
PeopleSoft 9.2: Enterprise Components

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PeopleSoft 9.2: Enterprise Components
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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.

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

Image: Configure Filter Definition page

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

*Field Name	*Status	Field Label ID	Field Label	Prompt Table	Required Flag	Restrict Operands if Required	Exclude Operator III	Display Order
BUSINESS_UNIT	Active	BUSINESS_UNIT	Business Unit	SP_BUS_AP_NONVW	☒	☒	☐	1
VOUCHER_ID	Active	VOUCHER_ID	Voucher ID	VOUCHER	☐	☐	☐	2
VENDOR_ID	Active	FSCM_VENDOR_ID	Supplier ID	VNDR_VNDSET_VW	☐	☐	☐	3
ORIGIN	Active	ORIGIN	Origin	ORIGIN_AP	☐	☐	☐	4
GRP_AP_ID	Active	GRP_AP_ID	Control Group ID	AP_WC_GRP_VW	☐	☐	☐	5
INVOICE_DT	Active	INVOICE_DT	Invoice Date		☐	☐	☐	6
OPRID	Active	CREATED_BY	Created By	OPRID_VW	☐	☐	☐	7
OPRID_LAST_UPDT	Active	OPRID_LAST_UPDT	Last User to Update	OPRID_VW	☐	☐	☐	8
ENTERED_DT	Active	CREATE_DT	Created On		☐	☐	☐	9

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 WorkCenters.

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

Model Rec (model record)

Select a record name that provides the fields to which you will use to filter data.

Public

Select to indicate that the criteria for the filter can be added or modified by end users

Test

Click to view the Test Filter Criteria window. This window displays how the filter option appears to the end user.

Configure Filter Fields

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

Status

Select a status for the field. Options are Active and Inactive.

Active fields are available for editing on the Configure Filter Values page and are available to end users when filtering data.

Field Label ID

Select an option that corresponds the field label.

Prompt Table

Displays the prompt table that controls the valid values that can be entered on the Configure Filter Values page.

For translate and yes or no *fields*, this value defaults from the prompt table that is defined on the record. You can choose to keep the default value or change it.

	For translate <i>tables</i> , 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

Image: Configure Filter Values page

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

Configure Filter Values

User ID DVP1

Filter ID AR_DEP_FL Deposit Filter

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

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 WorkCenters.

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.

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.

Filter Values Inquiry

*Filter ID Incomplete Voucher

☐ Required Field Only

Field Name Search

Filter Fields Find | View All First 1 of 12 Last

Field Name	DESCRIPTION	Business Unit
Filter Values		
User ID	Description	Field Name Condition Values
AJORDAN	Alic Jordan	BUSINESS_UNIT = EGNBU
APS1	Mashad, Marcia	BUSINESS_UNIT = US001
CADAMS	Cynthia Adams	BUSINESS_UNIT = US001
DVP1	Smith, Jane	BUSINESS_UNIT = US001
LADAMS	Linda Adams	BUSINESS_UNIT = WCGEN
MGR3	Dallas, Eugene	BUSINESS_UNIT = US001
MLEE	Mei Lee	BUSINESS_UNIT = US001
RGIANNOTTI	Roberto Giannotti	BUSINESS_UNIT = EGUBU
RSTARR	Rhonda Starr	BUSINESS_UNIT = EGUBU
SAMPLE	Theresa Monroe	BUSINESS_UNIT = US001
VKUTTAPPAN1	Vik Kuttappan	BUSINESS_UNIT = WCGEN
VP1	Kenneth Schumacher	BUSINESS_UNIT = US001
VP2	Michael Buhler	BUSINESS_UNIT = US001

Notify

Validate Filters Page

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

Navigation

Enterprise Components >WorkCenter/Dashboards >Validate Filters

Image: Validate Filters page

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

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.

Image: Delete Filter Values page

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

Delete Filter Values

User ID Arthur Erickson

Select All Deselect All

Filters	Filter ID	Description
☒	AP_AMINTFC	Vouchers not Sent to AM
☐	AP_ARINTFC	Transactions Ready for AR
☐	AP_BDGT_ER	Budget Check Errors
☒	AP_DOC_TOL	Document Tolerance Exceptions
☐	AP_INCCGRP	Unverified Control Groups
☐	AP_INCVCHR	Incomplete Voucher
☐	AP_LCEXTRT	Transactions Ready for LC
☐	AP_MASSAPR	Voucher Mass Approval
☐	AP_PMNT	Scheduled Payment on Hold
☐	AP_PREPMNT	Available Prepayments
☐	AP_PYMTPOST	Payments Ready for Posting
☐	AP_UNPVCHR	Unpaid Voucher Status
☐	AP_VCHRDNY	Vouchers Rejected by Approvers
☒	AP_VCHRPND	Vouchers Pending Approval
☐	AP_VCHRPST	Vouchers Ready for Posting

Selected Filters

Filter ID	Description
AP_AMINTFC	Vouchers not Sent to AM
AP_DOC_TOL	Document Tolerance Exceptions
AP_VCHRPND	Vouchers Pending Approval

Delete Filter Values

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

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.

Select Filters - Step 1 of 3

Select a user id to display available filters. From the resulting list, select one or more filters. The selected filters will be copied to the users selected in the next step.

User ID: Kenneth Schumacher

[Select All](#) [Deselect All](#)

Filter ID	Description
☒ AM_ERR_LOG	Depreciation Process Log
☐ AM_INTFERR	Load Transaction Errors
☐ AM_OPENTXN	Pending Open Transactions
☐ AM_PREAM_P	PO/AP Transactions
☐ AM_WVC_INTF	Load Transaction into AM
☐ AP_AMINTFC	Vouchers not Sent to AM
☐ AP_ARINTFC	Transactions Ready for AR
☐ AP_BDGT_ER	Budget Check Errors
☒ AP_DOC_TOL	Document Tolerance Exceptions
☐ AP_INCCGRP	Unverified Control Groups
☐ AP_INCVCHR	Incomplete Voucher
☐ AP_LCEXTRT	Transactions Ready for LC
☐ AP_MASSAPR	Voucher Mass Approval
☐ AP_PMNT	Scheduled Payment on Hold
☐ AP_PREPMNT	Available Prepayments

Selected Filters

Filter ID	Description
AM_ERR_LOG	Depreciation Process Log
AP_DOC_TOL	Document Tolerance Exceptions

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.

