new classification to the category list.

Here you can mark the classification specified as Personal Identifier or/and Sensitive accordingly.



Select to open Maintain Classification Page.

Maintain Classification Page

Use the Maintain Classification (EODP_CLSFCN_FL) page to define new classifications or view available classifications.

Navigation

Enterprise Components >Data Privacy Framework > Maintain Category

Select the Maintain Classification button.

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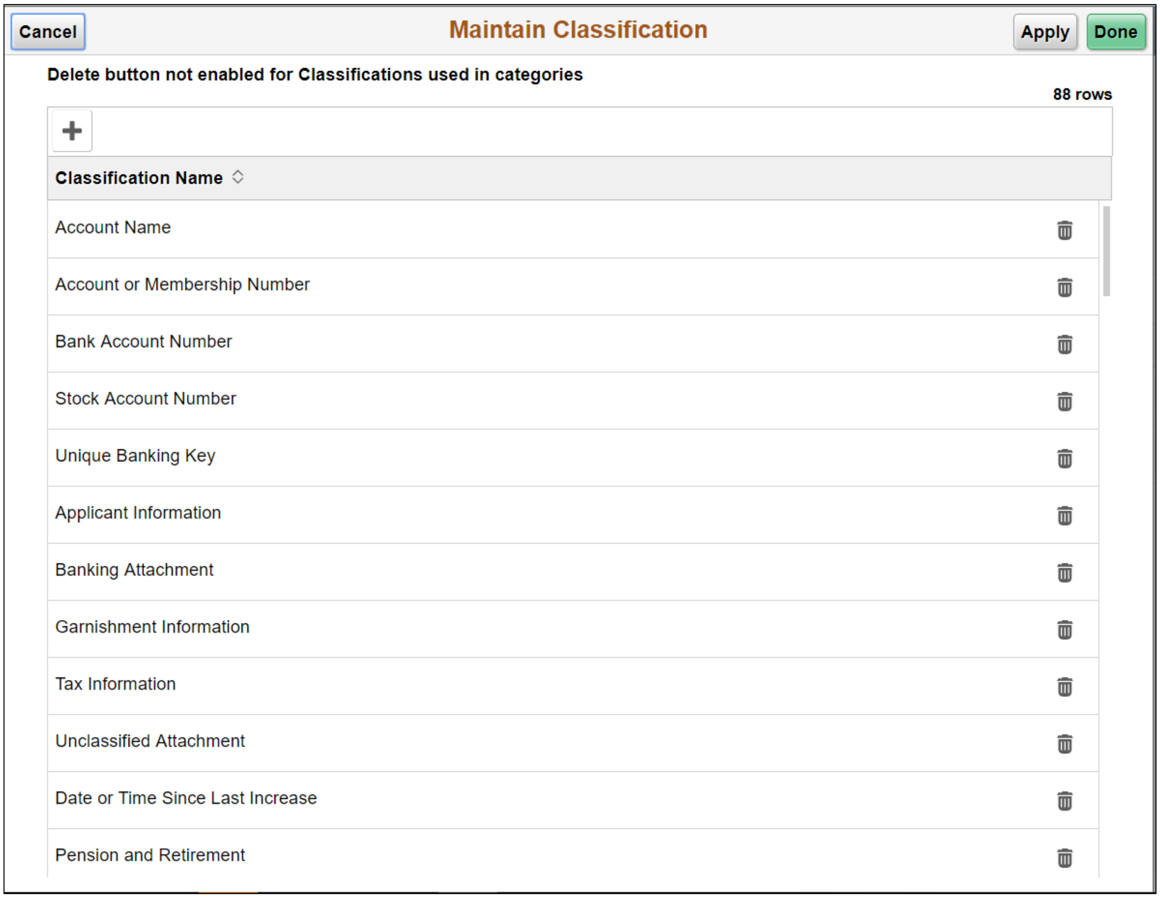
Image: Maintain Classification page

This example illustrates the fields and controls on the Maintain Classification page.



Select to add a new classification.

Maintain Data Privacy Settings Page

Use the Maintain Data Privacy Settings (EODP_RECFLD_MNT_FL) page to:

- view delivered Record Fields and their Data Privacy Attributes.
- modify Data Privacy Attributes for existing Record Field information.
- add new Record Field Information and map Data Privacy Attributes.

Data Privacy Attributes are mapped to Records and Fields in Maintain Data Privacy Settings Page. System data is delivered for Record Fields and their Data Privacy Attributes. You can modify Delivered information, but delete is disabled for such rows. You can add new Records and Fields to the configuration, and map data privacy attributes to it.

You can delete rows which are not System data.

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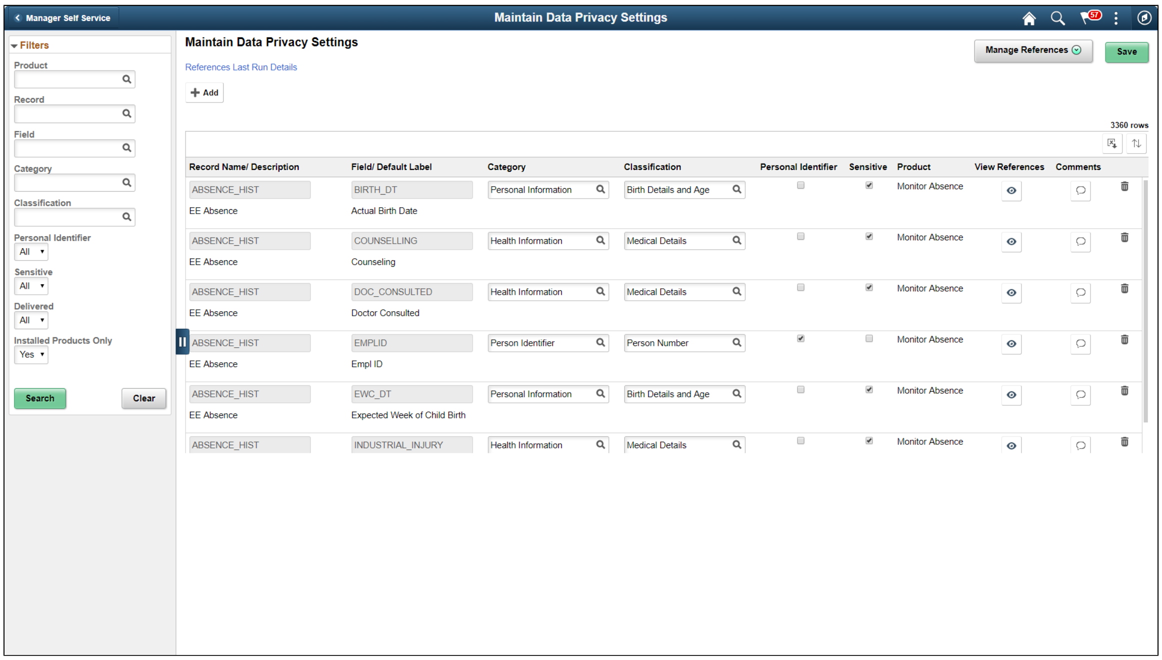
Navigation

Enterprise Components >Data Privacy Framework > Maintain Data Privacy Settings

Image: Maintain Data Privacy Settings page

This example illustrates the fields and controls on the Maintain Data Privacy Settings page.



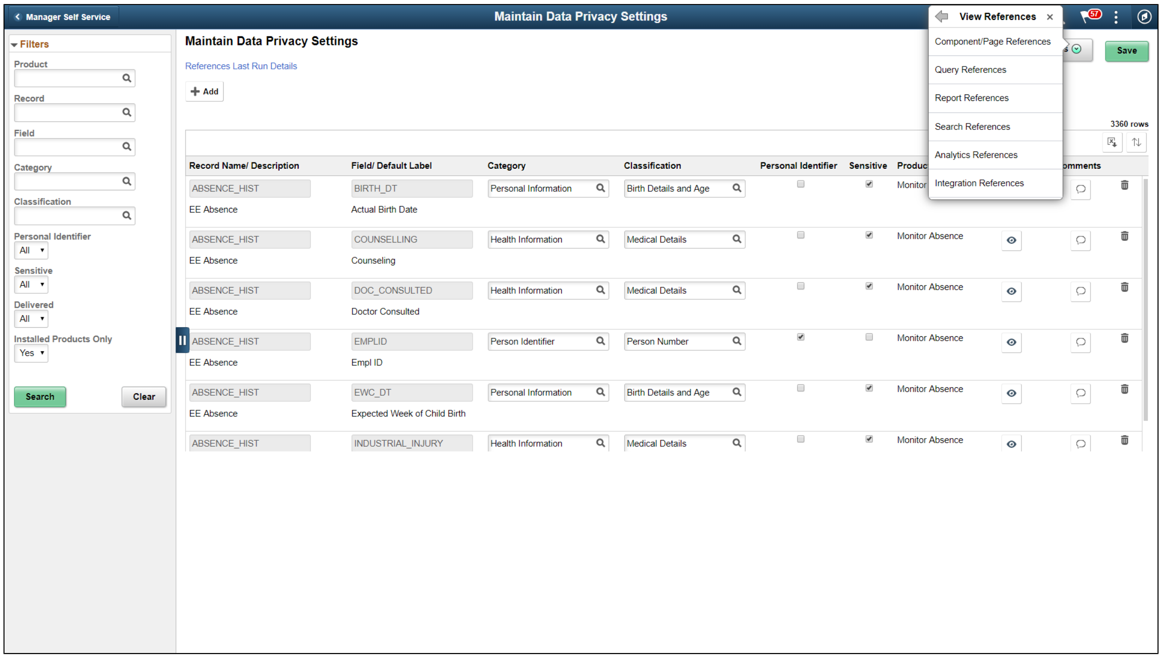
The left pane lists different filters available for Data Privacy Settings maintenance page. Available filters are:

- Product
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive
- Delivered
- Installed Products Only

Note: By default, all Record Fields and their references are displayed in Data Privacy framework. A filter *Installed Products Only* is added to Maintain Data Privacy settings page and View References pages all tabs to display information on installed products alone. The products to be displayed are selected from the Products page (Set Up HCM, Install, Installation Table, Products). By default the option for Installed Products Only will be selected as No.

Image: Maintain Data Privacy_References_Actions

This example illustrates the references actions from Maintain Data Privacy Settings page.



The search results based on the filtered criteria are displayed on the right pane.

Add Record Fields and map Data Privacy Attributes to it.

Note: The Personal Identifier and Sensitive flags will be defaulted depending on the category and classification.

Select to view the options of View References, Update References and Process Monitor.

On selecting View References, you can navigate to other pages listed below:

- View Reference Page — Component/Page Tab
- View Reference Page — Query Tab
- View Reference Page — Reports Tab
- View Reference Page — Search Tab
- View Reference Page — Analytics Tab
- View Reference Page — Integration Tab

Select Reference Type Pageto update or refresh a reference type.

References Last Run Details

View last run times of each reference type. This References Last Run Page also displays when Record Field information was last updated

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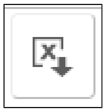
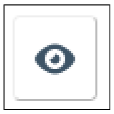
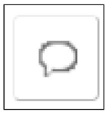
	Select to download the filtered Record Field Information.
	Select to view reference for the Record Field combination.
	Select to open Comments Modal to enter, review or update the comments for a Record.

Note: To view the status of the process run for the selected references, see *Viewing the Status of Process* under *Process Scheduler*.

Select Reference Type Page

Use the Select Reference Type (EODP_GENPARM_SCF) page to open the Select Reference Type modal. In this modal, you can select the reference type which need an update or refresh.

The Component / Page and Query should be selected to generate Report References. Select Refresh References to delete and reload all references except for the system data.

Navigation

Enterprise Components >Data Privacy Framework > Maintain Data Privacy Settings

Select Update References from the Actions menu of the Manage References button.

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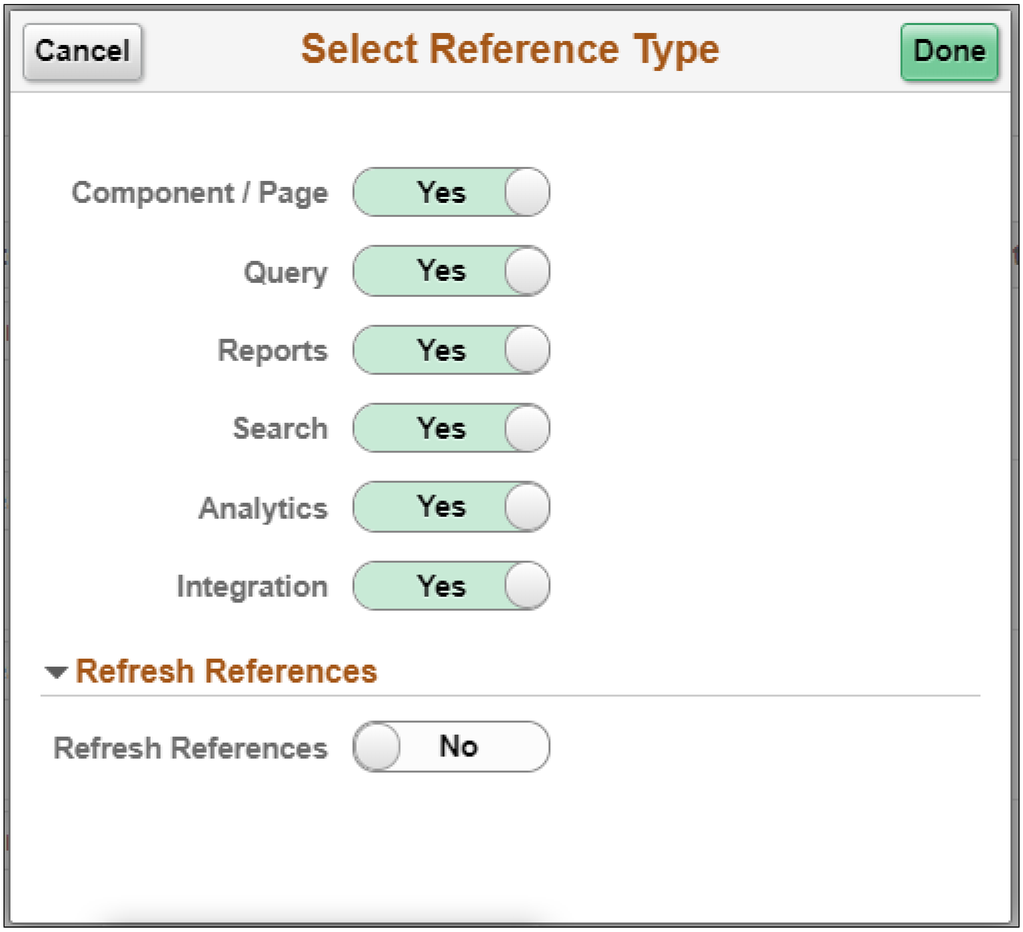
Image: Select References Page

This example illustrates the Select References page.



References Last Run Page

Use the Reference Last Run (EODP_RF_LSTRUN_SCF) page to view last run times of each reference type. The page also displays when Record Field information was last updated

Navigation

Enterprise Components >Data Privacy Framework > Maintain Data Privacy Settings

Select Reference Last Run Details link.

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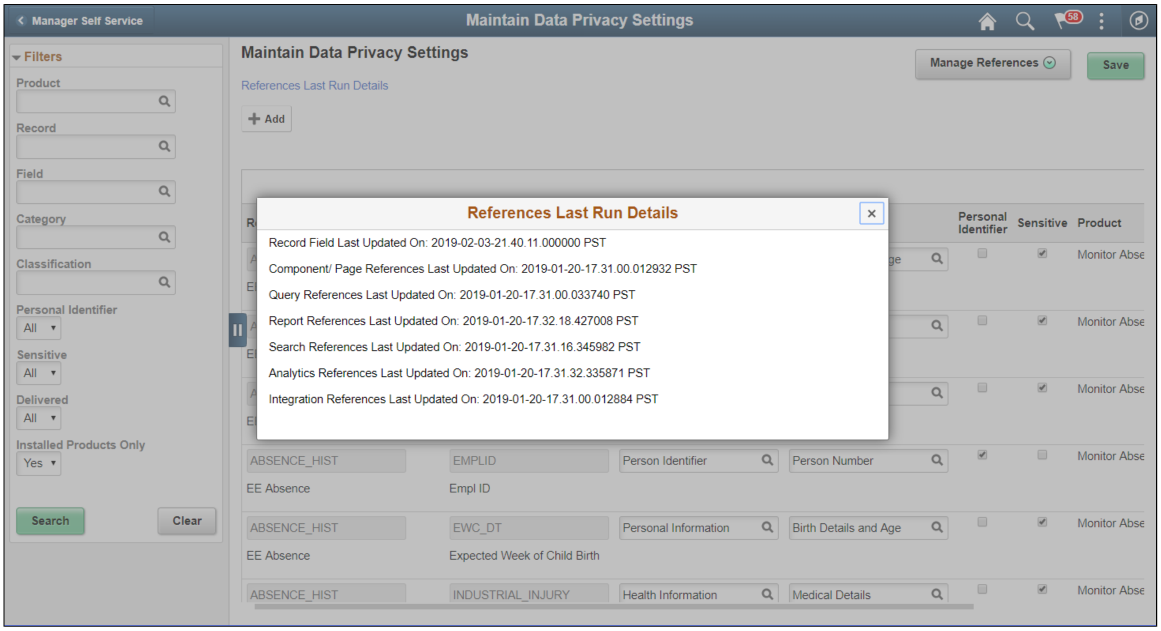
Image: Reference Last Run Details Page

This example illustrates the Reference Last Run Details page.



Comments Modal

Use Comments Modal (EODP_RF_CMNT_SCF) to enter, review and update the comments for a Record Field Combination.

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Image: Comments Modal Window

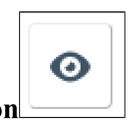
This illustration represents the comments modal for Record field.

View References Page

View References page display References to Record Fields configured in Maintain Data Privacy Settings page. These pages can be accessed in the following ways:

Navigation

Direct Navigation: Enterprise Components >Data Privacy Framework >View References

Row Level Action 	Select from Maintain Data Privacy Settings page. This is a modal window.
	Select to get the option of • View References: to directly navigate to the corresponding tab in View References page. • Update References: to access

This page uses a tabbed interface to display different types of references. Different Reference Types displayed are:

- Components/Page
- Query
- Reports

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- Search
- Analytics
- Integration

Note: Data Privacy Attributes in Component / Page References gets defaulted from Data Privacy Attributes at Record Field level, but this can be overridden. Data Privacy Attributes for Reference Types are read-only, and are displayed based on the Data Privacy Attributes configured at the Record Field level.
System data is delivered just for Component/Page References.
Some Component/Page References are delivered as System data. New Component/Page references get generated for newly added Record Fields when Update References or Refresh References are run.

View Reference Page — Component/Page Tab

Use the Component/Page (EODP_VIEW_REF_FL) tab to view the references on Record Field References in Components and Pages.

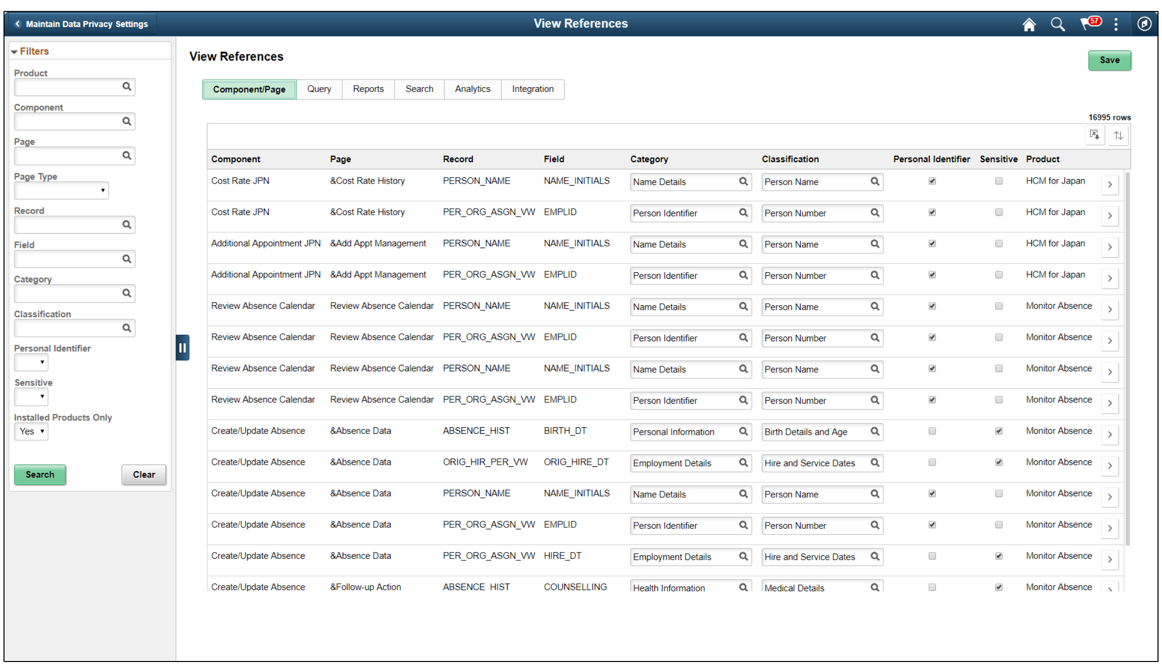
Note: Update References and Refresh References don't overwrite Data Privacy Attributes set in Component / Page References.

Navigation

Enterprise Components >Data Privacy Framework > View References >Component/Page tab

Image: Component/Page

This example illustrates the fields and controls on the Component/Page tab.



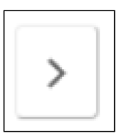
The left panel have Filters listed as follows:

- Product

- Component
- Page
- Page Type:
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive
- Installed Products Only

Page Type has three options:

- Search: Show references of Record Fields in Component Search Records. This reference is displayed only if the Record field is a Key / Search Key / Alternate Search Key / List Box Item in the Search Record for the Component.
- Secondary/ Popup: Show references in Secondary Page or Popup page. Component Name is blank for this Page type.
- Standard: Show references in Standard pages.



Select to open the Component Page Details for Standard page.

Component Page Details for Standard page

Use the Component/Page Details (EODP_COMP_REF_SCF) modal to view more details of the reference used.

The details display portal navigation and any component interface references.

Navigation

Enterprise Components >Data Privacy Framework > View References

Select the chevron in the Component/Page tab.

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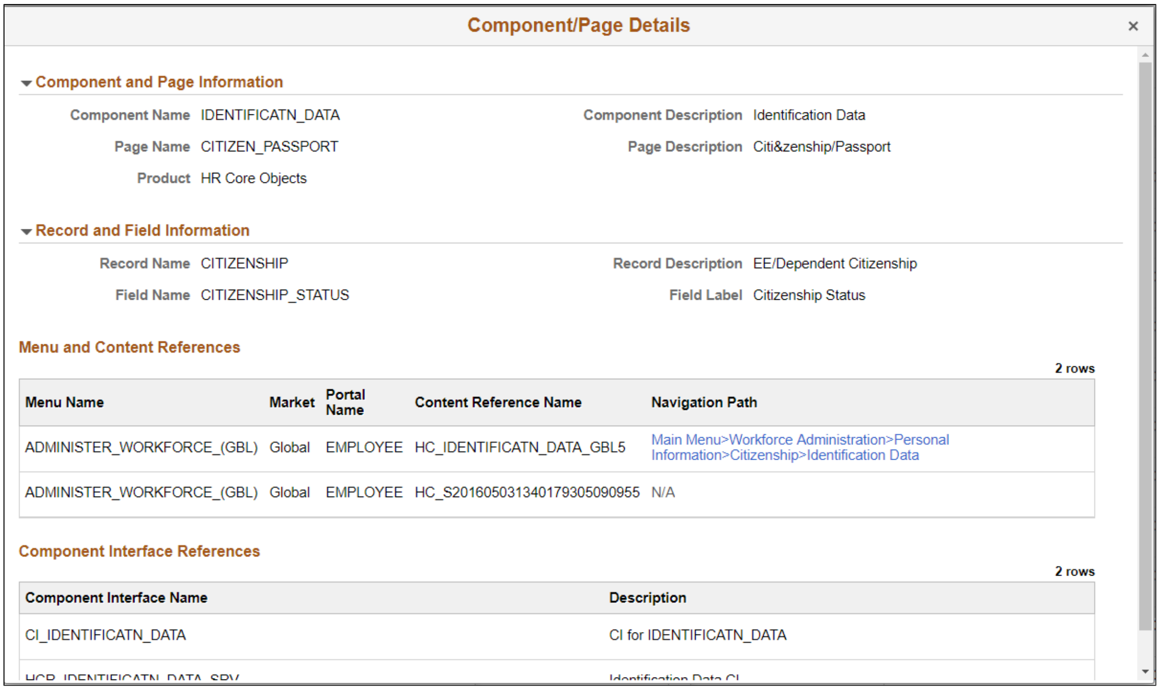
Image: Component/Page Details

This example illustrates the fields and controls on the Component/Page Details.



Select the navigation link to open a new window for the particular component. For a user who do not have access to the components, the navigation link is disabled. If there is no Navigation to a Component, the navigation column shows N/A.

View Reference Page — Query Tab

Use the View References (EODP_VIEW_REF_FL) Query tab to view references for Record Fields in Queries, Connected Queries and Composite Queries.

Navigation

Enterprise Components >Data Privacy Framework >View References >Query tab.

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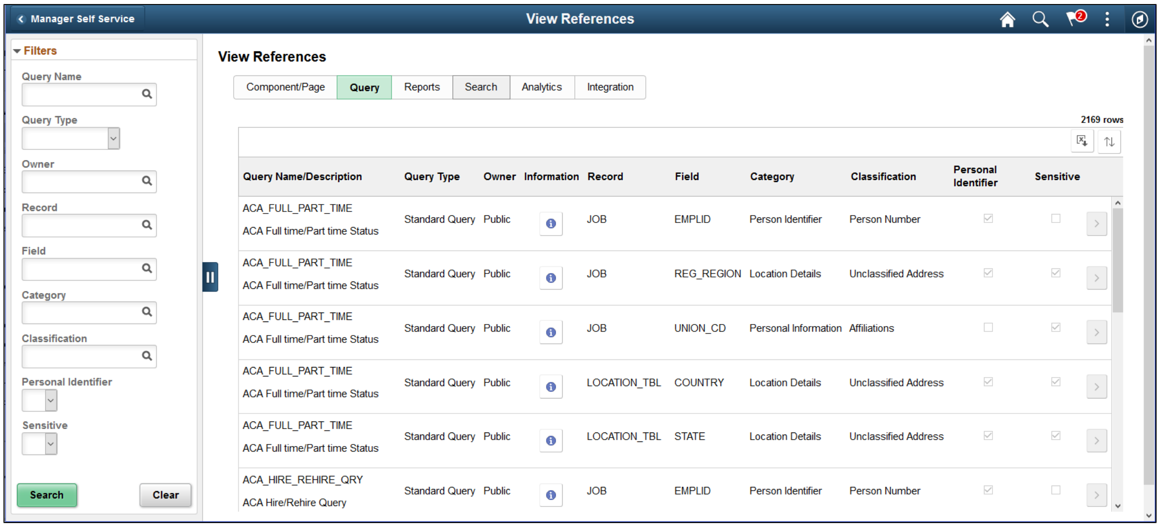
Image: Query Page with query type as Connected

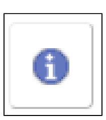
This example illustrates the fields and controls on the Query tab listing standard query results.



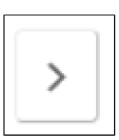
The left panel have Filters listed as follows:

- Query name
- Query Type

  Query Type has three options: Composite, Connected and Standard.
- Owner
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive



Select to view the usage of Record Field in the Query.



Select to open the Query Details page.

Note: The chevron is enabled for *Composite Query* and *Connected Query*.

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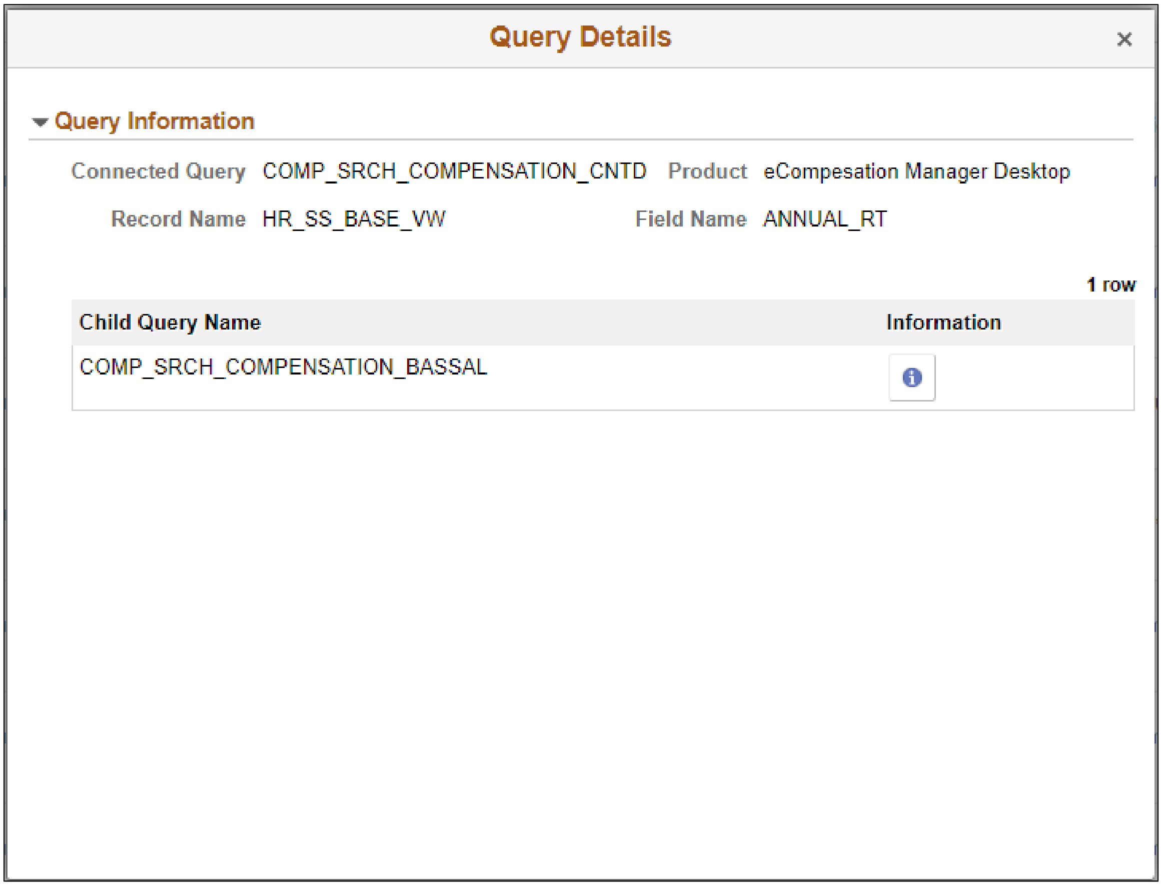
Image: Query Details Page

This example illustrates the fields and controls in Query Details (EODP_QRY_REF_SCF) page.



Note: For connected and composite queries, the chevron is enabled, and selecting this opens the Query Details modal which displays the child queries that uses the Record Field.

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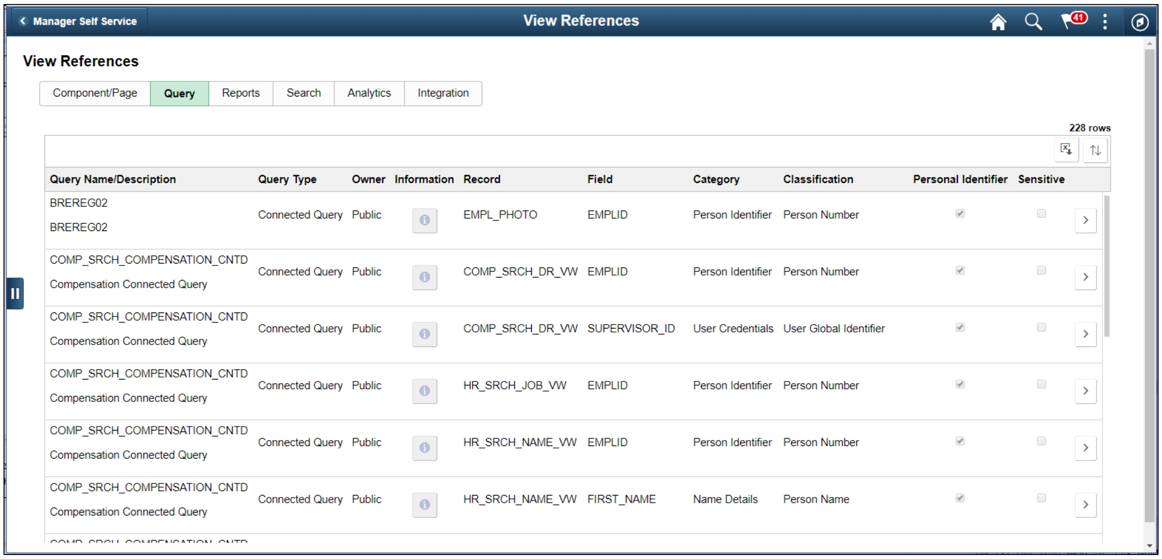
Image: Query tab with connected query search results

This example illustrates the search result for a type of connected query.



Query Details Modal

The Connected Query Details (EODP_QRY_REF_SCF) modal displays details of connected queries.

Navigation

Enterprise Components >Data Privacy Framework > View References >Query Tab

Select the Query Type as Connected Queries and select the chevron for details.

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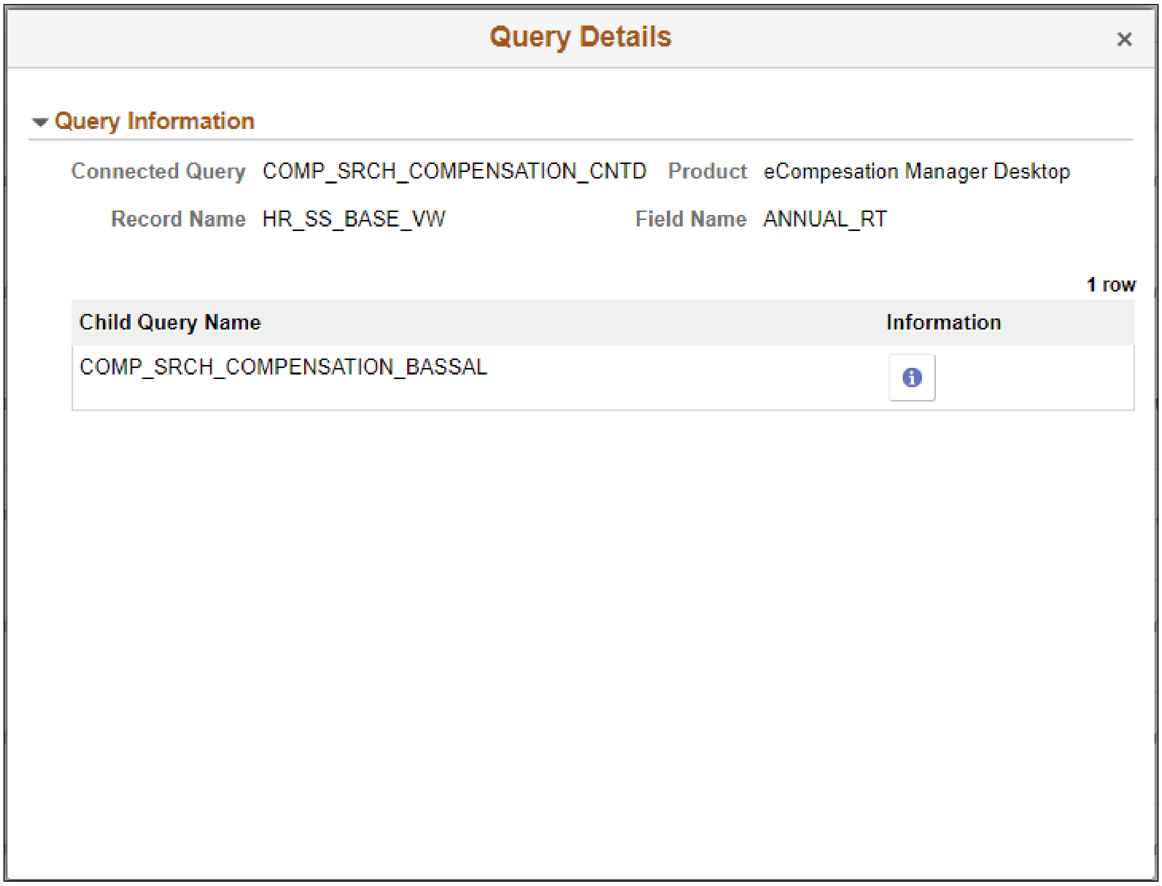
Image: Query Details Page

This example illustrates the fields and controls in Query Details (EODP_QRY_REF_SCF) page.



View Reference Page — Reports Tab

Use the View References (EODP_VIEW_REF_FL) page Reports tab to view the Report References in Business Intelligence Publisher Reports (BIP) and Structured Query Reports (SQR).

Navigation

Enterprise Components >Data Privacy Framework > View References >Reports tab

Select Report Type as BIP to view references in BI Publisher Reports.

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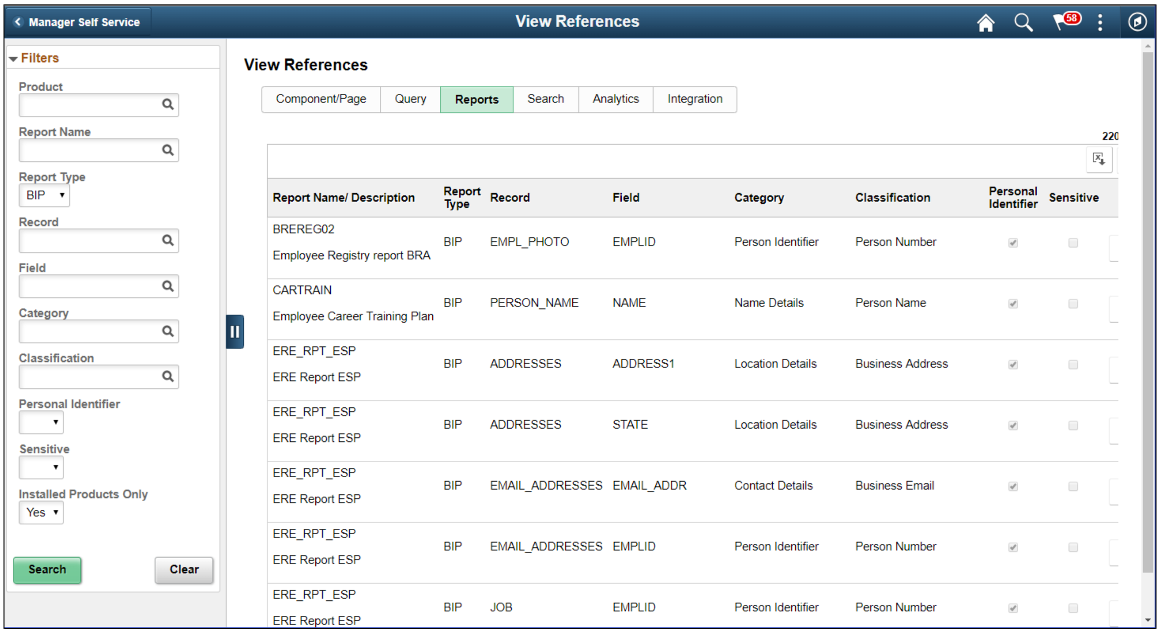
Image: View References — Reports Tab for BIP

This example illustrates the fields and controls on the View References — Reports Tab for Report Type BIP.



Select Report Type as SQR to view references in SQR Reports.

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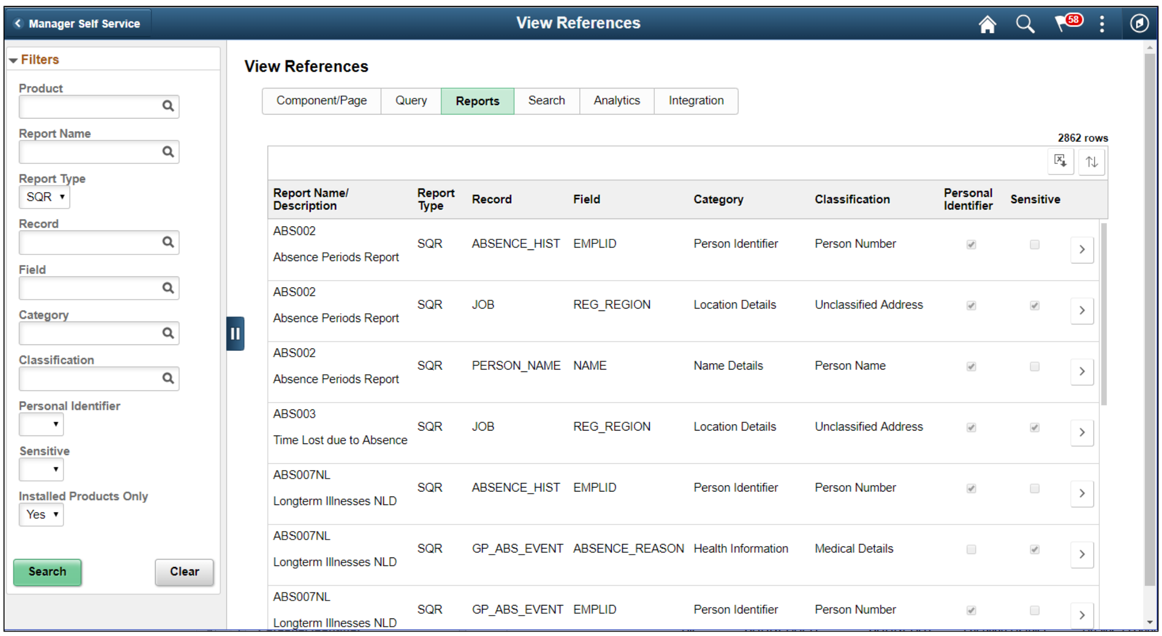
Image: View References — Reports Tab for SQR

This example illustrates the fields and controls on the View References — Reports Tab for Report Type SQR.

Note: Data Privacy Framework uses File Pre-Processor to load Record Field references in SQR files. This utility is bundled with PeopleSoft Change Impact Analyser. For details, refer *PeopleSoft Change Impact Analyser* in *File Pre-Processor* PeopleBooks.
System data for Oracle delivered SQRs is pre-delivered. This data gets loaded when Update References is run for Reference type- Reports. Customers on PeopleTools patches 8.55.26/8.56.12 or higher will have the ability to generate references for Record Fields used in all the SQR files they maintain. To do this, File Pre-Processor should be run in your environment prior to running Update References with Refresh option selected.

Warning! File Pre-processor is process intensive and may continue to run for some time.



The left panel have Filters listed as follows:

- Product
- Report Name
- Report Type:

  Report Type has two options: SQR and BIP .
- Record
- Field
- Category
- Classification
- Personal Identifier

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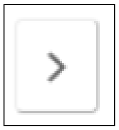
- Sensitive
- Installed Products Only



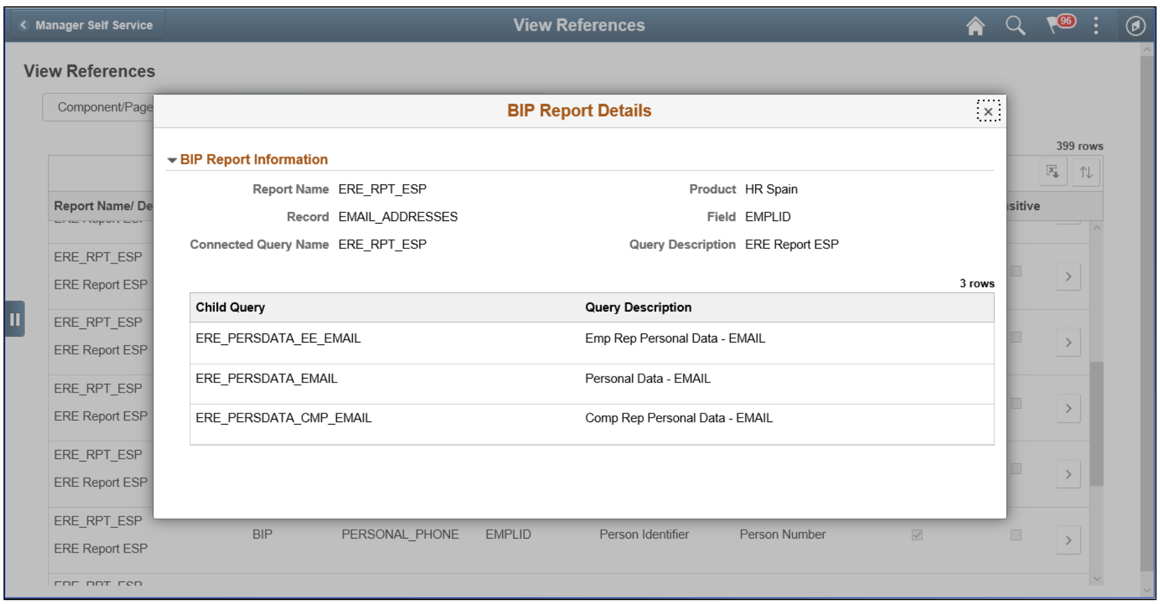
Select to open the report details of BIP Report Details Modal or SQR Report Details Modal

BIP Report Details Modal

The BIP Report Details Modal (EODP_REPT_DTL_SCF) display Query Details. If Connected Query is used, Child Query details are displayed.

Image: BIP Report Details Modal

This example illustrates the BIP Report Details Modal.



SQR Report Details Modal

The SQR Report Details Modal (EODP_SQR_DTL_SCF) displays details of Run Control components from which SQR Reports are run.

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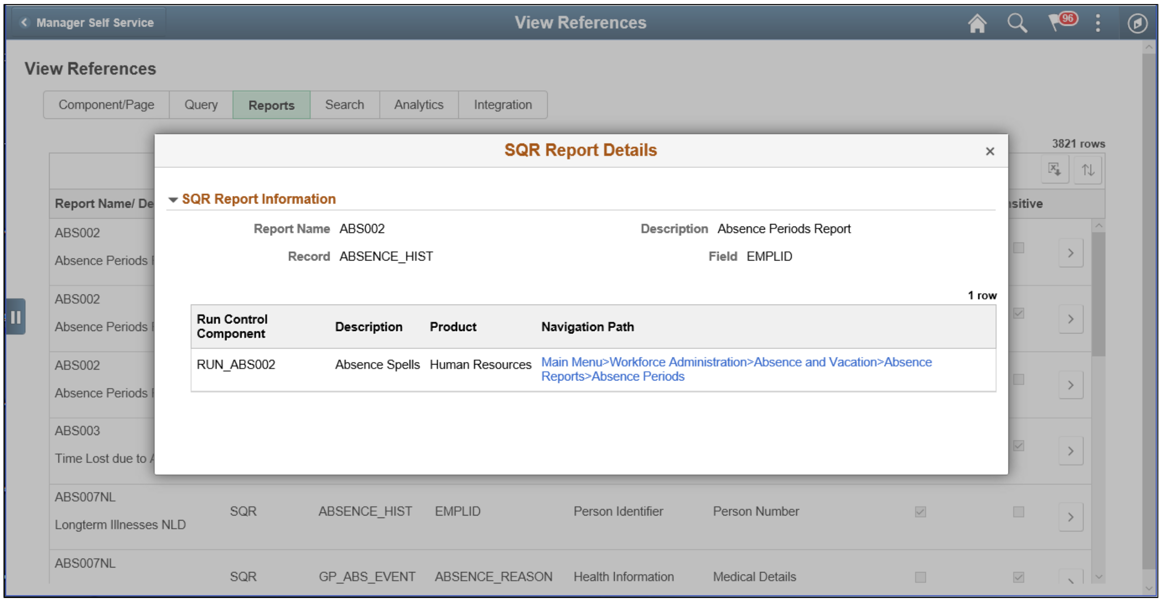
Image: SQR Report Details Modal

This example illustrates the SQR Report Details Modal.



View Reference Page — Search Tab

Use the View References Search (EODP_VIEW_REF_FL) tab to view references in Search Definitions and Search Categories.

Navigation

Enterprise Components >Data Privacy Framework > View References >Search tab

---

Note: Query Expressions used in Search Definitions are excluded from Search References.

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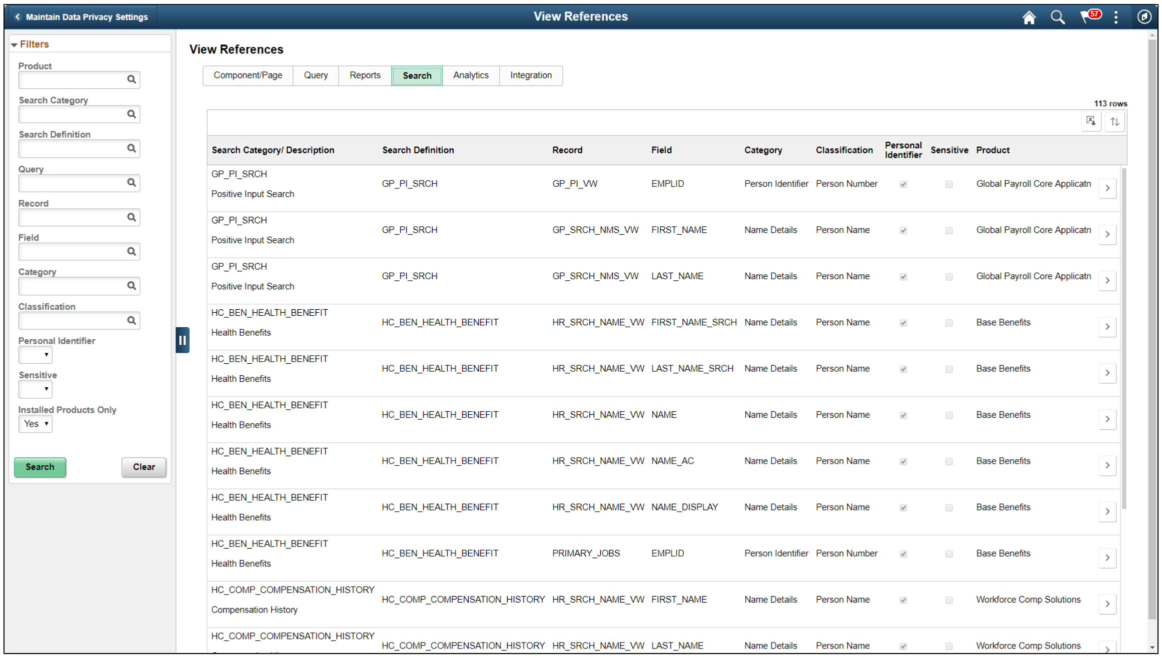
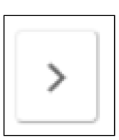
Image: View References-Search tab

This example illustrates the fields and controls on the View References-Search tab.



The left panel have Filters listed as follows:

- Product
- Search Category
- Search Definition
- Query
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive
- Installed Products Only

	Select to open the Search Details Modal.

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Search Details Modal

The Search Details (EODP_SRCH_DTL_SCF) modal displays details of queries in each search definition.

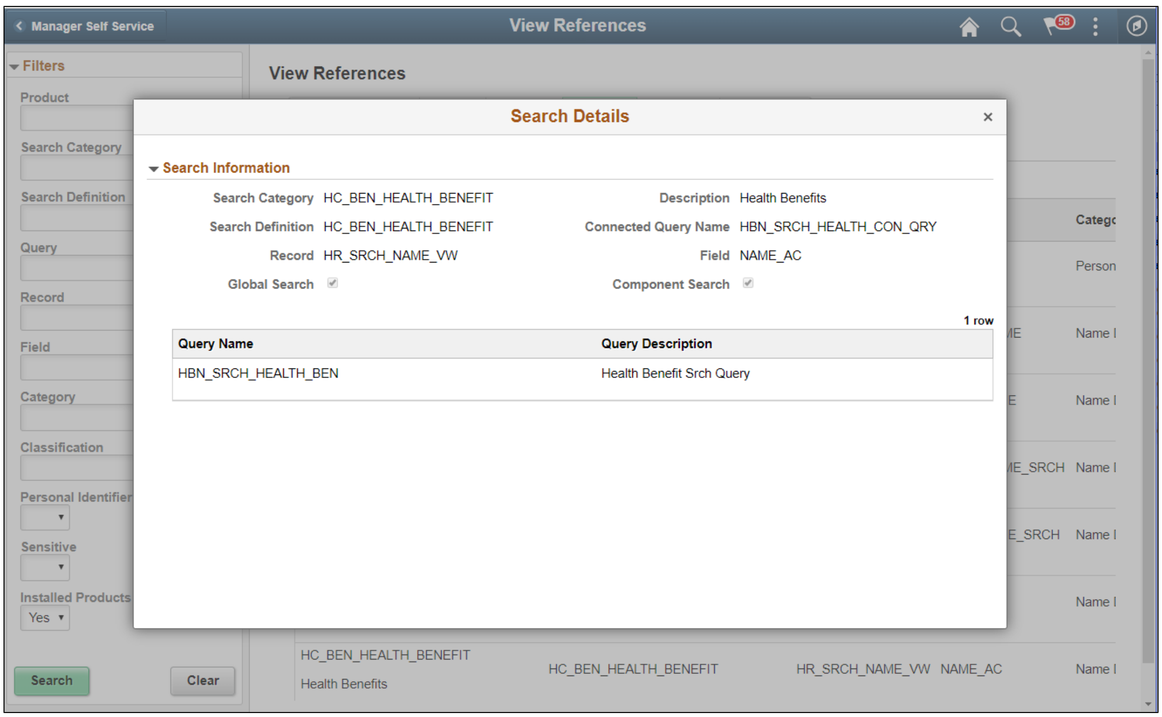
Navigation

Enterprise Components >Data Privacy Framework > View References >Search Tab

Select the chevron in the Search Results.

Image: Search Details Modal

This example illustrates the Search Details Modal.



This modal shows the information on the query name and whether it is a global search or component search.

View Reference Page — Analytics Tab

The Analytics (EODP_VIEW_REF_FL) tab list references in Pivot Grids.

Navigation

Enterprise Components >Data Privacy Framework > View References >Analytics tab

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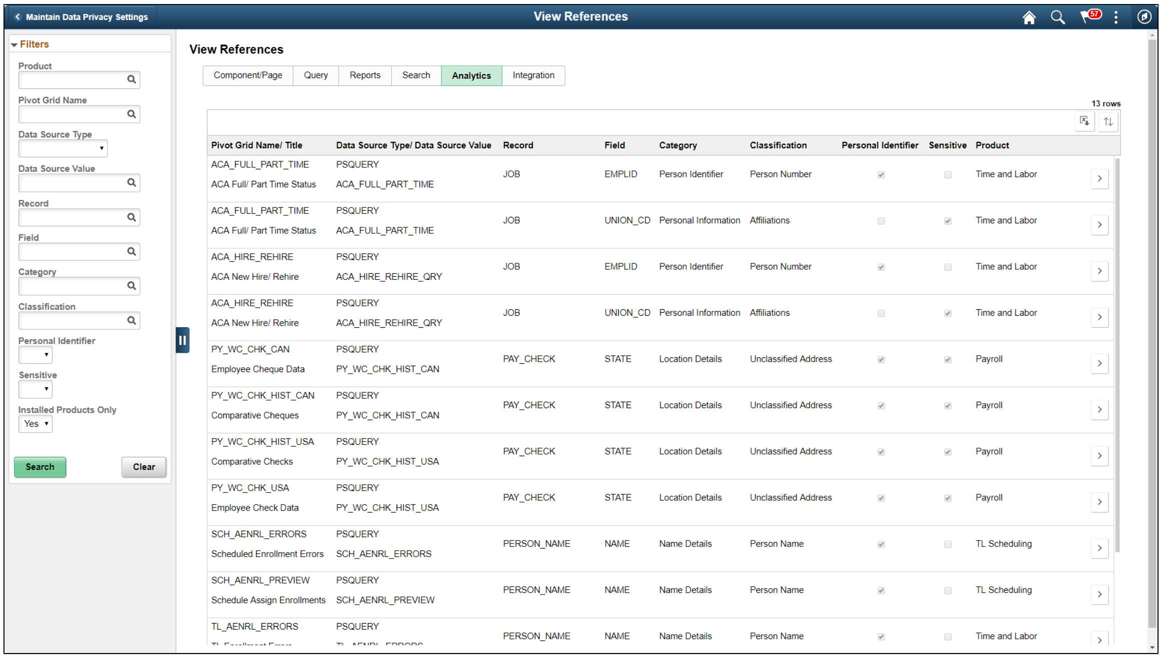
Image: Component/Page

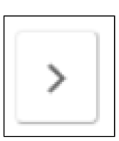
This example illustrates the fields and controls on the Analytics tab.



The left panel have Filters listed as follows:

- Product
- Pivot Grid Name
- Data Source Type

  Data Source Type has three options: COMPONENT, PSCOMPQUERY and PSQUERY.
- Data Source Value
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive
- Installed Products Only



Select to open the Pivot Grid Details Modal

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Pivot Grid Details Modal

The Pivot Grid Details (EODP_PIVOT_DTL_SCF) modal displays Query details and publish options for the Pivot Grid.

The modal also lists the tile details. You can view the Pivot Grid in Pivot Grid Viewer

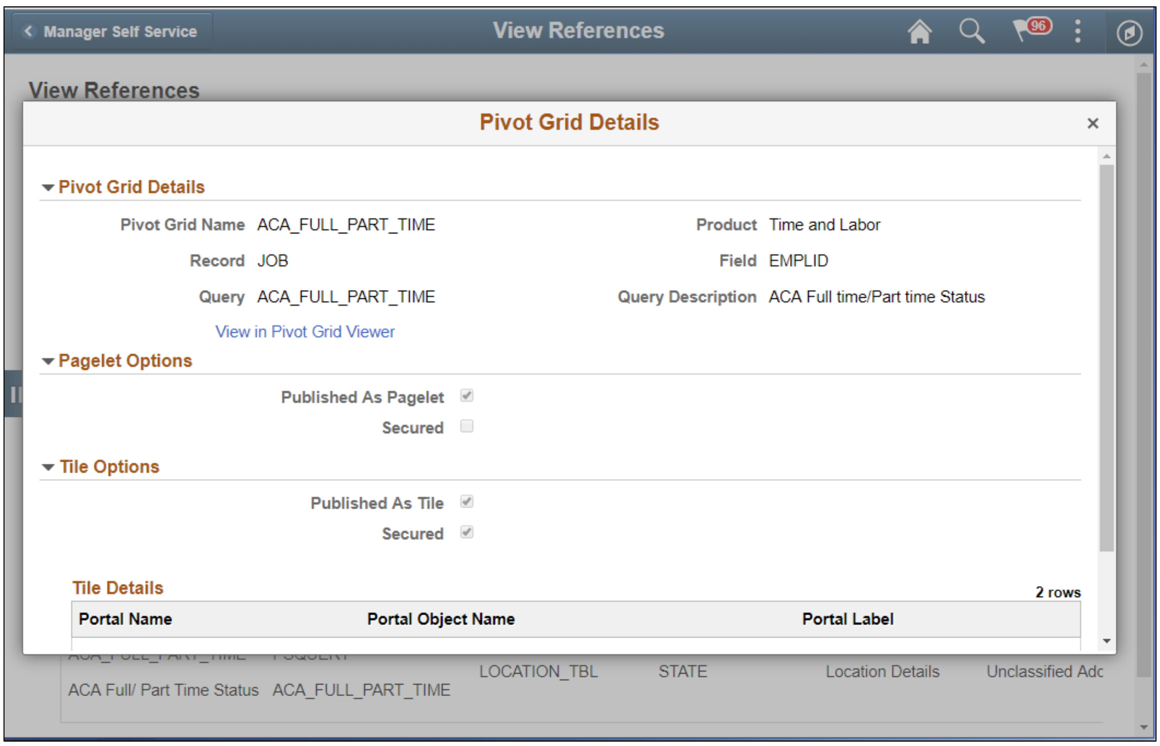
Navigation

Enterprise Components >Data Privacy Framework > View References >Analytics Tab

Select the chevron in the Search Results.

Image: Pivot Grid Details Modal

This example illustrates the Pivot Grid Details Modal.



View Reference Page — Integration Tab

Use the Integration (EODP_VIEW_REF_FL) tab to view references to Integration Broker related objects.

Navigation

Enterprise Components >Data Privacy Framework > View References >Integration tab

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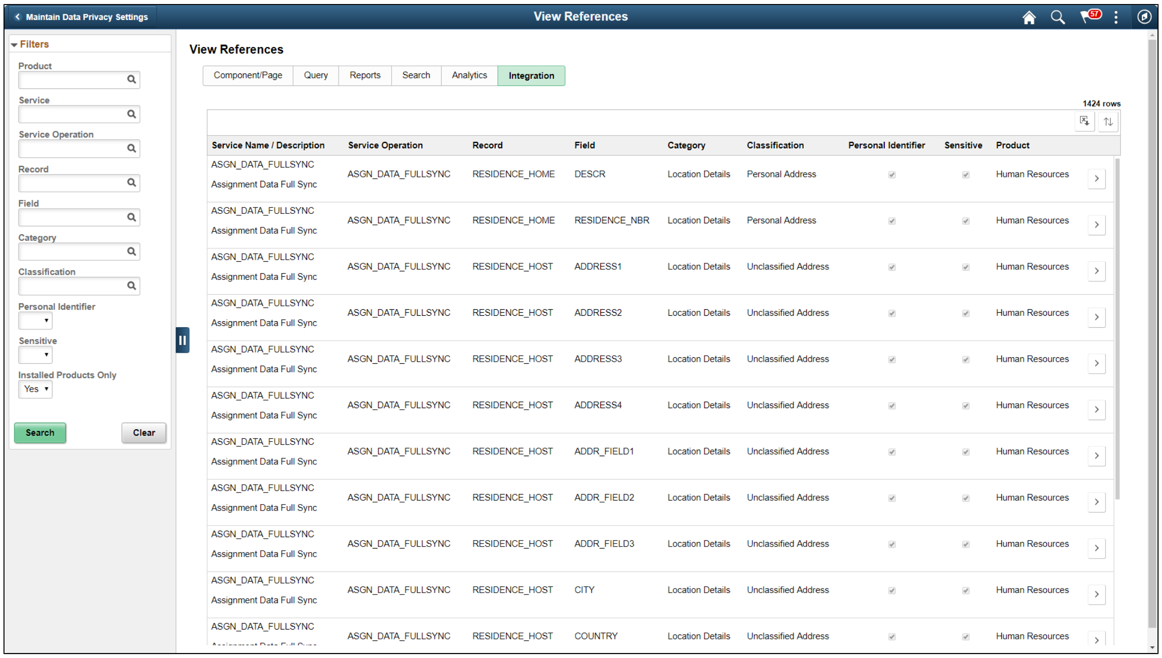
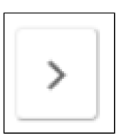
Image: Component/Page

This example illustrates the fields and controls on the Integration tab.



The left panel have Filters listed as follows:

- Product
- Service
- Service Operation
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive
- Installed Products Only



Select to open the Integration Details Modal.

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Integration Details Modal

The Integration Details (EODP_IB_REF_SCF) modal displays details of Integration Broker Objects. Some details displayed are the Default Service Operation Version, Queue Name, Type and Message Information. This modal also displays the Integration Group References, if any.

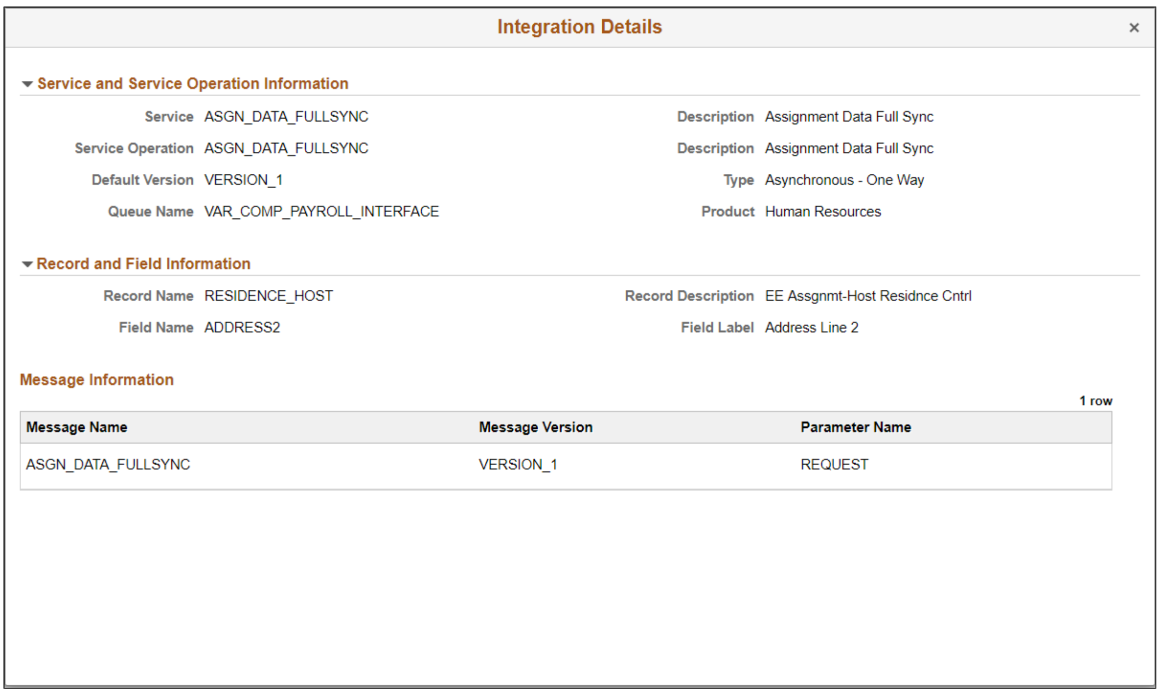
Navigation

Enterprise Components >Data Privacy Framework > View References >Integration Tab

Select the Action icon in the Search Results.

Image: Integration Details Modal

This example illustrates the Integration Details Modal.



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Chapter 13

Security Automation

Understanding Security Automation

The PeopeSoft Secutity Automation tool allows users to automate the customization of pre-existing permission lists, roles and menus. It allows setting the permission list security for:

- Pages
- Component Interfaces
- Query Trees (Access Groups)
- ADS (Access Groups and general settings)
- Process Groups (Process Groups and general settings)
- Web Services

It allows adding or removing permission lists from roles, adding or removing items to, or from a menu that points to new or deprecated components. The required changes are put together by user and is stored in a table as metadata. This is then run by the Security Update Automation Engine process. There are three AE process to be run for security updates for Permission Lists, Role and Menu

Configuring Metadata for Security Automation

There are three metadata pages that users can use to set security for Permissions, Roles and Menus

Pages Used to Configure Metadata for Security Automation

Page Name	***Definition Name***	***Usage***
Manage Permissions Page	EOPM_SUPD_PERM	Set security metadata for new permissions or change the security for existing permissions
Manage Roles Page	EOPM_SUPD_ROLE	Set security metadata for new roles or change the security for existing roles.
Manage Menus Page	EOPM_SUPD_MENU	Set security metadata for new menus or change the security for existing menus.

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Manage Permissions Page

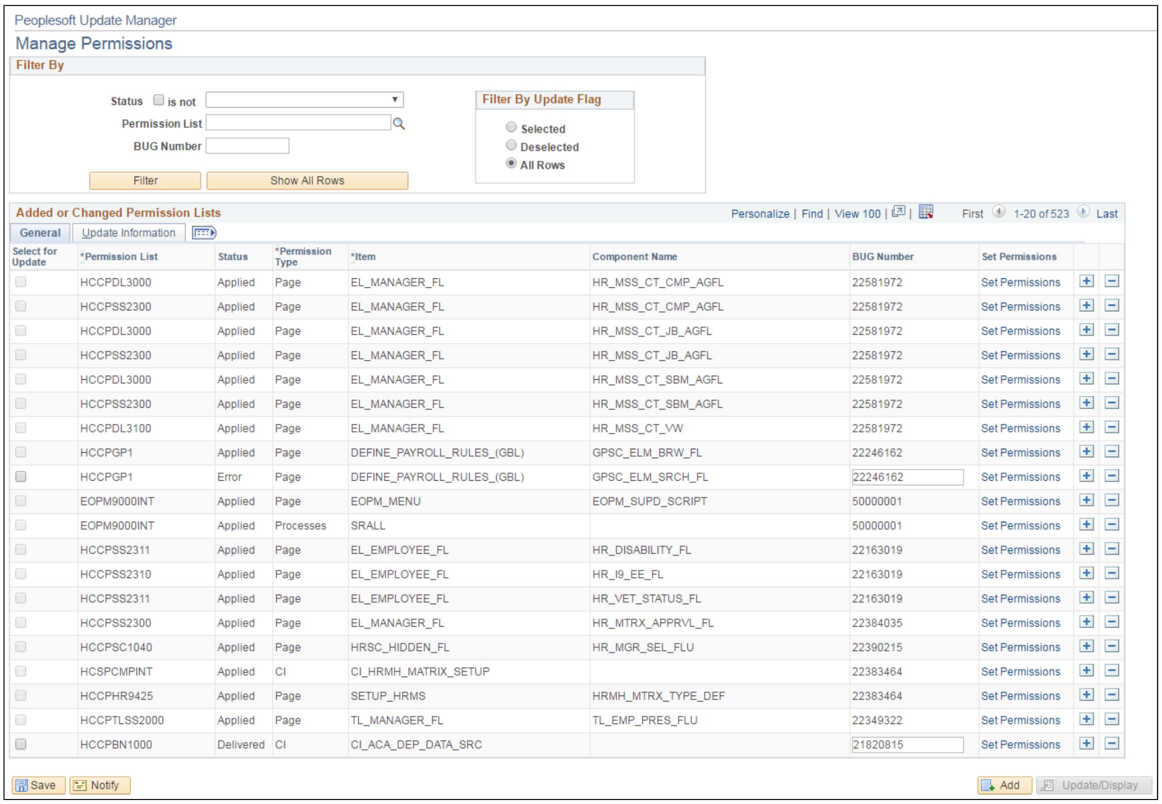
Use the Manage Permissions page (EOPM_SUPD_PERM) to set security for new permissions or to change the security for existing permissions.

Navigation

Enterprise Components >Security Deployment > Update Permission Lists

Image: Manage Permissions page

This example illustrates the fields and controls on the Manage Permissions page.



Select for Update	*Permission List	Status	*Permission Type	*Item	Component Name	BUG Number	Set Permissions
	HCCPDL3000	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_CMP_AGFL	22581972	Set Permissions
	HCCPSS2300	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_CMP_AGFL	22581972	Set Permissions
	HCCPDL3000	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_JB_AGFL	22581972	Set Permissions
	HCCPSS2300	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_JB_AGFL	22581972	Set Permissions
	HCCPDL3000	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_SBM_AGFL	22581972	Set Permissions
	HCCPSS2300	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_SBM_AGFL	22581972	Set Permissions
	HCCPDL3100	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_VW	22581972	Set Permissions
	HCCPGP1	Applied	Page	DEFINE_PAYROLL_RULES_(GBL)	GPSC_ELM_BRW_FL	22246162	Set Permissions
	HCCPGP1	Error	Page	DEFINE_PAYROLL_RULES_(GBL)	GPSC_ELM_SRCH_FL	22246162	Set Permissions
	EOPM9000INT	Applied	Page	EOPM_MENU	EOPM_SUPD_SCRIPT	50000001	Set Permissions
	EOPM9000INT	Applied	Processes	SRALL		50000001	Set Permissions
	HCCPSS2311	Applied	Page	EL_EMPLOYEE_FL	HR_DISABILITY_FL	22163019	Set Permissions
	HCCPSS2310	Applied	Page	EL_EMPLOYEE_FL	HR_I9_EE_FL	22163019	Set Permissions
	HCCPSS2311	Applied	Page	EL_EMPLOYEE_FL	HR_VET_STATUS_FL	22163019	Set Permissions
	HCCPSS2300	Applied	Page	EL_MANAGER_FL	HR_MTRX_APPRVL_FL	22384035	Set Permissions
	HCCPSC1040	Applied	Page	HRSC_HIDDEN_FL	HR_MGR_SEL_FLU	22390215	Set Permissions
	HCSPCMPINT	Applied	CI	CI_HRMH_MATRIX_SETUP		22383464	Set Permissions
	HCCPHR9425	Applied	Page	SETUP_HRMS	HRMH_MTRX_TYPE_DEF	22383464	Set Permissions
	HCCPTLSS2000	Applied	Page	TL_MANAGER_FL	TL_EMP_PRES_FLU	22349322	Set Permissions
	HCCPBN1000	Delivered	CI	CI_ACA_DEP_DATA_SRC		21820815	Set Permissions

Users can filter on existing rows of the metadata. Filtering can be done based on:

- Status (whether = or <>)
- Permission List
- Bug Number
- Update Flag

The following are the field definitions for the permission lists:

Select for Update	Select the check box to run the AE update for the permission list.
Permission List	Enter the permission List that is used to update.
Status	New — When new data is entered.

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	Changed — When an existing data is changed. Delivered — When the Permission update project is exported to the DAT file. Applied — When an AE change is successfully applied Tested — When the AE was started in Test mode Error — When the applied change is not successful
Permission Type	The user can define the type of permission they want to define metadata for. Available values are: • Page • Component Interfaces • Query Trees • Access Group Permission • Search Groups • Process Groups and Process Profile Permissions • Web services
Menu/CI/Tree/Search	The name for the corresponding Menu/CI/Query Tree/SES permission type.
Component Name	This is available if the Permission Type is Page.
Bug Number	This is populated by the developer delivering the fix but it is not mandatory.
Set Permissions	Depending on the Permission type, different modal windows are opened to set permission
+/-	Add or remove rows from the grid

Manage Roles Page

Use the Manage Roles page (EOPM_SUPD_ROLE) to set security for new permissions or to change the security for existing permissions.

Navigation

Enterprise Components >Security Deployment > Update Roles

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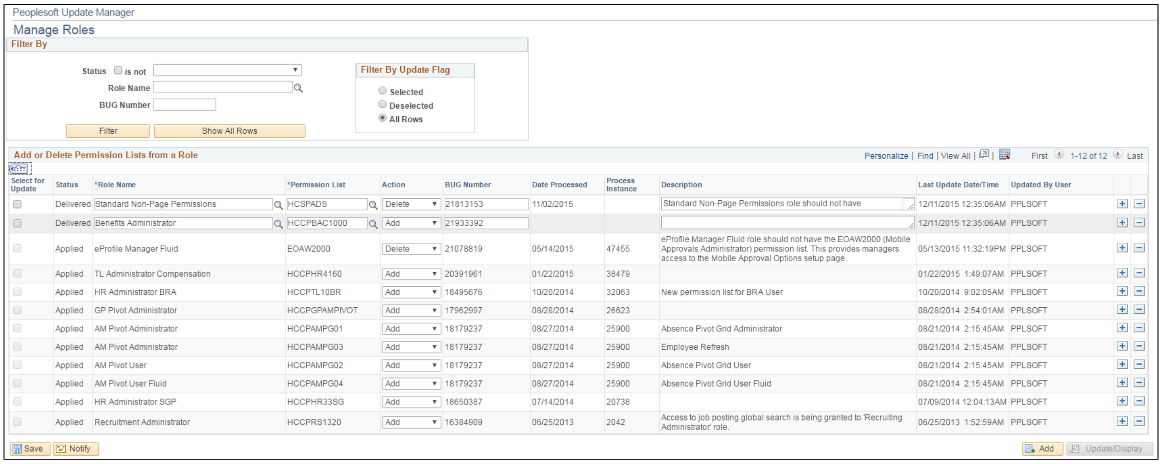
Image: Manage Roles page

This example illustrates the fields and controls on the Manage Permissions page.



Select for Update	Select the check box to select the role for AE execution.
Status	see the description for Status for the Manage Permissions Page.
Role Name	Name of the Role
Permissions List	Permission List for that role.
Action	Action to be taken for the permission for that role.
Bug Number	Bug number delivered by the developer. This is not mandatory.
Date Processed	date processed.
Process Instance	Process Instance.
Description	Description for the role.
Last Updated Date/Time	Last updated date and time
Updated by user	User name that ran the update.

Manage Menus Page

Use the Manage Menus page (EOPM_SUPD_MENU) to set security for new menu or to change the security for existing menu.

Navigation

Enterprise Components >Security Deployment > Update Menus

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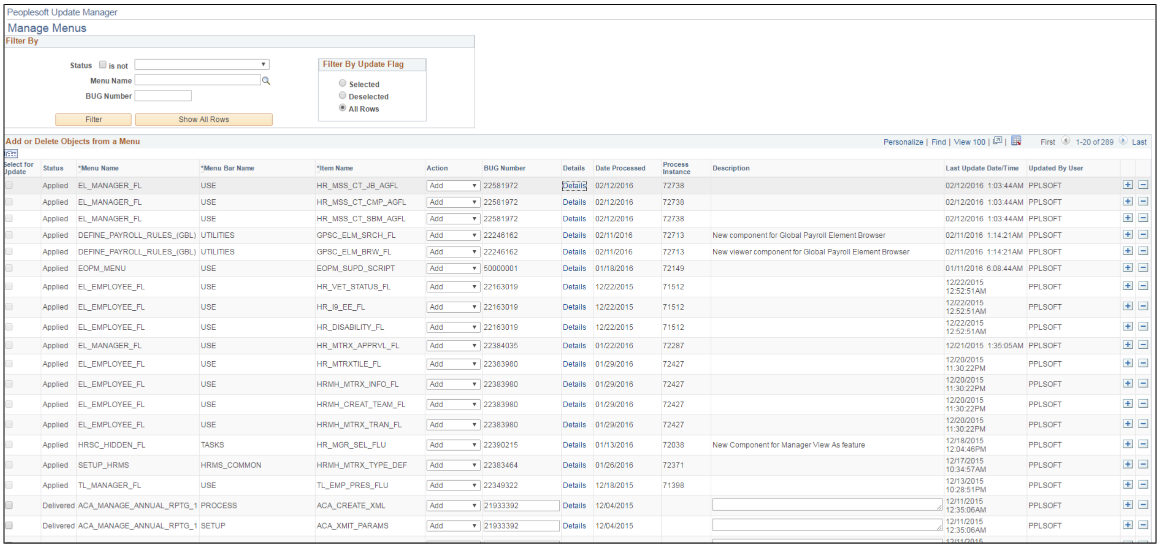
Image: Manage Menus Page

This example illustrates the fields and controls on the Manage Menus page.



Select for Update Select the check box to select the role for AE execution.

Status see the description for Status for the Manage Permissions Page.

Menu Name Select the Menu name

Menu Bar Name select the Menu Bar name

Item Name Select the Menu Item

Action Select the action to be performed on the Menu

Bug Number This is delivered by developer. This is optional

Details This is a modal window that shows the Menu Item details

Date Processed Date of processing.

Process Instance Processing instance

Description Menu Item description.

Last Updated Date/Time Last updated date and time

Updated by User User name that ran the update.

+/- Add or remove rows from the grid

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Chapter 14

Supplemental Data

Understanding Supplemental Data

Because every organization has different data requirements for work orders based upon unique business processes and regulatory issues, PeopleSoft Maintenance Management includes the Supplemental Data component to provide a way to define additional work-order related data. This component enables system administrators to extend the information that is stored for an object without requiring modifications to the object's base table (record) and without requiring additional PeopleCode or PeopleTools customizations. The supplemental data framework uses the PeopleSoft Common Components Active Analytic Framework (AAF) to define the business rules for the additional data.

Supplemental data is valuable when you want to capture information about a subset of object instances with fields that are relevant only to these particular object instances. Objects include records, pages and components, which you must configure specifically to accept supplemental data. For example, PeopleSoft defines and enables the Service Request, Work Order Header, and Work Order Task to include supplemental data for PeopleSoft Maintenance Management. Supplemental data may be a field that is embedded in the page or displays on a secondary page. PeopleSoft defines and registers both the supplemental data store records associated with a base record and the components to be used for supplemental data. Be aware that adding any additional objects is regarded as a customization and requires familiarity with PeopleTools.

When you set up supplemental data, you define records and fields and map them to a data storage record. These definitions are not stored in the PeopleTools metadata tables but in the supplemental data's own metadata tables. You define supplemental data page elements to display on the page in two columns. You must also group supplemental data fields within a display group for display purposes. You assign display groups to pages that are enabled for supplemental data. Once you have made this designation, you can define the conditions under which the application should use the supplemental data. You may perform a search on one display group. The pages within the Supplemental Data component enable you to accomplish these tasks.

Considerations and Limitations

The decision to add supplemental data to your application should be based on how applicable the data objects are to instances of the object. If the data objects apply to a significant number of instances of the object, then it may be better to add a field to the table using Application Designer instead of using attributes to capture the data. If the data elements apply to a much smaller percentage of the objects, then attributes may be the solution. While supplemental data provides a large amount of flexibility in terms of adding data elements without changing the underlying data model, you should consider the following limitations when you are evaluating whether to implement supplemental data:

- Supplemental data does not fall under the normal upgrade capabilities that are provided with PeopleTools.

  Because supplemental data records are not a type of PeopleTools object, you cannot use the standard upgrade facilities that are provided by PeopleTools, such as the Upgrade Copy or Upgrade Compare

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process, to upgrade supplemental data from one database to another. The mechanism for migrating supplemental data is to extract the data from the source database and move the data to the target database, which can be accomplished, for example, by using Data Mover or a similar tool. PeopleSoft does not deliver any utilities, such as data mover scripts, for migrating supplemental data.

- Because supplemental data records are stored in separate tables (distinct from the base table), it can be difficult to incorporate supplemental information into reports.
- Supplemental data can only be displayed in a two-column format.
- Performance issues can occur if you have too many supplemental data records in the system.

  Use supplemental data only if the data elements are truly dynamic in nature or if they apply to certain instances of an object. Never use supplemental data simply because it is easier to create than standard PeopleTools fields.

Terms

The following terms are used when discussing supplemental data:

Supplemental Data Field	Defined in the Supplemental Data Record, mapped to fields of the data store record. Also referred to as "Field" in the context of supplemental data setup.
Display Group	Grouping of supplemental data fields, for display purpose.
Supplemental Data Page	The page where supplemental data will be displayed or entered in runtime. Also referred to as *Page* in the context of supplemental data setup.
Supplemental Data Record	Logical data model for supplemental data. Also referred to as *Record* in the context of supplemental data setup.
Supplemental Data Store	The physical table where supplemental data is stored. Also referred to as *Data Store* or *Data Store Record.*
Search Record	Record that saves search criteria for the base record.
Supplemental Search Record	Record that saves search criteria for the base record. The criteria are based on the supplemental data defined for the base record.

Supplemental Data Record Details

The Supplemental Data components, Register Record and Register Component are system-defined by PeopleSoft. The purpose of these options is to associate the supplemental data storage and optional search records with a PeopleSoft Maintenance Management base record and a PeopleSoft Maintenance Management component.

For each base PeopleSoft Maintenance Management record, there is an associated supplemental data storage record:

Base Record	***Supplemental Data Storage Record***
WM_WO_HDR	WM_WO_HDR_SD

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Base Record	Supplemental Data Storage Record
WM_WO_TSK	WM_WO_TSK_SD
WM_WR_HDR	WM_WR_HDR_SD

The following components and pages are enabled for supplemental data. There are AAF contexts and terms defined for the components. You can define an AAF condition to show different display groups based on business rules.

Component	Page	Base Record
WM_ADD_WR_SS	WM_WORK_REQUEST_SS	WM_WR_HDR
WM_ADD_WR_WIZARD	WM_WR_SUMMARY_WIZ	WM_WR_HDR
WM_ADD_WR_WIZARD	WM_WR_SUPLDATA_WIZ	WM_WR_HDR
WM_WO	WM_TSK_SD_SEC	WM_WO_TSK
WM_WO	WM_WO_DETAIL	WM_WO_HDR
WM_WO	WM_WOHDR_SD_SEC	WM_WO_HDR
WM_WO_WR	WM_WOHDR_SD_SEC	WM_WO_HDR
WM_WOE_SD	WM_WOE_SD	WM_WO_TSK
WM_WORK_REQUEST	WM_WORK_REQUEST	WM_WR_HDR

The following delivered system data enables users to search work order tasks based on a work order header's supplemental data. There can be supplemental display groups with no AAF condition on a search page. Since the advanced search page is implemented as a secondary page, which users can invoke from the main page, you need to have the same assignment for these two pages:

Base Record	Storage Record	Base Search Record	Supplemental Data Search Record
WM_WO_HDR	WM_WO_HDR_SD	WM_TSK_SRCH	WM_TSK_SRCH_SD

The system stores the search criteria in the Supplemental Data Search Record using the same mapping defined for the Supplemental Record. There are no AAF contexts and terms defined for the components used for the search:

Component	Page	Base Record
WM_WOE_TWP	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOE_TWP	WM_WOE_TWP	WM_WO_HDR

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Component	***Page***	***Base Record***
WM_WOE_WB1	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOE_WB1	WM_WOE_WB	WM_WO_HDR
WM_WOTSK_WORKBENCH	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOTSK_WORKBENCH	WM_WOTSK_WORKBENCH	WM_WO_HDR

Example

PeopleSoft Maintenance Management serves as an excellent example of how supplemental data is set up and used in an application. For example, an organization may need to create work orders to assign and schedule resources to repair vehicles and uses PeopleSoft Maintenance Management. Part of this repair process includes the requirement to track any hazardous waste that was created while performing this work. This organization wants a Hazardous Waste group box to display, which contains the fields labeled as Date Generated (DATE), Description (DESCR), Notes (NOTES), Quantity (QTY), Unit of Measure (UOM), and Waste Code (WASTE_CD) when you create or update a work order task for this type of work.

Based on the registered records and components, you access the Define Record component and define each supplemental data record such as PS_HAZARD_WASTE, associate it with a supplemental data stored record, such as WM_WO_TSK_SD, and add all the field names and their associated details that you want to include in this record. Based on the hazardous waste example, you would add the fields: DATE, DESCR, NOTES, QTY, UOM, and WASTE_CD. You create a field name (WASTE_CD), a field label (Waste Code), select how the field will be used (code), the field length displays based on the field's use type (4 displays for code), and select a supplemental database field (SD_TEXT_4_1) in which to store each field's data. Since the use type for the field in this example is *code,* an additional group box displays where you can define all the field values and the order in which you want each value to display on the drop-down list For example, the WASTE_CD values might be D001, D002, D003, D004, D005, D006. Initially the status in the Record page is *In Design.* You must change the status in the Record page to *Activated* before saving the data and exiting this option.

Note: If you access the Define Record component for an existing record, you must change the status field to *In Design* before making any changes. After you add the new field, you must change the status field back to *Activated* before saving and exiting the component.

Once you have defined and activated all of your fields, you must access the Define Display Group component and create a display group, such as PS_HAZARD_WASTE, and associate it with a base record, such as WM_WO_TSK. You then must identify the fields and their associated records that you want to appear in either the left or the right column of the page. If a label is not associated with the field name, you may enter a label here. For example, for the PS_HAZARD_WASTE record, you might want to put the fields DATE, DESCR, and NOTES fields in the right column, and the QTY, UOM, and WASTE_CD fields in the left column.

Once you create a display group, you associate one or more of the display groups that you created to a component, such as the WM_WO component. This is also where you identify whether the condition is editable or read-only. If the condition is editable, you may access the condition term page where you may edit and add conditions for this display group. When you access the Work Order component in PeopleSoft

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Maintenance Management and access the WM_WO_DETAIL page, the supplemental data group box containing the supplemental data fields appear on the page.

Establishing Supplemental Data

To establish supplemental data, use the following components:

- Register Record (FS_SD_REG_REC) component.
- Register Component (FS_SD_REG_COMP) component.
- Define Record (FS_SD_RECDEFN) component.
- Define Display Group (FS_SD_GRPDEFN) component.
- Assign Display Group (FS_SD_PAGE_GRP) component.

This section discusses how to define a supplemental data record, define and map supplemental data record fields to data store records, specify details for supplemental data record files, define a supplemental data display group, assign a supplemental data display group, and define conditions for display groups.

Pages Used to Set Up Supplemental Data

Page Name	***Definition Name***	***Usage***
Register Record Page	SD_REG_REC	Registers the supplemental data base record and optionally registers the record that saves the search criteria for the base record. This is PeopleSoft system-defined data and is not set up by users. It should not be modified.
Register Component Page	SD_REG_COMP	Registers and enables the component and the pages for supplemental data. This is PeopleSoft system-defined data and is not set up by users. It should not be modified.
Define Record - Record Page	SD_RECDEFN	Defines the supplemental data record associated with the base record and identifies where to store this record.
Define Record - Fields Summary Page	SD_RECFLD	Maps fields to the data storage fields.
Define Record - Fields Detail Page	SD_RECFLD_DTL	Defines a field's detail information.
Define Display Group Page	SD_GRPDEFN	Defines a display group and associates any records and fields, as well as identifies the order in which the fields appear on the page.

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Page Name	Definition Name	Usage
Assign Display Group Page	SD_PAGE_GRP	Assigns one or more display groups to a supplemental data-enabled component and page.
Assign Display Group - Conditions Page	SD_PHRASE_SEC SD_TERM_SEC	Specify conditions that control when a display group appears.

Define Record - Record Page

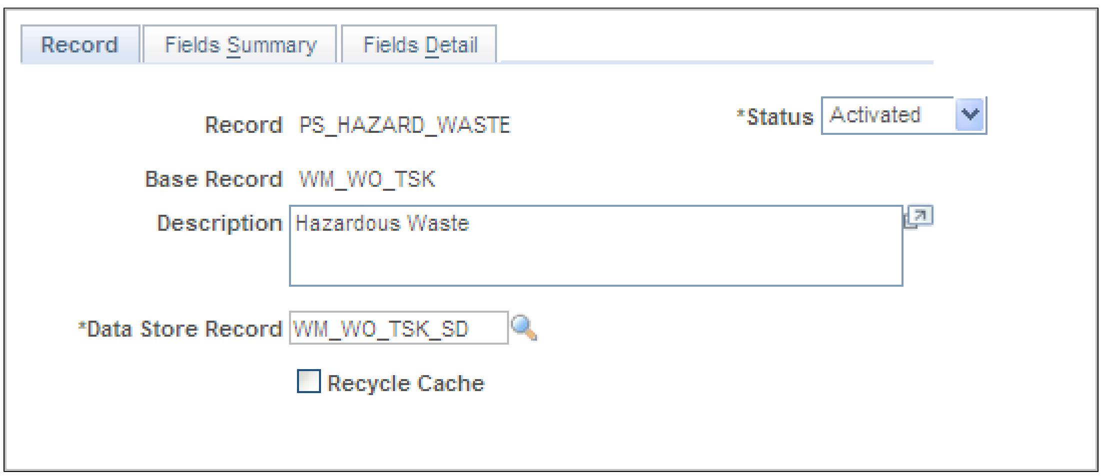
Use the Define Record - Record page (SD_RECDEFN) to defines the supplemental data record associated with the base record and identifies where to store this record.

Navigation

Enterprise Components > Supplemental Data > Define Record > Record

Image: Define Record - Record page

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



Record	Enter a name for a supplemental data record. For example a possible supplemental data record name used for PeopleSoft Maintenance Management may be PS_WASTE.
Base Record	Select a base record on the Define Record page to associate with this supplemental data record. For example, a PeopleSoft Maintenance Management base record is WM_WO_TSK.
Status	Select a status of *In Design* during the time that you are defining this record. Change the status to *Activated* to indicate that you completed mapping the supplemental data fields.

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Note: If you update a record, before you add a field or make changes to a record, you must change this status back to *In Design.* When you have completed the modification, you must change the status back to *Activated* before saving and exiting the component.

Data Store Record — Select one of the data store records that you previously registered that you want to use to store this supplemental data record. For example, the data store record for this supplemental data record in PeopleSoft Maintenance Management is WM_ WO_TSK_SD.

Recycle Cache — Clears the cache for the Supplemental Data.

Define Record - Fields Summary Page

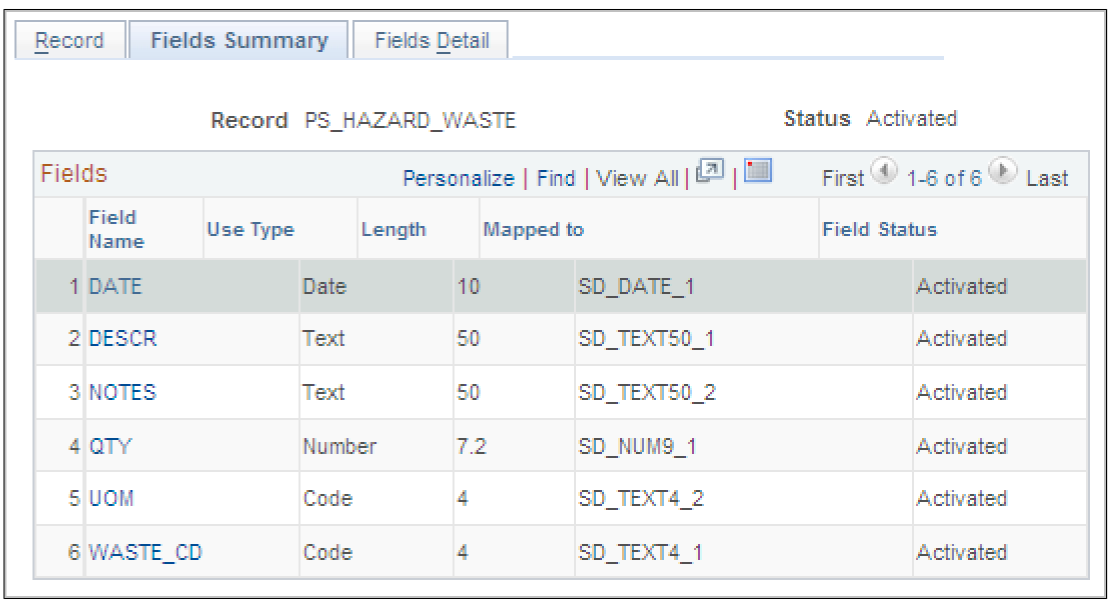
Use the Define Record - Fields Summary page (SD_RECFLD) to maps fields to the data storage fields.