Image: Select Roles/Users page

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

Select Role/Users - Step 2 of 3

Select a target role and from the resulting list of users in that role, select the users who will be assigned the filter values.

Role: Administrator

Select All | Deselect All

Users	Personalize	Find	First	1-57 of 57	Last
☒ AERICKSON	Arthur Erickson				
☐ AJAMES	Anton James				
☐ AMARTIN	Allan Martin				
☐ BSUPER	Bob Super				
☒ CMONET	Claude Monet				
☐ CTRAN	Connie Tran				
☐ CUST	Customer				
☐ DHAMMONDS	Dorothy Hammonds				
☒ DVP1	Smith, Jane				
☐ EDONAHUE	Edward Donahue				
☐ FSCMSEC	FSCMSEC				
☐ GKEEPER	Greg Keeper				
☐ GM_AIWDA	Grants Administrator				
☐ GM_COPI	Co-PI				
☐ GM_DPHD	Department Head				

Selected Users	Personalize	Find	First	1-3 of 3	Last
AERICKSON	Arthur Erickson				
CMONET	Claude Monet				
DVP1	Smith, Jane				

Exit | Previous | Next

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.

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.

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

Image: Configure Pagelets – WorkCenter/Dashboard Page

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

Employee Self Service

Configure Pagelets

WorkCenter/Dashboard | My Work | Links | Queries | Reports/Processes

Configuration ID: BI
 Description: Billing WorkCenter
 Portal Name: EMPLOYEE

WorkCenter
 Menu Item: EP_BI_WORKCENTER

Fluid WorkCenter
 Menu Item: EPBI_WORKCENTER_FL_GBL

Dashboard/Hompage
 Menu Item: EP_BI_MGR_DASHBOARD_TAB

Fluid WorkCenter Grouplet Display Order

Display Order	Fluid WorkCenter Grouplet	Show Grouplet	Start Grouplet Collapsed
1	My Work	☒	☐
2	Links	☒	☐
3	Queries	☒	☐

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Add | Update/Display

WorkCenter/Dashboard | My Work | Links | Queries | Reports/Processes

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 WorkCenters*.

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 boxes, and it must be performed using this field.

Show Grouplet

Choose to show or hide the Grouplet.

Start Grouplet Collapsed

Choose to start the Grouplet in collapsed or open mode.

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.

WorkCenter/Dashboard | **My Work** | Links | Queries | Reports/Processes

Configuration ID: BI

Description: Billing WorkCenter

☒ Allow User to Personalize the Display Options

☒ Enable Scope

[Set Up Scope Security](#)

Update User Personalization Settings ?

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

[Activate My Work Settings](#)

Last Modified: 04/14/2016 11:09:40AM VP1
Last Run: 04/14/2016 11:09:40AM VP1

My Work Groups ?

*Group Label: Current Work

Display Order: 1

☐ Start Group Collapsed

☐ Hide Group

My Work Links ?

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

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

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

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.

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. 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.

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.

Define My Work Link

*Link Type: System-Defined

*Link Label: State Data Missing

Application Class for Classic Mode ?

Root Package ID:

Application Class Path:

Application Class for Fluid Mode ?

Root Package ID: PY_WORKCENTER_FL

Application Class Path: CurrentWork:MyWorkLinks:StateTaxDataMissingUSA

☒ Show in SFF

Filter

*Record Based On: PY_QRY_FT_VW

Filter ID: PY_QRY_FLT

Public: ☒ Public

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

Link Type

Select the type of link. The fields in this window change depending on the option selected in this field. Options include:

- Events and Notifications Alert
- System-Defined
- User-Defined
- Worklist

Link Type is Events and Notifications Alert

Process Name

Select a process name that the system must run to display the results of an event or notification alert.

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

Import My Work Link Page

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

Navigation

Enterprise Components >WorkCenter/Dashboards >Configure Pagelets

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

Image: Import My Work Link page

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

Import My Work Link

Link Label

Object Owner ID

Record Based On

Search

System-Defined My Work Links

Personalize | Find | View All | First 1 of 1 Last

	Link Label	Object Owner ID	Record
☐			

OK Cancel

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

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

Link Label

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

Object Owner ID

Select the application owner of the object. For example: Billing, 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.

The screenshot shows the 'Configure Pagelets - Links' page for the 'Billing WorkCenter'. The 'Configuration ID' is 'BI'. Under 'Description', there are two checked options: 'Allow User to Personalize the Display Options' and 'Allow User to Add Additional Links'. A 'Link Groups' section shows a group labeled 'Bill Entry Group' with a display order of 1. Below this is a 'Link List' table with 6 rows of menu items. The table has columns for 'Define Link/Security', 'Display Order', 'Link Label', 'Link Type', 'Show Link', 'Starting Page', 'Open in New Window', and action buttons. The items are: Express Billing, Create Consolidated Header, Adjust Entire Bill, Recurring Bill Schedules, Installment Bill Schedules, and Copy Single Bill. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window		
Define	1	Express Billing	Menu Item	☒	☐	☐	+	-
Define	2	Create Consolidated Header	Menu Item	☒	☐	☐	+	-
Define	3	Adjust Entire Bill	Menu Item	☒	☐	☐	+	-
Define	4	Recurring Bill Schedules	Menu Item	☒	☐	☐	+	-
Define	5	Installment Bill Schedules	Menu Item	☒	☐	☐	+	-
Define	6	Copy Single Bill	Menu Item	☒	☐	☐	+	-

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

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

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

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

Allow User to Add Additional Links Select to indicate that an end user can add groups and links to the pagelet.

Update User Personalization Settings

Activate Links Settings

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

Link Groups

Group Label

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

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

Start Group Collapsed

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

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

Display Order

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

Hide Group

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

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

Link List

Define Link/Security

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

Display Order

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

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

Show Link

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

PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this

check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time.

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

Starting Page

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

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.

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.

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.

Configuration ID: BI

Description: Billing WorkCenter

- ☒ Allow User to Personalize the Display Options
- ☒ Allow User to Add Additional Links
- ☒ Display the Query Manager/Viewer link

Update User Personalization Settings

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

Activate Queries Settings

Last Modified: 05/08/2019 1:53:26AM PS
Last Run On: 06/21/2012 4:14:07PM SAMPLE

Query Groups

*Group Label: Billing Queries

Display Order: 1

☐ Start Group Collapsed

☐ Hide Group

Query Definition

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

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Add** **Update/Display**

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

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

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

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

Allow User to Add Additional Links Select to indicate that an end user can add groups and links to the pagelet.

Display the Query Manager/Viewer Link The end user can see the link to the Query Manager.

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.

Query Definition

Display Order

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

Type

Select an 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.

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.

Image: Configure Pagelets – Reports/Processes page

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

WorkCenter/Dashboard | My Work | Links | Queries | Reports/Processes

Configuration ID AP

Description Accounts Payable WorkCenter

☒ Allow User to Personalize the Display Options

☒ Allow User to Add Additional Links

Update User Personalization Settings ?

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

Activate Reports/Processes Settings

Last Modified 10/21/2015 2:57:52PM VP1

Last Run On 07/13/2012 3:04:44PM SAMPLE

Link Groups ? Find | View All First 1 of 2 Last

*Group Label Reports ☐ Start Group Collapsed

Display Order 1 ☐ Hide Group

Link List ? Personalize | Find | First 1-8 of 8 Last

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window	
Define	1	Registered Voucher	Menu Item	☒	☐	☐	+ -
Define	2	Trial Register	Menu Item	☒	☐	☐	+ -
Define	3	Payables Open Liability	Menu Item	☒	☐	☐	+ -
Define	4	Supplier Liability Aging	Menu Item	☒	☐	☐	+ -
Define	5	Supplier Balance	Menu Item	☒	☐	☐	+ -
Define	6	Unpaid Debit Memos	Menu Item	☒	☐	☐	+ -
Define	7	Voucher Activity	Menu Item	☒	☐	☐	+ -
Define	8	Open Liability Reconciliation	Menu Item	☒	☐	☐	+ -

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

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

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

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

Allow User to Add Additional Links Select to indicate that an end user can add groups and links to the pagelet.

Update User Personalization Settings

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

Link Groups

Group Label

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

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

Start Group Collapsed

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

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

Display Order

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

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.

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.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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:

- %Blank
 - %Date
 - %EmployeeID
 - %PersonID
 - %Time
 - %UserID
2. Assign the dataset rules to dataset roles, according to role security and data requirements.

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

See *PeopleTools: Security Administration*, “Understanding Roles”.
 3. Ensure that the original user roles on which dataset roles were based are associated with appropriate user IDs.

Each user ID can have multiple user roles.

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

Dataset Rules Page

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

Navigation

Enterprise Components > Component Configurations > Datasets > Dataset Rules

Image: Dataset Rules page

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

Dataset Rules

Dataset Name

TIME_ZONE

*Description

Time Zone

Dataset Rules

Find | View All

First 1 of 1 Last

*Rule

+ -

*Description

*Search Record Name

PSTIMEZONEDEFN

Time Zone Data

*Status

Active

Rule Conditions

((... *Field Name *Operator *Field Value))...

Last Update Date/Time

Later Than

%Date

+ -

Test SQL

Show SQL

Data distribution rule is valid.

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

Dataset Rules

Search Record Name

Select the name of the search record for this rule. You can create a view specifically for use in the rule.

Status

Select *Active* or *Inactive*.

Rule Conditions

...((and))...

If the AND or OR field is left blank, specify the nesting level for this condition. Be sure to match opening and closing parentheses.

Field Name

Select the field name on which this rule operates.

Operator

Specify the operation with which to compare the specified field value. Select from standard conditional operators.

Field Value

Specify the value of the specified field against which to compare.

AND or OR

For second and subsequent rule conditions, specify *AND* or *OR*, or leave blank if the rule statements are nested.

Test SQL

Click to test the validity of the rule conditions. The result is returned below the button.

Show SQL

Click to view the SQL statement generated by the rule.

Defining Dataset Roles

This section discusses how to define dataset roles.

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

Page Used to Define Dataset Roles

Page Name	Definition Name	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.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Mobile Data Distribution Page</u>	EOEC_MP_RULE	Define data distribution rules for mobile devices based on datasets.
<u>Mobile User Rules Page</u>	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

Mobile Data Distribution Page

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

Navigation

Enterprise Components > Component Configurations > Mobile > Mobile Data Distribution

Image: Mobile Data Distribution page

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

Mobile Data Distribution

Component Interface Name PSTIMEZONE PSTIMEZONE CI (mobile)

Search Record Name PSTIMEZONE Time Zone Data

*Laptop Limit All Data Laptop Count 999999999

*PDA Limit All Data PDA Count 999999999

Dataset Name

Dataset Details

Dataset Rules			
Rule	Description	Status	Search Record Name
		Active	

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

Laptop Limit

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

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

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

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

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

	If <i>Reference Data Only</i> 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: <i>All Data:</i> All data matching the rule's conditions is downloaded. <i>Limit By Count:</i> Only data matching the rule's conditions up to the specified count is downloaded. Referenced data is also included. <i>Referenced Data Only:</i> Only data referenced by the component interface is downloaded.
Laptop Count and PDA Count	If you select <i>Limit By Count</i> in the Laptop Limit field or the PDA Limit field, specify the maximum number of data instances to be downloaded.
Dataset Name	Select the dataset to apply to this mobile data distribution rule.
Dataset Details	Click to access the Dataset Rules page, where you can view and modify the selected dataset definition. See Dataset Rules Page.

The Dataset Rules grid lists rules for the specified dataset.