Navigation

Enterprise Components > Supplemental Data > Define Record > and select the Fields Summary tab.

Image: Define Record - Fields Summary page

This example illustrates the fields and controls on the Define Record - Fields Summary page. You can find definitions for the fields and controls later on this page.



	Field Name	Use Type	Length	Mapped to	Field Status
1	DATE	Date	10	SD_DATE_1	Activated
2	DESCR	Text	50	SD_TEXT50_1	Activated
3	NOTES	Text	50	SD_TEXT50_2	Activated
4	QTY	Number	7.2	SD_NUM9_1	Activated
5	UOM	Code	4	SD_TEXT4_2	Activated
6	WASTE_CD	Code	4	SD_TEXT4_1	Activated

Field Name, Use Type, Length, Mapped to and **Field Status** — Click the Field Name link to access the Fields Detail page. The remaining fields on this page are all defined in the Fields Detail page. Once you finish adding all the fields and their descriptions on the Field Details page, and change the Status value in the Record page to *Activated,* each new field name and its characteristics appear on this summary page. You may

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then click on each field name and access the field name's detail information in the Define Record - Fields Detail page.

Define Record - Fields Detail Page

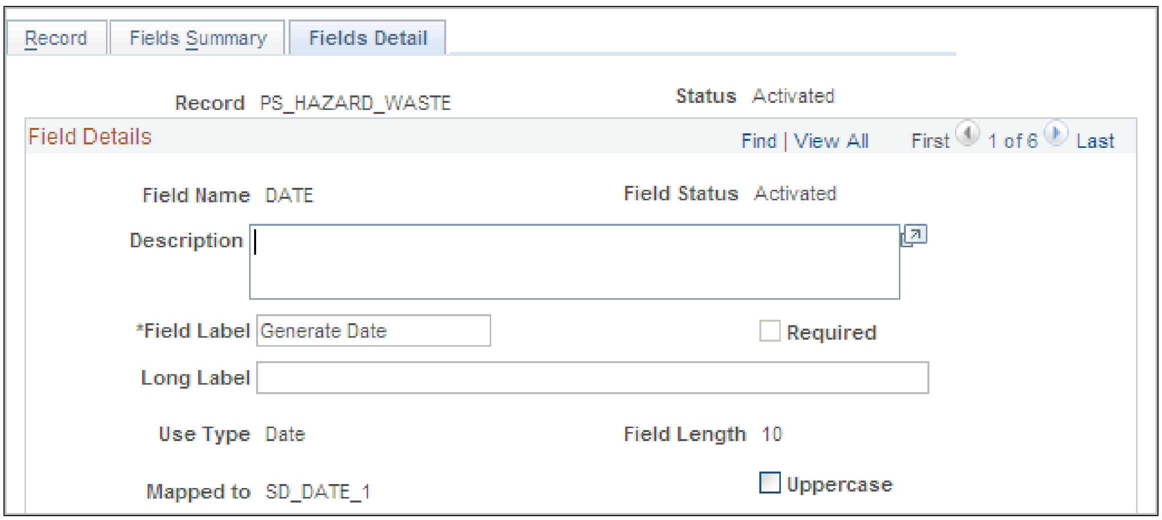
Use the Define Record - Fields Detail page (SD_RECFLD_DTL) to defines a field's detail information.

Navigation

- Enterprise Components > Supplemental Data > Define Record > Fields Detail
- Click a field name on the Define Record - Fields Summary page.

Image: Define Record - Fields Detail page

This example illustrates the fields and controls on the Define Record - Fields Detail page. You can find definitions for the fields and controls later on this page.



Field Name

Enter a name for the supplemental data field and a description of the field. For example, in PeopleSoft Maintenance Management this field might be called WASTE_CD.

Field Label

Enter the a label to display on the page for this field. For example, in PeopleSoft Maintenance Management this field might be *Waste Code.*

Use Type

Select one of the following based on how the field will be used:

- *Code*
- *Date*
- *Number*
- *Prompt*
- *Section*
- *Signed*

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- *Text*
- *Time*
- *Yes/No*

Field Length

Select a length based on the selected Use Type:

- If the use type is a number or signed number consisting of an integer or decimal position, the field lengths may only be: 9.0, 7.2, and 15.4.
- If the use type is text, the field length may be 4, 20, 50, or 100.
- If you select any of the remaining use types, each type's field length is dictated by the specific length of the selected use type.

Mapped To

Select the data store field to which you want to map this field.

Note: Once you change the status to *Activated* on the Record page, the information listed above, with the exception of the description and field label, becomes read-only and cannot be modified.

Codes

This group box displays if you selected *code* as a Use Type and identifies a list of code values for a drop-down list.

Sequence

Enter a number to represent the order in which you want to see these codes listed in a drop-down list or lookup page.

Field Value and **Translate Long Name**

Enter each valid code in this list along with the text that you want to appear on the list when the drop-down list displays.

Field Status

Displays the current status of the field. Initially this value will be *In Design.* The value changes to *Activated* after you change the record status to*Activated* on the Define Record - Record page.

Reorder

Click this button to assign each code a unique sequential number and reorganize the sequence numbers in top-down numerical order.

Define Display Group Page

Use the Define Display Group page (SD_GRPDEFN) to defines a display group and associates any records and fields, as well as identifies the order in which the fields appear on the page.

Navigation

Enterprise Components, Supplemental Data, Define Display Group

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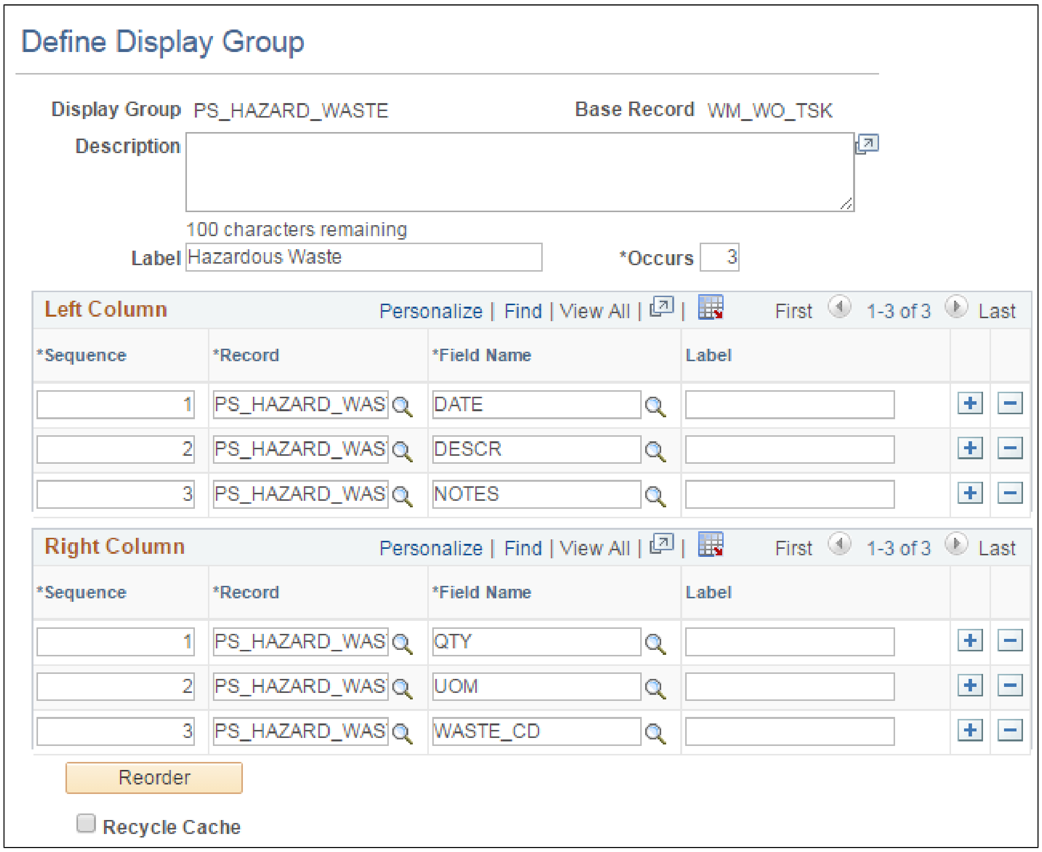
Image: Define Display Group page

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



Display Group — Select a base record to associate this new display group with and enter a name for this display group in the Define Display Group Add page.

Label — Enter a label for the display group data group box.

Occurs — Enter the number of rows of data to display in the group box.

Left and Right Columns

The supplemental fields that you want to appear on a page are defined in left and right columns.

Sequence, Record, Field Name, and **Label** — Select the record and field name, enter a label that you want to display on the page for the field name for each supplemental data field. Enter a sequence number to determine the order in which the fields should display on the page for each column.

Reorder — Reorders the group as per the sequence entered by the user in the Sequence column.

Recycle Cache — Clears the cache for the Supplemental Data.

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Assign Display Group Page

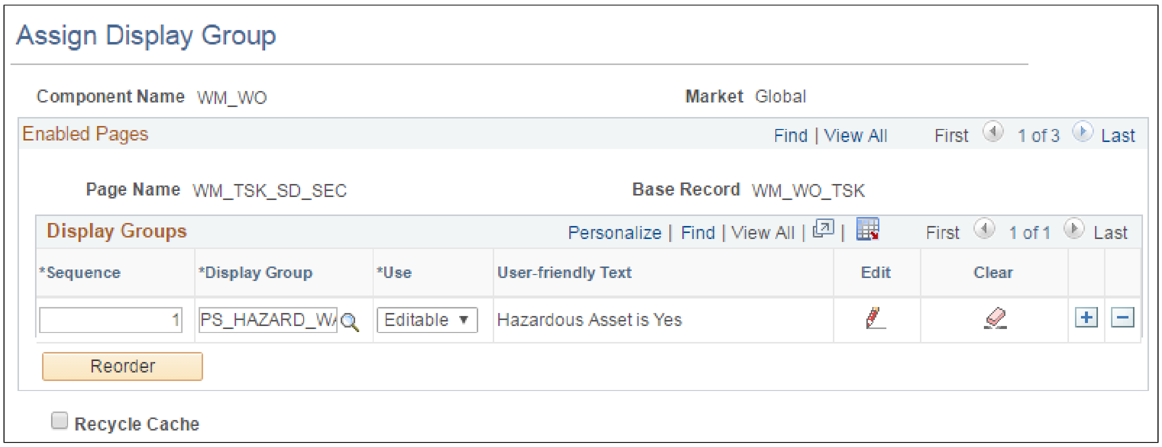
Use the Assign Display Group page (SD_PAGE_GRP) to assigns one or more display groups to a supplemental data-enabled component and page.

Navigation

Enterprise Components, Supplemental Data, Assign Display Group

Image: Assign Display Group page

Use the Assign Display Group page (SD_PAGE_GRP) to assigns one or more display groups to a supplemental data-enabled component and page



Component Name and **Market**	Select the component that is enabled for supplemental data and with which you want to associate a supplemental data display group in the Assign Display Group Search page. The Market for which this component was defined displays as read-only along with the Component Name.

Enabled Pages and Display Groups

This group box displays the name of the pages within the component that are enabled for supplemental data, their associated base record, and any associated display groups. You may also add the display groups that you want to appear in this component and page.

Sequence, Display Group, Use	Add a supplemental data display group that you want to associate with this component and this page, and select whether you want the text associated with the display group to be *Editable* or *Read-only.*
User Friendly Text	Describes the condition associated with this display group in easy to understand terminology.
	Click the Edit icon to access the Assign Display Group - Conditions page where you can establish conditions that control when a display group appears. For example, you could set a condition so that a display group appears only when there is a

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	hazardous asset associated with a work order task, or when the work order is of the type *CM* (corrective maintenance).
	Click the Clear icon to remove the condition that is associated with this display group.
Reorder	Reorders the group as per the sequence entered by the user in the Sequence column.
Recycle Cache	Clears the cache for the Supplemental Data.

Note: If the supplemental data page is registered as a search page, then you may add only one display group to the page; you must select 1 as the value in the Occurs field for the selected display group; you must define all fields for this display group for the same record definition; and you must map this record to a data store record defined with a Search Supplemental Search record. With PeopleSoft Maintenance Management, you can only search based on supplemental data for the Work Order Header.

Assign Display Group - Conditions Page

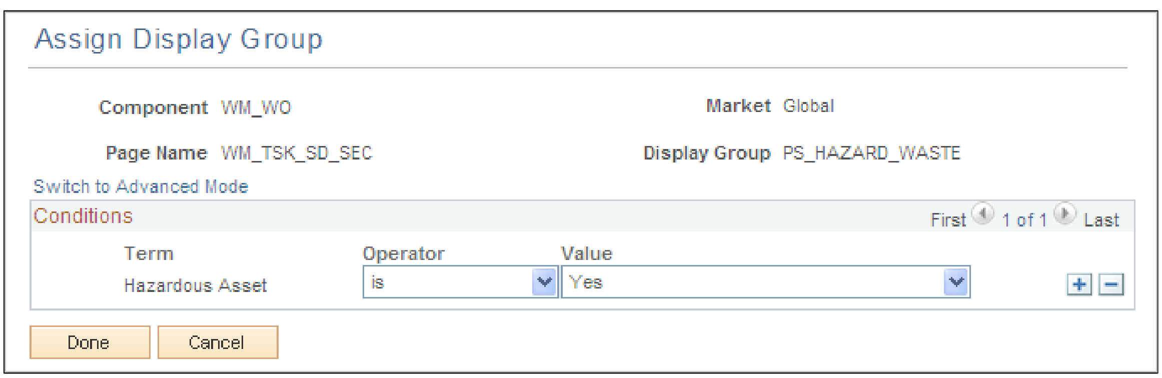
Use the Assign Display Group - Conditions page (SD_PHRASE_SEC) to specify conditions that control when a display group appears.

Navigation

Click the Edit icon on the Assign Display Group page.

Image: Assign Display Group - Conditions page

Use the Assign Display Group - Conditions page (SD_PHRASE_SEC) to specify conditions that control when a display group appears



Supplemental data depends on the Active Analytics Framework (AAF) to define and resolve the conditions for a supplemental data display group. AAF is a PeopleSoft Enterprise Component that includes the following components:

- Data Library Framework.
- Rule Evaluation Engine.
- Rule Builder Framework.
- Action Framework.

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PeopleSoft Maintenance Management utilizes all of these AAF components with the exception of the Action Framework.

You define a condition using a combination of a term, an operator, and a value or term. A term is a nontechnical name that refers to the information (data) that can be retrieved or computed and is the object evaluated within a condition. This page enables you to build conditions by viewing and selecting the terms, operators, and value/term that define the condition.

To add a condition:

1. Select a term.
2. Select an operator.
3. Enter or select values or terms to define the right side of the condition equation, if required by the selected operator.

Note: To add conditions for values derived from control tables that are keyed by SetID (for example, Work Type, Service Group ID), you must use one of the "in list" operators *(is in list,* or *is not in list).*

There are two modes that you can use to specify conditions:

- Basic.

  This is the default mode. When you select this option, the Select Subject Area group box appears, with a folder hierarchy of subjects. Navigate through the subjects and select one to view the terms available in an adjacent group box. Click a term to select it and insert it into the condition.

  If the criteria you define includes more than one condition row, the system uses AND logic for the conditions, therefore all of the conditions must be met for the criteria to evaluate as true.

- Advanced.

  This mode enables you to group condition rows using parenthesis, specify the logical operator for each condition row (AND, OR), and specify terms as values in the right-hand side of the condition equation.

Switch to Advanced Mode	Click to activate advanced mode.
Switch to Basic Mode	Click to activate basic mode.
Switch to Search Mode	Click to activate search mode, where you can execute a search for defined terms.
Switch to Browse Mode	Click to activate browse mode, where you can browse defined terms.
Select Term	Click to insert the term into the condition.
Term	Displays the term name used in the condition that is evaluated against the Value.
Operator	Select the operator to use for the condition. The list of available operators depends on the term upon which the condition is based.

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Value	Displays the value to which the Term is compared.
Done	Click to create the condition and return to the Assign Display Group page.
Cancel	Click to cancel building the condition.

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Chapter 15

Using the Configurable Analysis Framework

Understanding Configurable Analysis Framework

Oracle's PeopleSoft Configurable Analysis Framework (CAF) allows administrators to use a common framework to design end-user pages. These pages are intended to be used to compare or analyze PeopleSoft data. The CAF allows administrators to determine what factors (data) to display for an entity such as customers, suppliers.

There are two display layouts:

- Comparison - Displays multiple entities and factors in a column and row layout.

  This option allows users to compare the same factor for multiple entities, side-by-side.

- Analysis - displays multiple factors for one entity in any layout that the user chooses.

  This option allows users to focus on one entity at a time and both display layouts can be saved and shared with other users.

High level feature functionality includes:

- It is generic so that it can be used to display data for different types of entities and factors without modifying the framework.
- It is configurable so that the types of the factors and entities can be defined by administrators.
- It is extensible so that application developers can extend it to provide additional functionality that is not available from the framework.
- It supports comparison and analysis modes so that it can be used to compare entities or to focus on one entity at a time.
- It provides an intuitive user interface so that users can easily select the entities and factors to display and arrange them in the way that is most useful for them.
- It allows users to save a set of factors and entities, and recall it later or share it with other users.
- It has access control so that security can be applied to control the entities, factors, and actions that are accessible for the users.

Third Party Integration

The Configurable Analysis Framework uses the following third party Javascript libraries to implement its user interface. They are included as PeopleTools managed objects and don't reference to external URLs:

- JQuery 1.8.2, which is used to help interact and manipulate the Html DOM objects.

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- JQuery UI 1.9.0, which is used to implement the drag-drop and re-size capabilities in the user interface

The Fluid Configuration Analysis Framework does not use JQuery.

Performance

The Configurable Analysis Framework is a framework that hosts contents. The contents are provided by various factor handlers. It is not expected that there will be large overhead by the framework. However, depending on the types of factors used, potential performance issues may need to be considered.

Security

Standard PeopleTools security is used to secure the user login and access to the components. In addition, CAF provides access control to control user's access to the factors and related actions.

To control the access to entities, uptake can add OPRID to the entity record to filter the entities by OPRID, extend the built-in entity handler and override its logic to select the entities, or both. Since factor data is retrieved by factor handlers, it is expected that the factor handler will implement the necessary security (such as row-level security) to control the data displayed.

Understanding Technical Elements of Configurable Analysis Framework

Topics discussed in this section:

- Factor Types
- Handler Types
- Related Action Levels
- Security

Factor Types

Factor types are used in the Configurable Analysis Framework (CAF) when defining factors for an analysis on the Define Factor Page. The factor type is used by the system to display data.

Factor type options are:

Application Class	Select to indicate that the factor should use an application class to display the data.
Component	Select to indicate that the factor should use a PeopleSoft Classic component to display the data for classic pages and PeopleSoft Fluid component and pages for Fluid CAF.
Field List	Select to indicate that the factor should use a pre-formatted two column display that lists each field to display the data.

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HTML	Select to indicate that the factor should use HTML to display the data.
PS Query Pagelet	Select to indicate that the factor should use a PS Query Pagelet to display the data.
Pivot Grid Pagelet	Select to indicate that the factor should use a Pivot Grid Pagelet to display the data.
URL	Select to indicate that the factor should use a URL to display the data.

This table lists the factor types that support a value expression in the format of *#(type.value)*. CAF detects these factor types in the configuration and substitutes them with the proper value.

Factor Type	***Value***	***Description***	***Example***
URL	URL Object Name	Returns the text from the specified URL object.	*#(URL.HOMEPAGE):*returns the URL for the HOMEPAGE URL object.
IMG	Image Object Name	Returns the URL to the image object.	*#{IMG.LOGO}*: returns the URL to the LOGO image.
HTML	HTML Object Name	Returns the HTML content or text of the HTML object.	*#{HTML.COMMON_ HEADER}*: returns the HTML for the COMMON_HEADER HTML object.
MSG	MESSAGE_SET, MESSAGE _NBR	Returns the message catalog text. MESSAGE_SET and MESSAGE_NBR specify the message set and number	*#{MSG.6550,1}:* returns the text for message (6550,1).
MSGE	MESSAGE_SET, MESSAGE _NBR	Similar to MSG but returns the explanation text.	
All others specify record name	Field Name	Returns the values from the specified record field. The value is formatted: • If it is currency controlled, the amount is formatted as a currency. • If it is IMAGE or IMAGEREFERENCE, it returns the URL to the image.	*#{CUSTOMER.NAME1}* returns the value of the NAME1 field in the CUSTOMER record (customer name). *#{CUST_DATA.BAL_AMT}* returns the BAL_AMT amount formatted since the BAL_AMT field in the CUST _DATA record is currency controlled. *#{CUSTOMER.CUST_ LOGO}* returns the URL to the CUST_LOGO image (given that CUST_LOGO is an image field and stores the customer's logo).

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Handler Types

Configurable Analysis Framework (CAF) is an extendable framework using a plug-in architecture. The functionality of CAF can be extended using various types of handlers to override default behavior or provide additional functionality, such as additional type of data to display or related actions.

Handler types are set up using the Analysis Handler Registry Page. The purpose of this registry is to allow application developers to assign a single value to the application class. Therefore, users do not need to know the full path to the application class when specifying it during analysis configuration.

Handler type options are:

Action Handler

Handles configured related actions. Select to indicate that the handler is used to implement related actions on the Related Action Configuration Page.

The application class must be a subclass of CAF_ API:ActionHandler. The built-in action handlers are in the CAF _CORE:HANDLER:ActionHandler package.

For Fluid implementations, the application must be a subclass of CAFNUI_API: ActionHandler or CAFNUI_CORE:HANDLER: ActionHandler.

Analysis Handler

The application class for the component that displays the analysis. It is used to provide functionality at the analysis level. For example, it handles rendering the html for the display, managing the user sessions, and responding to user actions to save/edit the analysis views. It is also the handler that sends notifications. Select to indicate that the handler is used at the analysis level to handle events or override functionality provided by CAF on the Analysis Configuration Page.

The application class must be a subclass of CAF_ API:ComparisonHandler. For most implementations, it should be a subclass of CAF_CORE:HANDLER:ComparisonHandler so that most of the built-in functionality is used.

For Fluid implementations, the application must be a subclass of CAFNUI_API:ComparisonHandler or CAFNUI_ CORE:HANDLER:ComparisonHandler.

Entity Handler

The application class used to implement the functionality of an entity, including selecting/managing the entities, and implementing the entity related actions. Select to indicate that the handler is used at the entity level to handle events or override functionality provided by CAF on the Entity Configuration Page.

The application class must be a subclass of CAF_ API:EntityHandler. For most of implementations, it should be subclass of CAF_CORE:HANDLER:EntityHandler so that most of the built-in functionality is used.

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	For Fluid implementations, the application must be a subclass of CAFNUI_API: EntityHandler or CAFNUI_CORE:HANDLER: EntityHandler.
Factor Handler	The application class used to implement the functionality of a factor, including configuring and showing the factor data. It can also implement factor level related actions. Select to indicate that the handler is used at the factor level to handle events or override functionality provided by CAF on the Factor Configuration Page. The application class must be a subclass of CAF_ API:FactorHandler. If the factor handler is extending built-in factor types, it should be a subclass of the corresponding factor handlers in the CAF_ CORE:HANDLER:FactorHandler package. A CAF method is provided to enable the display of these icons for the factors that support them: • *Configure Factor:* allows the user to configure the factor display, such as changing filter values. • *Show Combined:* allows the user to show the data for all selected entities in a single report or chart. This option is only available for comparison mode and is not available for Fluid CAF. For Fluid implementations, the application must be a subclass of CAFNUI_API: FactorHandler or CAFNUI_CORE:HANDLER: FactorHandler.

For each type of handlers, CAF provides built-in setup to implement the core functionality. The interface definitions of each handler is in the CAF_API application package. The core setup is in the CAF_CORE:HANDLER application package. In almost all cases, implementation of handlers should be subclassed from the corresponding application classes in CAF_CORE:HANDLER.

To add a handler:

1. Create an application class as a subclass of the proper type (handler type) and begin to override the methods as required.
2. Register the application class using the Analysis Handler Registry Page.
3. Use the appropriate handler on each of the Analysis Configuration pages for analysis, entities, factors, and related actions.

Related Action Levels

Configurable Analysis Framework (CAF) is an actionable framework that allows related actions to be attached to many levels of the display so that users can take related/context sensitive actions.

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Related action levels are:

Common Factor	This option is a related action level for a factor, and is applicable to all factors.
Analysis	This option is a related action level for the whole analysis.
Entity	This option is a related action level for an entity and is applicable to a single entity.
Factor	This option is a related action level for a factor and is applicable to a single factor.
Factor Data	This option is a related action level for a combination of entity and factor and is applicable to the data display.
Selected Entities	This option is a related action level for an entity and is applicable to a group of entities.

Related actions can be

- Configured, meaning that the related action is configured using the Analysis Configuration Page. Administrators can add or remove related actions using the Related Action Configuration Page and determine access using the Analysis Access Control Page.
- Dynamic, meaning that the related action is implemented using handlers. Administrators can add or remove handlers dynamically.

Security

Configurable Analysis Framework (CAF) provides secure access to entities, factors, and related actions using the Analysis Access Control Page: This ensures that proper data security is applied when selecting the data to be displayed.

Entity	If an entity provided has OPRID as a high order key, then when entity data is selected from the database, row-level security (OPRID = %OperatorId) is applied to select only the entities that the user has access to. If this does not provide the required security to select the entities, the entity handler can implement or override the EntityHandler.GetAllEntities() method to select the entities.
Factor	The framework allows an administrator to specify factors that can be used and viewed by users. The access control is by user, role, or both. This can limit access to factors with sensitive data.
Related Action	Similar to factors, administrators can limit the related actions so which a user has access.

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Setting Up Configurable Analysis Framework

Pages Used to Set Up Configurable Analysis Framework

Page Name	***Definition Name***	***Usage***
Analysis Handler Registry Page	CAF_HANDLER_TBL	Register application classes used as handlers in Configurable Analysis Framework (CAF).
Analysis Configuration Page	CAF_CONFIG_TBL_GEN	Define data analysis.
Entity Configuration Page	CAF_CONFIG_TBL_ENT	Define the entity for the analysis.
Factor Configuration Page	CAF_CONFIG_TBL_FCT	Define the factors for the analysis.
Define Factor Page	CAF_FACTOR_SEC	Add factors to the Factor Analysis page.
Factor List Configuration Page	CAF_CONFIG_TBL_FLS	Create a pre-selected list of factors that are available to all users.
Copy Factor Lists Page	CAF_CNF_FL_SEL_SEC	Copy a factor list from other users.
Related Action Configuration Page	CAF_CONFIG_TBL_ACT	Define configured related actions for different levels of data.
Define Related Action Page	CAF_ACTION_SEC	Add a related action to the Related Action Configuration page.
Miscellaneous Page	CAF_CONFIG_TBL_MSC	Perform administrative tasks.
Analysis Access Control Page	CAF_ACC_CTL_TBL	Set up access control for factors and related actions for an analysis.

Analysis Handler Registry Page

Use the Analysis Handler Registry page (CAF_HANDLER_TBL) to register application classes used as handlers in Configurable Analysis Framework (CAF).

Navigation

Enterprise Components > Configurable Analysis >Handler Registry

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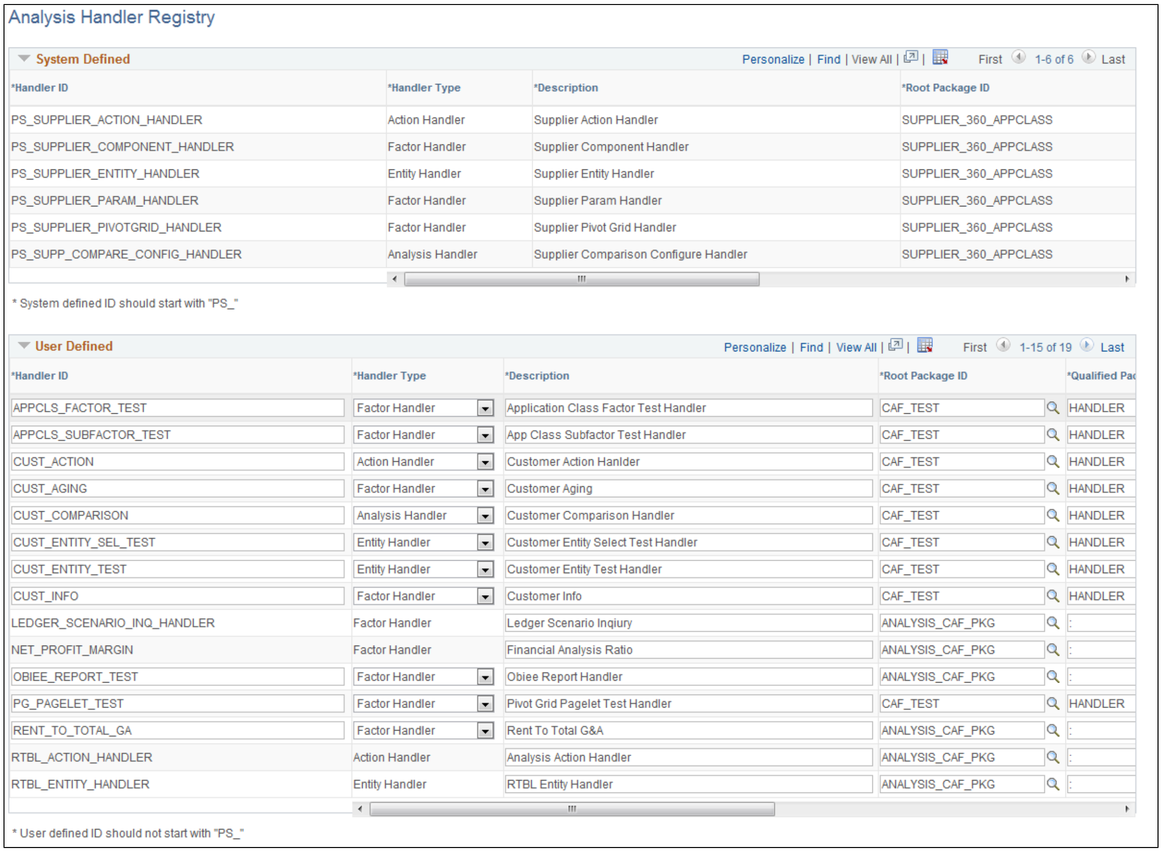
Image: Analysis Handler Registry Page (1 of 2)

This example illustrates the fields and controls on the Analysis Handler Registry page (1 of 2)



Analysis Handler Registry

System Defined — Personalize | Find | View All | First 1-6 of 6 Last

*Handler ID	*Handler Type	*Description	*Root Package ID
PS_SUPPLIER_ACTION_HANDLER	Action Handler	Supplier Action Handler	SUPPLIER_360_APPCLASS
PS_SUPPLIER_COMPONENT_HANDLER	Factor Handler	Supplier Component Handler	SUPPLIER_360_APPCLASS
PS_SUPPLIER_ENTITY_HANDLER	Entity Handler	Supplier Entity Handler	SUPPLIER_360_APPCLASS
PS_SUPPLIER_PARAM_HANDLER	Factor Handler	Supplier Param Handler	SUPPLIER_360_APPCLASS
PS_SUPPLIER_PIVOTGRID_HANDLER	Factor Handler	Supplier Pivot Grid Handler	SUPPLIER_360_APPCLASS
PS_SUPP_COMPARE_CONFIG_HANDLER	Analysis Handler	Supplier Comparison Configure Handler	SUPPLIER_360_APPCLASS

* System defined ID should start with "PS_"

User Defined — Personalize | Find | View All | First 1-15 of 19 Last

*Handler ID	*Handler Type	*Description	*Root Package ID	*Qualified Pac
APPCLS_FACTOR_TEST	Factor Handler	Application Class Factor Test Handler	CAF_TEST	HANDLER
APPCLS_SUBFACTOR_TEST	Factor Handler	App Class Subfactor Test Handler	CAF_TEST	HANDLER
CUST_ACTION	Action Handler	Customer Action Hanlder	CAF_TEST	HANDLER
CUST_AGING	Factor Handler	Customer Aging	CAF_TEST	HANDLER
CUST_COMPARISON	Analysis Handler	Customer Comparison Handler	CAF_TEST	HANDLER
CUST_ENTITY_SEL_TEST	Entity Handler	Customer Entity Select Test Handler	CAF_TEST	HANDLER
CUST_ENTITY_TEST	Entity Handler	Customer Entity Test Handler	CAF_TEST	HANDLER
CUST_INFO	Factor Handler	Customer Info	CAF_TEST	HANDLER
LEDGER_SCENARIO_INQ_HANDLER	Factor Handler	Ledger Scenario Inqiury	ANALYSIS_CAF_PKG	:
NET_PROFIT_MARGIN	Factor Handler	Financial Analysis Ratio	ANALYSIS_CAF_PKG	:
OBIEE_REPORT_TEST	Factor Handler	Obiee Report Handler	ANALYSIS_CAF_PKG	:
PG_PAGELET_TEST	Factor Handler	Pivot Grid Pagelet Test Handler	CAF_TEST	HANDLER
RENT_TO_TOTAL_GA	Factor Handler	Rent To Total G&A	ANALYSIS_CAF_PKG	:
RTBL_ACTION_HANDLER	Action Handler	Analysis Action Handler	ANALYSIS_CAF_PKG	:
RTBL_ENTITY_HANDLER	Entity Handler	RTBL Entity Handler	ANALYSIS_CAF_PKG	:

* User defined ID should not start with "PS_"

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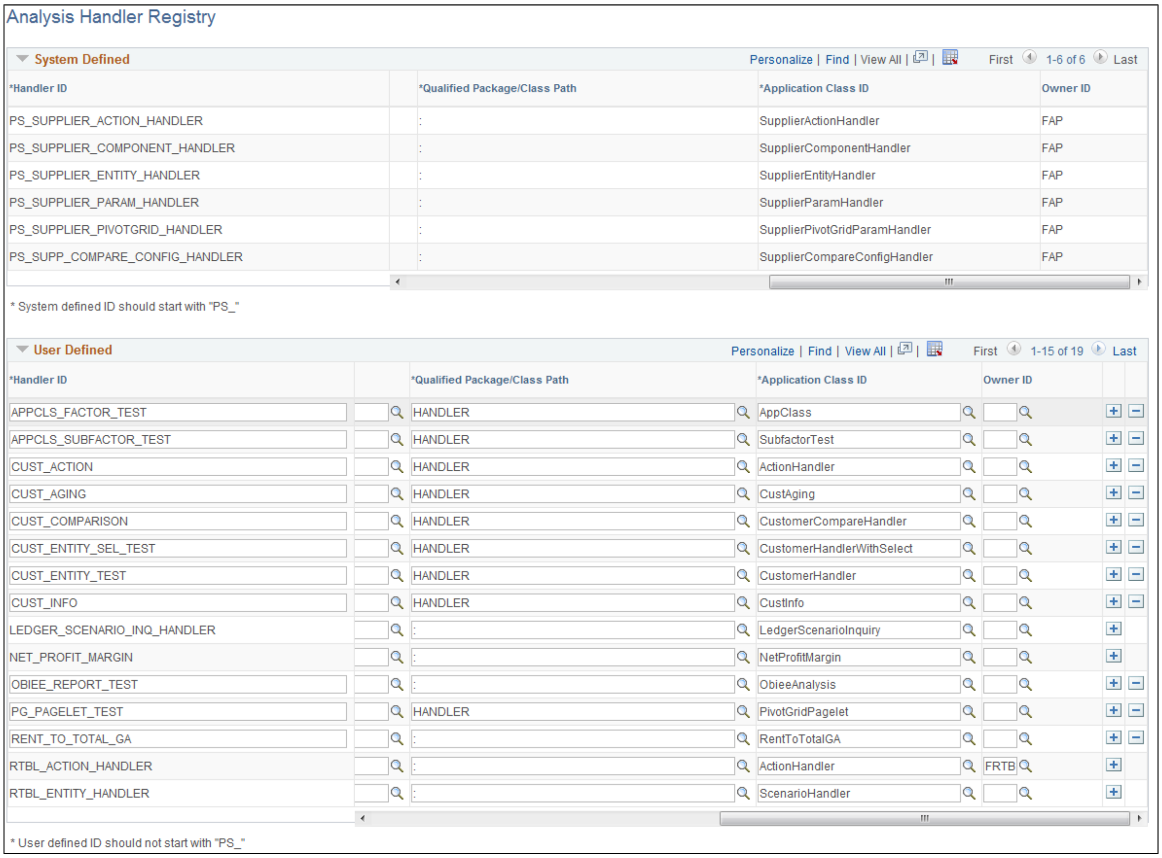
Image: Analysis Handler Registry Page (2 of 2) (scroll to right)

This example illustrates the fields and controls on the Analysis Handler Registry page (2 of 2) after scrolling to the right.


Analysis Handler Registry

System Defined — Personalize | Find | View All | First 1-6 of 6 Last

*Handler ID	*Qualified Package/Class Path	*Application Class ID	Owner ID
PS_SUPPLIER_ACTION_HANDLER	:	SupplierActionHandler	FAP
PS_SUPPLIER_COMPONENT_HANDLER	:	SupplierComponentHandler	FAP
PS_SUPPLIER_ENTITY_HANDLER	:	SupplierEntityHandler	FAP
PS_SUPPLIER_PARAM_HANDLER	:	SupplierParamHandler	FAP
PS_SUPPLIER_PIVOTGRID_HANDLER	:	SupplierPivotGridParamHandler	FAP
PS_SUPP_COMPARE_CONFIG_HANDLER	:	SupplierCompareConfigHandler	FAP

* System defined ID should start with "PS_"

User Defined — Personalize | Find | View All | First 1-15 of 19 Last

*Handler ID	*Qualified Package/Class Path	*Application Class ID	Owner ID
APPCLS_FACTOR_TEST	HANDLER	AppClass	
APPCLS_SUBFACTOR_TEST	HANDLER	SubfactorTest	
CUST_ACTION	HANDLER	ActionHandler	
CUST_AGING	HANDLER	CustAging	
CUST_COMPARISON	HANDLER	CustomerCompareHandler	
CUST_ENTITY_SEL_TEST	HANDLER	CustomerHandlerWithSelect	
CUST_ENTITY_TEST	HANDLER	CustomerHandler	
CUST_INFO	HANDLER	CustInfo	
LEDGER_SCENARIO_INQ_HANDLER	:	LedgerScenarioInquiry	
NET_PROFIT_MARGIN	:	NetProfitMargin	
OBIEE_REPORT_TEST	:	ObieeAnalysis	
PG_PAGELET_TEST	HANDLER	PivotGridPagelet	
RENT_TO_TOTAL_GA	:	RentToTotalGA	
RTBL_ACTION_HANDLER	:	ActionHandler	FRTB
RTBL_ENTITY_HANDLER	:	ScenarioHandler	

* User defined ID should not start with "PS_"

Application developers use this page to create user defined handler ID's.

User Defined

System defined handlers are available for you to use. However, if you need to create your own handlers, use this section to create user defined handlers.

Handler ID

Enter a unique Id that is used when referencing the application class.

Note: System defined handlers should always begin with "PS_". User defined handlers should NOT begin with "PS_".

Handler Type

Select the type of handler that is being registered. Options include:

- *Action Handler*
- *Analysis Handler*
- *Entity Handler*
- *Factor Handler*

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	For a description of each option and additional information, see Handler Types.
Root Package ID, **Qualified Package/ Class Path**, and **Application Class ID**	Select the full path to the application class. The system verifies that the application class is a valid subclass of the handler type when you save the page.
Owner	Select a product or owner ID for the handler. This is an optional field.

Analysis Configuration Page

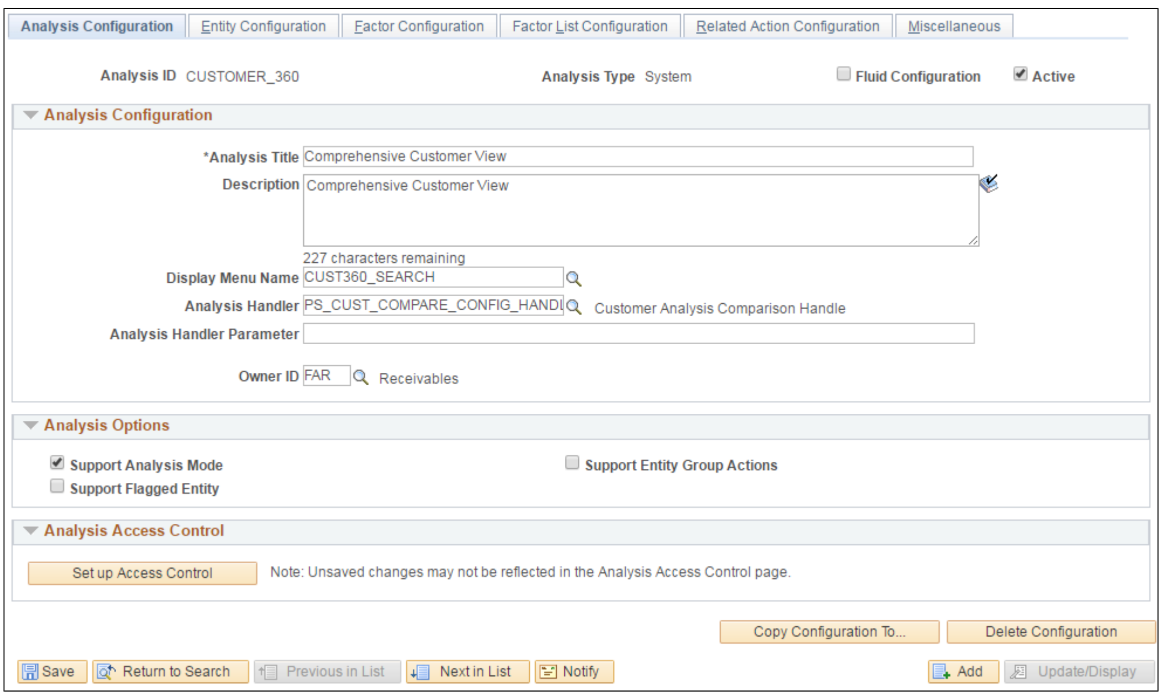
Use the Analysis Configuration page (CAF_CONFIG_TBL_GEN) to define data analysis.

Navigation

Enterprise Components > Configurable Analysis >Analysis Configuration

Image: Analysis Configuration Page

This example illustrates the fields and controls on the Analysis Configuration page.



Use this page to set up general information about the analysis.

Analysis ID and **Analysis Type**	Displays key fields for the analysis. The analysis type is System Defined or User Defined, which corresponds to the Analysis Handler Registry Page.
Fluid Configuration	Select to indicate if this is a Fluid configuration.
Active	Select to indicate that the analysis can be used.

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Analysis Configuration

Analysis Title

Enter a title that appears on the Analysis Display page for Classic implementations. For more information about the Analysis Display page, see Using Configurable Analysis Framework.

Display Menu Name

Select the name of the menu where the Display Analysis page is accessed or the Tile in case of CAF Fluid implementation.

For Classic Implementations:

1. Register the CAF_DISPLAY component in an existing menu or a new menu.
2. The search record should be *INSTALLATION*

For Fluid Implementations:

1. Register the CAFNUI_DISPLAY_FL component in a new menu. Leave the search record as *INSTALLATION*.
2. Create a Content Reference in an existing or new Fluid Page referring to the Menu/Component pair mentioned in the previous step.
3. Specify the menu in this field.

Analysis Handler and **Analysis Handler Parameter**

(Optional) Select the handler and enter its parameter.

Owner ID

(Optional) Select an owner for the analysis. This field is informational only and is not used by the system.

Analysis Options

Support Analysis Mode

Select to support analysis mode.

Support Entity Group Actions

Select to support entity group actions. This is not allowed for Fluid configurations.

Support Flagged Entity

Select to allow users to flag one or more entities.

Analysis Access Control

Access control must be set up for the analysis.

Set up Access Control

Select this button to access the Analysis Access Control Page in a modal window.

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Note: The current data for the analysis configuration must be saved before changes are reflected in the Analysis Access Control component. For example, if a new factor is added on the Factor Configuration page, you must save the page before the factor is reflected on the Analysis Access Control component.

Copy Configuration To ...

Select this button to copy this configuration to a new configuration. This button accesses the Copy Configuration window where you can select an analysis type and enter a new analysis ID.

Entity Configuration Page

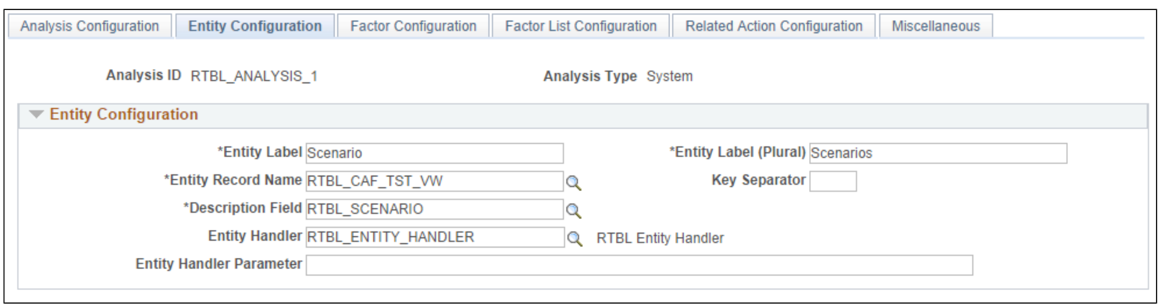
Use the Entity Configuration page (CAF_CONFIG_TBL_ENT) to define the entity for the analysis.

Navigation

Enterprise Components > Configurable Analysis >Analysis Configuration >Entity Configuration

Image: Entity Configuration Page

This example illustrates the fields and controls on the Entity Configuration page.



Entity Label and **Entity Label (Plural)**

Enter a singular and plural description for the entity label. The framework requires singular and plural forms so that it can properly create labels. Examples include *Customer* and *Customers* so that CAF can display messages such as "Flag this Customer" and "Select All Customers".

Entity Record Name

Select a record or view that indicates the structure of the entity and the record from which to retrieve the data.

If the keys of the record or view include OPRID (operator ID), then row-level security is used to select entities that are accessible to the user when CAF selects the data,

For Fluid CAF, when the record has a field of type Image, the image is displayed in Comparison Mode at the Header.

Key Separator

Enter a value that is used to separate key values.

The session tracks the entity keys using a composite key This key is obtained by concatenating the key fields of the entity. The key fields are separated by a key separator. If you leave

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the key separator blank, the system uses “~|~” as the default value. However, if you believe that “~|~” can be found in some key values, then you should specify a different value as the key separator.

Note: Use caution when changing key separators or entity keys because any saved views or saved sessions will not be valid.

Description Field

Select a field from the entity record that is used to retrieve the title or name for the entity. For example, *NAME1* for customer name.

Entity Handler and **Entity Handler Parameter**

Select the handler ID and the parameters if a handler is implemented for the entity.

Factor Configuration Page

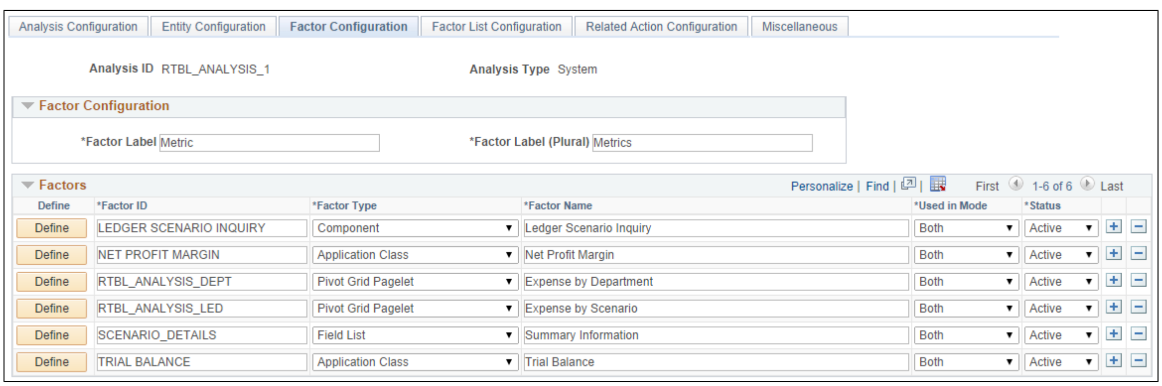
Use the Factor Configuration page (CAF_CONFIG_TBL_FCT) to define the factors for the analysis.

Navigation

Common Definitions > Enterprise Components >Analysis Configuration >Factor Configuration

Image: Factor Configuration Page

This example illustrates the fields and controls on the Factor Configuration page.



Factor Configuration

Factor Label and **Factor Label (Plural)**

Enter a singular and plural description for the factor label. The framework requires singular and plural forms so that CAF can properly display messages. Examples include *Measure* and *Measures*.

Factors

Use this section to add factors that are to be used in the analysis.

Define

Click this button to access the Define Factor Page.

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Define Factor Page

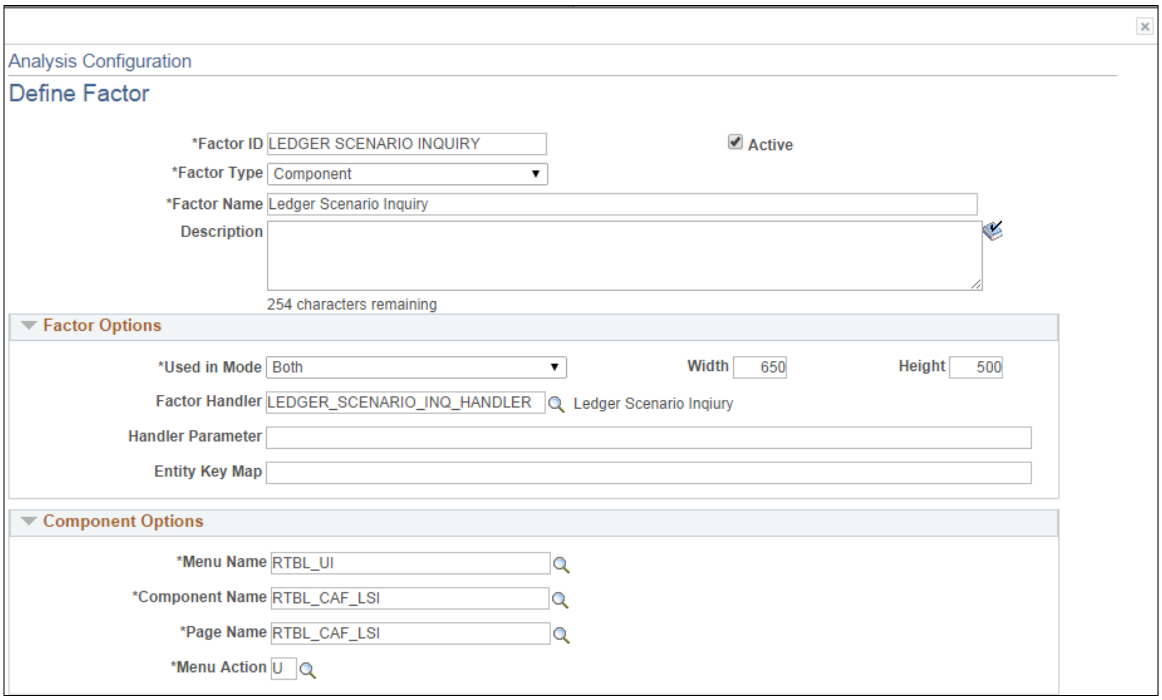
Use the Define Factor page (CAF_FACTOR_SEC) to add factors to the Factor Comparison page.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Configurable Analysis >Analysis Configuration >Factor Configuration. Click the Define button in the Factors section of the page.

Image: Define Factor Page

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



Factor ID	Enter an ID that identifies the factor.
Factor Type	Select the type of factor you want to use to display the data.. Depending on the option selected, additional fields are displayed to define the factor details. Options include: • *Application Class* • *Component* • *Field List* • *HTML* • *PS Query Pagelet* • *Pivot Grid Pagelet* • *URL*

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When an option other than *Application Class* is selected, a new section with additional fields appears lower on the page.

For a description of each option and additional information, see Factor Types.

Factor Name

Enter a name for the factor, which is used when displaying it to the user.

Factor Options

Used In Mode

Select a mode for which this factor can be used. Options include:

- *Analysis*: Select to indicate that the factor can only be use in Analysis Mode.
- *Comparison*: Select to indicate that the factor can only be used in Comparison Mode.
- *Both*: Select to indicate that the factor can be use in Analysis and Comparison Mode.

Width and **Height**

Enter a value that represents the size of the factor. The system defaults the size to *400* (width) and *300* (height).

Note: For fixed size factor types, such as Component, Chart, and pagelets, the size should be large enough to accommodate the content and avoid scroll bars that the user would need to view the data.

Factor Handler and **Handler Parameter**

Select the factor handler and specify its parameters.

This is a required field when the Factor Type is *Application Class*.

When the Factor Type is anything other than application class, then factor handler is already determined. However, if you need to extend, or override, the built-in handler, then you can specify a customized handler and its parameters. The custom handler should extend or subclass from the built-in handler class.

Entity Key Map

Enter a value that is used to map the key values when a the record specified uses different key fields.

For example, the entity record for Customer can be CUSTOMER, which is keyed by SETID and CUST_ID. If the data is retrieved from a view or record that is keyed by BILL_TO_SETID and BILL_TO_CUST_ID, then the Entity Key Map that can be used to specify the mapping could be *BILL_TO_SETID=SETID,BILL_TO_CUST_ID=CUST_ID*

For some factor types, CAF automatically passes the selected entity keys to retrieve the data for display. For example, with

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the HTML factor type, an administrator can use the expression #{RECORD.FIELD} to specify the record and the field to retrieve the data. In most cases, the record specified should be keyed at the entity level and use the same key fields. However, it is possible that the record specified uses different key fields.

Component Options

Data is displayed by entity and the search record for the component should be keyed by entity. CAF automatically passes the entity keys to the component to bypass the search dialog. The Entity Key Map field can be used if the key fields are different. However, this create a transaction to display the data. Therefore, it may be more efficient to use other factor types such as PS Query, Field List, and so on.

Menu Name, **Component Name, Page Name**, and **Menu Action**: Enter the values for the target component.

Field List Options

When this option is selected the left column is intended to display field labels and right justified. The right column is intended to display the field values and is left justified.

Label Column Width and **Value Column Width**: Enter the column width for field labels and field values.

The preferred method is to enter one column a percentage so that the data display can automatically adjust based on the cell size of the data. Then, enter the other column using “*”, which indicates that it will use the remaining width.

Seq (sequence): Enter the sequence of each row. The rows are ordered in this sequence when viewed by a user.

HTML Options

If the HTML generated for each entity is the same except for the data, then this factor type can be used. The HTML can be coded to format the data and the value expressions can be used to substitute the data in the HTML.

HTML: Enter the HTML code. Value expressions should be used to substitute the data that is specific to each entity. You may provide formatting for this data.

PS Query Pagelet Options

When this option is selected, you must perform theses steps:

1. Create a PS Query.
2. Use the Pagelet Wizard to create the Pagelet for the PS Query.
3. Create a factor that uses PS Query Pagelet as the factor type and complete the PS Query Pagelet Options.

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The data that is generated for this option is a static HTML, image, or both, and the factor is not interactive. However, this options provides the best performance when displaying the data. Therefore, if you want a simple chart, grid, or both, this option should be used instead of the Component option.

Maximum Rows	Enter the maximum number of rows to display. This field overrides the MAXROWS parameter in the pagelet.
Pagelet Width and **Pagelet Height**	Enter the size of the container that holds the pagelet. This value should be slightly larger than the size of the pagelet specified in the Pagelet Wizard, and smaller than the size entered in the Factor Options. This provides clean margins and reduces scrolling.
Pagelet ID	Select the ID of the Pagelet that you created in the Pagelet Wizard.

Pivot Grid Pagelet Options

When this option is selected, you must perform theses steps:

1. Create a PS Query.
2. Use the Pivot Wizard to create the Pivot Grid.
3. Use the Pagelet Wizard to create the Pagelet for the Pivot Grid.
4. Create a factor that uses Pivot Grid Pagelet as the factor type and complete the Pivot Grid Pagelet Options.
5. For Fluid, use Publish as a Grouplet found at the last page of the Pivot Grid Wizard to create the grouplet. The new Pivot Grid Content Reference should have exactly the same name of the Pagelet.

The data that is generated for this option uses iframe and is interactive. Therefore a user can make changes to the Pivot Grid view. Changes are independent for each view, therefore to apply changes to all views, you must use the Configure Factor related action for the factor.

Pagelet Width and **Pagelet Height**	Enter the size of the pagelet. these values override the values in the Pagelet Wizard. These values should be slightly smaller than the size entered in the Factor Options. This provides clean margins and reduces scrolling.
Pagelet ID	Select the ID of the Pivot Grid pagelet that you created in the Pagelet Wizard.

URL Options

URL	Enter the URL for the factor. The URL should be based on the entity, the installed system, or both. **Note:** Due to security limitations, not all URLs are supported.

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Pivot Grid Pagelet Options for Fluid

The Fluid Configurable Analysis Framework allows users to setup how each prompt field of their Pivot Grids should be populated. Handlers are not needed in most cases. Use the Pivot Grid Prompt Fields to populate the prompt fields.

Image: Pivot Grid Prompt Fields for Fluid CAF (1 of 2).

Pivot Grid Prompt Fields for Fluid CAF.

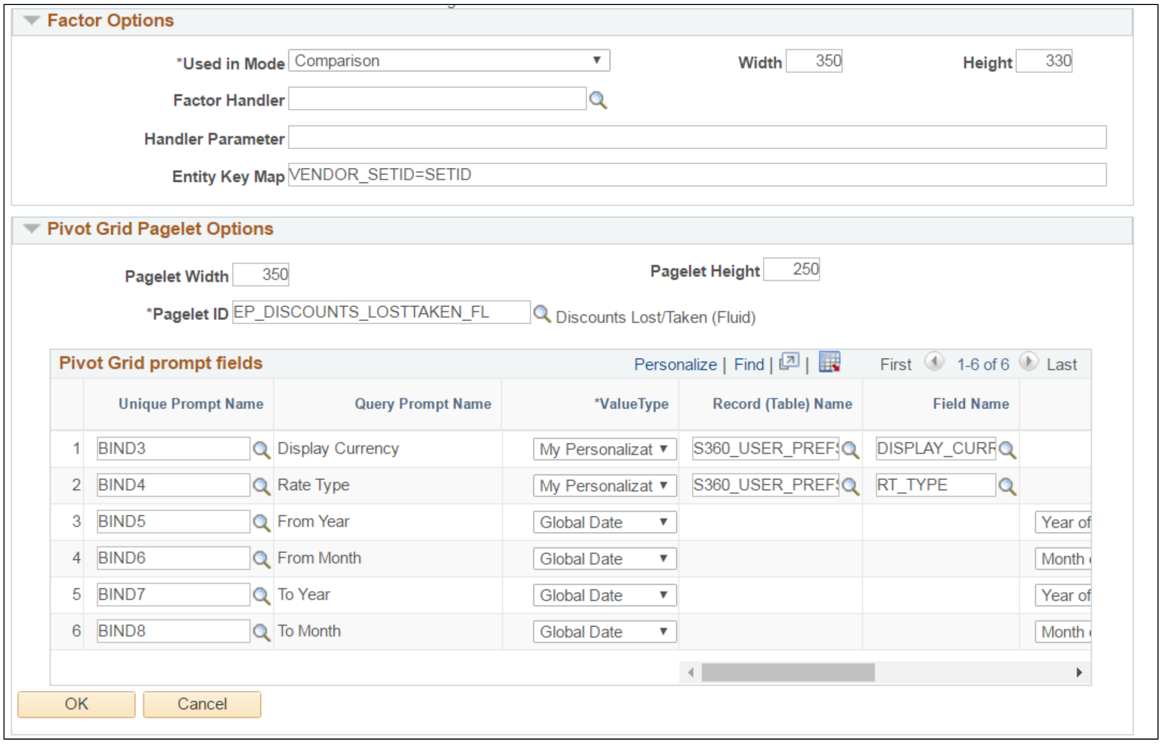
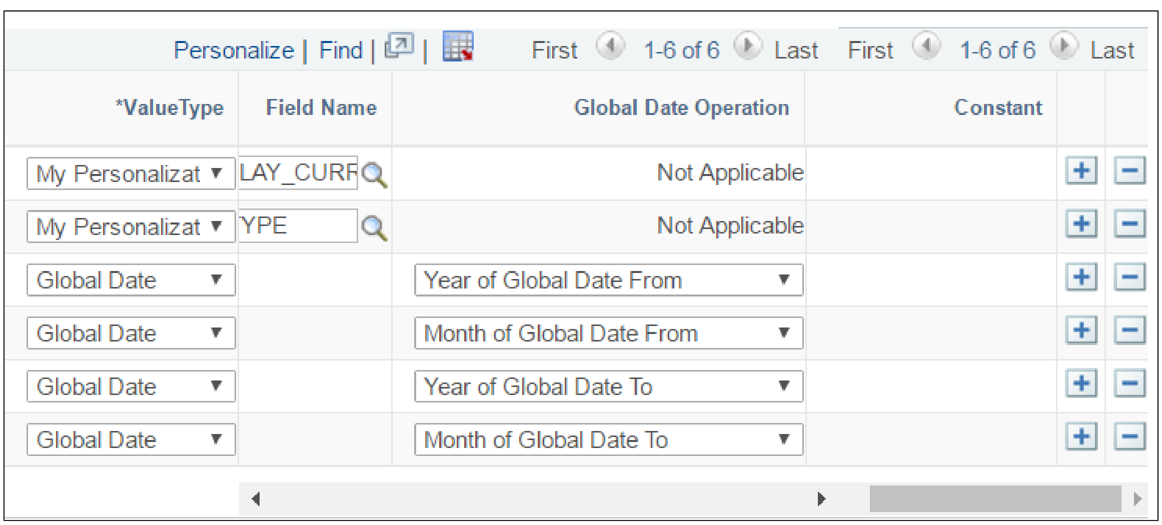


Image: Pivot Grid Prompt Fields for Fluid CAF (2 of 2).

Pivot Grid Prompt Fields for Fluid CAF (2 of 2).



Unique Prompt Name	The Pivot Grid prompt fields defined in Pivot Grid Wizard.

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Value Type	The options users can use to populate the prompt fields. Available options are: • Constant • Global Date • My Personalization
Record (Table) Name	This field is enabled only when the Value Type is My Personalization. The personalization can be changed dynamically if the Action Level is set to Analysis. For more details, see Related Action Configuration Page
Field Name	This field is enabled only when the Value Type is My Personalization. Specify a field of the My Personalization record.
Global Date Operation	This field is enabled only when the Value Type is Global Date. The options available are: • Global Date from • Global Date to • Day of Global Date from • Day of Global Date to • Month of Global Date from • Month of Global Date to • Year of Global Date from • Year of Global Date to • Day Difference • Month Difference • Year Difference
Constant	This field is enabled only when the Value Type is Constant. Specify a constant value for this field.

Factor List Configuration Page

Use the Factor List Configuration Page (CAF_CONFIG_TBL_FLS) to create a pre-selected list of factors that are available to all users.

Navigation

Common Definitions > Enterprise Components >Factor List Configuration.

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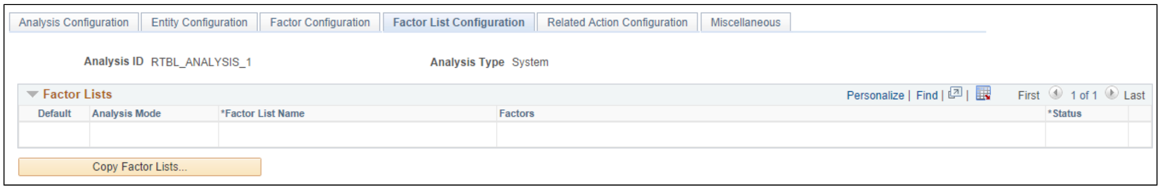
Image: Factor List Configuration Page

This example illustrates the fields and controls on the Factor List Configuration page..



Depending on the needs of your users, this page allows them to switch between different sets of factors without having to select individual factors, or without having to create their own factor lists. The list includes the position and size of the factor for the administrator to create the list using the CAF Display page (for the classic CAF implementations) or the Fluid CAF for Fluid implementation as opposed to entering the data in this page. Therefore, to set up a factor list, create it using the CAF Display page or the Fluid CAF page and then use this page to copy the factor lists as part of your configuration. Alternatively, the administrator can copy public factor lists from other users and make them part of the configuration.

Factor Lists

This section displays all the factor lists that have been configured for the analysis. Each row represents one factor list.

Default

Select to indicate that this row is the default factor list for each display mode. Therefore, only one row can be selected for an Analysis mode row and a second row can be selected as long as it is for a Comparison mode row.

The select factor list is used the first time a user accesses the analysis without specifying any factors.

Analysis Mode

Displays the mode to which the factor list belongs.

Factor List Name

Displays the name of the factor list. This value is copied from the source factor list and can be changed.

Factors

Displays the list of factors of the factor list.

Status

Select *Active* or *Inactive*. Active factor lists are available to users.

Copy Factor Lists

Click this button to access the Copy Factor Lists page where you can copy factor lists from users.

Copy Factor Lists Page

Use the Copy Factor Lists page (CAF_CNF_FL_SEL_SEC) to copy a factor list from other users.

Navigation

Enterprise Components > Configurable Analysis >Analysis Configuration >Factor List Configuration. Click the Copy Factor Lists button.

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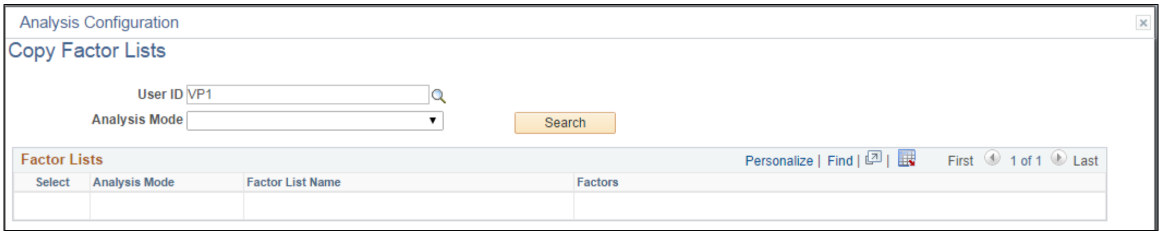
Image: Copy Factor Lists Page

This example illustrates the fields and controls on the Copy Factor Lists page.



Follow these steps to search for and copy a factor list into the Factor List Configuration page:

1. Enter or select a user ID.
2. (Optional) Select the analysis mode.
3. Click the Search button.
4. Select the check box next to the factor list that you want to copy.

   You can select more than one if you want to copy multiple factor lists.
5. Click the OK button to copy the factor list and return to the Factor List Configuration page.

Related Action Configuration Page

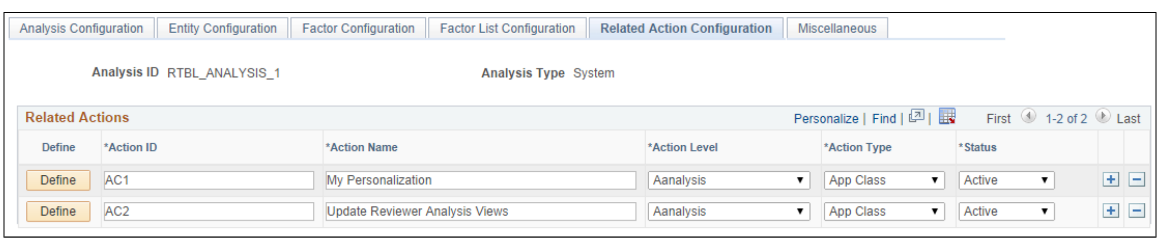
Use the Related Action Configuration page (CAF_CONFIG_TBL_ACT) to define configured related actions for different levels of data.

Navigation

Enterprise Components > Configurable Analysis >Related Action Configuration.

Image: Related Action Configuration Page

This example illustrates the fields and controls on the Related Action Configuration page.



Field definitions are available below the Define Related Action page.

Define	Click this button to access the Define Related Action Page.

Define Related Action Page

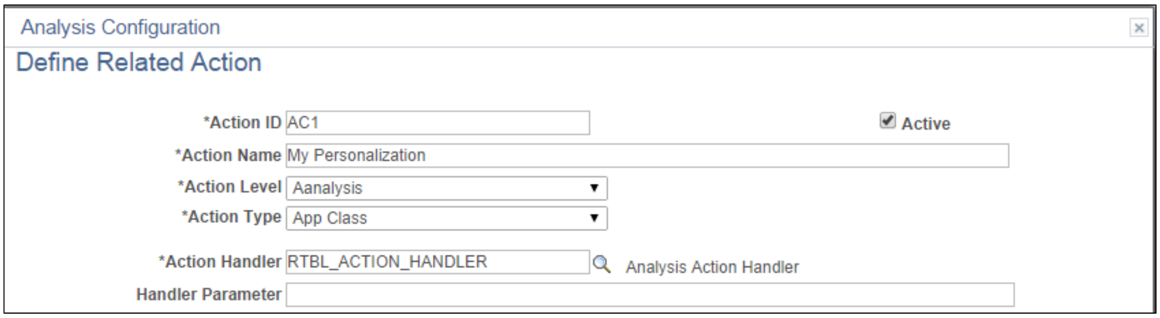
Use the Define Related Action page (CAF_ACTION_SEC) to add a related action to the Related Action Configuration page.

Navigation

Enterprise Components > Configurable Analysis >Related Action Configuration. Click the Define button.

Image: Define Related Action Page

This example illustrates the fields and controls on the Define Related Action page.



Action ID and **Action Name**	Enter a unique action ID and a name for the related action. The name appears for users.
Active	Select the check box to indicate that the action is active. Only active related actions are displayed to users.
Action Level	Select the level to which the related action is associated. Options are: • Analysis • Common Factor • Entity • Factor • Factor Data • Selected Entities
Factor ID	Select the factor to which this action is associated. Or, you can leave this field is blank and it will be applicable to all factors in the analysis. This option is only available when the action level is Factor and Factor Data.
Configure Action	Select to indicate that this is the configuration action for the factor. It is the action that is associated with the Configuration Factor button for the factor. Only one related action can have the this check box selected and it overrides any dynamic configure action from the faction handler. This check box is only available when the action level is Factor.

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Action Type

Select the type of related action. Options include:

- *App Class* (application class): the related action is handled through an application class.
- *Component*: the related action is intended to open a component.

Action Handler and **Handler Parameter**

Select the action handler for the related action. This field is required for the application class action type, and is optional for the component action type.

When the action handler is selected, it overrides the built-in handler and you can enter the parameter of the handler.

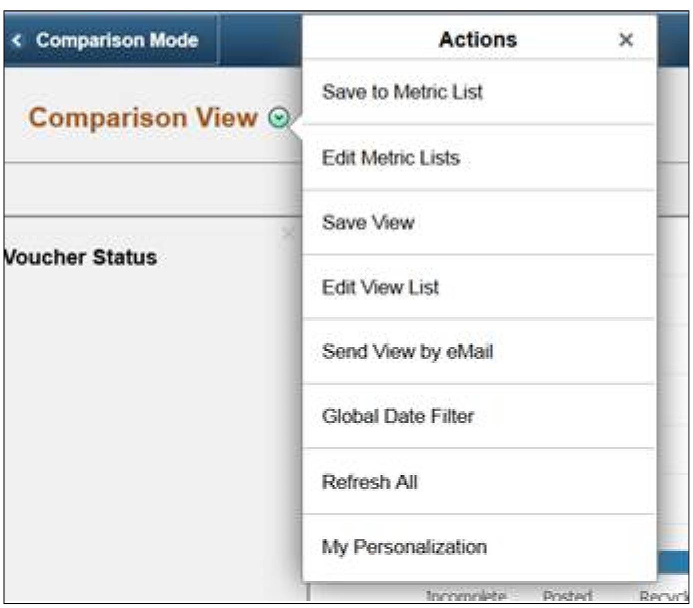
To create an Analysis Related Action My Personalization:

1. Create an action with Action Level = Analysis, and Action Type: App Class.
2. Create a handler to display a page where the user can maintain the fields for My Personalization record.
3. Enter Handler Parameter = *refreshall=y*.

   A value is changed by doing this action every time. The Pivot Grids using Value Type = My Personalization will be automatically refreshed to reflect this change.

Image: My Personalization in Related Actions for an analysis

My Personalization in Related Actions for an analysis



Component Options

This section appears when *Component* is selected as the action type.

Key Map

Enter the map, which is similar to the entity key map.

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This option maps the key differences between the data from CAF and the data in the search record of the target component. The key fields and values that are passed from CAF when opening the component are defined in record CAF_XFRSRCH_WRK.

Navigation Type

Select to indicate how the component is to be opened. Options include:

- *Modal:* indicates that the component is opened as a modal page.
- *New Page:* indicates that the component is opened in a new browser page or tab.
- *Replace Page:* indicates that the component is opened in place of the current page, which would be the CAF DISPLAY page.

Menu Name, Bar Name, Item Name, Panel Name, and **Menu Action**

Select the path and action of the component.

Miscellaneous Page

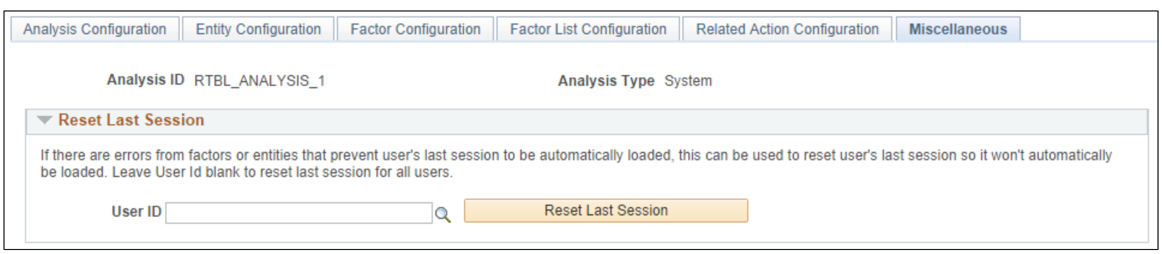
Use the Miscellaneous page (CAF_CONFIG_TBL_MSC) to perform administrative tasks.

Navigation

Enterprise Components > Configurable Analysis >Miscellaneous.

Image: Miscellaneous Page

This example illustrates the fields and controls on the Miscellaneous page.



Use this page to reset the last session for a specific user or for all users.

Every time a user accesses the CAF_DISPLAY page (for Classic CAF implementations) or the Fluid CAF, a new session is created. When a user makes changes on the page, such as adding, deleting, or rearranging the entities, factors, or both the session data is saved. When the user comes back to the CAF_DISPLAY page for the same analysis, the last session that the user accessed is loaded, unless a specific session is entered by the user. If there is problem with the factors, entities, or both from the last session, during configuration or factor development, the session may not load and the page may not be displayed properly. The Reset Last Session button is provided for an administrator or developer to reset the last session, which loads a blank session instead of the last session that had the issue.

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User Id
Select a user ID to reset the last session for a specific user. Leave this field blank to reset the last session for all users.

Reset Last Session
Click to reset the last session to a blank session for the specified user, or for all users, if a User ID is not specified in the User Id field.

Analysis Access Control Page

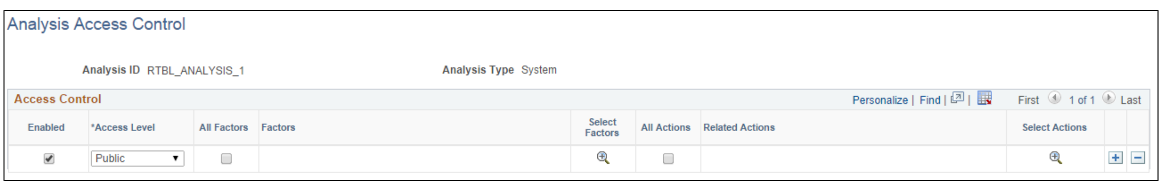
Use the Analysis Access Control page (CAF_ACC_CTL_TBL) to set up access control for factors and related actions for an analysis.

Navigation

- Enterprise Components > Configurable Analysis >Analysis Access Control.
- Enterprise Components > Analysis Configuration. Click the Set Up Access Control button on the Analysis Configuration page.

Image: Analysis Access Control Page

This example illustrates the fields and controls on the Analysis Access Control page. This setup page is used by both Classic CAF and Fluid CAF



Use this page to grant access to each analysis.

Enabled
Select to allow access control.

Access Level
Select the level of access. Options include:

- *Public*: Select to indicate that access is available for all users.

  When this option is selected, the Access Level Value field is not available for entry.

- *Role:* Select to indicate that access is defined by role.

  When this options is selected, indicate the role in the Access Level Value field.

- *User:* Select to indicate that access is defined by User ID.

  When this option is selected, indicate the user ID in the Access Level Value field.

All Factors
Select to indicate that access is granted to all factors. When this option is selected, Factors and Select Factors are not displayed.

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Select Factors	Select to access the Select Factors page, where you can select which factors of the analysis are available for the access level. This option is available when the All Factors check box is not selected.
All Actions	Select to indicate that access is granted to all related actions. When this option is selected, Related Actions and Select Actions are not displayed.
Select Actions	Select to access the Select Related Actions page where you can select which related actions are available for the access level. This option is available when the All Actions check box is not selected.

Using Configurable Analysis Framework

Pages Used to Utilize Configurable Analysis Framework

Page Name	*Definition Name*	*Usage*
Analysis Display Page (Comparison Mode)	CAF_DISPLAY	Compare data for multiple entities in a tabular or grid format.
Analysis Display Page (Analysis Mode)	CAF_DISPLAY	Analyze data for one entity.
Fluid Analysis Display Page (Comparison Mode)	CAFNUI_DISPLAY_FL	Compare data for multiple entities in Fluid.
Fluid Analysis Display Page (Analysis Mode)	CAFNUI_360_FL	Analyze data for one entity in Fluid.

Understanding Configurable Analysis Framework

The CAF_DISPLAY page is the page that is used to view and interact with comparison and analysis data. This page supports two modes: comparison mode and analysis mode. Each mode has some similarities and some differences.

When a PeopleSoft application uses CAF, component CAF_DISPLAY should be registered under its own menu. For example, a customer analysis might be accessed from the Customers menu. It is registered under the Analysis menu as Display Analysis, and Display Analysis Test for an administrator to test the configuration only.

The default search record for Component.CAF_DISPLAY is *INSTALLATION*. This bypasses the search dialog and displays the default comparison associated with the menu. However, the search record can be overridden for a menu to provide the search dialog to allow users to select from multiple comparisons, if desirable.

The CAF_DISPLAY page is automatically re-sized when the size of the browser window changes. Users can add, remove, and rearrange entities and factors. There is no built-in limitation on the number of entities and factors that a user can selected at the same time.

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Warning! Depending on your implementation, there may be performance issues if a user selects too many entities, factors, or both.

Common Elements on the Display Analysis Page

The Display Analysis page is displayed in two modes. Each mode has similarities and differences. This section discusses the similarities.

Select Analysis View

Select previously saved views that are available for a user. Saved views are created by the user who is signed on or by other users.

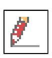
Analysis View

Displays the last analysis view selected from the drop down list box. This can be used as a reference if the factors, entities, or both have been modified since the analysis view was selected and the current display does not reflect that analysis view.

 (Save As)

Click the Save icon so that the current view can be accessed in the future. The user must enter text in the Name of Analysis View to Save field, and click the OK button. The saved view includes the list of entities and factors, including the layout information such as order and size. The system also saves the data for both modes.

If the name entered in the Name of Analysis View to Save field exists, the view is replaced.

 (Edit)

Click the Edit icon to access the Edit Analysis View page and perform these tasks:

- Select the Public check box to make the view available to other users.

  The system adds the owners user ID to the end of the view name for other users to identify the modified view and who modified it.

- Select the Delete check box to delete the view.

 (Notify)

Click the Notify icon to access the Email Notification page and send an e-mail to other users. The field The e-mail includes a link to the current view.

- To: select the e-mail addresses icon if the analysis handler includes a list of e-mail addresses to choose from.
- BCC: is automatically populated with the user’s e-mail address so they have a copy of the message and can re-send it if necessary.
- Subject: The system automatically populates this field with the analysis title.

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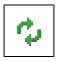
- Message: The system automatically populates this field with the entities and factors selected.

  In addition, a link is provided for the e-mail recipients to open the current view.

 (Refresh)	Click the Refresh icon to refresh the data that is displayed on the page.
 (Analyze this Entity)	Click the Analyze this <entity> icon to access the Comparison Analysis page in analysis mode. This icon acts like a toggle between comparison mode and analysis mode. This option is only available if the Support Analysis Mode check box is selected on the Analysis Configuration Page.
(Analysis related actions)	Click the Analysis related actions icon to perform related actions. This icon is only available if related actions are available for the analysis.

Analysis Display Page (Comparison Mode)

Use the Analysis Display page (Comparison Mode) (CAF_DISPLAY) to compare data for multiple entities in a tabular or grid format.

Image: Analysis Display Page (Comparison Mode) (1 of 2)

This example illustrates the fields and controls on the Analysis Display Page (Comparison Mode) (1 of 2).

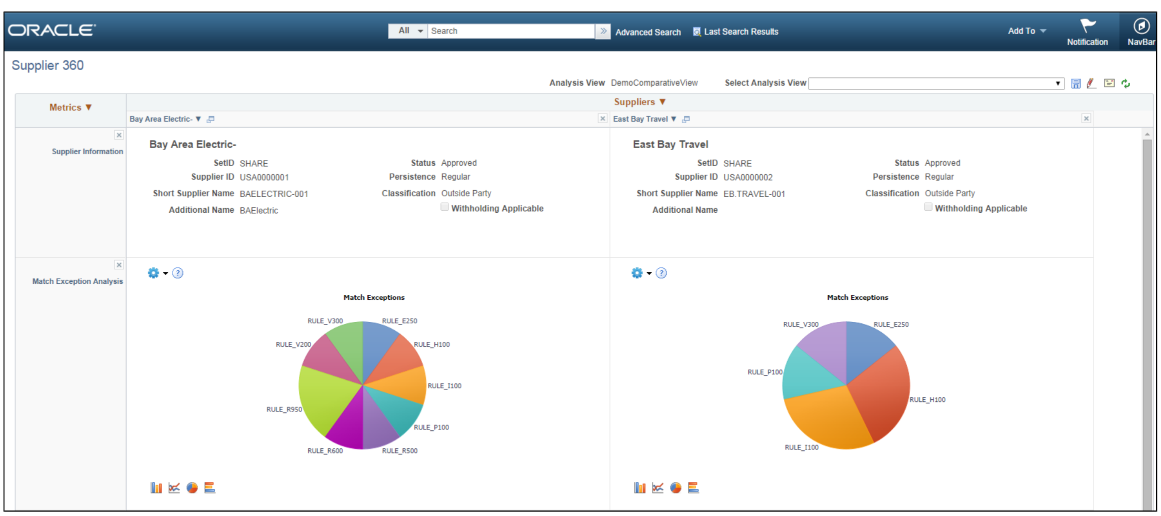


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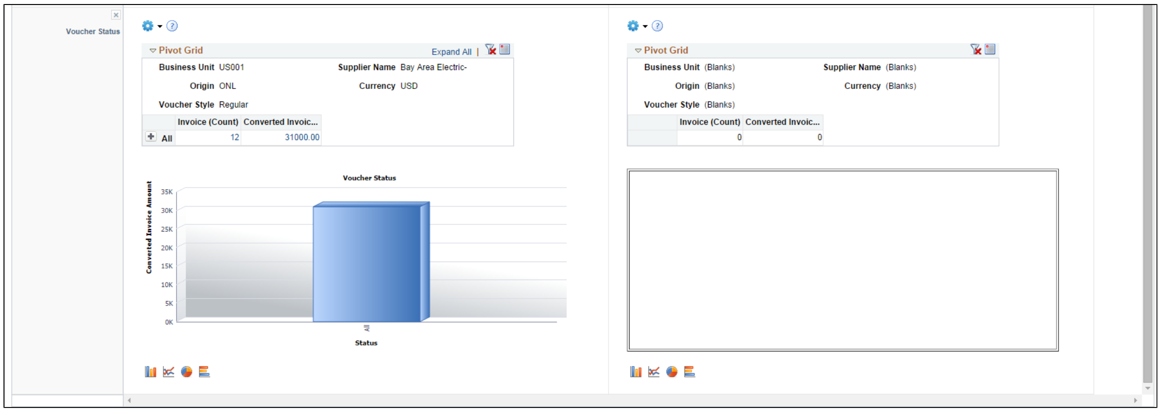
Image: Analysis Display Page (Comparison Mode) (2 of 2)

This example illustrates the fields and controls on the Analysis Display Page (Comparison Mode) (2 of 2).



The comparison mode has three primary areas:

- The Entity Header area is shown across the top of the page.

  It shows entity column headings and actions related to the entities.

- The Factor Header area is shown on the left pane.

  It show factor row headings and actions related to factors.

- The Factor Data area is shown in the largest part of the page.

  It shows the data and actions related to the associated entity and factor.

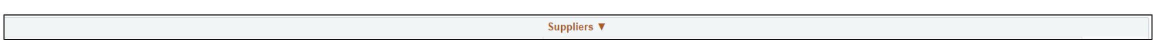
If a user makes a change to one area, the system synchronizes the other two areas. For example, if a user rearranges the entities using drag-n-drop or the Choose Displayed <*Entities*> option, the corresponding columns in the Factor Data areas are rearranged

Entity Header Area (comparison mode)

The entity header is located across the top of the Analysis Display page (CAF_DISPLAY), when in comparison mode. The first row of the entity header displays the entity selected on the Entity Configuration Page.

Image: Entity Header (Comparison Mode - row 1)

This example illustrates the Entity Header (Comparison Mode - row 1).



Users can click the drop down arrow next to the entity to select these options:

Choose Displayed <Entities>	Select to access a popup (or window) that enables the user to select the entities to display in the view.
Select All <Entities>	Select this option to add a check mark in each check box that is next to the individual entity.
Deselect All <Entities>	Select this option to remove all check marks in each check box that is next to each entity.

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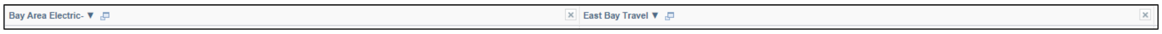
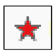
The second row of the entity header displays each entity selected for the view. These tasks can be performed:

Image: Entity Header (Comparison Mode - row 2)

This example illustrates the Entity Header (Comparison Mode - row 2).



(check box)	Select the entity for the Selected Entities action options. This option is only available if the Support Entity Group Actions check box is selected on the Analysis Configuration Page.
 (Selected)	This icon indicates that the entity is selected.
(entity name)	Click the entity name to open related actions. • *Flag this <Entity>* and C*lear Flag for this <Entity>*: These option add or remove a check mark from the check box next to the entity name. This option is only available if the Support Flagged Entity check box is selected on the Analysis Configuration Page. • Other actions: The actions that are displayed are dynamic, from the handler, or configured at the entity action level on the Related Action Configuration Page.
 (remove)	Click the Remove icon to remove the entity from the view.

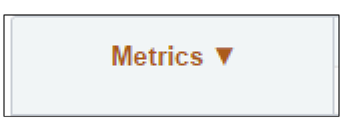
Users can re-position the entity name columns by using the Entity Chooser option or by dragging the column to the new position.

Factor Header Area (comparison mode)

The factor header is located on the left pane of the Comparison Analysis page (CAF_DISPLAY), when in comparison mode.

Image: Factor Header (comparison mode)

This example illustrates the Factor Header when in Comparison mode.



The top of the factor header displays the factor labels that are defined on the Factor Configuration Page. Users can select the label to access the related actions that are associated with each factor. This section also provides the dynamic and configured related actions for each factor.

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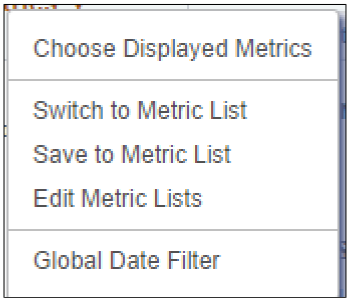
Image: Factor Header Options (comparison mode)

This example illustrates the Factor Header Options when in comparison mode. The factor label *Metric* is defined so that it appears wherever <Factor> is referenced.



Users can click the drop down arrow next to the factor to select these options:

Choose Displayed <Factor>	Select to open the Factor Chooser where users can select, remove, and rearrange the factors in the view.
Switch to <Factor> List	Select to open the factor list where users can switch to a pre-defined list of factors. The factor lists are defined by the user, by other users, and by an administrator using the Factor List Configuration Page.
Save to <Factor> List	Select to open a window where the user can enter a list name and save the factor list. If the name entered in the List Name field already exists, the factor list is replaced with the current factors.
Edit <Factor> Lists	Select to access the Edit <Factor Lists page that shows the factor lists that have been saved by the user. The user can make the factor lists public, change the status to Active or Inactive, or delete a factor list.

Factor Data Area (comparison mode)

The factor data is located on the center of the Analysis Display page (CAF_DISPLAY), when in comparison mode. The factor data is displayed in a cell, which combines the entity in the Entity Header and the factor in the Factor Header.

(More drop down)	Click the More drop down to select related actions. Each factor data cell can have factor related actions, which are determined from the factor handler or the Related Action Configuration Page.
(Action button)	Click the Action button to access embedded related actions for the factor data.

Analysis Display Page (Analysis Mode)

Use the Analysis Display page (Analysis Mode) (CAF_DISPLAY) to analyze data for one entity.

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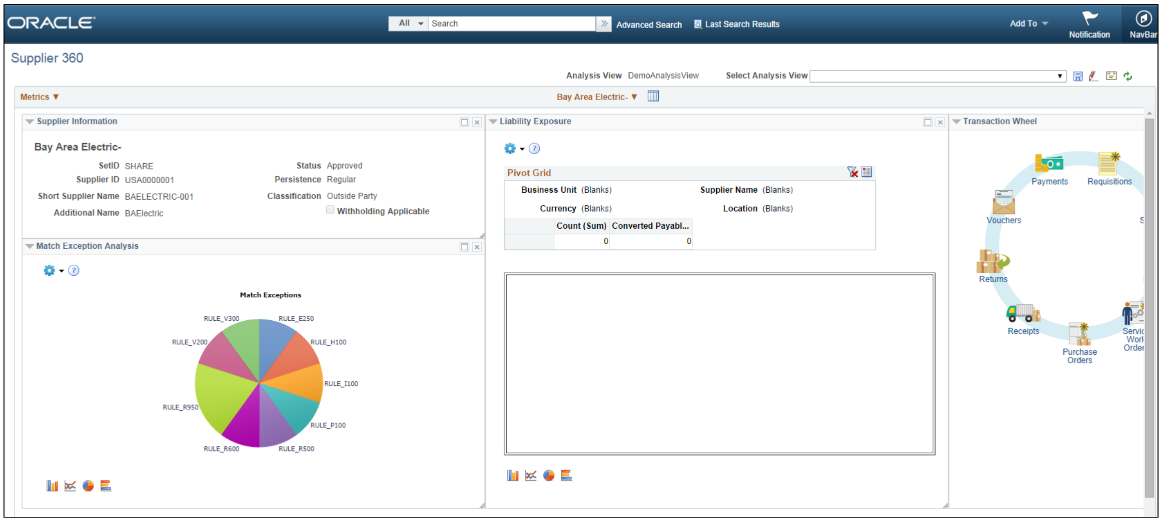
Image: Analysis Display Page (Analysis Mode)

This example illustrates the fields and controls on the Analysis Display page (Analysis Mode).



The analysis mode has two primary areas:

- The Entity Header area is shown across the top of the page.

  It shows the entity and related actions.

- The Factor Data area is shown in the largest part of the page.

  It shows the factor data for the entity. Factors can be added, removed, resized, repositioned, minimized, and maximized by the user.

Entity Header Area (analysis mode)

The Entity Header area displays entity information and actions that allow the user to access the factor related actions.

Image: Entity Header Options (analysis mode)

This example illustrates the Entity Header Options when in analysis mode.