Mobile User Rules Page

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

Navigation

Enterprise Components > Component Configurations > Mobile > Mobile User Rules

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

Show Rule Count	Click to view the number of results the mobile data distribution rule returns.
Show Laptop Count and Show PDA Count	Click to view the number of results the mobile data distribution rule returns to a laptop computer or PDA based on any limits set for the mobile device on the Mobile Data Distribution page.
Laptop and PDA	Select to display the results of this mobile data distribution rule on a laptop computer or on a PDA, or both.

Note: If neither Laptop nor PDA is selected, no data from this mobile data distribution rule is displayed.

Preview Laptop Results and Preview PDA Results

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

Chapter 3

Formatting Addresses

Understanding Address Formats

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

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

Specifying Address Formats

This section discusses how to 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Country Description Page</u>	COUNTRY_DEFN	Define countries to be used throughout the system. This is used mainly for currencies and addresses.
<u>Address Format Page</u>	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.
<u>Valid Address Page</u>	EO_ADDR_VALIDAT	Add valid combinations of address fields.
<u>State/Province Page</u>	STATE_DEFN	Add or review a state, province, county, or other geopolitical region within a country.

Country Description Page

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

This is used mainly for currencies and addresses.

Navigation

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

Image: Country Description page

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

The screenshot shows a web interface for the 'Country Description' page. At the top, there are three tabs: 'Country Description' (which is active), 'Address Format', and 'Valid Address'. Below the tabs, the page title is 'Country HKG'. The main content area is a form with several fields: 'Country' (displaying 'HKG'), '*Description' (displaying 'Hong Kong'), 'Short Description' (displaying 'Hong Kong'), '2-Char Country Code' (displaying 'HK'), and a checkbox labeled 'EU Member State' which is currently unchecked.

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

2-Char Country Code (two-character country code) Enter the Value Added Tax (VAT) registration ID for the country.

EU Member State (European Union member state) Select if the country is a member of the European Union. Select to include the country in prompts for intrastate reporting.

Address Format Page

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

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

Navigation

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

Image: Address Format page

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

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

Address Edit Page

Displays the secondary page used for editing the address. You can create a new secondary page using Application Designer.

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

Enable Address Search

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

The system default is to leave this check box clear.

Enable Address Validation

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

The system default is to leave this check box clear.

Search Limit

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

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

Field Name

Displays the field options available for the address page.

Edit Label Override

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

Keep in mind the distinctions between county and state:

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

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

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

Used in Search

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

Include in Display

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

Include in Print

Select to print the field when printing.

Line Number and Position Number

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

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

Use Description

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

Pre Separator and Post Separator

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

Valid Address Page

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

Navigation

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

Image: Valid Address page

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

Country DescriptionAddress FormatValid Address

CountryHKGHong Kong

Valid addresses

PersonalizeFindView All

First1 of 1Last

1	+	-

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

State/Province Page

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

Navigation

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

Image: State/ Province page

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

State/Province

CountryHKGHong Kong

Postal AbbreviationH

Numeric Code

*Area CodeHong Kong Island

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

Numeric Code

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

Province

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

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

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

Chapter 4

Using the Find Object Navigation Utility

Understanding the Find Object Navigation Utility

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

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

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

Specifying Navigation Path Search Criteria

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

Page Used to Specify Navigation Path Search Criteria

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Find Object Navigation Page</u>	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.

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.

Find Object Navigation

Select Navigation By

☒ Component Name
☐ Page Name
☐ Secondary Page Name
☐ Content Reference Name

*Component Name Encryption Algorithm Chain

Page Name

Secondary Page

Portal Name

Content Reference

Results Personalize Find 1-7 of 7 First Last

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

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

Component Name

Select to search by component name.

The system default is *Component Name*.

*Component Name

This is a required field. Enter the name of the component for the search, or click the prompt to display available component names.

Search

Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL

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

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

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

Find Object Navigation

Select Navigation By

☐ Component Name
☒ Page Name
☐ Secondary Page Name
☐ Content Reference Name

Component Name

*Page Name 

Secondary Page

Portal Name

Content Reference

Results Personalize | Find |   First 1-7 of 7 Last

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

Page Name

Select to search by page name.

*Page Name

This is a required field. Enter the name of the page for the search, or click the prompt to display available page names.

Search

Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL

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

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

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

Find Object Navigation

Select Navigation By

☐ Component Name
☐ Page Name
☒ Secondary Page Name
☐ Content Reference Name

*Component Name

Page Name

*Secondary Page  Temporary Table Locks

Portal Name

Content Reference

Results

				Personalize	Find			First	1-7 of 7	Last
Portal Name	Component Name	Market	Navigation					Hidden	URL	
1 CUSTOMER	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage					☐	Review Temp Table Usage	
2 EMPLOYEE	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage					☐	Review Temp Table Usage	
3 HC_REGISTRY	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage					☐	Review Temp Table Usage	
4 MOBILE	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage					☐	Review Temp Table Usage	

Secondary Page Name

Select to search by secondary page name.

***Secondary Page Name**

This is a required field. Enter the name of the secondary page for the search, or click the prompt to display available secondary page names.

Search

Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL

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

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

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

Find Object Navigation

Select Navigation By

☐ Component Name
☐ Page Name
☐ Secondary Page Name
☒ Content Reference Name

Component Name
 Page Name
 Secondary Page
 *Portal Name
 *Content Reference Register Operators

Results Personalize | Find | First 1-5 of 5 Last

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

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

Content Reference Name

Select to search by CREF name for the portal that you specify.

When you select Content Reference Name, the Portal Name field becomes available to search for CREF names within a specific portal.

*Portal Name

This is a required field. Enter the name of the portal for the search, or click the prompt to display available portal names.

The default for this field is *Employee*.

*Content Reference

This is a required field. Enter the name of the CREF for the search, or click the prompt to display available CREF names.

Search

Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL

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

Working With Currencies and Market Rates

Understanding Currencies and Market Rates

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

This section provides overviews of:

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

Understanding Currency and Market Rate Tables

The following tables store currency and market rate data:

- CURRENCY_CD_TBL
Stores currency code data.
- CURR_QUOTE_PNL
Stores currency quotation method data.
- RT_INDEX_TBL
Stores market rate index data.
- RT_TYPE_TBL
Stores rate type data.
- RT_RATE_TBL
Stores market rate data.

Understanding Triangulation

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

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

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

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

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

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

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

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

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

Related Links

[Calculating Cross, Triangulated, and Reciprocal Rates](#)

Understanding Conversion Factor Fields and the Visual Rate

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

$$(\text{from-currency} / \text{RATE\_DIV}) \times \text{RATE\_MULT} = \text{to-currency}$$

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:

$$100 \text{ USD to GBP (indirect)} = (100 \text{ USD} / 1.6) \times 1 = 62.50 \text{ GBP}$$

$$1000 \text{ CHF to DEM (direct with units)} = (1000 \text{ CHF} / 100) \times 119.335 = 1193.35 \text{ DEM}$$

$$100 \text{ USD to FRF (triangulate)} = (100 \text{ USD} / 1.25) \times 6.8 = 544 \text{ FRF}$$

Related Links

[Defining Currency Quotation Methods](#)

Understanding Application-Specific Requirements for Currency Conversion

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

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

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

See Also

PeopleTools: Global Technology

PeopleTools: PeopleCode Developer's Guide

Defining Currencies

This section discusses how to define currency codes.

Page Used to Define Currency Codes

Page Name	Definition Name	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

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.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Currency Quotation Method Page</u>	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

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.

See [Understanding Conversion Factor Fields and the Visual Rate](#).

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

See [Defining Market Rates](#).

Direct and Indirect

In the Rate Quotation Basis section, indicate whether the rates for this currency pair are quoted directly or indirectly. For example, when defining a currency quotation method for USD and FRF:

- Select *Direct* if you want one USD to equal x.xxxx FRF.
- Select *Indirect* if you want x.xxxx USD to equal one FRF.

Even currency quotation methods for currency pairs that triangulate must be classified as either direct or indirect. In this case, the value is used to display the calculated cross rate.

Support for indirect and direct quotation methods allows applications to eliminate use of calculated reciprocal rates by using a single rate by which you either divide or multiply, depending on whether the conversion method is direct or indirect.

Quote Units

Enter a quote unit for the exchange rate, as is common business practice for some currencies. This field can have any value, but is usually a power of 10.

Sometimes called scaling factors, quote units are often used to preserve more decimal precision. For example, the exchange rate between Swiss francs (CHF) and Deutsche marks (DEM) may be stated as 100 CHF = 119.335 DEM instead of 1 CHF = 1.19335 DEM.

Auto Reciprocate

Select to automatically create or update the rate for the reciprocal currency pair on the Market Rate page whenever an exchange rate is added or updated.

For example, if you create a currency quotation method for USD to EUR. The reciprocal currency quotation method for EUR to USD is automatically created, regardless of this setting.

When you create a rate for USD to EUR on the Market Rate page, the EUR to USD reciprocal rate is automatically created if this Auto Reciprocate option is selected for the currency pair.

If the either rate for the currency pair is updated on the Market Rate page, the reciprocal rate is updated as long as the Auto Reciprocate option is selected for one of the currencies in the pair.

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

Defining Market Rates

This section discusses how to define market rates.

Pages Used to Define Market Rates

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

Page Name	Definition Name	Usage
<u>Market Rate Page</u>	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.
<u>Market Rate Definition Page</u>	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.
<u>Rate Definition Page</u>	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.
<u>Exchange Rate Detail Page</u>	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 Index

Index MODEL

*Rate Category Exchange Rate

*Description Default

☒ Default Exchange Rate Index

Market rate indexes are stored in the RT_INDEX_TBL table.

Index	Displays the key term for the highest level of organization for market rates in the application.
Rate Category	Select a general category for the market rate index, such as <i>Exchange Rate</i> , <i>Commodity Price</i> , or <i>Interest Rate</i> .
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 <i>Exchange Rate</i>. - 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.

The screenshot shows the 'Market Rate Type' page with the following fields and values:

- Rate Type**: ASK
- Description**: Asked Rate
- Short Description**: Ask

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

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

Market Rate Definition Page

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

Navigation

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

Image: Market Rate Definition page

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

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

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

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

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

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

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

From Currency Code

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

Refresh

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

Rate Definition**Term**

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

From Currency

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,

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.

Market Rates

Market Rate

Rate Category: Index MODEL Default Rate Definition

Rate Type ASK Exchange Rate

Term 0 Asked Rate

From Currency Code ADP Andorran Peseta

To Currency Code ADP Andorran Peseta

Rate	Find View All	First 1 of 1 Last
Effective Date: 01/01/1999	*Rate: 1.00000000	

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

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

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

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

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

Index	Displays the key term for the highest level of organization for market rates in the application.
Rate Category	Displays the general category for the market rate, such as <i>Exchange Rate</i> , <i>Commodity Price</i> , or <i>Interest Rate</i> .
Rate Type	Displays the selected rate type for this market rate. Some examples of rate types are commercial, average, floating and historical.
Term	Displays the entered term.
From Currency Code	Displays the selected currency that you are converting from.
To Currency Code	Displays the selected currency that you are converting to.
Rate Definition	Click to access the Rate Definition page and view market rate definition details, including the maximum variance and error handling definitions specified for the currency pair.
Rate	
Effective Date	Enter the date that you are initiating the currency exchange.
Rate	Displays the visual rate. If you are working with a triangulated exchange rate, this field displays the primary visual rate, which is typically the cross rate, but can also be one of the other component rates of the triangle. During online maintenance of market rates, you don't view or change RATE_MULT and RATE_DIV values directly, but instead access this visual rate, which is calculated by page logic based on RATE_MULT, RATE_DIV, and the currency quotation method defined for the currency pair on the Currency Quotation Method page. The visual rate is stored temporarily on a page work record. Click the Exchange Rate Detail icon to the right of the Rate field to access the Exchange Rate Detail (EXCH_RT_DTL) page, where you can view all three visual rates of a triangulated exchange rate.



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

See [Currency Quotation Method Page](#).

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

Rate Definition Page

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

Navigation

Click the Rate Definition link on the Market Rate page.