Choose Displayed <Factors>	Select to display a factor popup window that shows the available factors for the user. You can drag selected factors from the list to any location in the Factor Data area. The system

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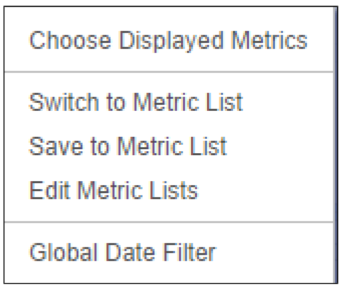
	shows a frame for the size of the factor. When you drop the factor, the factor data is retrieved and displayed.
(switch to Comparison Mode)	Click this icon to switch to comparison mode.

Factor Data Area (analysis mode)

The Factor Data area appears in the largest part of the page and shows the factors in a free-form format. Each factor is displayed in its own frame, with a header.

Image: Factor Header Options (analysis mode)

This example illustrates the Factor Header Options when in analysis mode.



The Factor Data area size is not limited to the size of your display. You can move the factor frame outside of the current Factor Data area and the area is re-sized to accommodate it. Use the scroll bars at the right and bottom of the Factor Data area to scroll through all factors

and (Collapse and expand icons)	Use the collapse and expand icons to collapse and expand each frame. When you collapse a frame, only the factor header is shown. You can also double-click on the factor header to maximize and consolidate the factor frame.
(factor name)	Click on a factor name to access the related actions for the factor. These actions are the same as those in comparison mode with the exception of Show Combined and Configure.
(remove icon)	Click the remove icon to remove the factor frame from the Factor Data Area.

Understanding Configurable Analysis Framework for Fluid Implementations

Use the CAFNUI_DISPLAY_FL page to view and interact with comparison and analysis data in Fluid implementations. This page supports only Comparison Mode. Comparison mode and analysis mode has some similarities and some differences.

The following steps need to be followed while implementing Fluid Configurable Analysis Framework:

1. Register the CAFNUI_DISPLAY_FL component in a new menu. Leave the search record as Installation.

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2. Create a Content Reference in an existing or new Fluid Page referring to the Menu/Component pair mentioned in the previous step.

3. Specify the menu in this field.

The Fluid Analysis Display is resized automatically when the browser window size is changed. User can add/remove/rearrange entities and factors in any way they desire. Please note that there might be potential performance issue if user selects too many entities and/or factors.

Common Elements for Comparison and Analysis Modes in Fluid Implementations

These are the common elements that are available in both modes:

View

This drop-down allows user to switch between saved views.

Choose Factors

Allows adding and removing of factors for comparison or analysis.

Choose Metrics

The selector Individual Factor/Factor Group switches between:

- Individual Factor(select/remove factorindividually.
- Factor Group (replace all factors with a set of factor or a factor list.

Related Actions (In Entity)

Lists all the actions defined in the Analysis configuration with Action level = Entity. It also lists:

- Flag this Entity. This is listed only when Support Flagged Entity is flagged at Analysis Configuration and the entity is not flagged.
- Clear Flag. This is listed only when only when Support Flagged Entity is flagged at Analysis Configuration, and the entity is already flagged. It then clears the flag.

Related Actions (in Analysis)

Lists all the actions defined in the Analysis configuration with Action level = Analyis. It also lists:

- Save to <Factor> List. This creates a new Factor List with all the metric currently displayed at the page. This factor list is accessible only to the user that created it.
- Edit <Factor> List. It allows to activate/inactivate, make public, delete or edit the user created Metric Lists
- Save View.
- Edit View List. Allows to make public or delete the created Views.
- Global Date Filter. allows users to change the Global Date range and refresh all factors.

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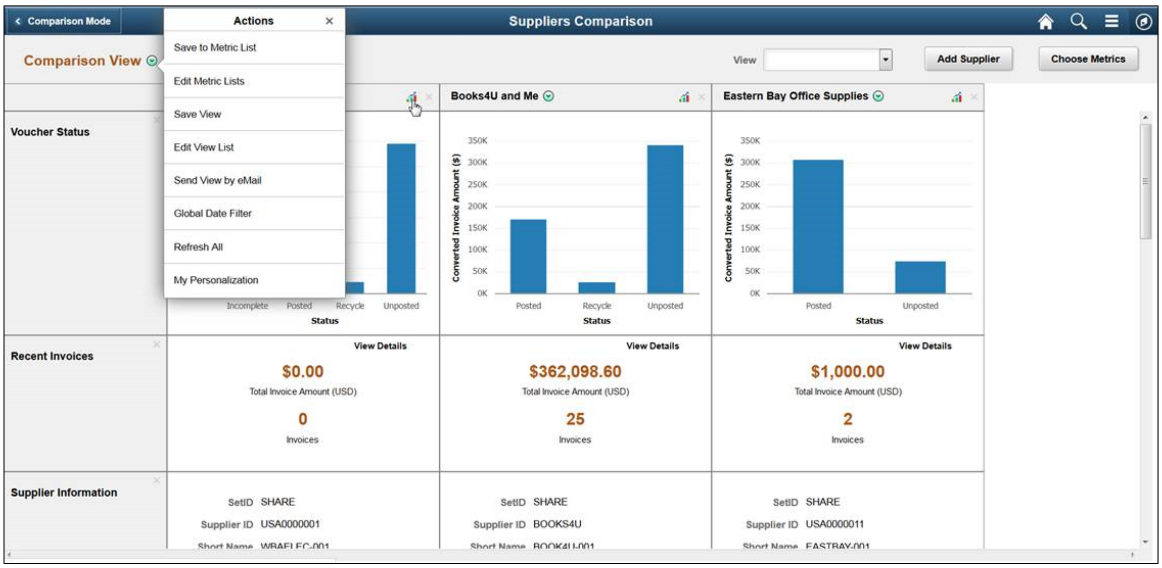
- Send View by eMail. Allows users to send an eMail to other users including the link to the current view display.

Fluid Analysis Display Page (Comparison Mode)

Use the Analysis Display Page (CAFNUI_DISPLAY_FL) in Fluid implementations to compare different entities.

Image: Fluid Analysis Display Page (Comparison Mode)

Fluid Analysis Display Page (Comparison Mode)



The items specific to Comparison mode are:

Comparison Title	Name of the comparison.
Add Entity	Allows adding and removing entities to the comparison.
Analysis Mode	Transfer to the Analysis mode, and the entity will be analyzed in Analysis mode.
Remove Factor	Allows removing the entire row of a factor or the entire column.
Flagged Entity Indicator	If the entity has been flagged, this flag is placed before this entity. If the user clicks at Analysis Mode icon for this Entity, this entity will show up as flagged in Analysis Mode. If the user unflags this entity in Analysis Mode, and navigates to Comparison Mode, it will show up unflagged in Comparison Mode.

Fluid Analysis Display Page (Analysis Mode)

Use the Analysis Display Page (CAFNUI_360_FL) in Fluid implementations to Analyze an entity.

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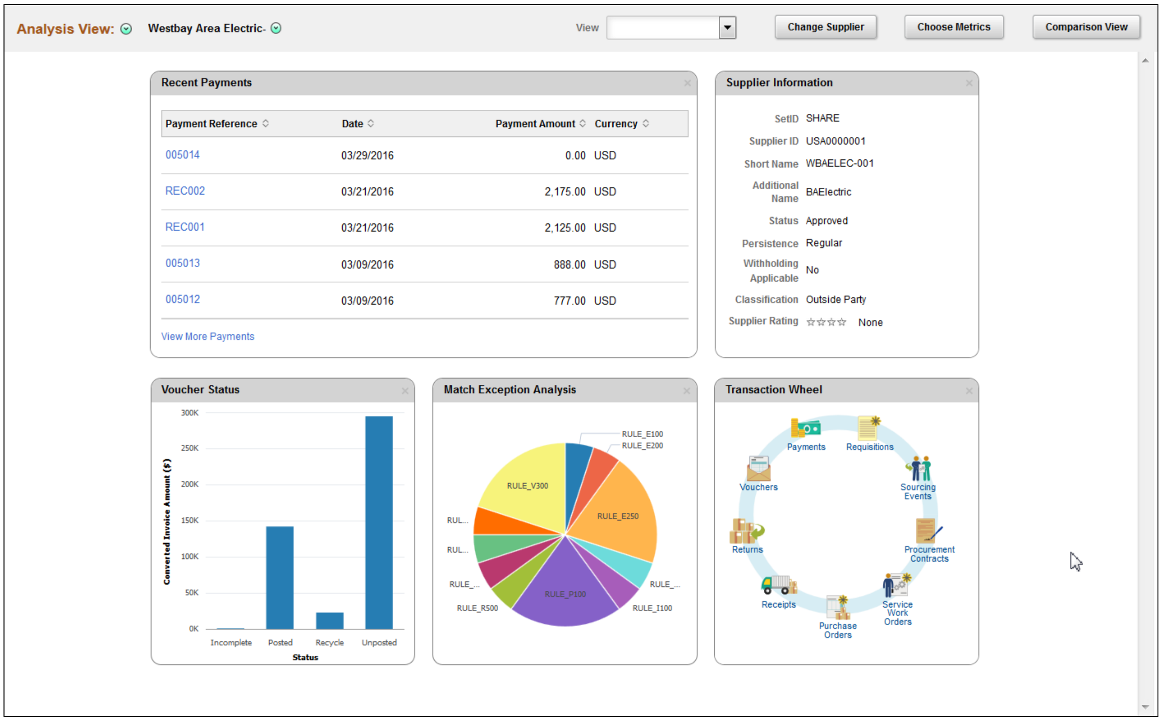
Image: Fluid Analysis Display Page (Analysis Mode)

Fluid Analysis Display Page (Analysis Mode)



The Analysis Mode allows user to concentrate on one entity by displaying factors for only one selected entity. It is displayed in the Entity Header area. The Factor Data area displays factor data for the entity. The factors can be added, removed or moved, by the user

The items specific to Analysis mode are:

Analysis Title	Name of the analysis.
Change Entity	Allows changing the entity spotted in Analysis Mode.
Remove factor	Allows removing a factor from the Analysis Mode page.
Comparison View	Transfer to the Comparison mode. The Entity currently displayed in Analysis Mode is not automatically added to Comparison mode.
Flagged Entity Indicator	If the entity has been flagged, this flag is placed before this entity. If the user clicks on Comparison View and this entity was already placed at Comparison Mode, this will show up as flagged in Comparison Mode. If the user unflags this entity in Comparison Mode and navigates back to Analysis Mode, it will show up unflagged in Analysis Mode.
Remove Entity	Allows removing an entity from the Analysis mode page.

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Chapter 16

Fluid Discussion Service

Understanding Fluid Discussion Service

Fluid Discussion Service is a simple and easy to use discussion tool that enables you to link Context Specific Discussions to PeopleSoft pages.

Discussion Service enables you to:

- Initiate discussion from a page with the context of current transaction
- Send/Receive messages and attachments
- Easily identify when and who posted what to discussion
- Search within discussions
- Edit Subject, Add/Remove participants
- Close/Reopen Discussions

Security Access

To access discussion components, users need to be assigned with the below roles:

- EOFD_USER: Discussions User, this role is required for accessing Discussions that the user is a participant of.
- EOFD_ADMIN: Discussion Service Administrator, user with this role will have access to configure new Discussion Types and Discussion Groups.
- EOFD_SUPER_ADMIN: Discussion Service Super Administrator, user with this role will have full access to all the Discussions in the system.

Note: In a cluster environment it is important that you assign the EOFD_USER role to the users in all the nodes.

Fluid Discussion Service Implementation Options

The fluid discussion service implementation options are listed in the below table.

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Sl. No:	*Implementation Option*	*Description*	*Steps*	*Result*
1	Assign Default Discussion Service at component level	The simplest way to implement Fluid Discussions is to assign the Default Discussion Service as a Related Content Tile or a Related Action	Assign the Default Discussion Service: EOFD_DEFAULT_DSCN to the component using Related Content framework. For details, see Assigning Default Discussion as a Related Content Tile.	Users with access to component can: Add a new topic, add participants and start discussion. View all discussions that they have been added to as participants. The discussion list will only show discussions created for the current component
2	Assign Default Discussion Service with context	Discussions can be made context specific by adding the context parameters to the service	Clone Default Service: EOFD_DEFAULT_DSCN and add context fields to the Service. Assign the cloned Service to the component as a Related Action or Related Content tile and map the page fields to the context fields so that values are passed at run time. For details, see Assigning Default Discussion as a Related Action with Context.	Users with access to component can: Add a new topic, add participants and start discussion. View all discussions that they have been added to as participants. The discussion list will only show discussions created for the current context. (example: current Class, Current Employee, etc.).
3	Implement Discussion Service with additional rules to auto-add dynamic participants and assign privileges.		Create Discussion Type and Discussion User Groups. Clone Default Service: EOFD_DEFAULT_DSCN and add context fields and discussion type field. Assign the cloned Service to the relevant Components and map the page fields to the context fields so that values are sent at run time. Specify the new Discussion type value for the Discussion type parameter. For details, see Implementing Discussion Service with a New Discussion Type.	Dynamic users are automatically added to relevant discussions with appropriate access based on the Discussion Type and Discussion User Group configurations.

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Understanding Default Discussion Type

Oracle delivers a default Discussion Service definition that has predefined rules configured in the DEFAULT discussion type. In most cases, you will be able to use this Default service for enabling Discussions on a component. Next few sections describe detailed steps for implementing the default discussion.

Note: DO NOT update the Default Discussion Configuration and Service.

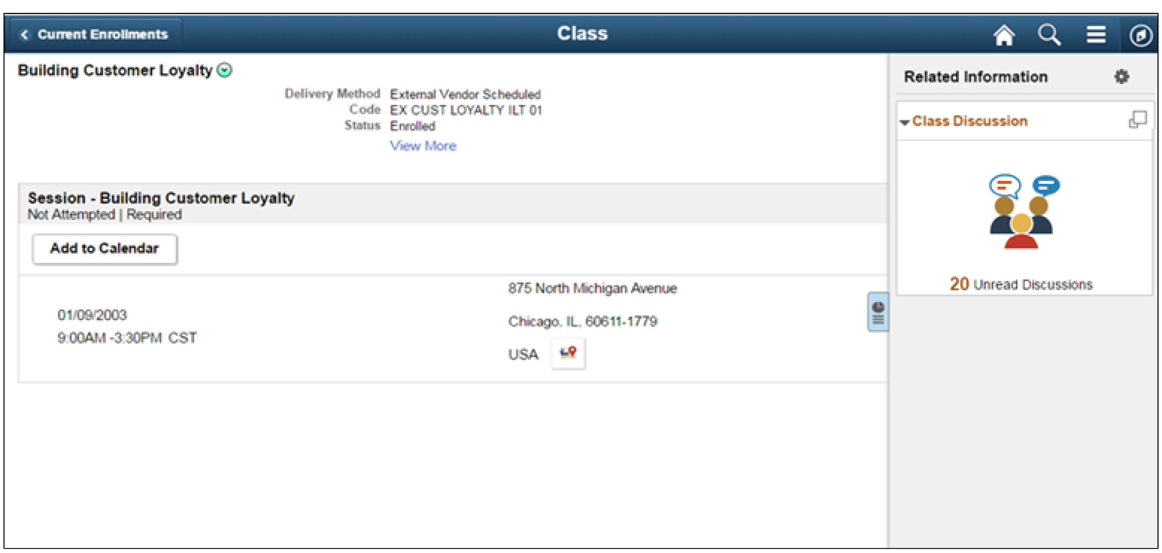
Assigning Default Discussion as a Related Content Tile

To assign default discussion as a RC tile, perform the following:

1. Navigate to PeopleTools, Portal, Related Content, Manage Related Content.
2. Select the Cref to which you need to assign the discussion service.
3. Assign the Service ID: EOFD_DEFAULT_DSCN under Component Level Related Content.
4. Update the Service label.
5. Click on Configure button to configure the service. For parameters EOFD_COMPONENT & EOFD_MARKET, choose mapping type as System Variable and mapping data as %Component and %Market respectively.
6. Select Security options as Related Content Provider Security.
7. Click Ok. Save the configuration details.

Image: Class Page

This example illustrates the fields and controls on the Class page.



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Assigning Default Discussion as a Related Action with Context

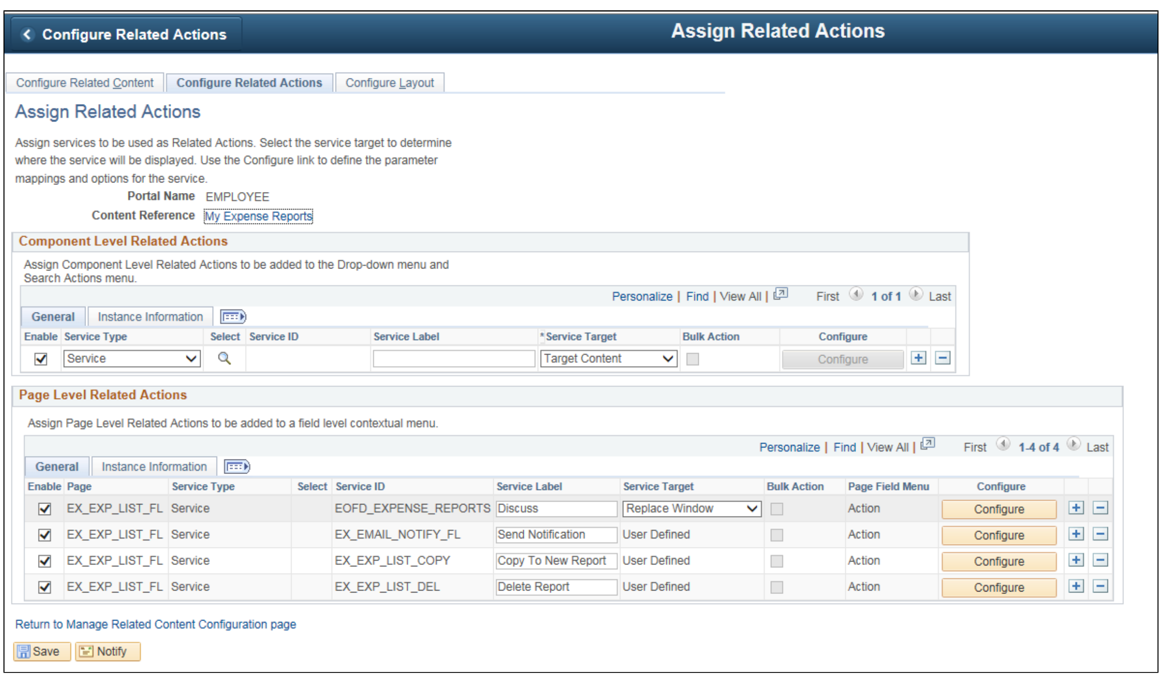
To assign default discussion as a related action with context, perform the following:

1. Navigate to PeopleTools, Portal, Related Content, Maintain Related Content.
2. Clone the Service: EOFD_DEFAULT_DSCN.
3. Add the context fields to the new service. Add below additional parameters to the service definition:
    - EOFD_<Context Key Field 1>
    - EOFD_<Context Key Field 2>

    You can add as many key fields as per your requirement. These parameters will be used to determine the context. If you want to use the same discussion type on multiple components then you can remove the Component parameter from the list. Save your changes.
4. Navigate to PeopleTools, Portal, Related Content, Manage Related Content.
5. Select the Cref to which you need to assign the default service.
6. Under Page-level Related Content, select the page in which Discussion Service link should be opened.
7. Select the new cloned service ID created in step 2.
8. Update the Service label.

    Image: Assign Related Actions Page

    Assign Related Actions Page

9. Click on Configure button to configure the service to pick the System variables.

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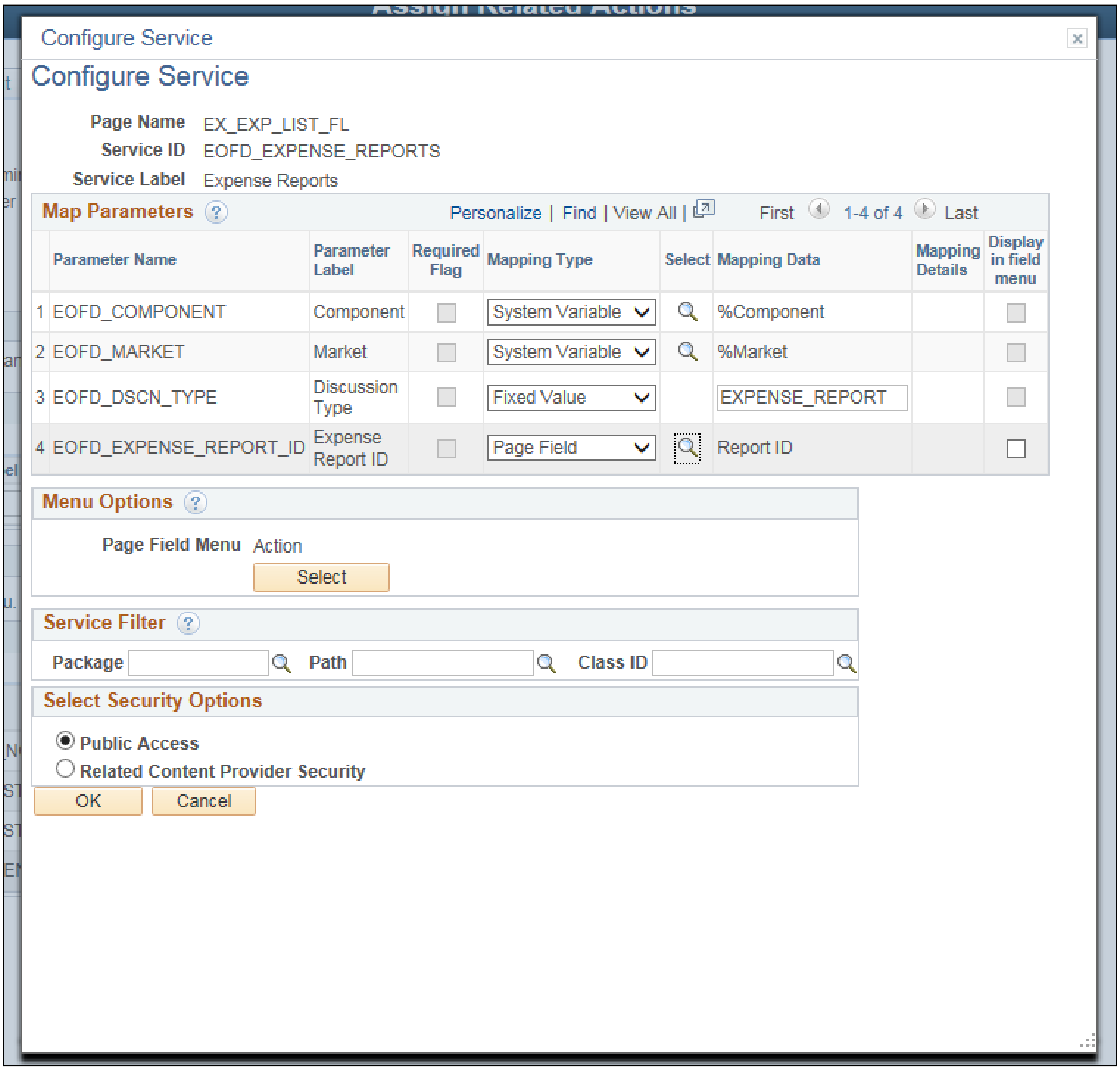
a. For parameters EOFD_COMPONENT & EOFD_MARKET, choose Mapping Type as System Variable and Mapping data as %Component and %Market respectively.

b. Assign fields from the page as values for the context field parameters.

10. Suppose the page in selected component reference is designed to have a Push button/Hyperlink for opening Discussion Service. Under Menu Options, select that field as Page Field Menu.

Image: Configure Service Modal Window

Configure Service Modal Window



11. Select Security Options and Click Ok.

12. Save the details configured in Assign Related Actions page. After performing all the above mentioned steps, the default discussion services appear as a related action in the Discussion list.

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Image: My Expense Reports Page

My Expense Reports Page

Clicking Discuss opens the Discussion list page.

Implementing Discussion Service with a New Discussion Type

Creating new Discussion type and Discussion User group enables you to implement additional rules to auto-add dynamic participants and assign privileges to specific roles.

Configuring Discussion Service

This topic provides an overview of discussion service configuration and describes how to:

- Define Discussion User Group •
- Define Discussion Type

Pages Used to Configure Discussion Service

Page Name	*Definition Name*	*Usage*
Discussion User Group Page	EOFD_DSCN_GROUP	To create a new discussion user group.
Discussion Type Page	EOFD_DSCN_TYPE	To create a new discussion type that can be assigned to components.

Discussion User Group Page

Use the Discussion User Group page (EOFD_DSCN_GROUP) to define discussion groups which enable you to create dynamic list of participants for a discussion based on the context. For example all participants and the instructor of a course class can be added to a discussion attached to the Course class page with a context of the course class id.

Navigation

Enterprise Components > Discussion Service > Discussion User Group

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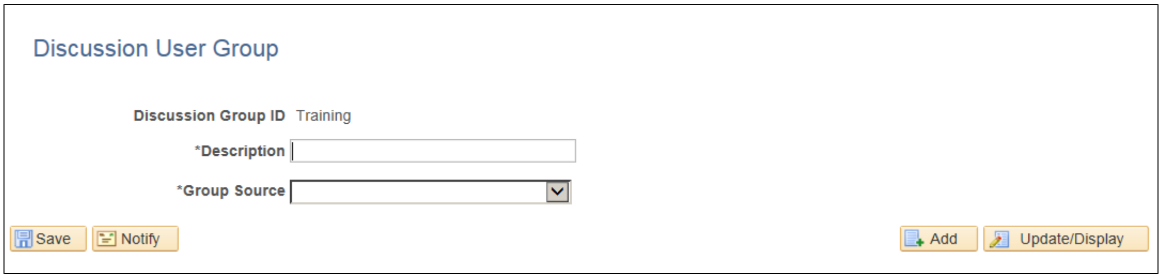
Image: Discussion User Group page

Discussion User Group page



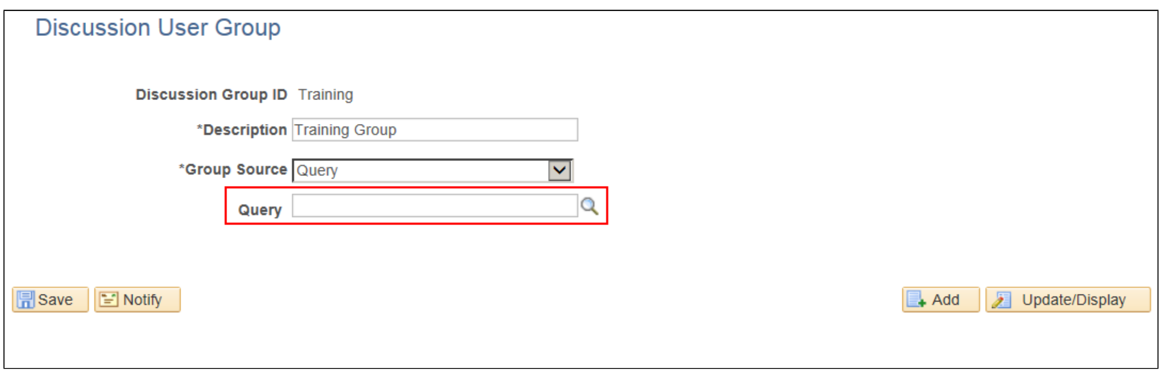
Defining Discussion User Group

To create a new discussion user group:

1. Login as an administrator.
2. Enter the required discussion group ID.
3. Click Add.
4. Type a meaningful description in the Description field.
5. Select an appropriate value from the Group Source field. On selecting a value, corresponding field is displayed as shown:

   Image: Discussion User Group Query Page

   This example illustrates the fields and controls on the Discussion User Group Query Page

Discussion Type Page

Use the Discussion Type page (EOFD_DSCN_TYPE) to define new discussion types. You can post attachments to the discussion, add default list of participant, define permissions for adding/removing participants, updating subject, and close or reopen discussion.

Enterprise Components >Discussion Service >Discussion Type

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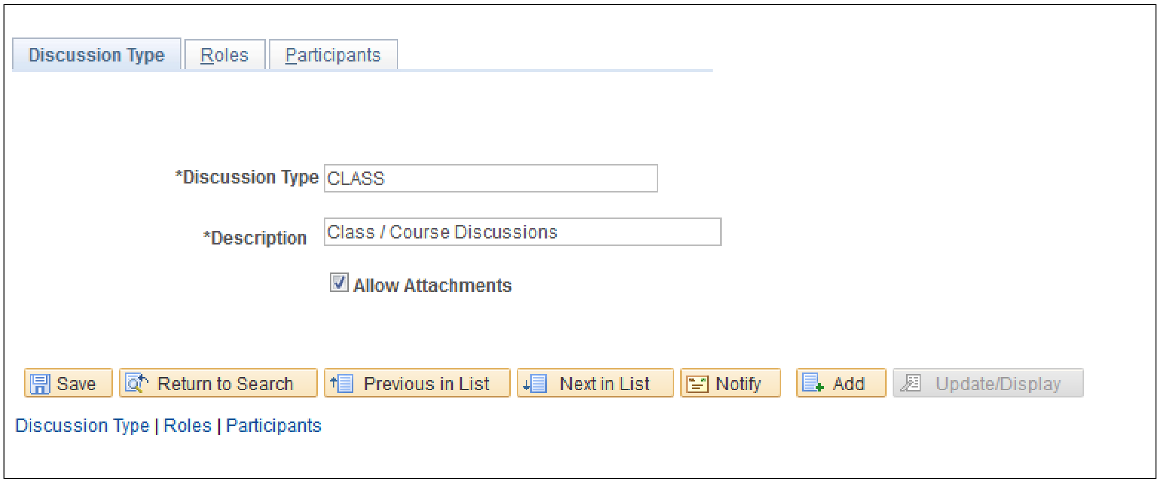
Image: Discussion Type Page

This example illustrates the fields and controls on the Discussion Type page.



Defining Discussion Type

To create a new discussion type:

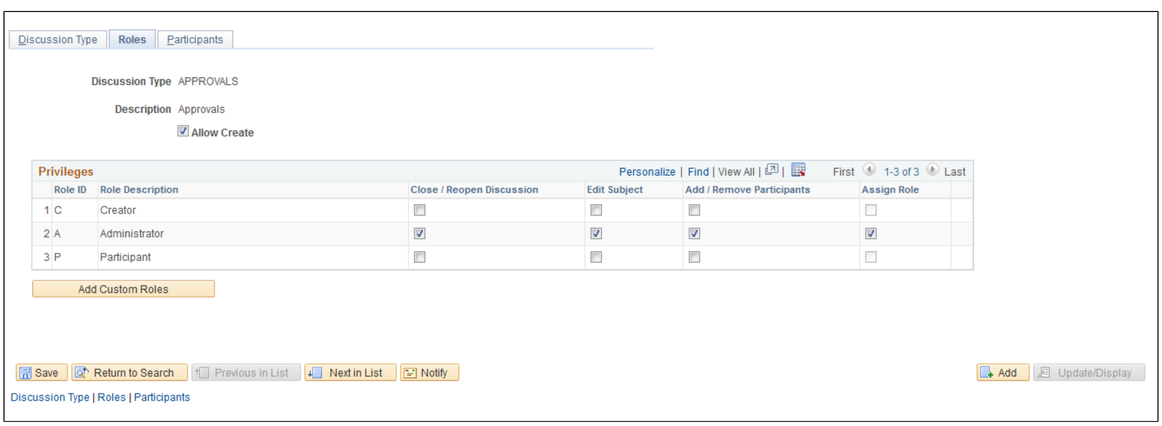
1. Login as an administrator.
2. Enter the discussion type and a meaningful description as per requirement.
3. To allow attachments, select the Allow Attachments check-box.

To configure the permissions for each type of user:

1. Select the Roles tab. The Discussion Type – Roles page appears as shown:

   Image: Discussion Type — Roles page

   This example illustrates the fields and controls on the Discussion Type — Roles page.



2. Select the Allow Create check-box, so that the user can create new discussions.

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Note: When 'Allow Create' is turned off, Creator role is removed and the users will not be allowed to add new discussions. Add Discussion(+) Button on the Discussion List page will be hidden for users.

Add Custom Roles Click this button to add new roles.

To automatically add users while creating discussions:

1. Click the Participants tab. The Participants tab is displayed only when you saved the Roles page details.

   Image: Discussion Type – Participants Page

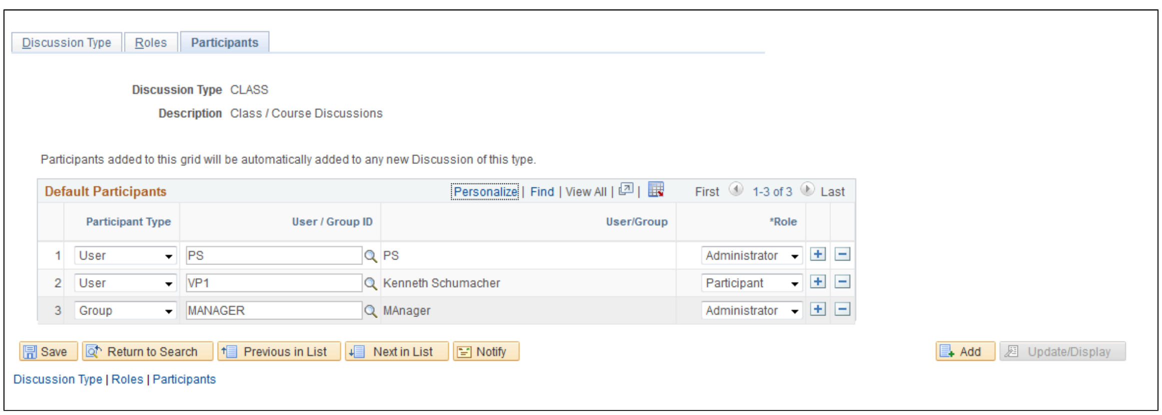
   This example illustrates the fields and controls on the Discussion Type – Participants Page:

2. Include User/Group in Participants tab to automatically add users when discussion is created. Assign Participant/Administrators role to user/group using this tab as shown.

   Image: Default Participants page

   Default Participants page

Assigning New Discussion Type as a Related Action with Context

To assign a new discussion type as a related action with context, perform the following:

1. Navigate to PeopleTools, Portal, Related Content, Maintain Related Content.
2. Clone the Service: EOFD_DEFAULT_DSCN.
3. Add the context fields to the new service. Add below additional parameters to the service definition:

a. EOFD_DSCN_TYPE_ID

b. EOFD_<Context Key Field 1>

c. EOFD_<Context Key Field 2>

You can add as many key fields as per your requirement. These parameters will be used to determine the context. If you want to use the same discussion type on multiple components then you can remove the Component parameter from the list. Save your changes.

4. Navigate to PeopleTools, Portal, Related Content, Manage Related Content.

5. Select the Cref to which you need to assign the default service.

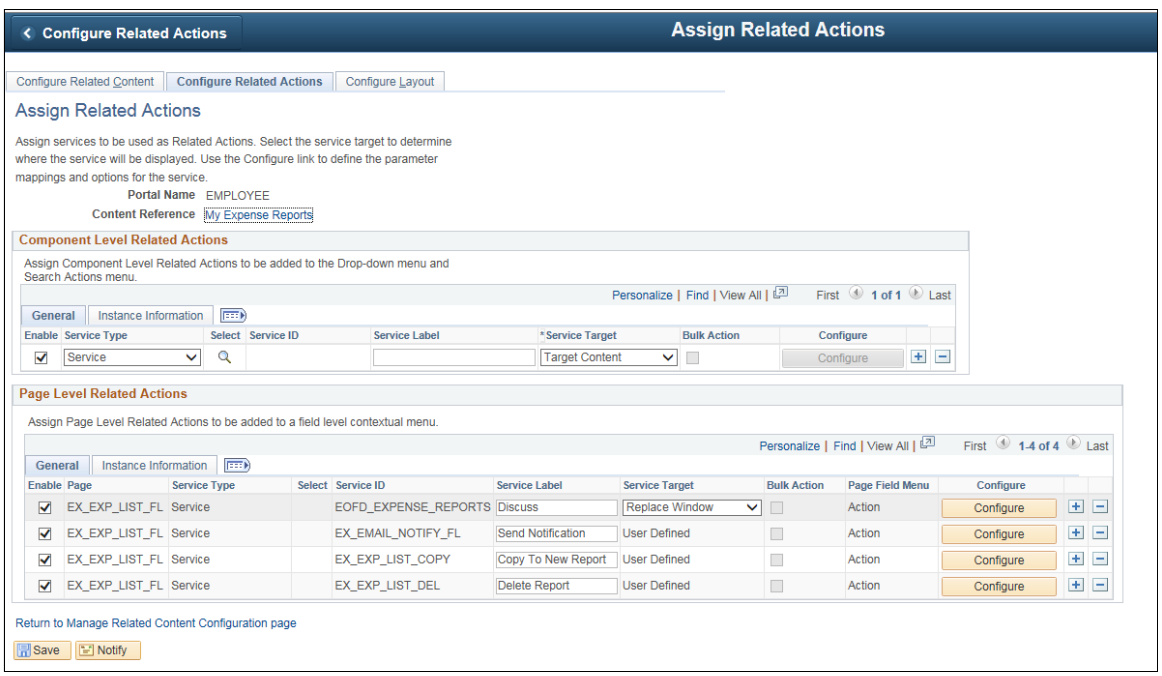
6. Under Page-level Related Content, select the page in which Discussion Service link should be opened.

7. Select the new cloned service ID created in step 2.

8. Update the Service label.

Image: Assign Related Actions Page

Assign Related Actions Page



9. Click on Configure button to configure the service to pick the System variables.

a. For parameters EOFD_COMPONENT & EOFD_MARKET, choose Mapping Type as System Variable and Mapping data as %Component and %Market respectively.

b. Assign fields from the page as values for the context fields.

c. Specify the new Discussion Type ID as fixed value for the parameter: EOFD_DSCN_TYPE_ID.

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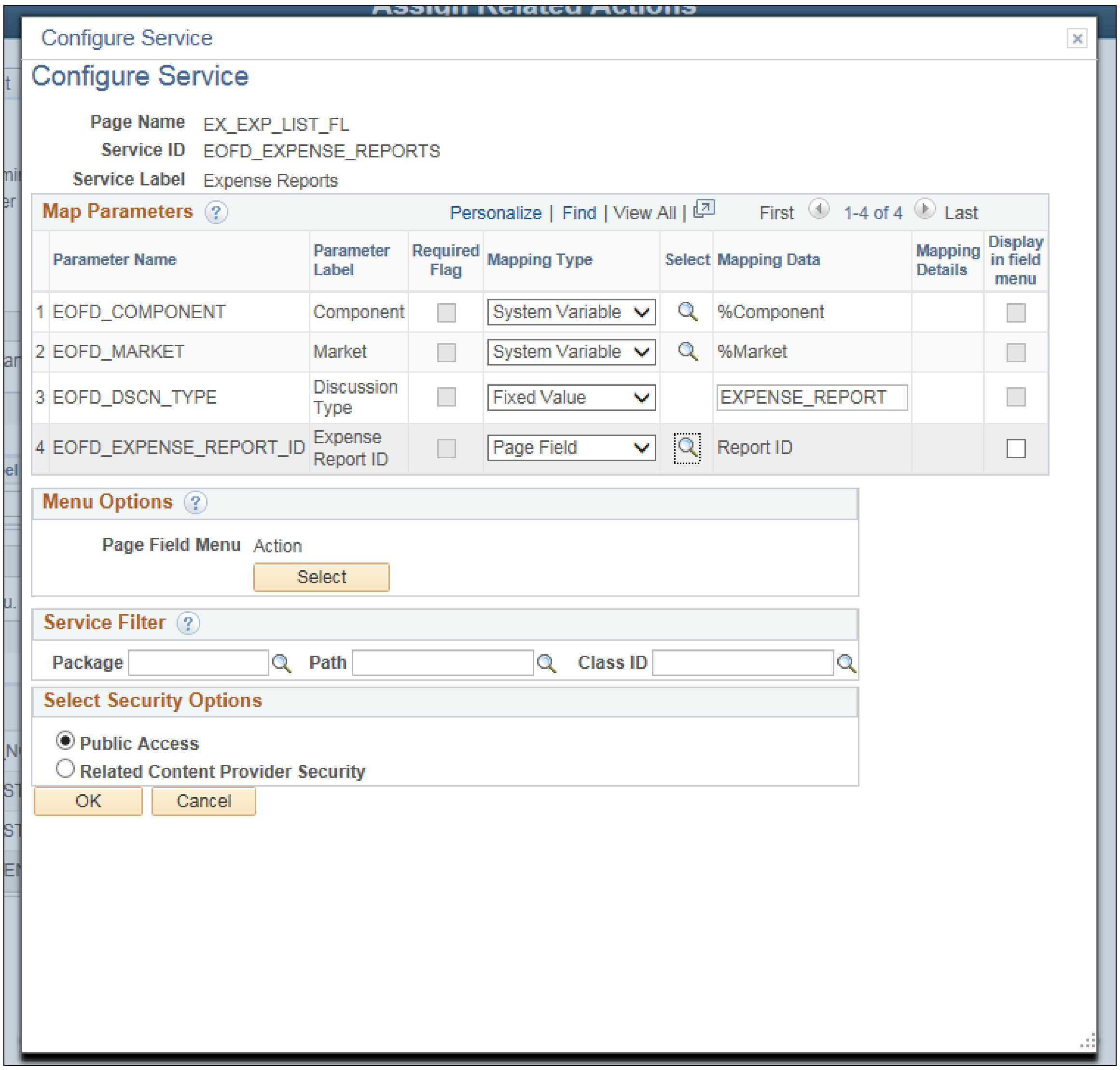
10. Suppose the page in selected component reference is designed to have a Push button/Hyperlink for opening Discussion Service. Under Menu Options, select that field as Page Field Menu.

Image: Configure Service Modal Window

Configure Service Modal Window



11. Select Security Options and Click Ok.

12. Save the details configured in Assign Related Actions page.

Scheduling Notifications

Certain actions in Fluid Discussion Service send users both an email message and a notification that appears on the RC tile or Discussion List page. On the RC tile, you can view unread messages and active discussions.

Notifications are triggered when the user initiate the following actions:

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- User is added to a new/existing conversation.
- New message is posted in a conversation.
- When the subject is changed
- When discussion is closed/reopened

Pages Used to Schedule Notifications

Page Name	*Definition Name*	*Usage*
Discussion Notification Page	EOFD_EML_RUN	To run discussion notifications.

Discussion Notification Page

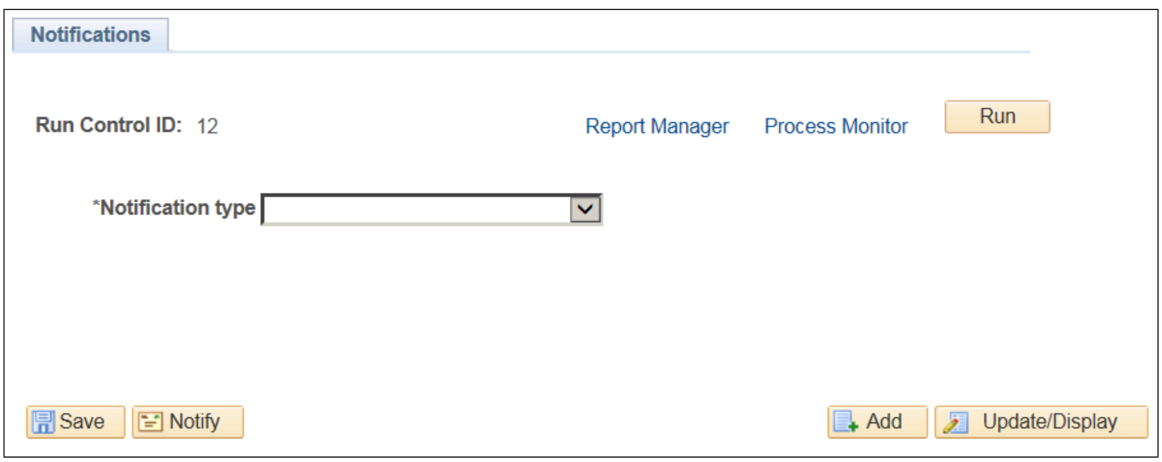
Use the Discussion Notification page (EOFD_EML_RUN) to schedule notifications.

Navigation

Enterprise Components > Discussion Service > Run Discussion Notifications

Image: Discussion Notification Page

This example illustrates the fields and controls on the Discussion Notification Page.



To schedule discussion notifications, perform the following:

1. Login as an administrator.
2. Access Discussion Notification page.
3. Enter the Run Control ID.
4. Click Add. This displays the Discussion Notifications page.
5. Select an appropriate value from the Notification Type field.
6. Click Run to process the notification request. This displays the Process Scheduler Request modal window as shown.

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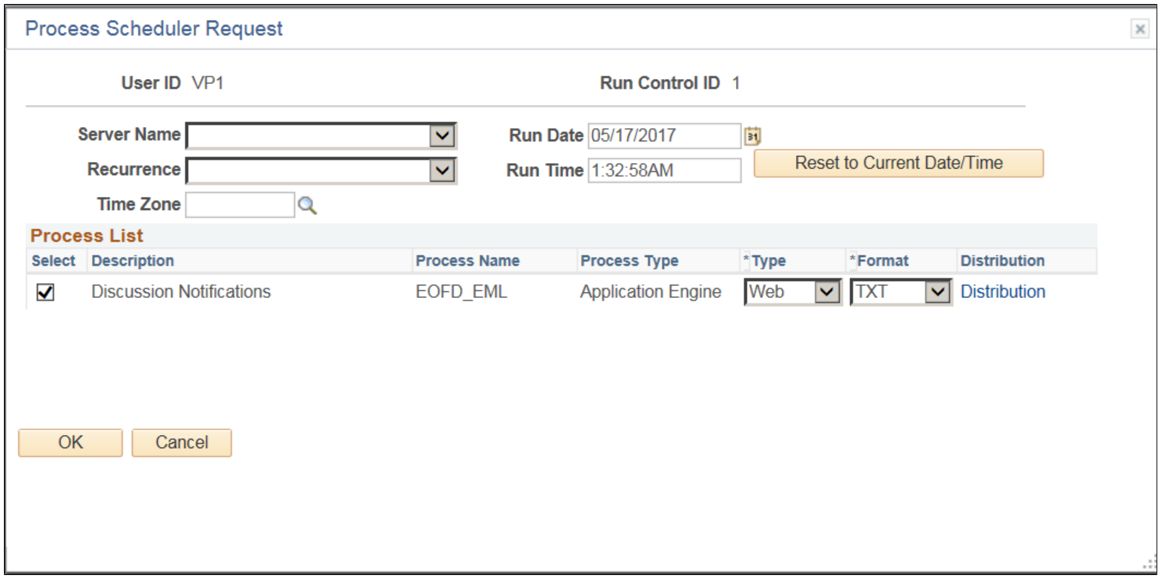
Image: Process Scheduler Request modal window

Process Scheduler Request modal window



Note: It is recommended to set different frequencies for email and push notifications. For instance, push notifications could be as frequent as every hour or every 5 minutes. Email notifications would be less frequent, say once a day or week.