Image: Rate Definition page

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

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

OK Cancel

Exchange Rate Detail Page

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

Navigation

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

Image: Exchange Rate Detail page

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

Exchange Rate Detail								
Rate Quotation Basis	Direct							
Quote Units	1							
Triangulate	N							
Reference Currency								
Current Quote	1 ADP = 1.00000000 ADP							
Historic Quote	1 ADP = 1 ADP							
<table border="1"> <thead> <tr> <th>From</th> <th>To</th> <th>Rate</th> </tr> </thead> <tbody> <tr> <td>ADP</td> <td>ADP</td> <td>1.00000000</td> </tr> </tbody> </table>			From	To	Rate	ADP	ADP	1.00000000
From	To	Rate						
ADP	ADP	1.00000000						
OK Cancel								

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

Rate Quotation Basis

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

Quote Units

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

Triangulate

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

Reference Currency

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

Current Quote

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

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

1 USD = 1.40000000 CAD

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

1.400000000 CAD = 1 USD

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

1.25 USD = 1 EUR = 6.8 FRF

Historic Quote

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

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

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

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

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

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

Exchange Rate

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

Calculating Cross, Triangulated, and Reciprocal Rates

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

Page Used to Run the EOP_RATECALC Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Calculate Cross/Reciprocal Rate - Parameters Page</u>	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.

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.

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 calculate 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:

$$(\text{from-currency} / \text{RATE\_DIV}) \times \text{RATE\_MULT} = \text{to-currency}$$

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

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

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

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

Generate Cross Rates

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

system automatically generates $CAD \text{ to } MXP = 9.8793 / 1.473 = 6.7069246$.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Currency Exchange Calculator Page</u>	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.

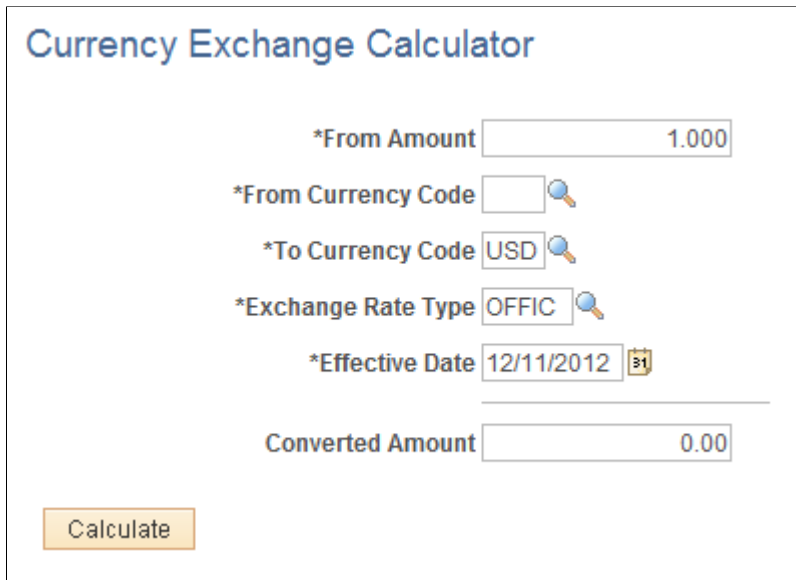
This tool enables you to select a rate type other than the base currency, but does not enable you to override the exchange rate.

Navigation

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

Image: Currency Exchange Calculator page

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



Currency Exchange Calculator

*From Amount

*From Currency Code

*To Currency Code

*Exchange Rate Type

*Effective Date

Converted Amount

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.

Working With PeopleSoft Forms and Approval Builder

Understanding PeopleSoft Forms and Approval Builder

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

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

Form Design

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

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

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

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

- Prompt

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

- Code

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

- Section

Enables you to organize the form into multiple sections.

Form Status

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

The possible status values for a *form* are:

In Design

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

Activated

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

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

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

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

Inactive

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

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

Initial

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

Pending

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

On Hold

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

Approved, Denied, or Cancelled

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

Security and Delivered Roles

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

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

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

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

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

Requirements

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

Related Links

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

Designing Forms

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

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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

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.

The screenshot shows the 'Design Form' interface with a progress bar at the top indicating six steps. Step 1, 'Basic Information', is the active step. The form contains several fields: 'Form REFERENCE' and 'Status In Design' at the top right; '*Effective Date From' with a date picker set to '01/01/2011' and 'Effective Date To' with an empty date picker; '*Label' with the text 'Request Reference Materials'; '*Long Description' with the text 'Request reference materials from library' and a '(254 Characters)' limit; and '*Owner Id' with the text 'PS' and a magnifying glass icon.

Form

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

Status

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

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

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

Effective Date From

Enter the date the form is first available for use.

Effective Date To

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

Label

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

Names can contain only alphanumeric and underscore characters.

Long Description

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

Owner Id

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

Design Form - Step 2: Instructions Page

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

Navigation

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

Image: Design Form - Step 2: Instructions page

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

Design Form

1 2 3 4 5 6

Step 2: Instructions

Form REFERENCE

Instructions

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

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

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

< Previous Next > Cancel

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

Design Form - Step 3: Form Fields Page

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

Navigation

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

Image: Design Form - Step 3: Form Fields page

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

Design Form

Step 3: Form Fields

Form REFERENCE

Left Column		Personalize Find View All [?] [X]		First	1-4 of 4	Last
	*Label	*Use Type	*Length	Field Status	Details	
1	Employee ID	Text	20	Activated	Details	↓
2	Employee Name	Text	20	Activated	Details	↑ ↓
3	Department	Code	4	Activated	Details	↑ ↓
4	Justification	Text	254	Activated	Details	↑

↓ Move to Right Column ↑ Move to Left Column

Right Column		Personalize Find View All [?] [X]		First	1-2 of 2	Last
	*Label	*Use Type	*Length	Field Status	Details	
1	Checkout Date	Date	10	Activated	Details	↓
2	Return Date	Date	10	Activated	Details	↑

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

< Previous Next > Cancel

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

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

Label

Enter the label to use for this field.

Use Type

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

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

Date: Use for dates.

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

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

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

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

Text: Use for text entries.

Time: Use for time entries.

Y/N: Use for yes/no responses.

Length

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

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

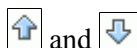
Field Status

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

Details

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

See [Form Field Edits Page](#).



Click the arrow icons to reposition a field.

Move to Right Column

Click to move selected fields to the right column.

Move to Left Column

Click to move selected fields to the left column.

Single column style

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

Form Field Edits Page

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

Navigation

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

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

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

The image shows a 'Form Field Edits' dialog box with the following fields and controls:

- Form**: REFERENCE
- Label**: Business Unit
- ☐ **Required**
- ☐ **Uppercase**
- Prompt Record**: [Text Field]
- Set ID**: [Text Field]
- Long Label**: [Text Field]
(100 characters)

Below these fields is a table with the following structure:

Prompt Control			
Personalize Find View All [Icons]			
First ◀ 1 of 1 ▶ Last			
	*Record Name	*Field Name	
1	[Text Field]	[Text Field]	[+/-]

At the bottom of the dialog are **OK** and **Cancel** buttons.

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

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

Form Field Edits

Form REFERENCE

Label Department

☐ Required

Long Label (100 characters)

Codes		Personalize Find View All [Icon] [Icon]	First 1-4 of 4 Last
*Field Value	*Translate Long Name	Field Status	
1 DEV	Development	Activated	[+] [-]
2 MARK	Marketing	Activated	[+] [-]
3 SALE	Sales	Activated	[+] [-]
4 SUPP	Support	Activated	[+] [-]

Prompt Control		Personalize Find View All [Icon] [Icon]	First 1 of 1 Last
*Record Name	*Field Name		
1 [Search Icon]	[Search Icon]	[+] [-]	

OK Cancel

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

Required

Select to require that a user enter a value in this field in order to save the form.

Uppercase (available only when the Use Type is set to Prompt or Text).

Select to have the system convert the field value to uppercase when the form is saved. Available for only Prompt and Text fields. Use this option for code values, such as department ID, for which it does not matter whether the user enters the value in uppercase or lowercase.

Long Label

Enter up to 100 characters as an alternate label for this field. If you enter a long label, then it will be appear on the form *instead* of the short label (the value specified in the Label field on the Design Form - Step 3: Form Fields page).

Prompt Record and SetID (available only when the Use Type is set to Prompt)

Select the record that contains the values to use for this field. For SetID based tables, specify the SetID from which to retrieve the values. To complete this field type, a form user can select one of the values from the prompt list, or they can enter a value by typing it into the field.

The records that are available for selection are established by form administrators using the Define Prompt Records page.

See [Defining Prompt Records](#).

Prompt Control (available for all Use Types except Section)

To use the value that a form user enters for this field as the key by which to filter the list of available values in one or more prompt fields elsewhere on this form, insert rows in the Prompt Control grid, and select the Record Name and Field Name for each of the form fields that will reference this field.

For example, to limit the Project IDs available in a prompt field to only those that are associated with the business unit that the user has already selected while completing the form, when designing the form you would:

- Add a row to the Business Unit field's Prompt Control grid and specify the record name that equates to the project record, and the field name in that record that equates to business unit.
- Define the Project ID field as a Prompt field, and specify the same record name that was used for the business unit Prompt Control record name as the prompt record for Project ID. 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.

Image: Design Form - Step 4: Attachment Templates page

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

Design Form

1 2 3 4 5 6

Step 4: Attachment Templates

Form REFERENCE

Form Attachment Templates

Personalize | Find | 1 of 1 | First | Last

Description	Attached File	Attach	Open
1		Attach	Open

< Previous Next > Cancel

Attach

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

Description

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

Attached File

Displays the file name of the attached file.

Open

Click to open the attached file.

Design Form - Step 5: Publish to Menu Page

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

Navigation

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

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

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

Design Form

1 2 3 4 5 6

Step 5: Publish to Menu

Form REFERENCE

Root

Sequence number

Folders	Personalize	Find	View All	First	1-15 of 28	Last
Company Directory						90
Manager Dashboard						91
Talent Summary						92
Org Chart Viewer						95
Self Service						100
Manager Self Service						200
Recruiting						1000
Workforce Administration						1050
Benefits						1100
Compensation						1150

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

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

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

Content References	Personalize	Find	View All	First	1-7 of 7	Last
Careers						100
Usage Monitoring						9979
Change My Password						9980
My Personalizations						9983
My System Profile						9986
My Dictionary						9989
My Feeds						9992

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

Sequence number

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

Folders

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

Content References

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

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

Design Form - Step 6: Approval Process Page

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

Navigation

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

Image: Design Form - Step 6: Approval Process page

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

Lockdown Options

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

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

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

Approver User List

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

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

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

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

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

Design Form: Complete Page

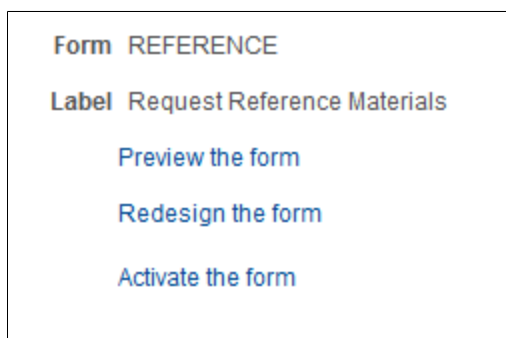
Use the Design Form: Complete page (FORM_DSN_WZR_DONE) to preview and activate or redesign a form.

Navigation

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

Image: Design Form: Complete page

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



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'.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Define Prompt Records Page</u>	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.

Page Used to Manage Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.

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 <i>Activated</i> or <i>In Design</i> .

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 <i>In Design</i> , the system transfers you to the Form Design Wizard component, where you can complete the form design and then activate it.
Inactivate	Click this button to inactivate an active form.

Reviewing Form Counts

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

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

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

Reassigning Form Ownership

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

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

Working with Forms

This section describes how to work with forms.