Viewing All Discussions

This section details the pages used to view discussions.

Pages Used to View Discussions

Page Name	*Definition Name*	*Usage*
Discussions Tile	EOFD_DSCN_LIST_FL_GBL	To view all discussions.
Discussions Page	EOFD_DSCN_LIST_FL	To access a list of discussion types which are having active discussions.

Discussions Tile

Use the Discussion tile (EOFD_DSCN_LIST_FL_GBL) to view all the discussions.

Navigation

Select Fluid Home under the main menu. On the page that appears, select Employee Self Service. The Discussions tile is available on the Employee Self Service landing page.

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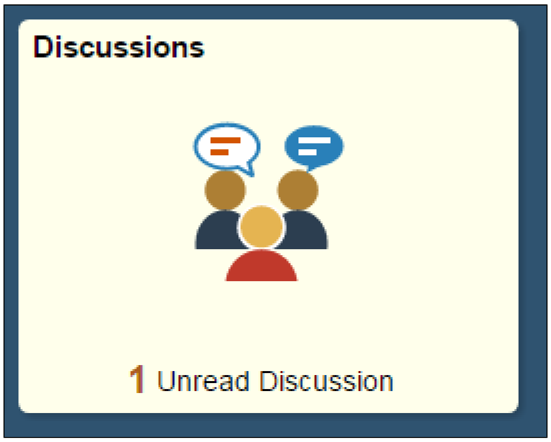
Note: Discussion Tile is not available on the homepage by default. It can be added using Personalize Homepage option.

Image: Discussions Tile

Discussions Tile



The tile displays the cumulative count of Unread and Active discussions from all the nodes.

Click the tile to access the aggregated discussion list.

Discussions Page

Use the Discussion page (EOFD_MAIN_LIST_FL) to access a list of discussion types which are having active discussions.

Navigation

Click the Discussion tile on the Employee Self Service homepage.

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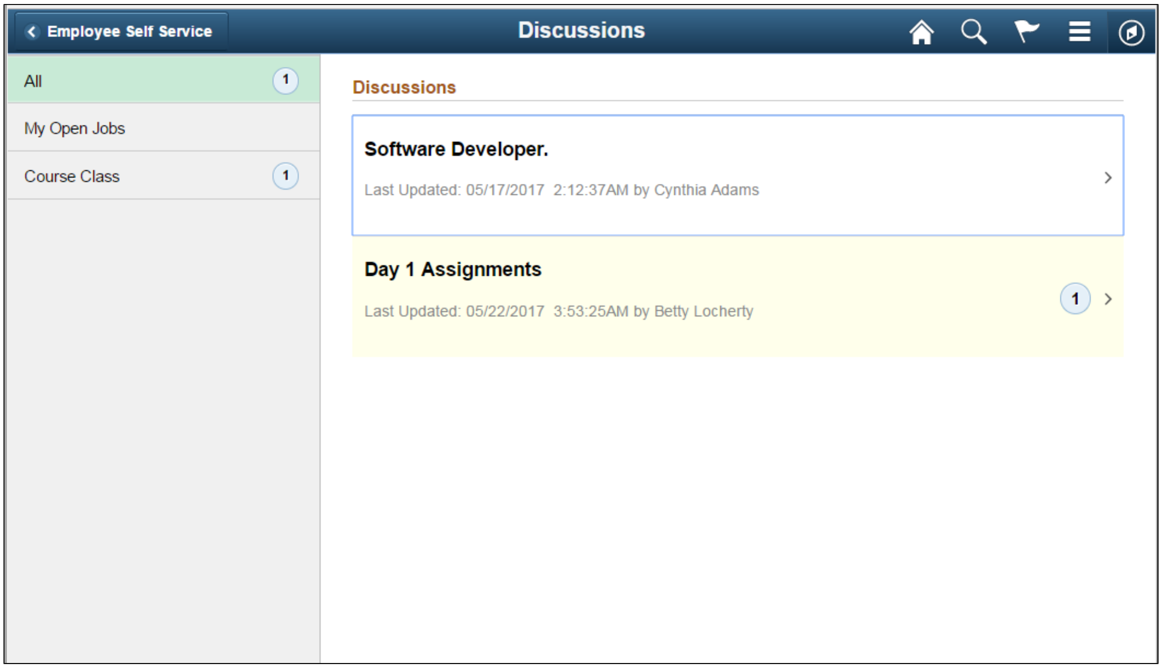
Image: Discussions page

This example illustrates the fields and controls on the Discussions page.



Only top fifty discussions are displayed on selection of any discussion type. To view all the discussions, click the View More link.

Note: By Default, 'All' is selected and the list of all discussions, of all discussion types, from all the nodes is displayed. Discussion Type description is followed by Unread Messages count.

Click on a discussion to open up the conversation window corresponding to the selected discussion.

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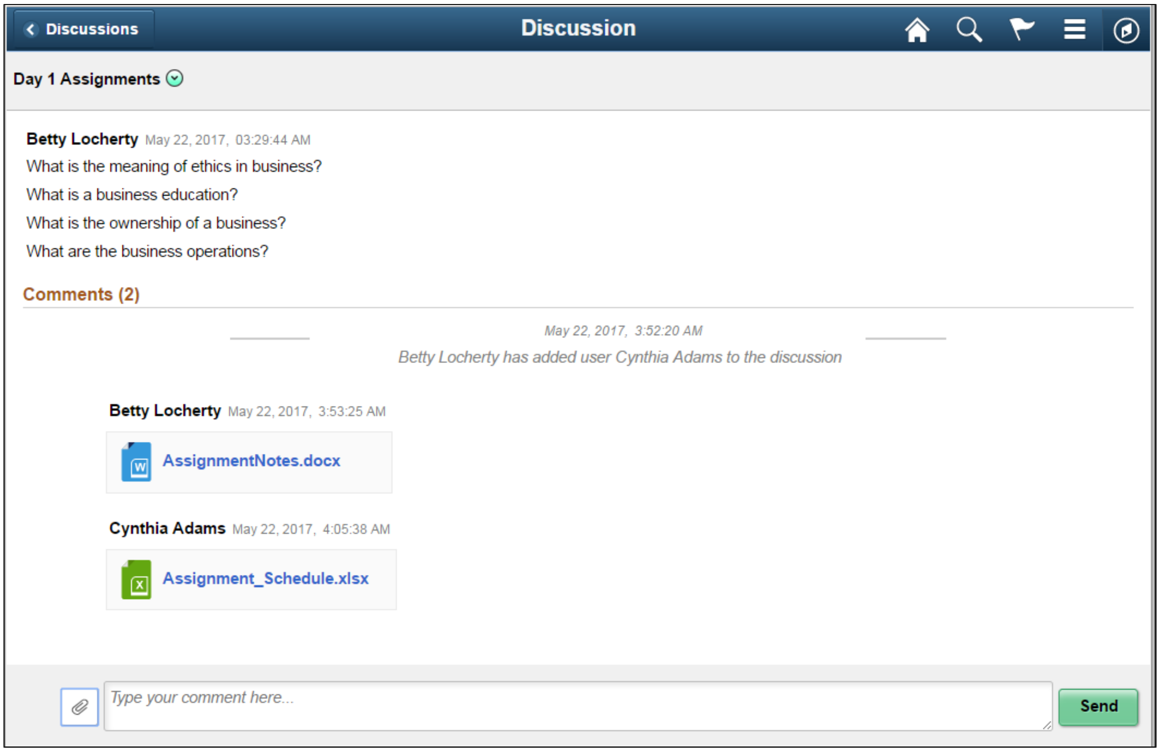
Image: Discussion Conversation page

Discussion Conversation page



You can enter your comments and attach supporting documents in this page.

Click Send to add your comments.

Actions on Discussions Page

In Discussions page, you can perform three actions on any discussions.

- Details
- View Attachements
- Notification Preferences

Click on the Related Action item. You can view the actions on Discussions page as shown.

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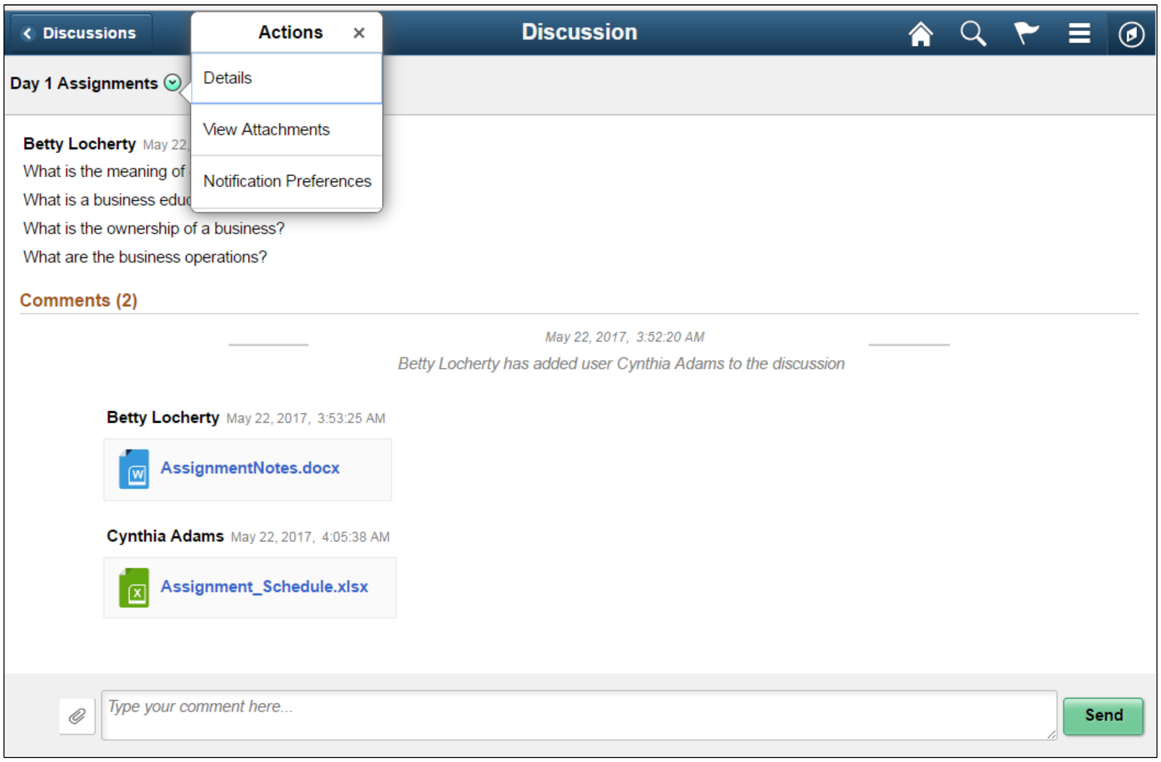
Image: Discussions – Actions Page

Discussions – Actions Page



Details Option

Use this option to access Discussion Details page which is used to update the discussion details and add or remove participants. Default Discussion grants full access to the creator of the discussion.

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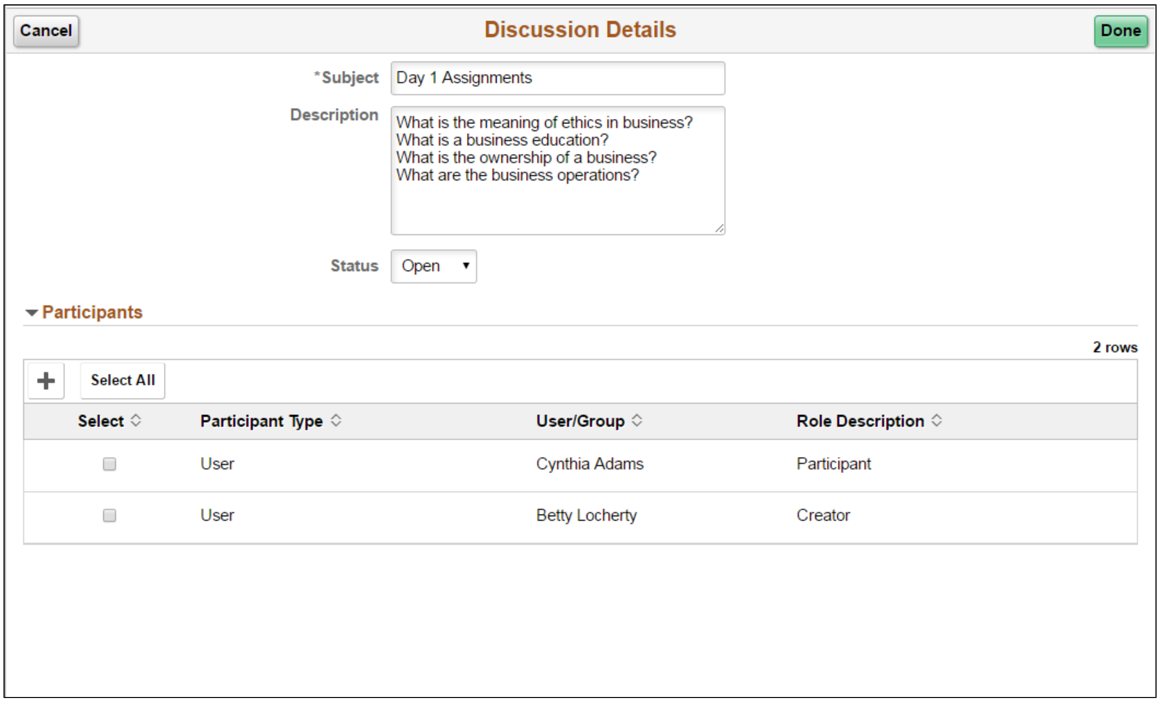
Image: Discussion Details Page

Discussion Details Page

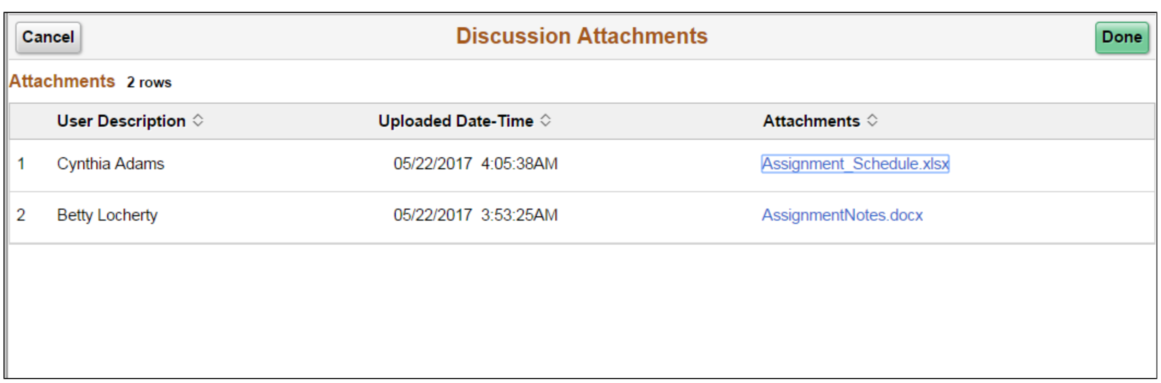


View Attachments Option

Use this action to access Discussion Attachments page which can be used to view all the attachments posted in the Discussion Conversation.

Image: Discussion Attachments Page

Discussion Attachments Page



Notification Preferences Page

Use this action to access User Notification Preferences page which can be used to enable or disable notifications for the current discussion.

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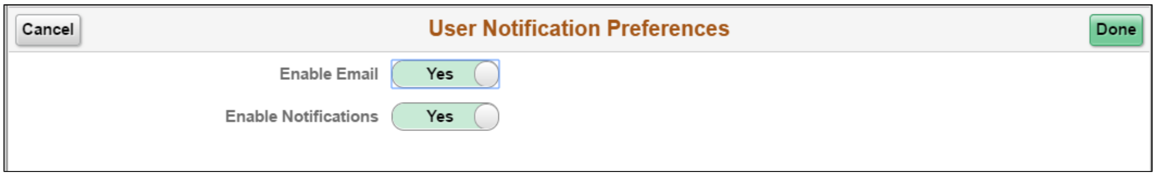
Image: User Notification Preferences Page

User Notification Preferences Page



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Chapter 17

Run Control Date Update Framework

Understanding the Run Control Date Update Framework

The Run Control Date Update Framework enables users to update the parameters for multiple run controls in a single step instead of having to manually update the parameters by visiting the relevant pages for each of the run controls. The framework enables the efficiency of organizations that have a big list of run controls that they need to update as and when the business need arises. The framework provides a registry page that administrators can use to enable the processes that can have their run controls edited. Once this is set, regular users can group a set of run controls having common parameters, under a single task. Updating the parameters of the task updates the parameters of all the run controls that are part of that task.

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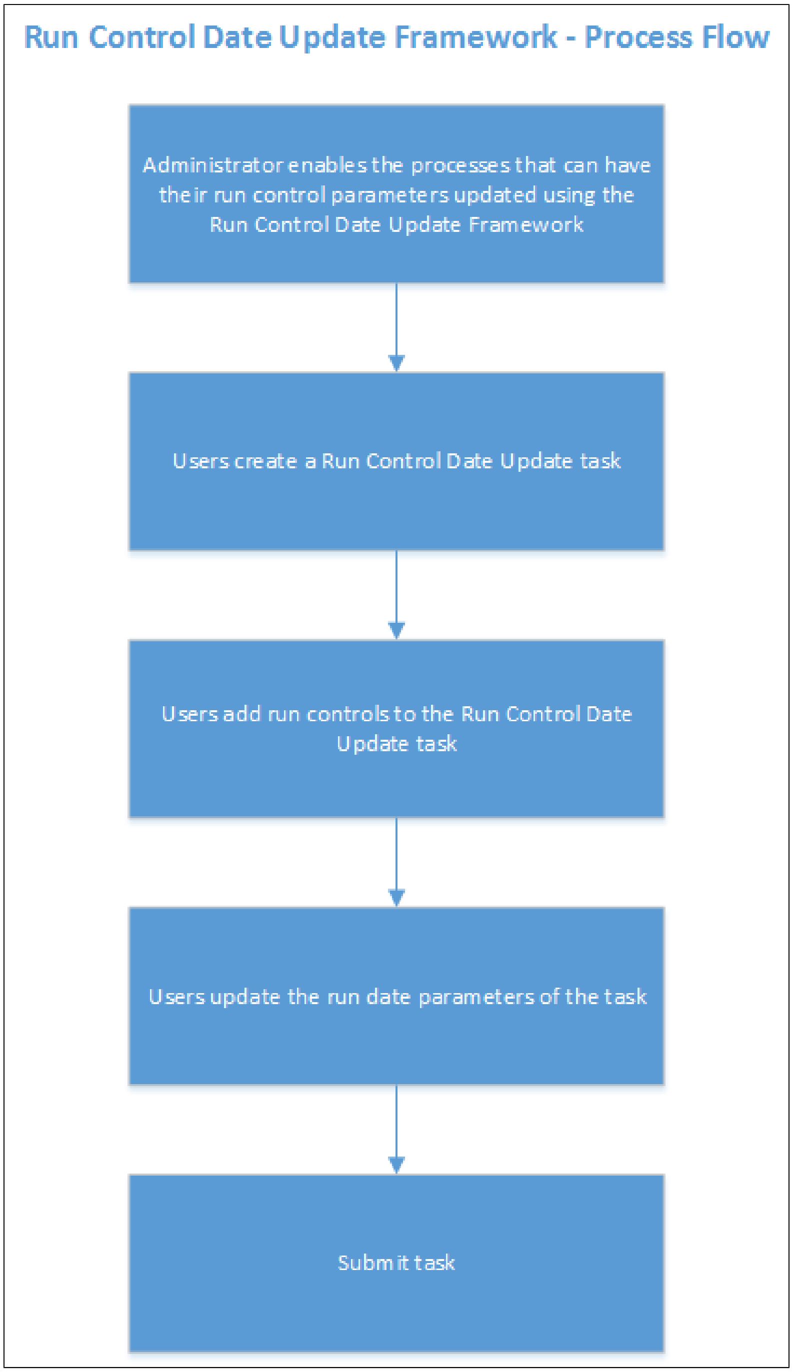
Image: Run Control Date Update Framework — Process Flow

The diagram depicts the functional diagram of the Run Control Date Update Framework



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Updating Dates on Run Controls

Pages Used to Register the Run Controls for Date Update

Page Name	Definition Name	Usage
Run Control Update Registry Page	EORC_RCCMPS	Register the Run Controls and fields for Date Update task.

Run Control Update Registry Page

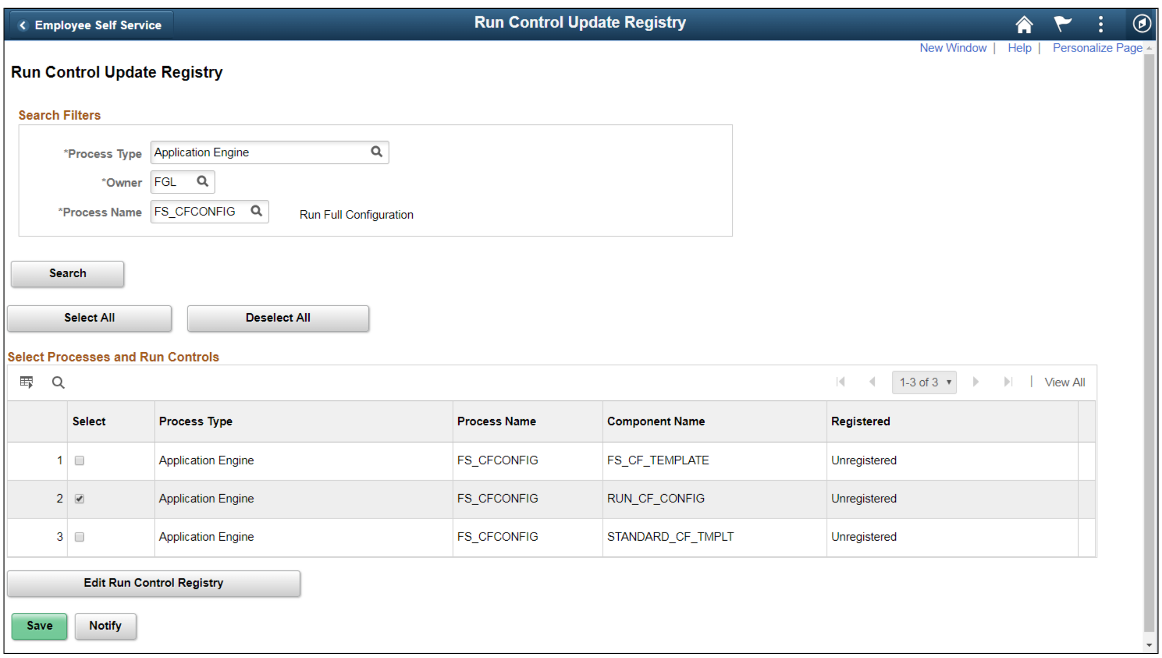
Use the Run Control Update Registry page (EORC_RCCMPS) for administrators to register the Run Controls that can be updated by the users.

Navigation

Enterprise Components >Run Control Registry > Run Control Update Registry

Image: Run Control Update Registry Page

Run Control Update Registry Page



Search Filters

Use the search filters to find the required run controls that you want to register for the Run Control Date Update task.

Process Type	Choose the relevant Process Type .
Owner	Choose the Object Owner.
Process name	Choose the Process name.

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Click Search to list the relevant run controls based on the user's search filters.

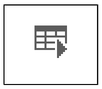
Select Processes and Run Controls

Select All

Select all the search results.

Deselect All

Deselect all the search results.



The Grid Action Menu provides three options that the user can perform on the search results:

- Personalize the column and sort order of the search result grid.
- Zoom or display in a popup page the selected processes and run controls.
- Download the selected processes and run controls table to and Excel sheet.

Search

Search a particular text in the search result.

Select

Select the required Run Controls from the search result.

Process Type

Displays the Process Type of the Run Controls.

Process Name

Displays the Process Name of the Run Controls.

Component name

Displays the Component Name of the Run Controls.

Registered

Indicates whether the Run Control has been registered for the date update task.

Edit Run Control Registry pagelet

Use the Edit Run Control Registry pagelet to include or specify the fields in the Run Control that is registered for Run Control Date Update.

Navigation

On the Run Control Update Registry page, click the Edit Run Control Registry button.

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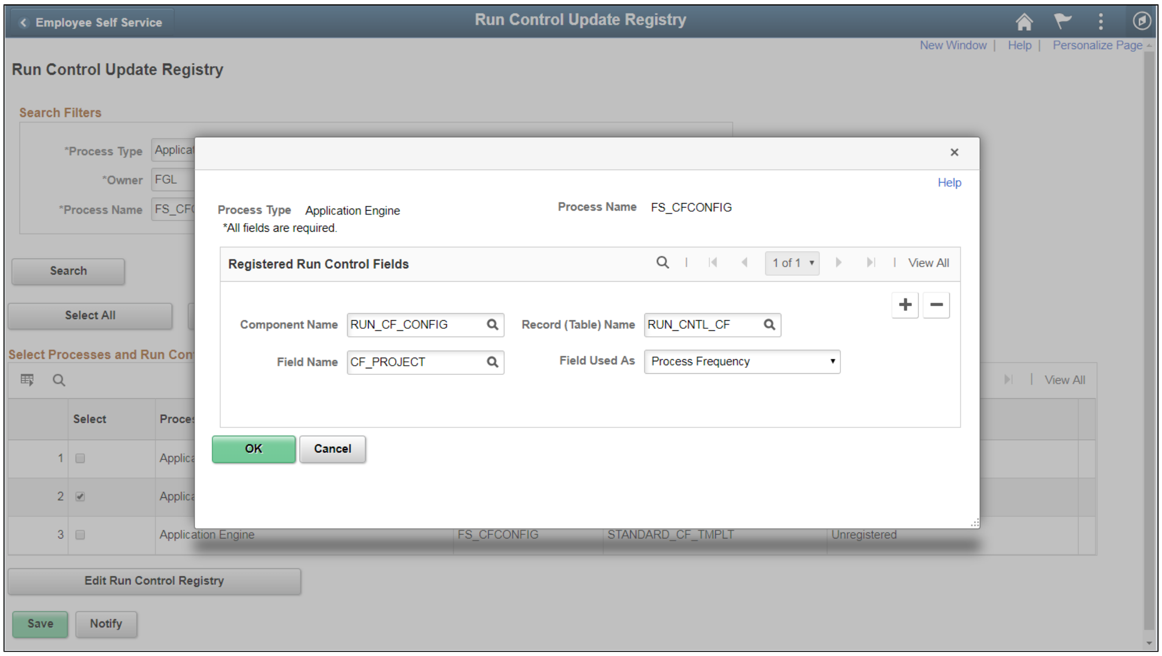
Image: Edit Run Control Registry pagelet

Edit Run Control Registry pagelet.



Registered Run Control Fields

Component Name	Choose the Run Control Component Name from the parent page.
Record (Table) Name	Choose the table name with the fields to be updated .
Field Name	Choose the field Name in the table that needs to be updated.
Field Used As	The list of page fields that the field can be used as.

Use the + or - buttons to add or remove fields to be registered for the run control date update task.

Note: System data of registered run control fields cannot be edited.

Once done, Click Save on the Run Control Update Registry Page to register the Run Control.

Click the Notify Button to notify selected users about the registration.

Pages Used to Create a Run Control Date Update task

Page Name	***Definition Name***	***Usage***
Run Control Date Update Page	EORC_TASKMAIN_FL	View existing Run Control Date Update tasks and take actions on them.
Create A Task Page	EORC_UPD_STEP1_FL	Define Run Control Date Update task.
Select Run Controls Page	EORC_UPD_STEP2_FL	Add Run Controls to the Date Update task.

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Page Name	Definition Name	Usage
Define New Values Page	EORC_UPD_STEP3_FL	Update dates on the Run Control Date Update task.

Run Control Date Update Page

Use the Run Control Date update page (EORC_TASKMAIN_FL) to view the existing list of Run Control Date Update tasks or to create, edit and manage an existing task.

Navigation

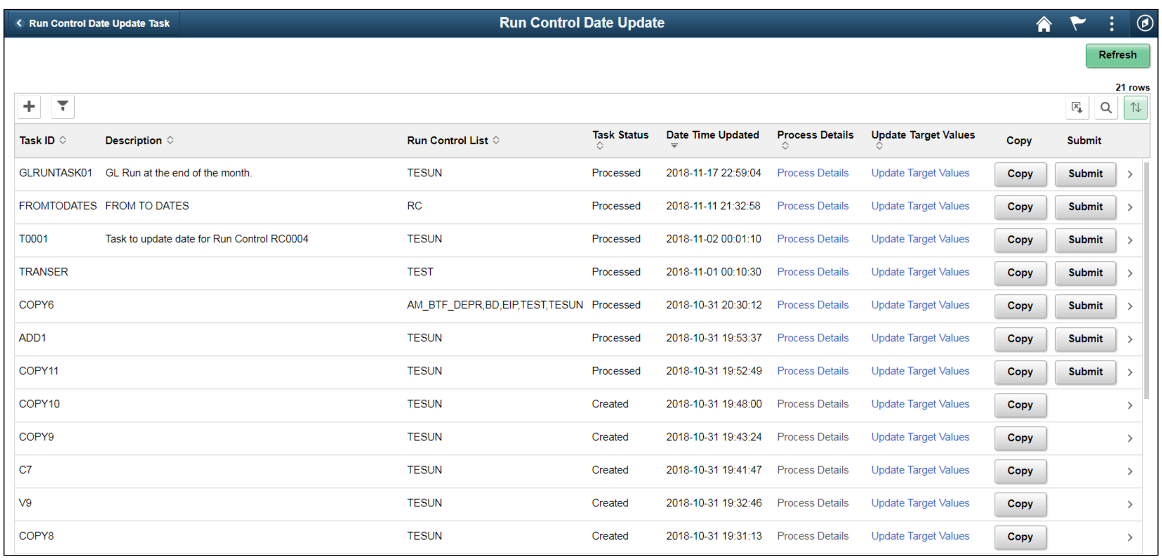
The Run Control Date Update page is delivered as a tile on your home page or dashboard. To access the tile, browse to:

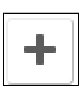
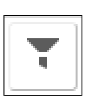
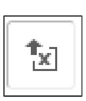
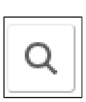
Personalize Homepage > Add Tile> Run Control management> Run Control Date Update.

Once the tile is available on the home page, click the tile to access the Run Control Date Update page.

Image: Run Control Date Update Page

Run Control Date Update Page.



	Click the Add button to add a new Run Control Date Update task.
	Click the filter button to filter the existing task list.
	Click spreadsheet button to download the task list to a spreadsheet.
	Click search to search for a particular text in the task list.

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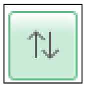


Click the sort button to sort the list based on any of the existing columns.

Task ID List of Task IDs that are available.

Description Task Description

Run Control List Run Controls that are associated with the Task ID.

Task Status Status of the task.

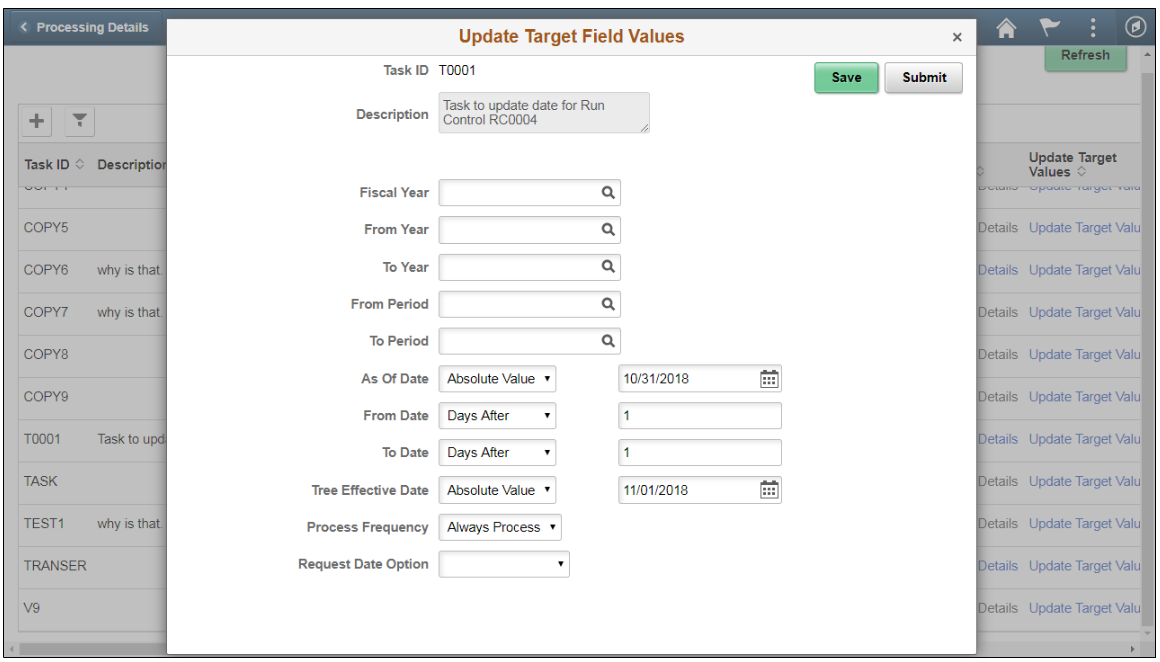
Date Time updated Last updated date and time of the task.

Process Details The processing details of the task.

Update Target Field Values This link delivers a pop-up page where the run control dates for the task can be updated.

Image: Update Target Field Values

Update Target Field Values



Copy Copy an existing Task ID to create a new task.

Submit Submit the task for processing.

Create A Task Page

Use the Create A task page (EORC_UPD_STEP1_FL) to create a new Run Control Date Update task.

Navigation

Click the Add (+) button on the Run Control Date Update Task page. This starts a three-step activity guide to create the task.

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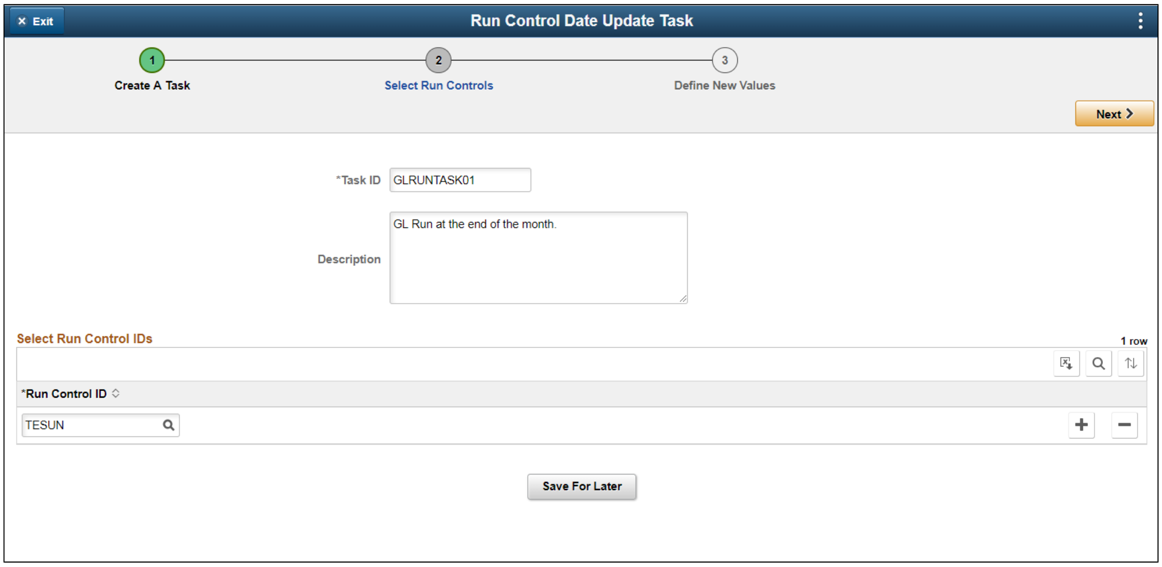
Image: Create A task page

Create A task page



Task ID

Enter a unique name for your task. Task ID should not contain spaces.

Description

Enter a short user-friendly description for the task.

Select Run Control IDs

Select all the Run Control IDs that needsto be grouped under this task. Use the + and – buttons to add more Run Control IDs or to remove any Run Control IDs. Only those run controls that were registered through the Run Control Update registry page will be available here.

Save For Later

Save the task as draft. The user can revisit the Run Control Date Update Task page to access this task later and continue with the creation of the task

Click the Next button to proceed to the next page in the activity guide.

Select Run Controls Page

Use the Select Run Controls page (EORC_UPD_STEP2_FL) to update the Run Control components.

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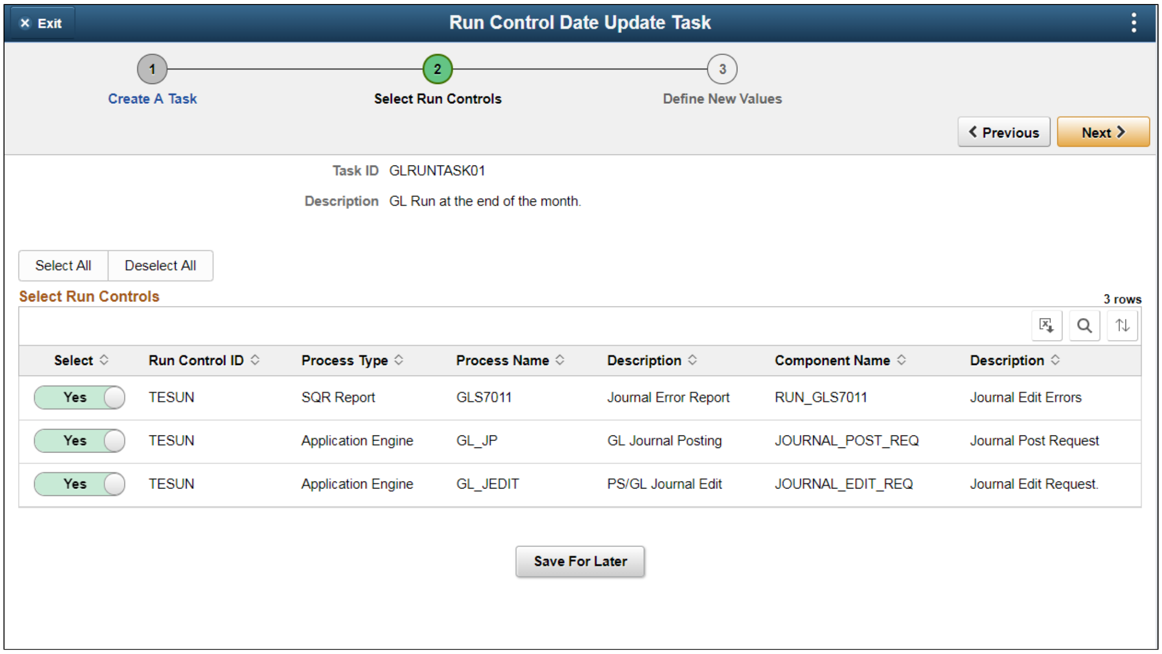
Image: Select Run Controls page

Select Run Controls page



Select All Select all the components for the update task.

Deselect All Deselect all the components for the update task.

Select Select the required components from the list for the update task.

Save For Later Save the task as draft.

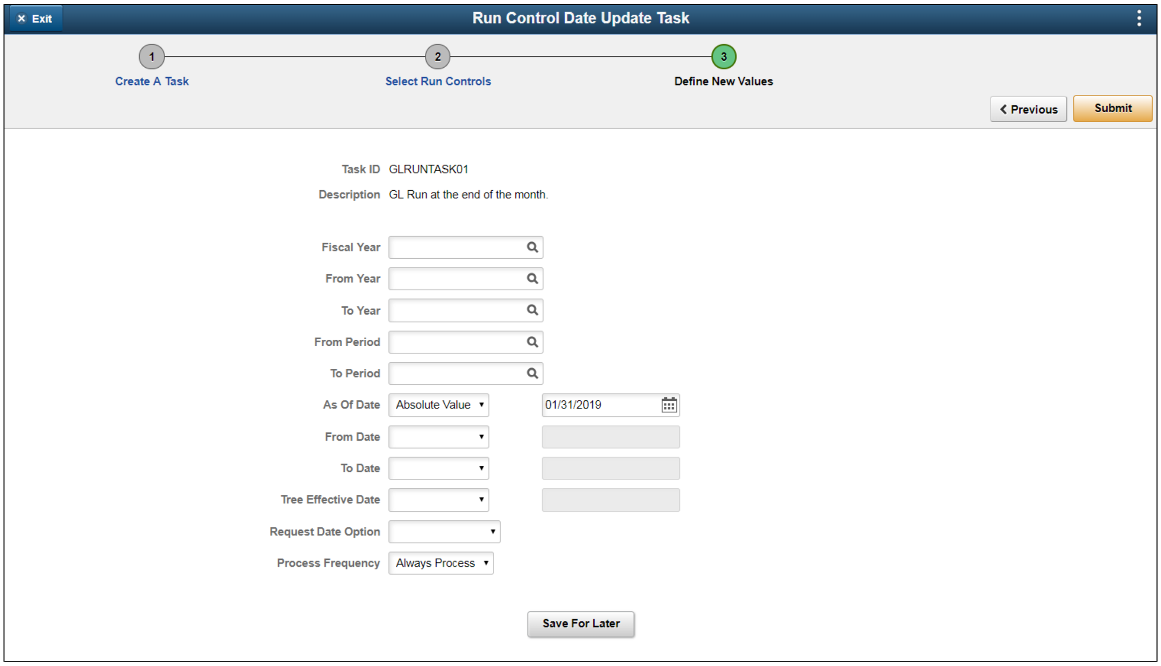
Click the Next button to proceed to the next page in the activity guide. Click Previous to go to the previous step in the activity guide.

Define New Values Page

Use the Define New values page (EORC_UPD_STEP3_FL) to define the new run control dates for the task.

Image: Define New values page

Define New values page



Fiscal Year	Choose from all Fiscal Year values available in the system.
From Year	Choose all Fiscal Year values available in the system.
To Year	Choose from all Fiscal Year values available in the system.
From Period	Choose from all periods in the current fiscal year.
To Period	Choose from all periods in the current fiscal year.
As Of Date	Choose the date on which the run controls associated with the task should run. As Of Date has the values Add Days and Absolute Value. Select Add Days to specify the number of days from which the run control needs to run from the current set date. Choose Absolute Value to run the run controls on a specific date.
From Date	Choose the From date for the run control period .
To Date	Choose the To date for the run control period.
Tree Effective Date	Choose the tree Effective Date.
Process Frequency	Choose the process frequency.
Save for Later	Save the changes as draft.

Use the Submit button to submit the task for processing.

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Chapter 18

Questionnaire Framework

Understanding Questionnaire Framework

PeopleSoft Questionnaire Framework enables users in an organization to design and create questionnaires based on a set of questions and plug it into activity guides. The framework allows users to categorize the questionnaire and control the security and permissions regarding who can create or deploy the questionnaires.

The following is the brief process flow of the questionnaire framework:

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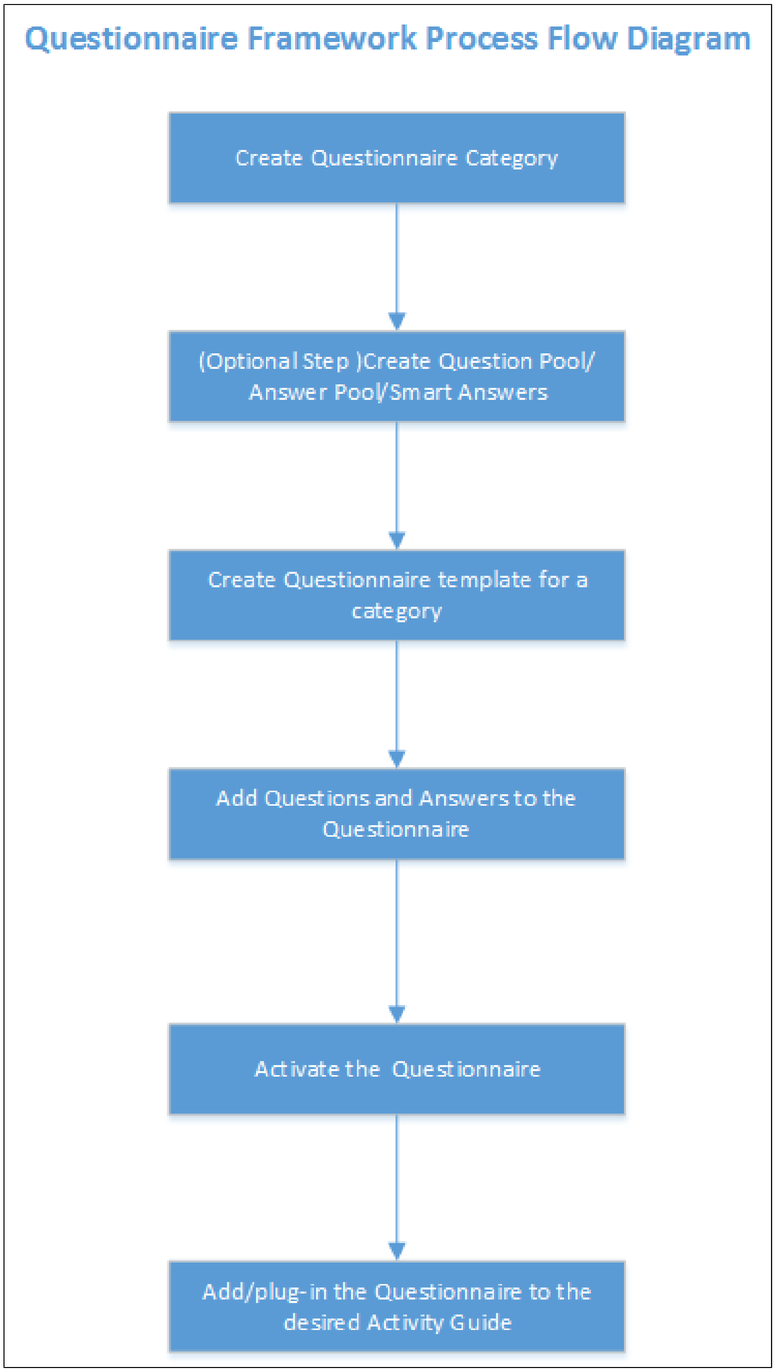
Image: Questionnaire Framework Process Flow

Questionnaire Framework Process Flow



Understanding Security in Questionnaire Framework

Roles

The Questionnaire Framework delivers the following Roles:

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1. Questionnaire Administrator. A Questionnaire Administrator role is a super user and has full access to the data in the Questionnaire Framework. The Questionnaire Administrator:

   - Has read and write access to setup pages like Questionnaire Category, Question Pool, Answer Pool, Smart Answers, Questionnaire Templates
   - Can access the Manage Questionnaires page and the COMMON category which is system delivered.
   - Can create New Question and Answer, Use Existing Question and Answer, add Question and Answer to the Pool.
   - Can edit the Access field in the Define Questionnaire page.
   - The Questionnaire Administrator role needs to be assigned to the user designated to manage and administer the Questionnaire Framework.

2. Questionnaire Composer. A Questionnaire Composer role can only access the Manage Questionnaires page and the COMMON category which is system delivered.

   User roles that need specific access rights to manage the questionnaires can be assigned in the Questionnaire Category Page

Permission list

The permission list EOQF3000 is system delivered to the Employee and Manager roles to view and answer questionnaires. If there are any custom roles created for employees and managers in an organization, this permission list should be added to those roles as well to enable them to view and answer questionnaires.

Configuring and Creating Questionnaires Using the Questionnaire Framework

Pages Used to Configure Questionnaire Framework>

Page Name	Definition Name	Usage
Questionnaire Category Page	EOQF_CATEGORY_FL	Create Questionnaire Category and set permissions to provide access to the users to be able to create questionnaires using existing question/answer or able to create new question and answers and be able to add them to the pool.
Question Pool Page	EOQF_QUESTION_FL	Create or Update questions. While creating a questionnaire, you can add existing questions that were created as part of the question pool.

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Page Name	Definition Name	Usage
Answer Pool Page	EOQF_ANSWER_FL	Create or Update answers. While creating a questionnaire, you can add existing answers that were created as part of the answer pool.
Smart Answers Page	EOQF_SANS_FL	Group of pre-defined answers form Smart Answer. While creating a questionnaire, use Smart Answer to pre-fill the answers in the questionnaire.
Manage Questionnaires Page	EOQF_TMPL_SRCH_FL	Manage the list of existing questionnaires like update, delete, clone, preview or create new questionnaires.
Define Questionnaire Page	EOQF_QSTNR_DEFN_FL	Define a new questionnaire and provide access level to it.
User Instructions Page	EOQF_INSTRUCTN_FL	Set instructions for the audience of the questionnaire.
Add Question Page	EOQF_ADD_QSTN_FL	Ability to add a question and link an answer based on permissions set at the questionnaire category level.
Format Questionnaire - Organize Question Page	EOQF_QSTNGRPDEF_FL	Organize and group the questions.
Format Questionnaire - Organize Question Groups Page	EOQF_QSTNGRPSEQ_FL	Organize the question groups.
Preview Questionnaire Page	EOQF_QSTNR_PRVW_FL	Preview the Questionnaire.
Questionnaire Options Page	EOQF_QSTNR_OPTN_FL	Set the questionnaire options.
Update Question Answer Pool Page	EOQF_QSTNR_POOL_FL	Based on permission set at the questionnaire category level, user will be able to add any new question and answers to the pool that was created as part of this questionnaire.
Activate Questionnaire Page	EOQF_QSTNR_STS_FL	Activate the Questionnaire.

Questionnaire Category Page

Use the Questionnaire Category page (EOQF_CATEGORY_FL) to create questionnaire categories.

Navigation

Enterprise Components > Questionnaire Framework > Questionnaire Category

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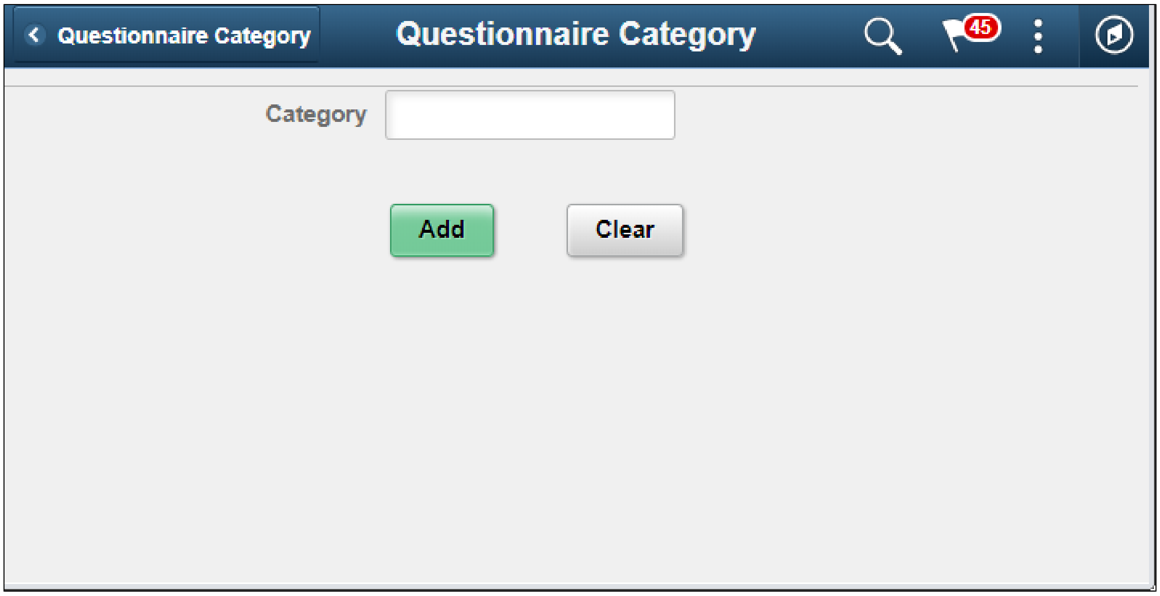
Image: Questionnaire Category

Questionnaire Category



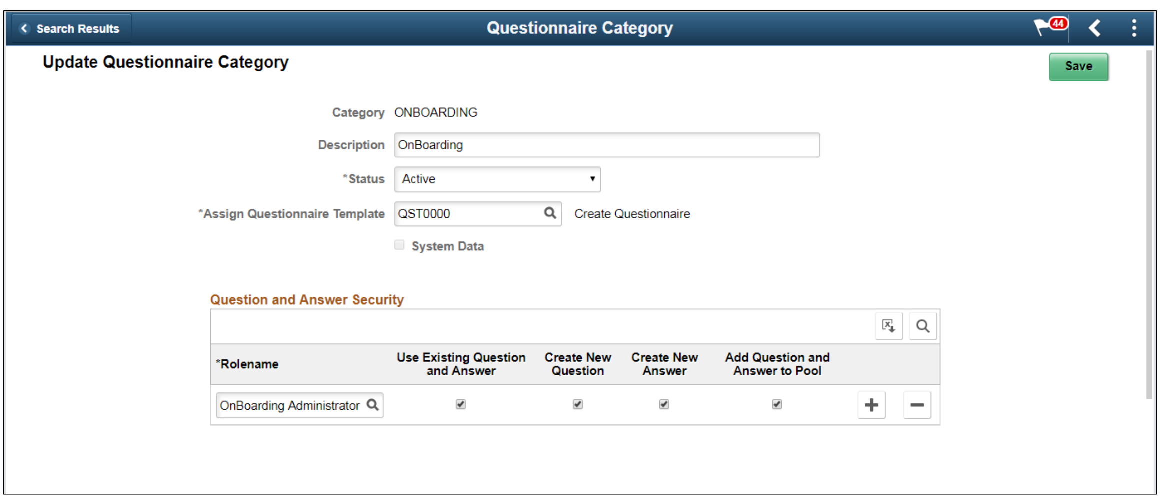
Category

Enter a meaningful name as the category name and click add.

Note: Once a category is created, it cannot be deleted.

Image: Create Questionnaire Category

Create Questionnaire Category



Description

Provide a description for the category.

Status

Specify whether the category should remain active or inactive in the system.

Assign Questionnaire Template

Specify the questionnaire template assigned to the category.

System Data

This indicates that the questionnaire category is system delivered.

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Rolename Select a rolename to provide access to the users to be able to create questionnaires using existing question/answer or able to create new question and answers and be able to add them to the pool.

Use Existing Question and Answer Enable this check box if you want to give Role Users access to existing questions and answers from the question and answer pool while creating a questionnaire.

Create New Question Enable this check box if you want Role users to be able to create new questions while creating a questionnaire.

Create New Answer Enable this check box if you want Role users to be able to create new answers while creating a questionnaire.

Add Question and Answer to Pool Enable the check box if you want to the Role user to add newly created question/answer to the pool while creating the questionnaire.

Question Pool Page

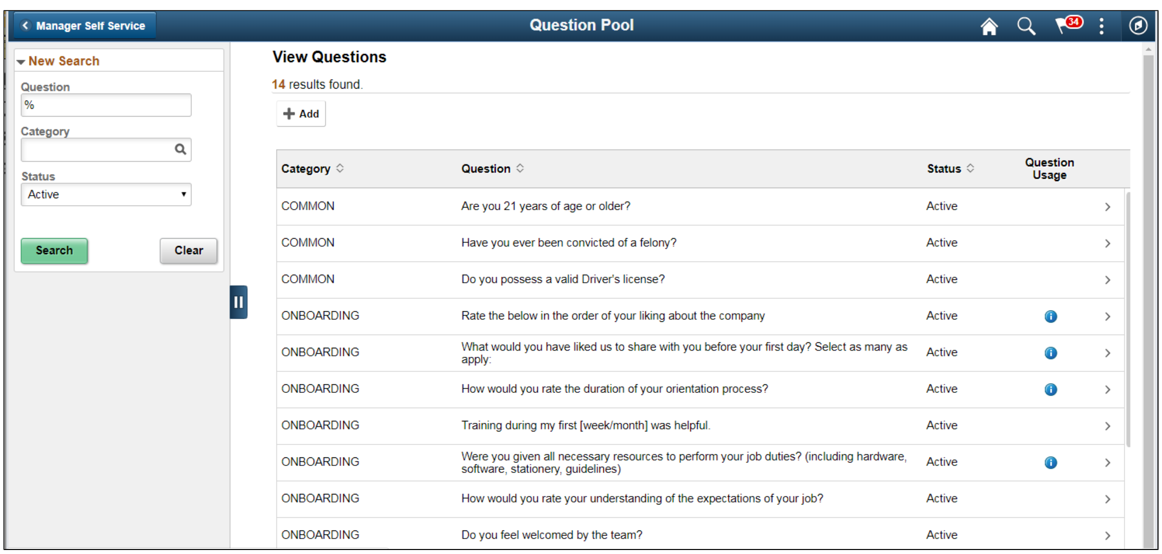
Use the Question Pool page (EOQF_QUESTION_FL) to add questions to a pool which can later be used when creating a questionnaire.

Navigation

Enterprise Components > Questionnaire Framework > Question Pool

Image: Question Pool page

Question Pool page



The Question Pool page lists the questions that have been created and added to the pool.

Users can use the filter options on the left pane to search for questions.

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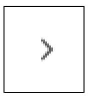
Use the left search filter panel of the page to enter search or filter criteria to find a question. To enter partial searches, use the % wildcard character.

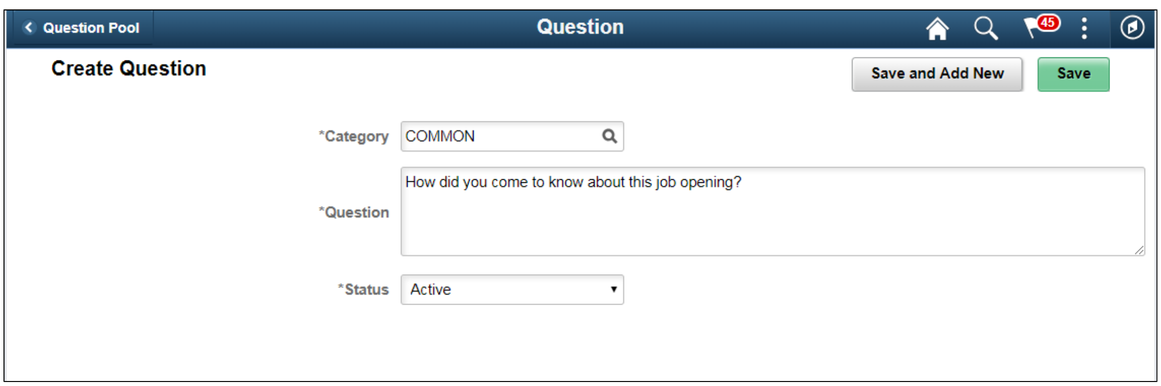
Click the Hide Filters or Show Filters tab to close or open the filter panel. After you have entered filter criteria, click Search. The right panel will display the results of the search and the left search filter panel will display additional criteria that you can use to continue filtering your search by facets

Category	Category of the particular question
Question	Question
Status	Displays whether the question is active or inactive.
Question Usage	Click the Question Usage icon to see the list of questionnaires where the question is currently in use.
	Click the more button to open the question in Update Question page and make changes to it if necessary.

To add a new question to the question pool, click the Add (+) button. This launches the page to add new question.

Image: Add Question Page

Add Question page



Category	Category of the particular question
Question	Question
Status	Choose whether to keep the question Active or Inactive. The question will be available for use in a questionnaire only if the status is Active

Select Save and Add New to save a question and add a new question belonging to the same category.

Click Save to save the question.

Answer Pool Page

Use the Answer Pool page (EOQF_ANSWER_FL) to add answers which can be later added to the questionnaire.

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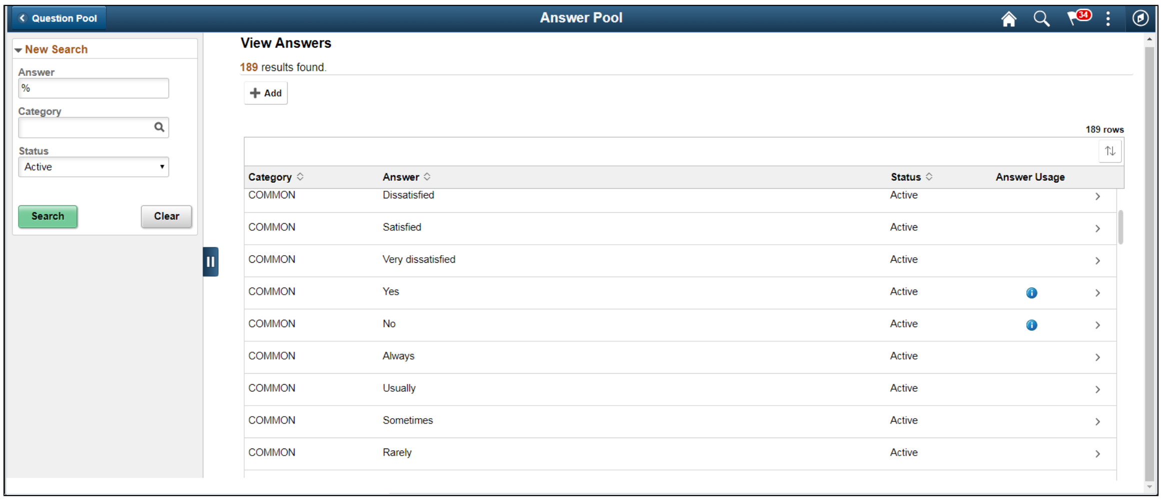
Navigation

Enterprise Components > Questionnaire Framework > Answer Pool

Image: Answer Pool page

Answer Pool page

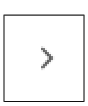


The Answer Pool page lists the answers that have been created and added to the pool.

Users can use the filter options on the left pane to search for answers.

Use the left search filter panel of the page to enter search or filter criteria to find an answer. To enter partial searches, use the % wildcard character.

Click the Hide Filters or Show Filters tab to close or open the filter panel. After you have entered filter criteria, click Search. The right panel will display the results of the search and the left search filter panel will display additional criteria that you can use to continue filtering your search by facets.

Category	Category of the particular Answer
Answer	Answer
Status	Displays whether the answer is active or inactive.
Answer Usage	Click the Answer Usage icon to see the list of questionnaires where the answer is currently in use.
	Click the more button to open the answer in Update Answer page and make changes to it if necessary.

To add a new answer to the answer pool, click the add (+) button. This launches the page to add new answer.

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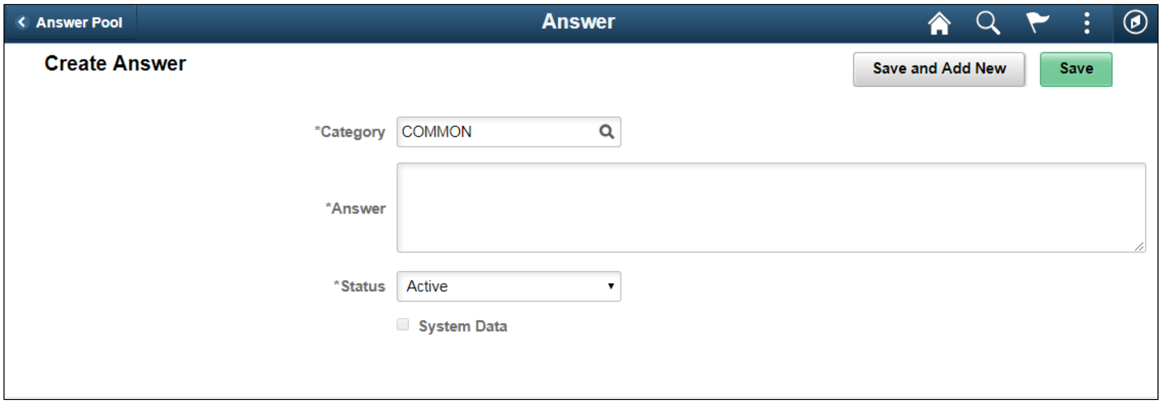
Image: Create Answer page

Create Answer page



Category	Category of the particular Answer.
Question	Enter your answer.
Status	Choose whether to keep the answer Active or Inactive. The answer will be available for use in a questionnaire only if the status is Active.
System Data	Indicates whether the answer is system delivered data.

Smart Answers Page

Use the Smart Answers page (EOQF_SANS_FL) to create a group of answers that may be used repeatedly in the questionnaire.

Navigation

Enterprise Components > Questionnaire Framework > Smart Answers

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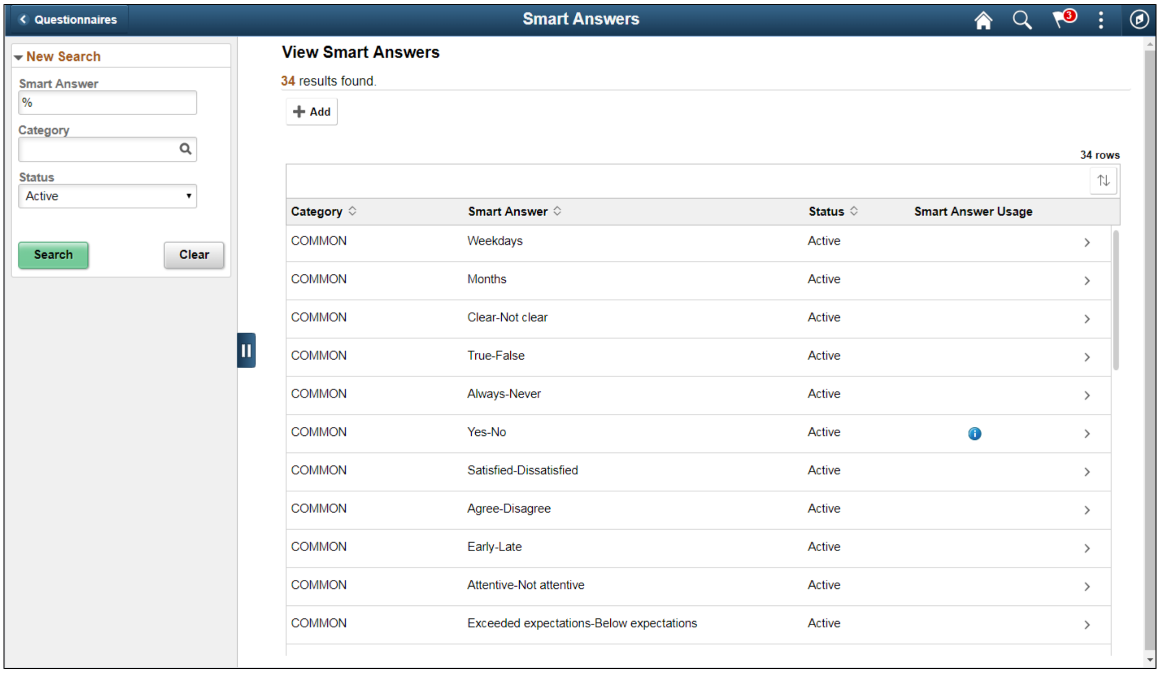
Image: Smart Answers page

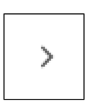
Smart Answers page



Users can use the filter options on the left pane to search for smart answers.

Use the left search filter panel of the page to enter search or filter criteria to find a smart answer. To enter partial searches, use the % wildcard character.

Click the Hide Filters or Show Filters tab to close or open the filter panel. After you have entered filter criteria, click Search. The right panel will display the results of the search and the left search filter panel will display additional criteria that you can use to continue filtering your search by facets.

Category	Category of the particular smart answer
Smart Answer	smart answer
Status	Displays whether the smart answer is active or inactive.
Smart Answer Usage	Click the Smart Answer Usage icon to see the list of questionnaires where the smart answer is currently in use.
	Click the more button to open the smart answer in Update Smart Answer page and make changes to it if necessary.

To add a new smart answer, click the add (+) button. This launches the page to add new smart answer.

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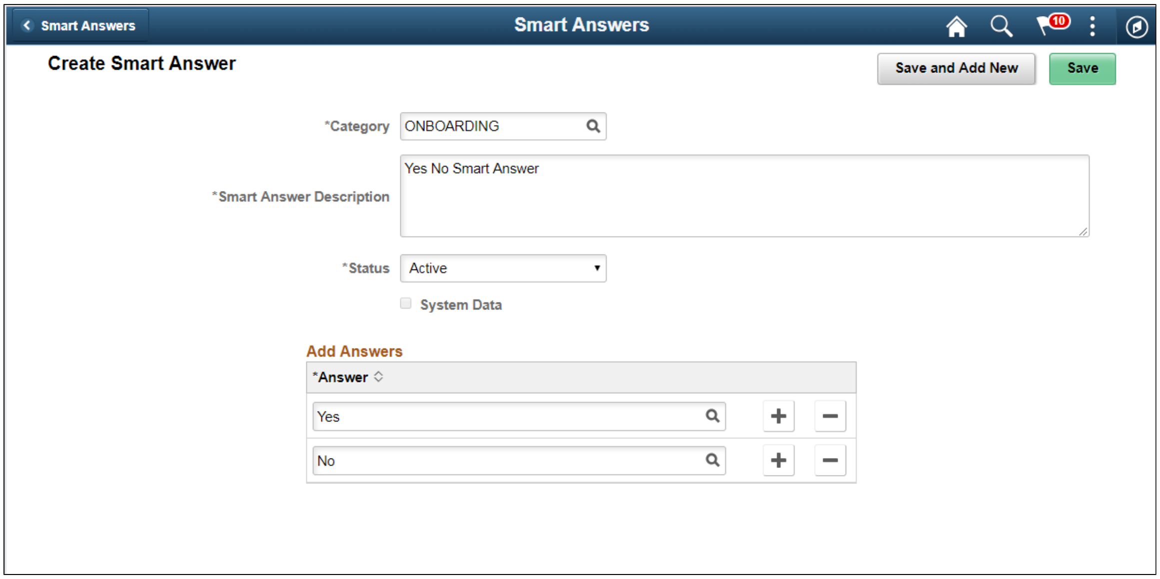
Image: Create Smart Answer page

Create Smart Answer page



Category Choose the Category for the smart answer.

Smart Answer Description Choose a description for the smart answer. This description will appear in the Smart Answer field in the Add New Question page.

Status Choose whether to keep the smart answer Active or Inactive.

System Data Indicates whether the smart answer is system delivered.

Add Answers You will be able to add answers from the answer pool that belongs to the same category as smart answer or the common category. Use the + button to add a new row. Use the - button to remove a row.

Select Save and Add New to save a smart answer and add a new smart answer belonging to the same category.

Click Save to save the smart answer.

Manage Questionnaires Page

Use the Manage Questionnaires page (EOQF_TMPL_SRCH_FL) to search and manage existing questionnaires and to create new questionnaires.

Navigation

Enterprise Components > Questionnaire Framework > Questionnaires

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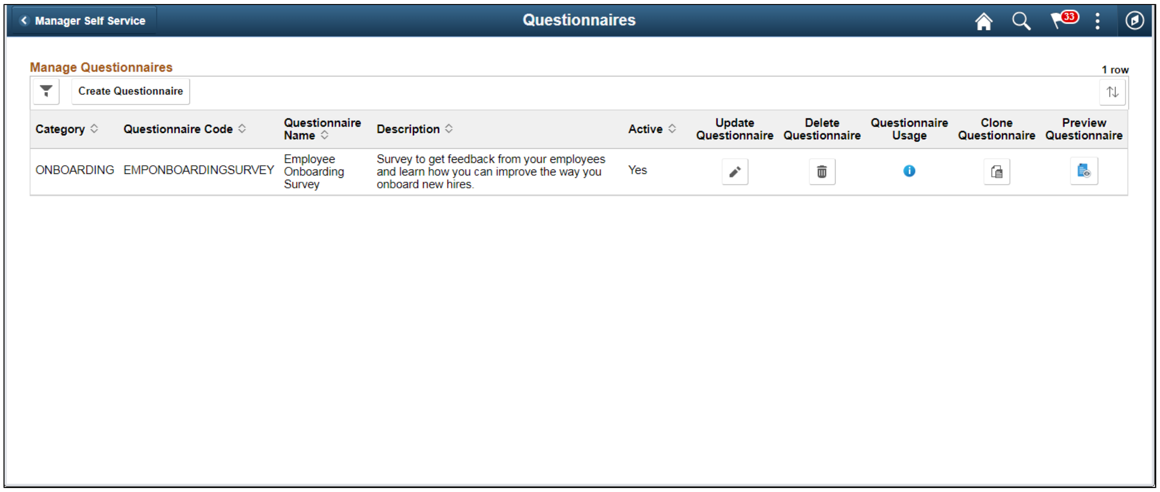
Image: Manage Questionnaires page

Manage Questionnaires page



The manage Questionnaires page lists all the questionnaires created by users based on your security. You can use the filter option on this page to filter your search for a specific questionnaire.

Category	Associate the category to the questionnaire.
Questionnaire Code	Questionnaire code.
Questionnaire Name	Name of the Questionnaire.
Description	Description of the Questionnaire.
Active	If the questionnaire is active in the system it will be available for including in activity guides that uses Activity Guide Composer.
Update Questionnaire	Edit the questionnaire. If the questionnaire is in use in any activity guide, a warning message is displayed about the impact of editing the questionnaire. Updates to the questionnaire will immediately reflect in all questionnaires in progress.
Delete Questionnaire	Delete the Questionnaire. If the Questionnaire is in use in an Activity Guide, a warning message is displayed about the impact of deleting the questionnaire.
Questionnaire Usage	Shows the Activity Guides where the Questionnaire is currently in use.
Clone Questionnaire	Copy the questionnaire to create a new one.
Preview Questionnaire	Preview the questionnaire.

Click the Create Questionnaire button to create a new questionnaire.

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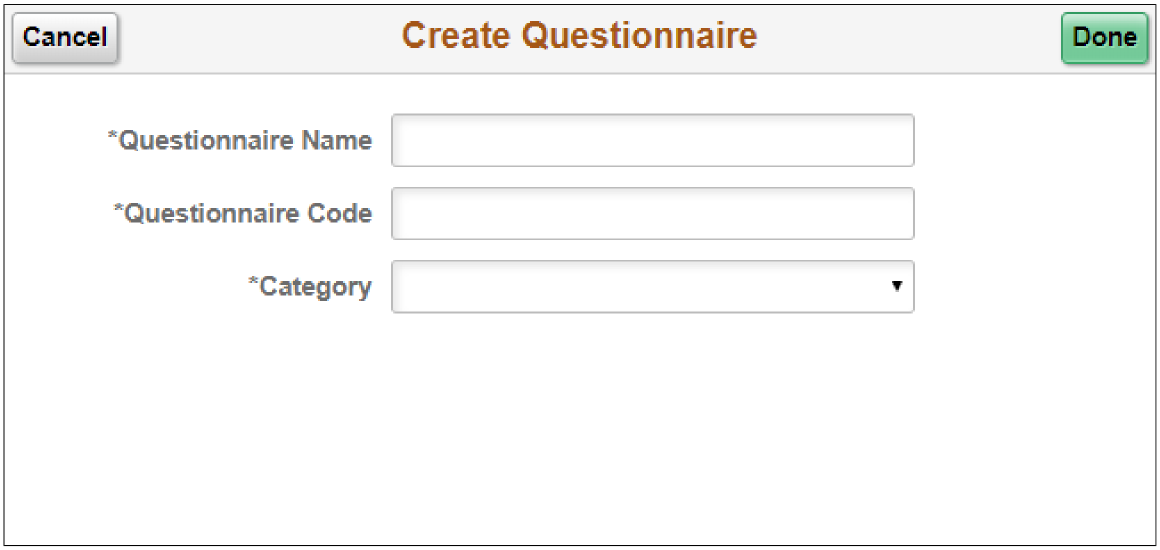
Image: Create Questionnaire

Create Questionnaire



Questionnaire Name	Enter the name of the questionnaire in the Create Questionnaire page.
Questionnaire Code	Enter the value for this questionnaire.
Category	Choose the category for the questionnaire.

Click the Done button to create the questionnaire and to start the activity guide for adding rest of the details for the questionnaire.

Define Questionnaire Page

Use the Define Questionnaire page (EOQF_QSTNR_DEFN_FL) in the Questionnaire Framework guided process (Activity Guide) to add a description to questionnaire.

Navigation

Enterprise Components > Questionnaire Framework > Questionnaires (Then, click the Update Questionnaire option for the relevant Questionnaire Name or click Create Questionnaire button)

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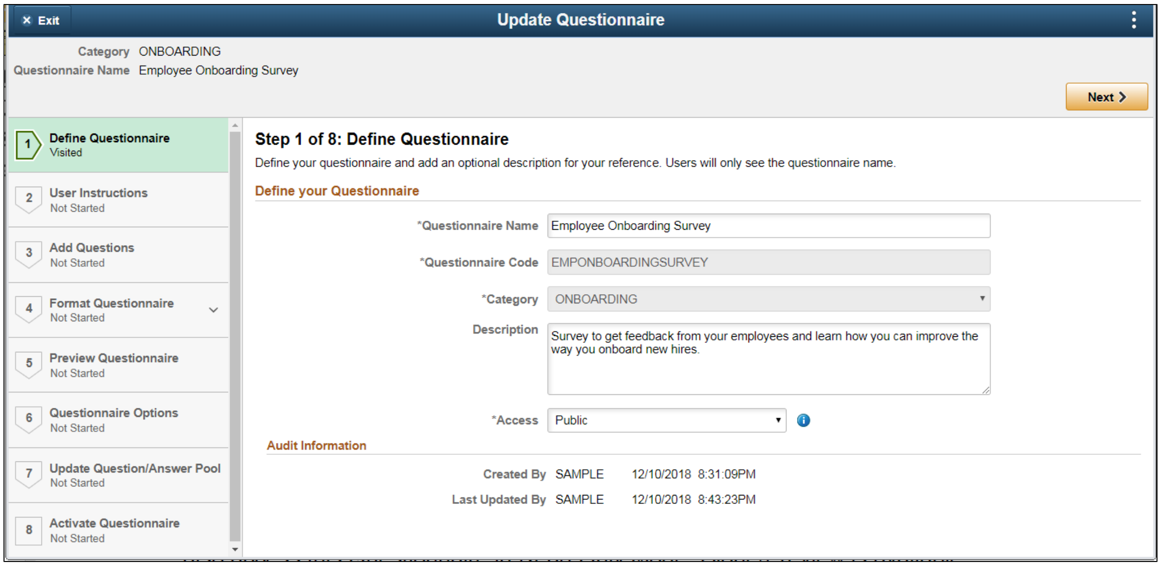
Image: Define Questionnaire page

Define Questionnaire page



Description

Enter a description for the Questionnaire.

Access

Set the access restrictions for the Questionnaire. The available access types are:

- Private: Indicates that the Questionnaire is accessible only by the owner.
- Public: Indicates that apart from owner, other users who have access to the category can also access this Questionnaire in Update/Delete/Clone/Preview Mode.
- Read Only: Indicates that apart from owner, other users who have access to the category can also access this Questionnaire in Read Only Mode. Preview is available.
- Restricted: Indicates that apart from owner, other users who have access to the category can also access this Questionnaire in Read Only Mode. Clone/Preview is available.

Note: Only the owner of the questionnaire and the Questionnaire Administrator can edit the access restrictions. Questionnaire Administrator has access to all questionnaires regardless of access.

Click the Next button to proceed to the next step in the create questionnaire guided process.

Note: You can click any of the steps in the left-hand pane to access that particular step in the guided process if you had already visited that step.

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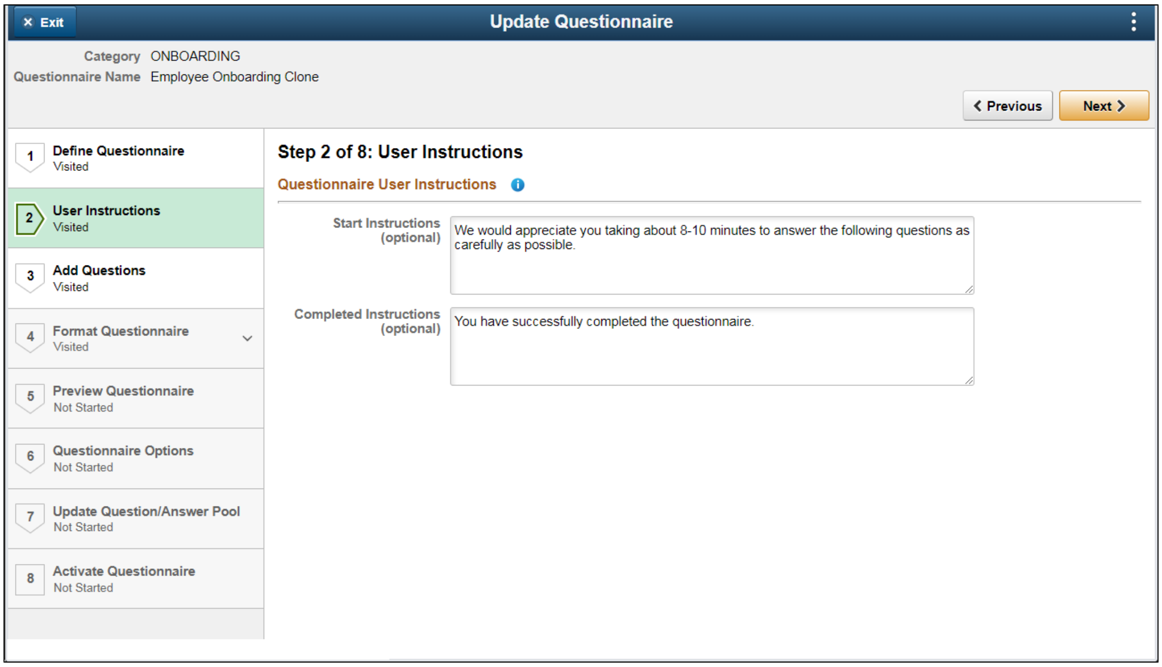
User Instructions Page

The User Instructions page (EOQF_INSTRUCTN_FL) provides specify instructions to the persons answering the questionnaire.

Image: User Instructions page

User Instructions page



Start Instructions	The instructions or message entered here will be displayed to the users at the start of the questionnaire.
Completed Instructions	The instructions or message displayed here will be visible at the end of the questionnaire as a pop up screen once the user finishes answering the questionnaire.

Add Question Page

Use the Add Questions page (EOQF_ADD_QSTN_FL) to add questions to a questionnaire and associate answers with it.

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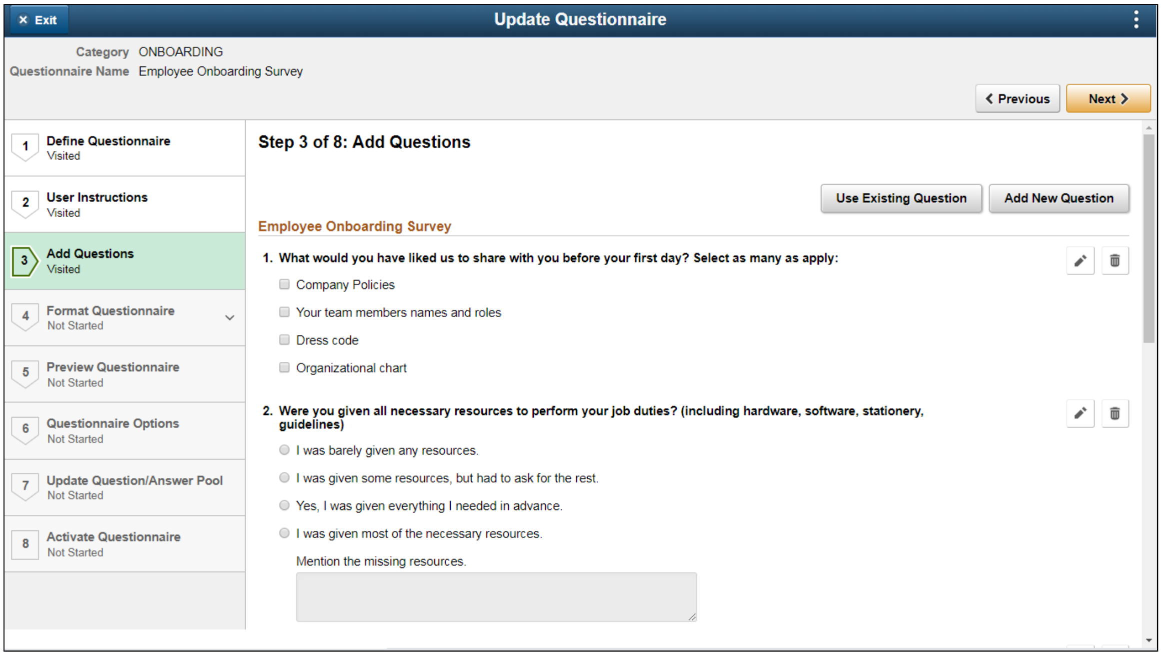
Image: Add Questions page

Add Questions page



Click the Use Existing Question button to add questions that exist in the question pool.

In the Use Existing Questions page, enter search keywords in the Search Questions field, choose the relevant category and click Search. From the list of search results, choose the appropriate question to add it to the questionnaire.

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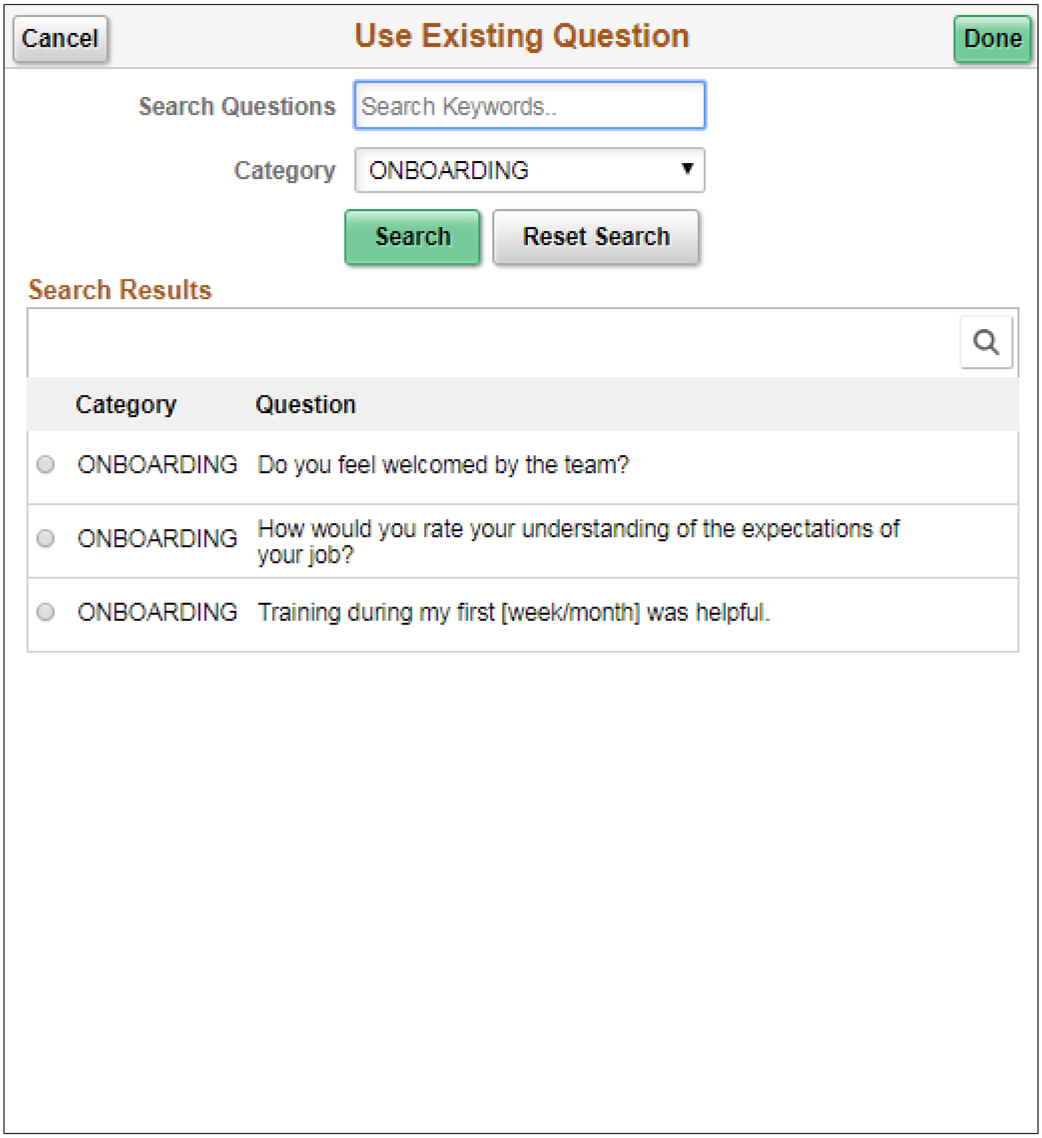
Image: Use Existing Question

Use Existing Question



Click the Create New Question button to add a new question to the questionnaire. This opens up the Add New Question page.

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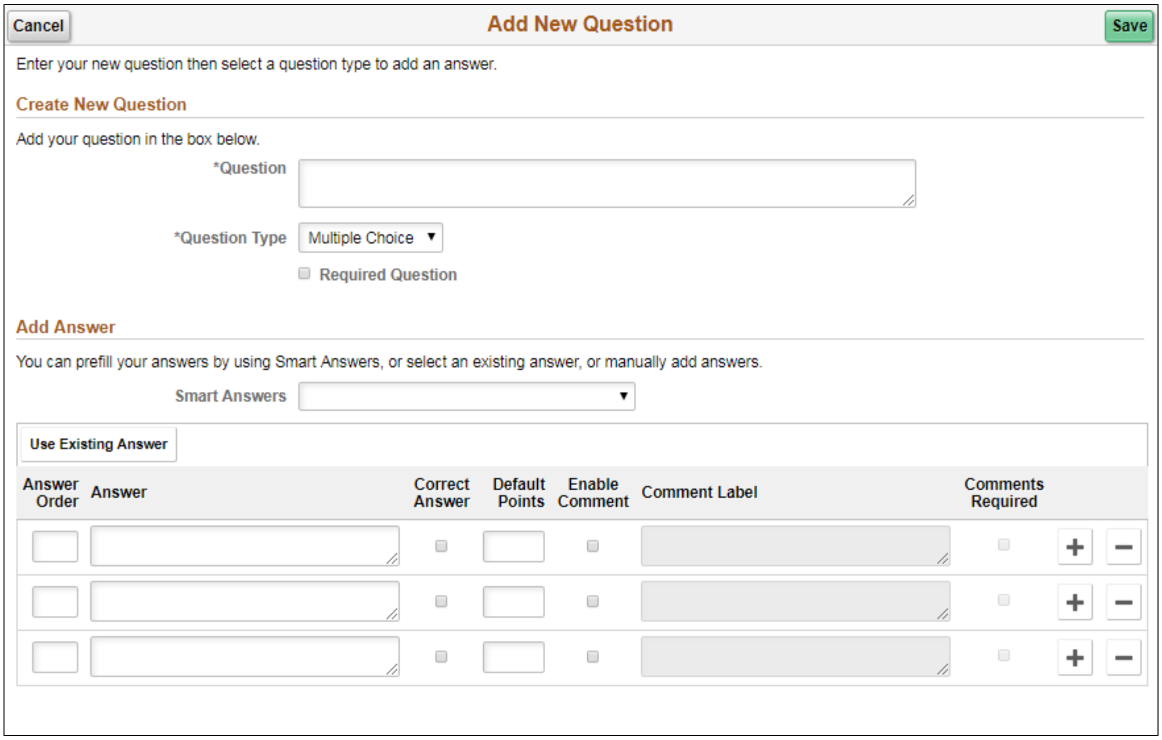
Image: Add New Question page

Add new Question page



Question Enter the question that you want to add.

Question Type Select the question type. Available options are:

- Multiple choice
- Single choice
- Drop Down
- Number
- Date
- Open Ended
- Ranking

Required Question Choose this option if you want to make this question compulsory and do not want the user to skip this question. Note: for Single choice option where the question is not marked as required, if the user selects an answer, it cannot be deselected. However user can switch between the answers.

Once done, users can define the answers associated with that question.

Use the Smart Answers option to add an already defined group of answer to the question. If you want to create a new smart answer, see Smart Answers Page

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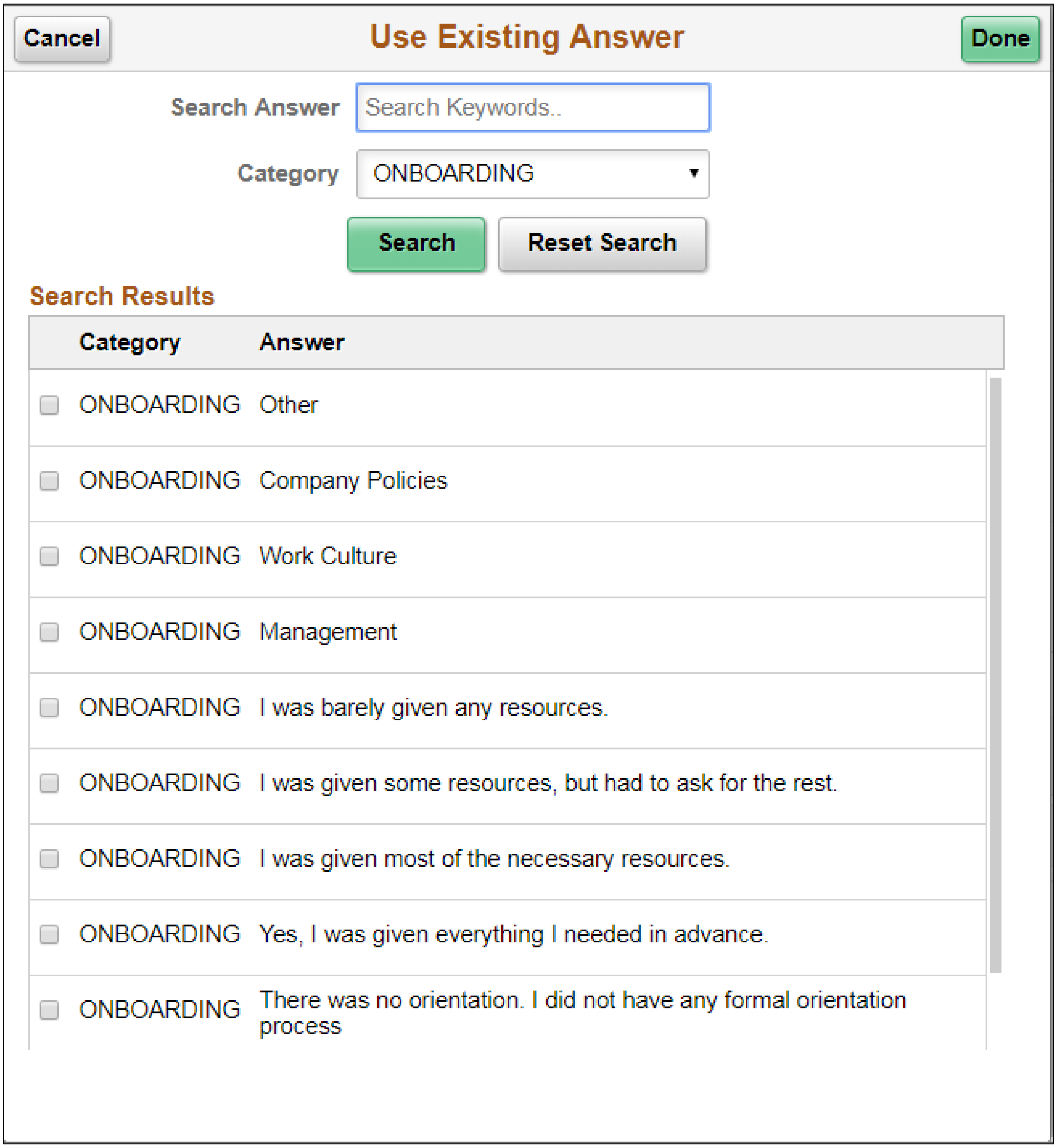
Use the Use Existing Answer button to add an answer from the Answer pool.

Image: Use Existing Answer

Use Existing Answer



Use the Edit icon to edit a particular question in the Add Questions page.

Use the Delete icon to remove a question from the Add Questions page. The question will be removed from that questionnaire.

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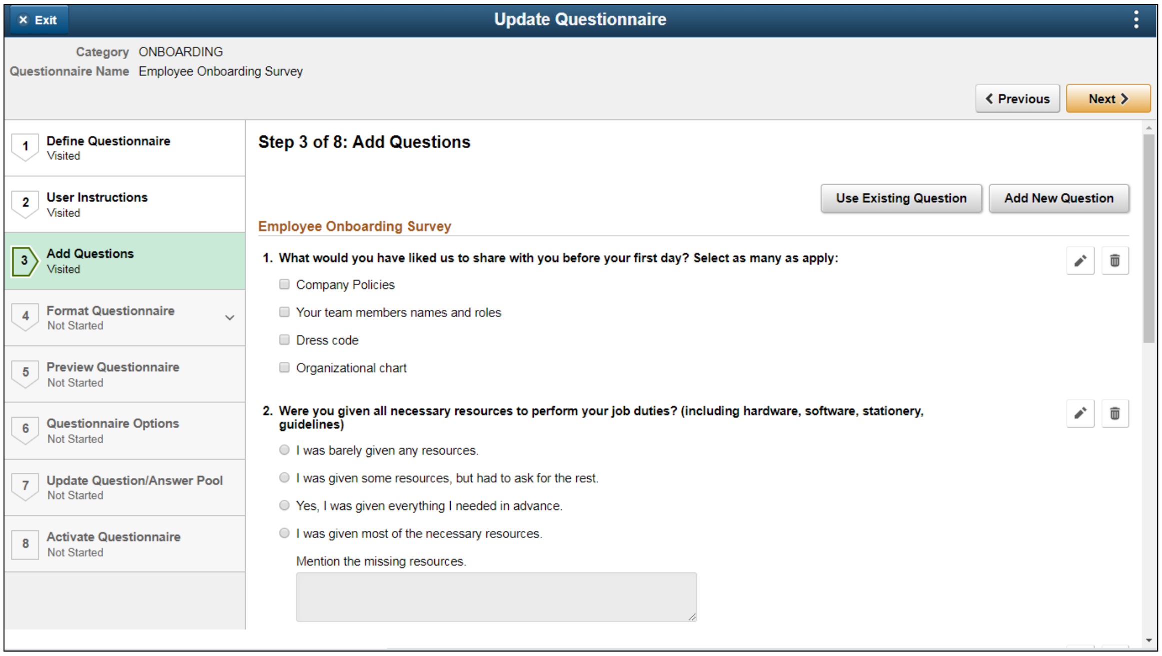
Image: Edit and Delete options for each Question

Edit and Delete options for each Question



Format Questionnaire - Organize Question Page

Use the Format Questionnaire – Organize Questions page (EOQF_QSTNGRPDEF_FL) to set the order of the questions for your questionnaire and create question groups.

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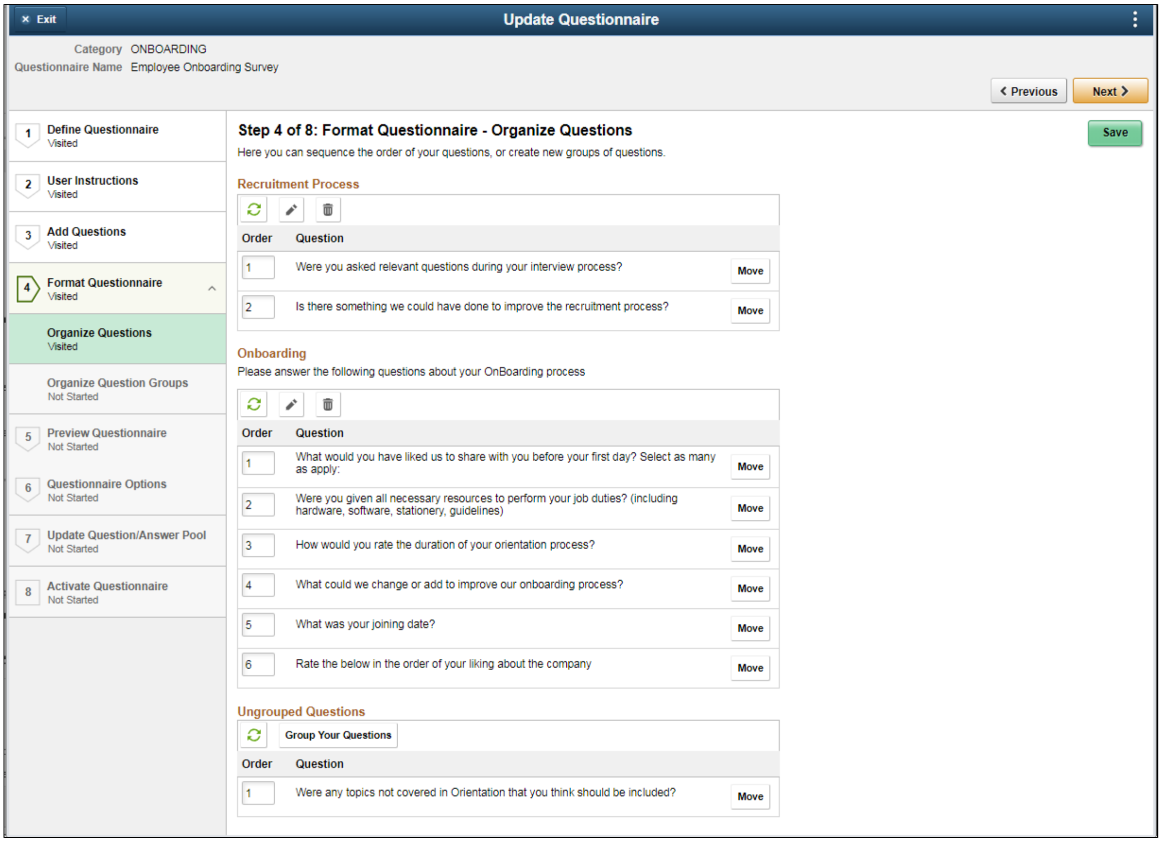
Image: Organize Questions page

Organize Questions page



Use the Order column to specify the order in which you want the questions to appear within the question group. Once done, use the Refresh icon to arrange the questions in the order specified.

To create section or group of questions, use the Group Your Questions button. This is optional.

Use the Edit button to edit the questions in a question group.

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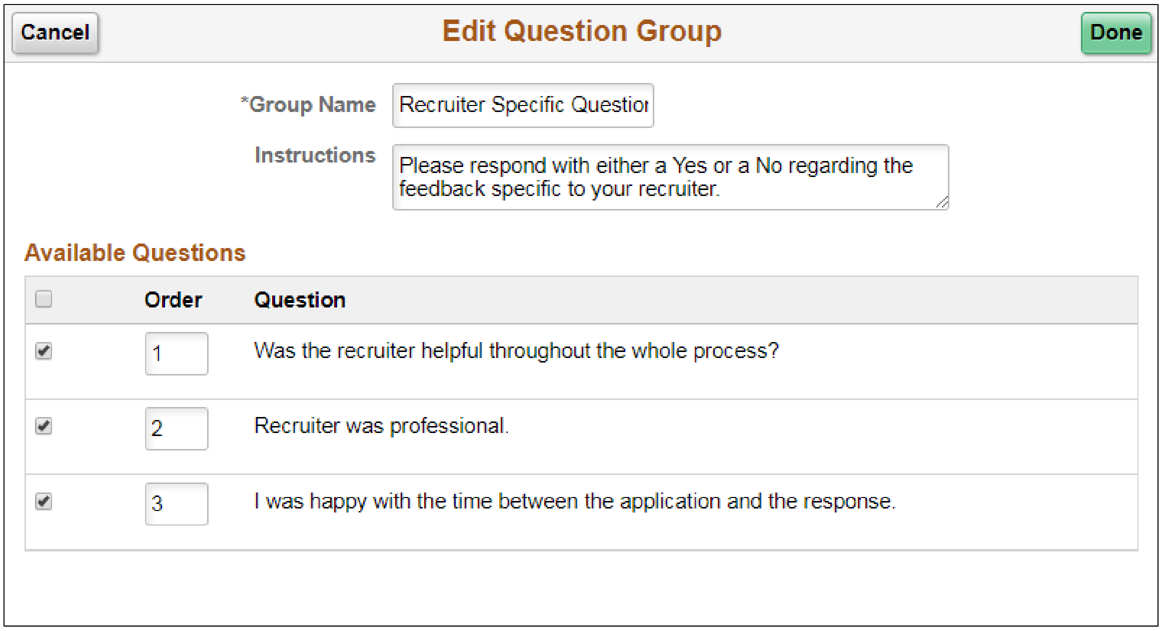
Image: Edit Question Group

Edit Question Group



If some of the questions are left ungrouped, then the ungrouped questions are displayed at the start of the questionnaire followed by the grouped questions.

Use the Move button to move a question from one group to another group or to ungroup the question

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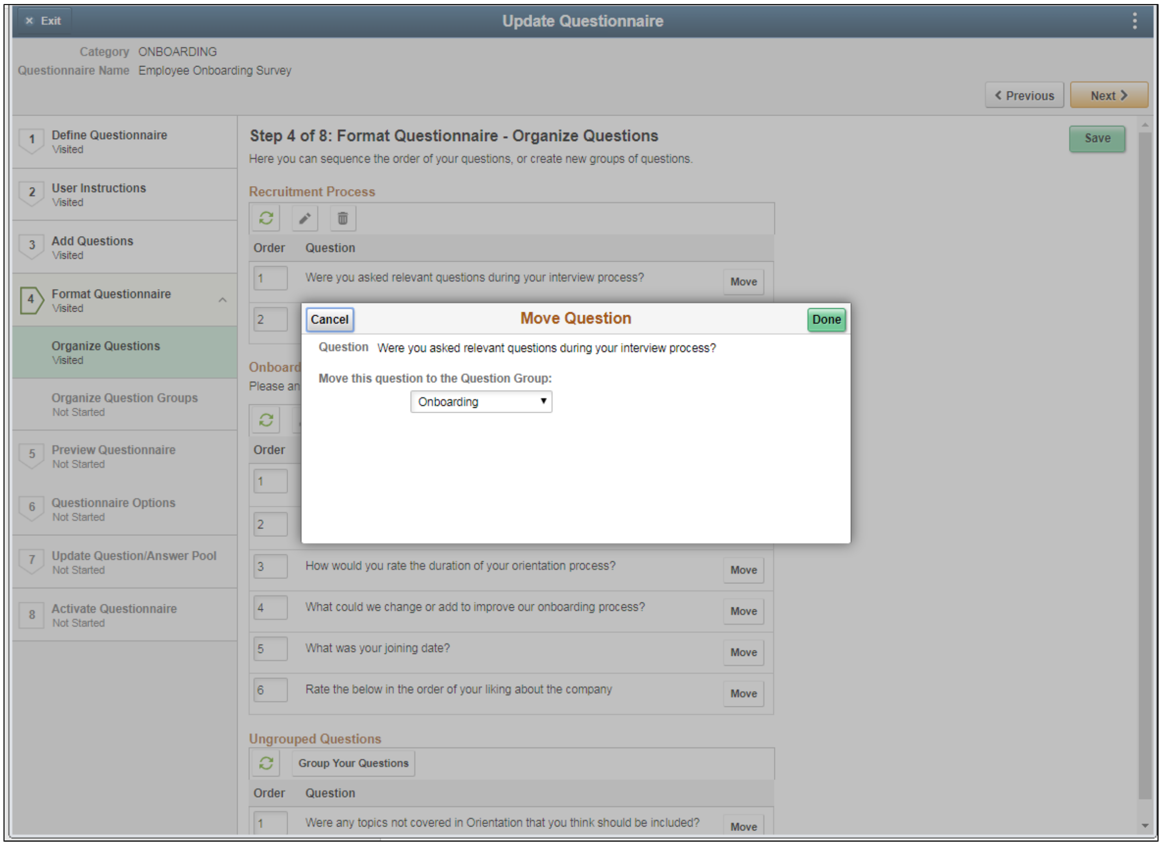
Image: Move Question

Move Question

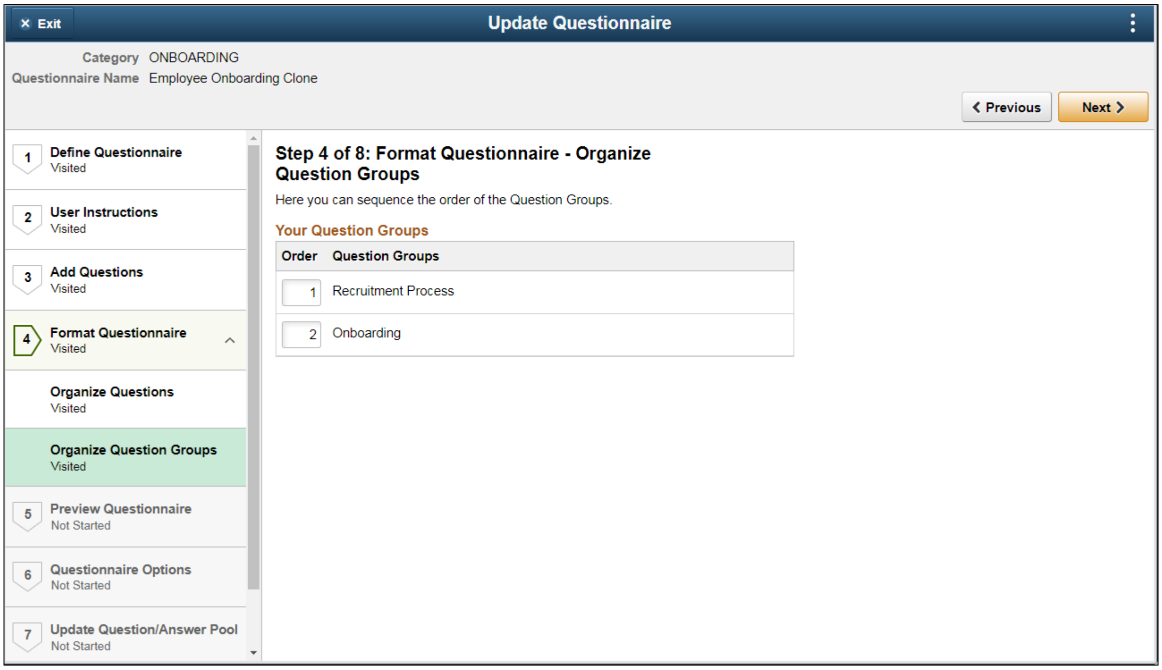


Format Questionnaire - Organize Question Groups Page

Use the Format Questionnaire – Organize Question Groups page (EOQF_QSTNGRPSEQ_FL) to set the order of the question groups

Image: Organize Question Groups page

Organize Question Groups page

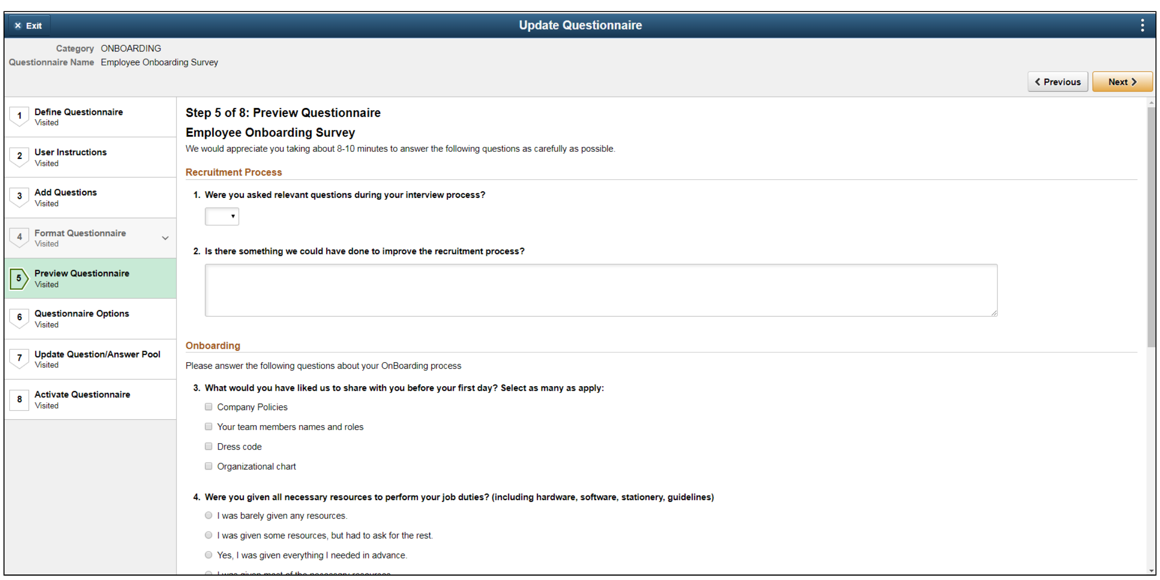


Preview Questionnaire Page

Use the Preview Questionnaire page (EOQF_QSTNR_PRVW_FL) to see how the questions appear to the users. Use the Previous button to go back to previous steps to make any changes to the questionnaire.

Image: Preview Questionnaire

Preview Questionnaire page



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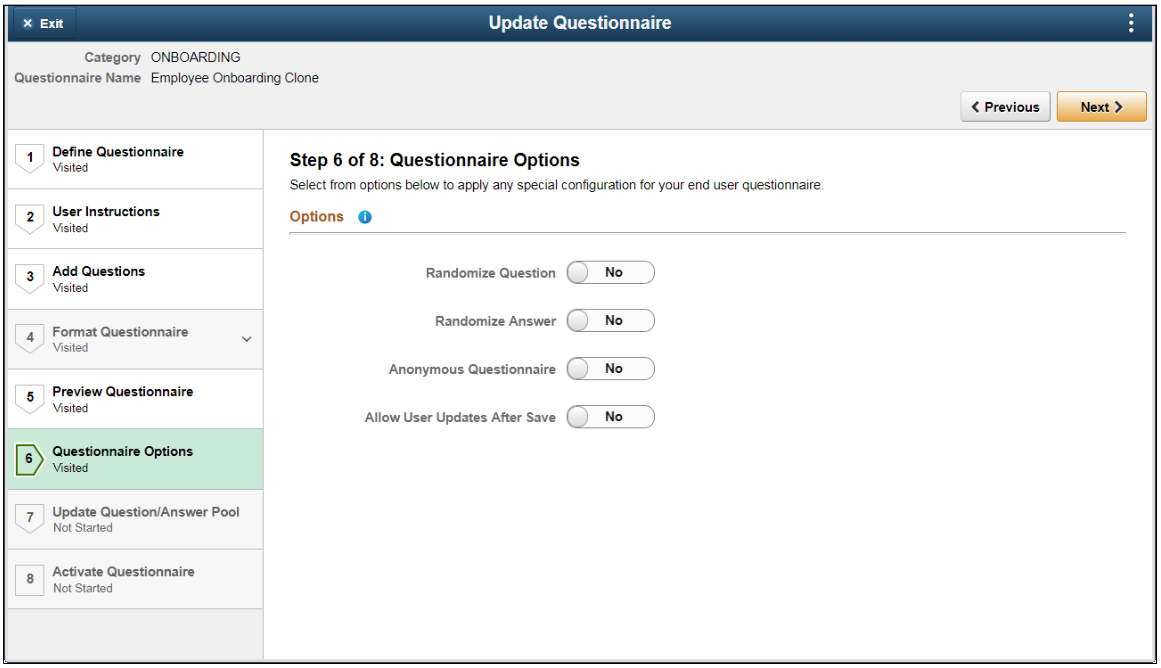
Questionnaire Options Page

Use the Questionnaire Options page (EOQF_QSTNR_OPTN_FL) to set additional options for the questionnaire.

Image: Questionnaire Options page

Questionnaire Options page



Randomize Question	Randomize the order of the questions within any question group in the questionnaire.If there is no question group , then randomize the questions within the questionnaire.
Randomize Answer	Randomize the order of answers within a question.
Anonymous Questionnaire	Allows users to answer the questionnaire anonymously. If used within an activity guide, the activity guide instance should be deleted for the questionnaire to be truly anonymous.
Allow User Updates After Save	Users can change their response even after saving the answers of the questions.

Update Question Answer Pool Page

Use the Update Question/Answer Pool page (EOQF_QSTNR_POOL_FL) to add new questions and answers to the question and answer pool.

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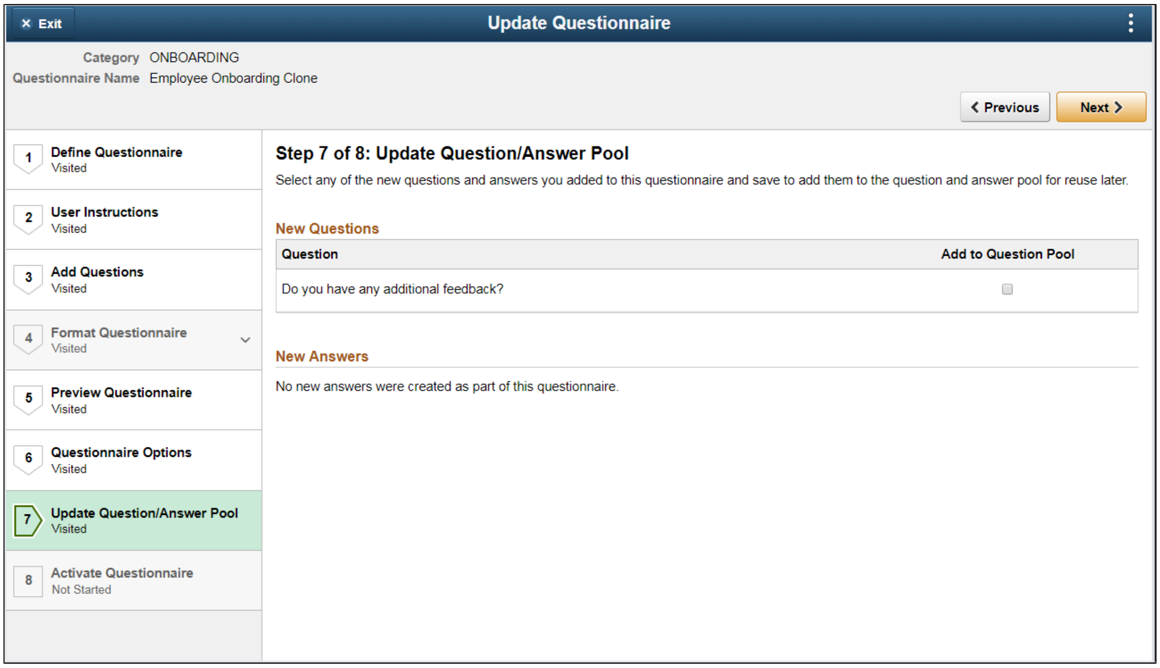
Image: Update Question/Answer Pool

Update Question/Answer Pool



All new questions and answers created as part of the questionnaire are listed in this page. Users can choose questions and answers from this list by selecting the Add to Question Pool option. When the page is saved, the selected questions and answers are added to the question and answer pool and is available for future use.

Note: This page is visible based on the permission levels provided in the Category. If the user has access to add question and answer to the pool, only then this page is accessible. Else the user will not see the data in this page

---

<Page Element Name>

Activate Questionnaire Page

Use the Activate Questionnaire page (EOQF_QSTNR_STS_FL) to activate the questionnaire.

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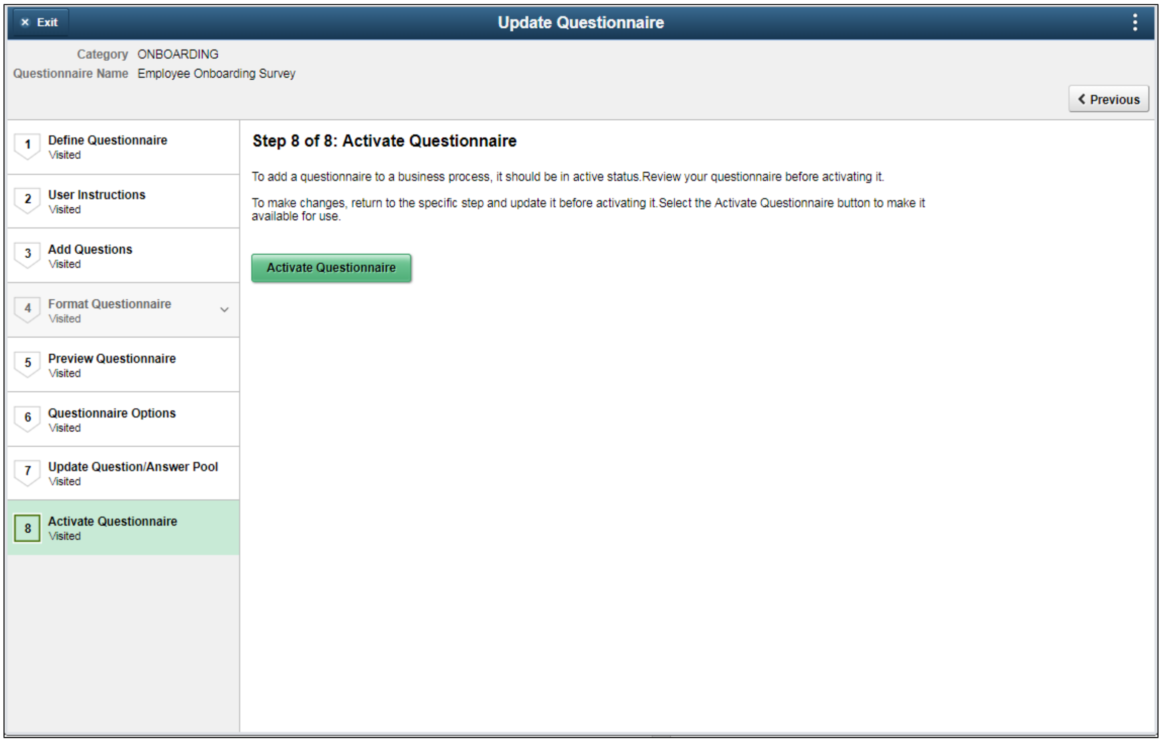
Image: Activate Questionnaire page

Activate Questionnaire pag



Choose the Activate Questionnaire button to activate the questionnaire. The questionnaire then becomes available for users to add to activity guides.

Adding Questionnaire as a Step in an Activity Guide

The questionnaire can be used as a step in a activity guide. This section discuss the pages used to configure the questionnaire as a step in an activity guide.

Pages Used to Add the Questionnaire as a Step in an Activity Guide

Page Name	***Definition Name***	***Usage***
Categories - Steps Page	AGC_CAT_TBL5	Modify an existing category to include the Questionnaire step.
Activity Guide Templates Page	AGC_TMPL_SRCH_FL	Update a template to include the Questionnaire step.
Activity Guide Composer - General Information Page	AGC_TMPL_GNRL_FL	Enter the activity guide template category into which the Questionnaire step is added.
Activity Guide Composer - Select Steps Page	AGC_TMPL_STEP1_FL	Select the Questionnaire step to be included in an activity guide.

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Page Name	*Definition Name*	*Usage*
Activity Guide Composer - Organize and Configure Steps Page	AGC_TMPL_STEP2_FL	Position the Questionnaire step in the activity guide template.

Categories - Steps Page

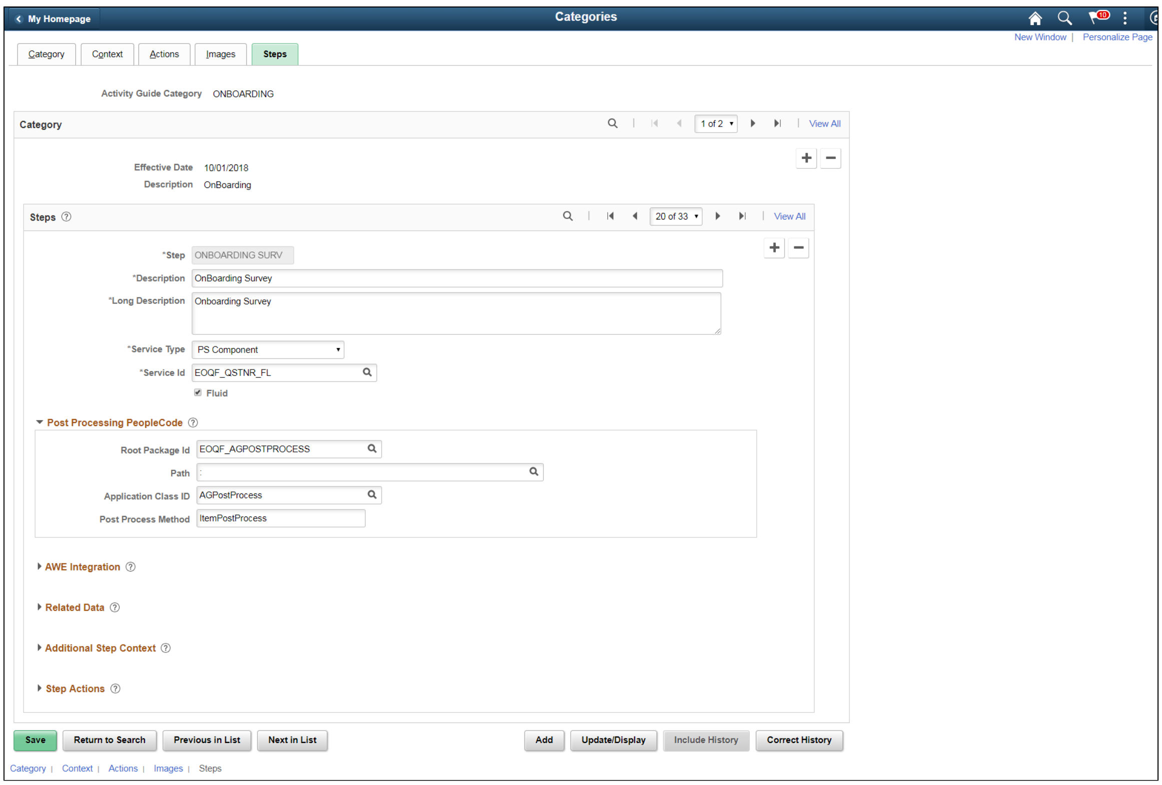
Use the Categories - Steps page (AGC_CAT_TBL5) modify an existing category to include the Questionnaire step.

Navigation

Set Up HCM >Common Definitions >Activity Guide Composer >Categories >Steps

Image: Categories Steps page

Categories Steps page



Service Type	Select PS Component to associate with the Questionnaire step.
Service ID	EOQF_QSTNR_FL
Fluid	Select the Fluid check box, to load the fluid page in the activity guide.

Post Processing PeopleCode

Root Package Id	Select EOQF_AGPOSTPROCESS..

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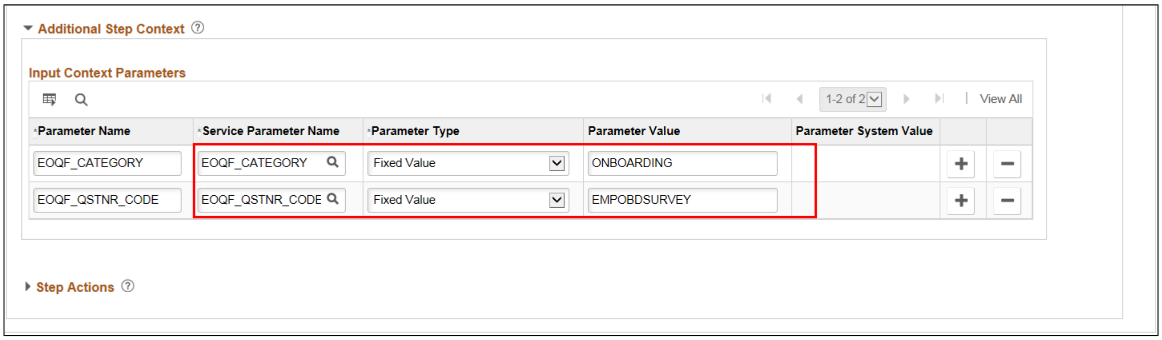
Path	Select :
Application Class ID	Select AGPostProcess..
Post Process Method	Enter ItemPostProcess.

Image: Additional Steps

Additional Steps



Parameter Name	EOQF_CATEGORY
Service Parameter Name	EOQF_CATEGORY
Parameter Type	Fixed Value
Parameter Value	Enter the Questionnaire Category created for this Questionnaire.

Note: You can add multiple Questionnaire steps within the same activity guide category by using different parameter values (i.e. Questionnaire categories) and by giving a different step name

Activity Guide Templates Page

Use the Activity Guide Templates page (AGC_TMPL_SRCH_FL) to create a new activity guide template or update a template to include the step.

Note: You will only see templates you have administrator access to or where no security has been defined for the template.

Navigation

Set Up HCM >Common Definitions >Activity Guide Composer >Templates >Activity Guide Templates

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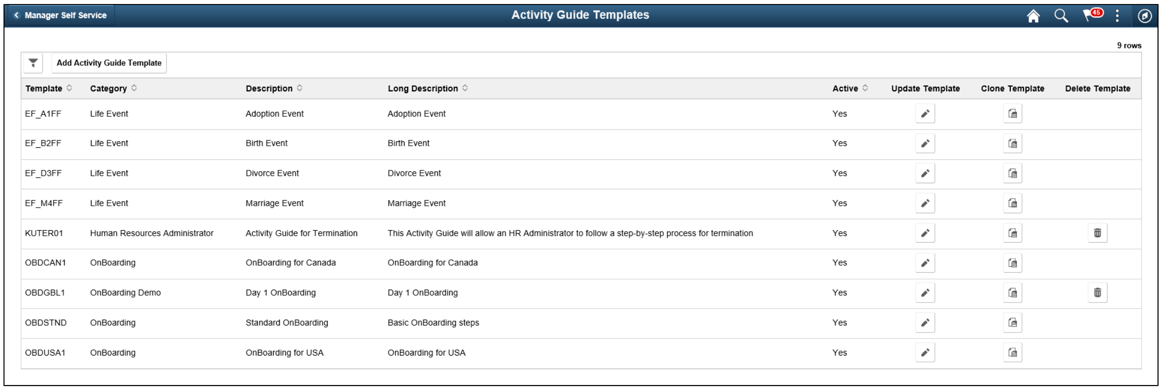
Image: Activity Guide Templates Page

This example illustrates the fields and controls on the Activity Guide Templates Page.



Template	Category	Description	Long Description	Active	Update Template	Clone Template	Delete Template
EF_A1FF	Life Event	Adoption Event	Adoption Event	Yes			
EF_B2FF	Life Event	Birth Event	Birth Event	Yes			
EF_D3FF	Life Event	Divorce Event	Divorce Event	Yes			
EF_M4FF	Life Event	Marriage Event	Marriage Event	Yes			
KUTER01	Human Resources Administrator	Activity Guide for Termination	This Activity Guide will allow an HR Administrator to follow a step-by-step process for termination	Yes			
OBDCAN1	OnBoarding	OnBoarding for Canada	OnBoarding for Canada	Yes			
OBDGBL1	OnBoarding Demo	Day 1 OnBoarding	Day 1 OnBoarding	Yes			
OBDSTND	OnBoarding	Standard OnBoarding	Basic OnBoarding steps	Yes			
OBDUSA1	OnBoarding	OnBoarding for USA	OnBoarding for USA	Yes			

The page displays all templates in template ID order to which you have administrator security access. Click the column headings to sort the template rows by that category.

Add Activity Guide Template button — Click this button to access the Activity Guide Templates page to create a new activity guide template.

Update Template button — Click the button for a template row to access the Update Template page for the template you have chosen.

Activity Guide Composer - General Information Page

Use the Activity Guide Composer - General Information page (AGC_TMPL_GNRL_FL) to enter the activity guide template category into which the Questionnaire step is added.

Navigation

Set Up HCM >Common Definitions >Activity Guide Composer >Templates >Activity Guide Template

- Click the Add Activity Guide Template button from the Activity Guide Templates page, enter the template ID and effective date on the Add Activity Guide Template page, and click Continue.
- Click the Update Template button from the Update Template page.

From within the Activity Guide Composer, select the General Information tab from the left panel category list, or click the Next or Previous buttons to navigate to the page.

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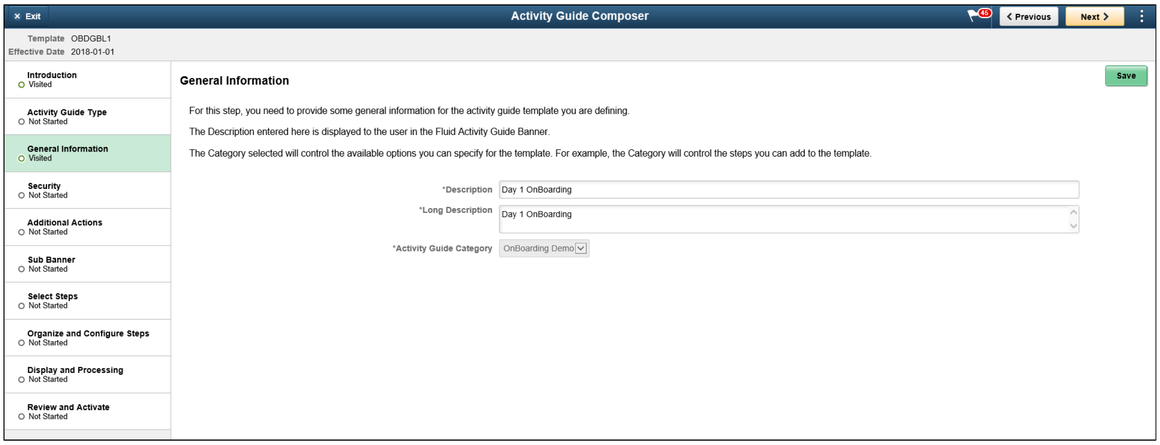
Image: Activity Guide Composer - General Information page

This example illustrates the fields and controls on the Activity Guide Composer - General Information page.



Note: This example shows a template cloned from a delivered template with a new effective dated row inserted. The fields for the original effective dated row of a delivered template are not available for edit. You must insert a new row or clone a delivered template to make changes to the description, but you cannot change the Activity Guide Category value.

Activity Guide Category	Select the category that contains the record structure, actions, and step that apply to this template. Delivered options include *Life Events* and *OnBoarding*, however you can create new categories using the Activity Guide Composer - Categories component. **Note:** You cannot change the category for this template after you have saved this page. If you have cloned or inserted a new row for an existing template, you cannot change the category.

Activity Guide Composer - Select Steps Page

Use the Activity Guide Composer - Select Steps page (AGC_TMPL_STEP1_FL) to select the Questionnaire step to be included in this activity guide.

Navigation

Set Up HCM >Common Definitions >Activity Guide Composer >Templates >Activity Guide Template

- Click the Add Activity Guide Template button from the Activity Guide Templates page, enter the template ID and effective date on the Add Activity Guide Template page, and click Continue.
- Click the Update Template button from the Update Template page.

From within the Activity Guide Composer, select the Select Steps tab from the left panel category list, or click the Next or Previous buttons to navigate to the page.

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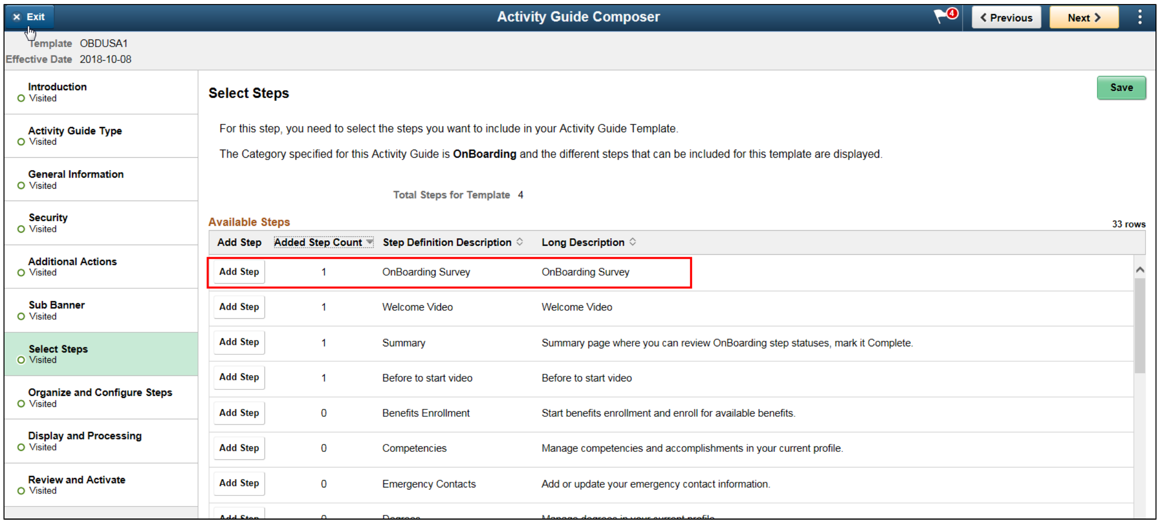
Image: Select Steps page

Select Steps page



Note: You must first identify the security roles for this template before you can select steps.

The top of this page displays the category associated with this template. The activity guide category defines the valid steps that are available for the activity guide template. To manage steps for a category, use the Categories - Steps page.

Add Step

Click this button to add the Questionnaire step to this Activity Guide template.

Added Step Count

The Added Step Count field identifies if you have already added this step to your template and how many times it will be listed as a step.

Activity Guide Composer - Organize and Configure Steps Page

Use the Activity Guide Composer - Organize and Configure Steps page (AGC_TMPL_STEP2_FL) to position the Questionnaire step in the activity guide template.

Navigation

Set Up HCM >Common Definitions >Activity Guide Composer >Templates >Activity Guide Template

- Click the Add Activity Guide Template button from the Activity Guide Templates page, enter the template ID and effective date on the Add Activity Guide Template page, and click Continue.
- Click the Update Template button from the Update Template page.

From within the Activity Guide Composer, select the Organize and Configure Steps tab from the left panel category list, or click the Next or Previous buttons to navigate to the page

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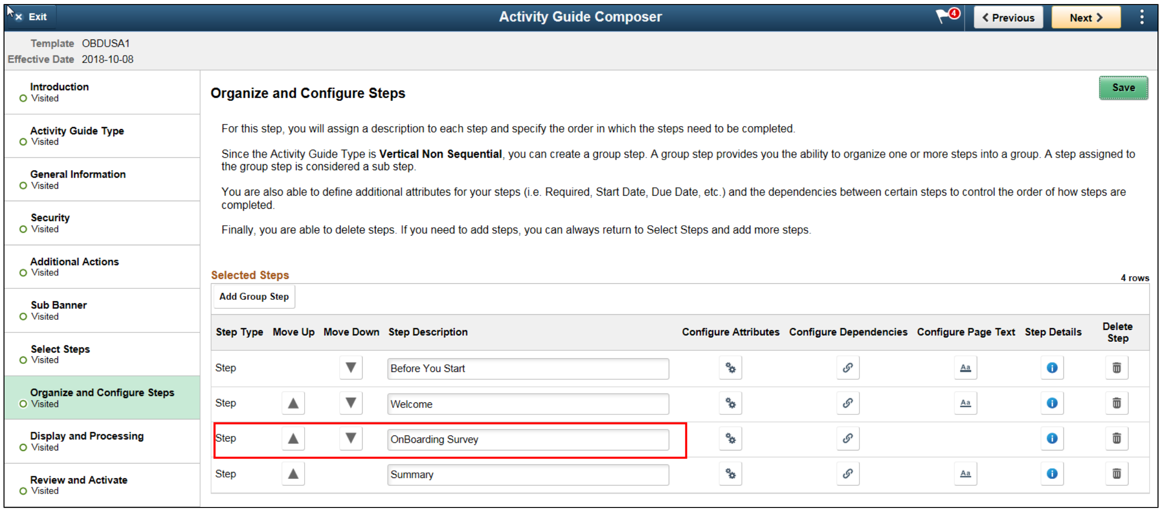
Image: Organize and Configure Steps page

Organize and Configure Steps page



Note: You must first identify the security roles and select step for this template before you can configure steps.

You can determine the step order by moving the steps up and down in the list. Here, we position the questionnaire step right after the Welcome Video.

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