Pages Used to Work with Forms

Page Name	Definition Name	Usage
<u>Search/Fill a Form Page</u>	FORM_ADD	Search for an existing form instance to update, or complete a new form instance.
<u>Form Page</u>	FORM FORM2	Complete a form instance and submit it for approval.
<u><Portal label (approval preview)> Page</u>	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.
<u>Form Approval Page</u>	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.

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.

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.

The screenshot shows a web form titled "Request Reference Materials". At the top, there are three tabs: "Form" (selected), "Instructions", and "Attachments". Below the tabs, the form fields are as follows:

- *Subject: A text input field.
- Priority: A dropdown menu with "3-Standard" selected.
- Due Date: A date input field with a calendar icon.
- Status: A label "Initial".
- More Information: A large, empty text area.
- Save: A button at the bottom left.

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.

The screenshot shows the same "Request Reference Materials" form, but now it contains saved data and additional controls:

- Seq Nbr: 1 (displayed at the top left).
- *Subject: "My Req #1" (filled in the text input field).
- Priority: "3-Standard" (selected in the dropdown menu).
- Due Date: A date input field with a calendar icon.
- Status: "Initial" (displayed as a label).
- Preview Approval: A button next to the Status label.
- Submit: A button next to the Preview Approval button.
- More Information: A large, empty text area.
- Save: A button at the bottom left.

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.

Available for forms in Initial or Cancelled status.

Save & Post Form

Click this button to post the data to the transactional tables of the component the form instance is associated with. A message appears to confirm that the form has been successfully posted to the transactional tables.

This button is available only for form instances in *Approved* status that have a defined component interface mapping, and only to users that have access to the application component that is associated with the component interface to which the form is mapped. For example, if a user has access to the Department component then they will have access to this button if the form instance has been approved and the form is set up to integrate with the Department component interface.

Related Documents

Click the document key string link within this grid to access the data within the related component. Available only for successfully posted forms.

Attachments

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

<Portal label (approval preview)> Page

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

Navigation

Click the Preview Approval button on the Form page.

Image: <portal label (approval preview)> page

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

Request Reference Materials

Subject My Req #1

Review/Edit Approvers

Request Reference Materials: 1:Initiated View/Hide Comments

1

Skipped
No approvers found
Supervisor by UserId

Not Routed
Multiple Approvers
Error Step

Comments

OK Submit

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.

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.

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 EODC4000, for example) to grant access to the newly created component interfaces.

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

Form Design Guidelines

Keep the following considerations in mind when designing integrated forms:

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

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

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

Form to CI Collection Mapping Page

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

Navigation

Enterprise Components > Forms > Form to CI Mapping

Image: Form to CI Collection Mapping page

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

Form to CI Collection Mapping

Document Category: Form *Description:

Document Name: REFERENCE

Form Type: REFERENCE

*Mode: Add

Document Component Interfaces Find | View All First 1 of 1 Last

Component Interface Name: Level0 Record Name: + -

Menu Name: Sequence:

☒ Select All ☐ Clear All Delete Get CI Properties

CI Collection Property Mappings Personalize | Find | View All | First 1 of 1 Last

Seq	Form Field Name	CI Scroll Level	CI Key Field	CI Collection	CI Collection Property Name	CI Property Default	Active Flag
		Level 0					☒

Document Category

Indicates the type of document. Currently, *Form* is the only valid value.

Document Name

Select the form to map.

Description

Enter a description for the mapping.

Form Type

Automatically populates to the same value as Document Name. You cannot edit this field.

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

Document Component Interfaces

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

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

CI Collection Property Mappings

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

Seq (sequence)	Enter a number to specify the order in which to process the field mapping. Processing order is important because any data in a form that depends on other data must be processed after the data on which it depends is entered.
Form Field Name	Select the name of the form field to map. Only form fields with <i>Active</i> status appear in the selection list.
CI Scroll Level	Select the CI component buffer level to map the field to. Three levels are supported.

CI Key Field

Select to specify the field is a key field. You must specify all the key fields associated to the Level0 main record. For lower levels, you specify only any additional keys; you do not need to repeat the Level 0 keys.

For example, if Level0 keys are SETID and DEPTID, and Level1 keys are SETID, DEPTID, and EFFDT, then select the CI Key Field check box for SETID and DEPTID for Level 0, for level1 select the CIKey Field check box for EFFDT.

The CI Key Field check box is selected initially, so you must review and adjust these for each field.

CI Collection

Select the name of the CI Collection to map to this form field.

CI Collection Property Name

Select the name of the CI Collection property to map to this form field.

CI Property Default

Enter a value in this field to define a default value to assign to this field when the form is used. For example, you could map the SETID form field to the CI Property of SETID and set the default value to SHARE. When a form user creates a new form instance, the SETID field on the form will be initially set to SHARE, but the form user can override the default value as needed.

Default values are currently limited to number, text, and date. Date values must be entered in YYYYMMDD format.

Active Flag

Select to activate the field mapping, deselect to inactivate the field mapping. Inactive mappings are ignored by the Form to CI Framework when posting data to the transactional tables.

CI Level Main Record

Select the component level main record that is associated with the CI Collection. This information is required since a CI property can potentially be associated with a work record, and the system needs to know the CI Level Main Record information in the mapping so that the framework can identify it.

CI Parent Collection Name

Lists the parent collection associated with the corresponding CI Collection. For example, for a Level 1 CI Collection, the parent collection will always be PS_ROOT. This value is automatically populated.

CI Record Name

Lists the component record name associated with the corresponding CI Property. This value is automatically populated based on the CI Collection and CI Collection Property.

CI FieldName

Lists the component field name associated with the corresponding CI Property. This value is automatically populated based on the CI Collection and CI Collection Property. The system uses both CI Record Name and CI Field Name to perform the default value validation and conversion

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

Document Form References Page

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

Navigation

Enterprise Components > Forms > Document Form References

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

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

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](#)

Pages Used to Manage Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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	Label	Status	Effective Date From	Effective Date To	
1 PRJPR1	Project Postpone Request	Activated	06/15/2016		Edit Add To Homepage Transfer
2 TUITION	Tuition Reimbursement Request	Activated	06/14/2016		Edit Add To Homepage Transfer

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.

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.

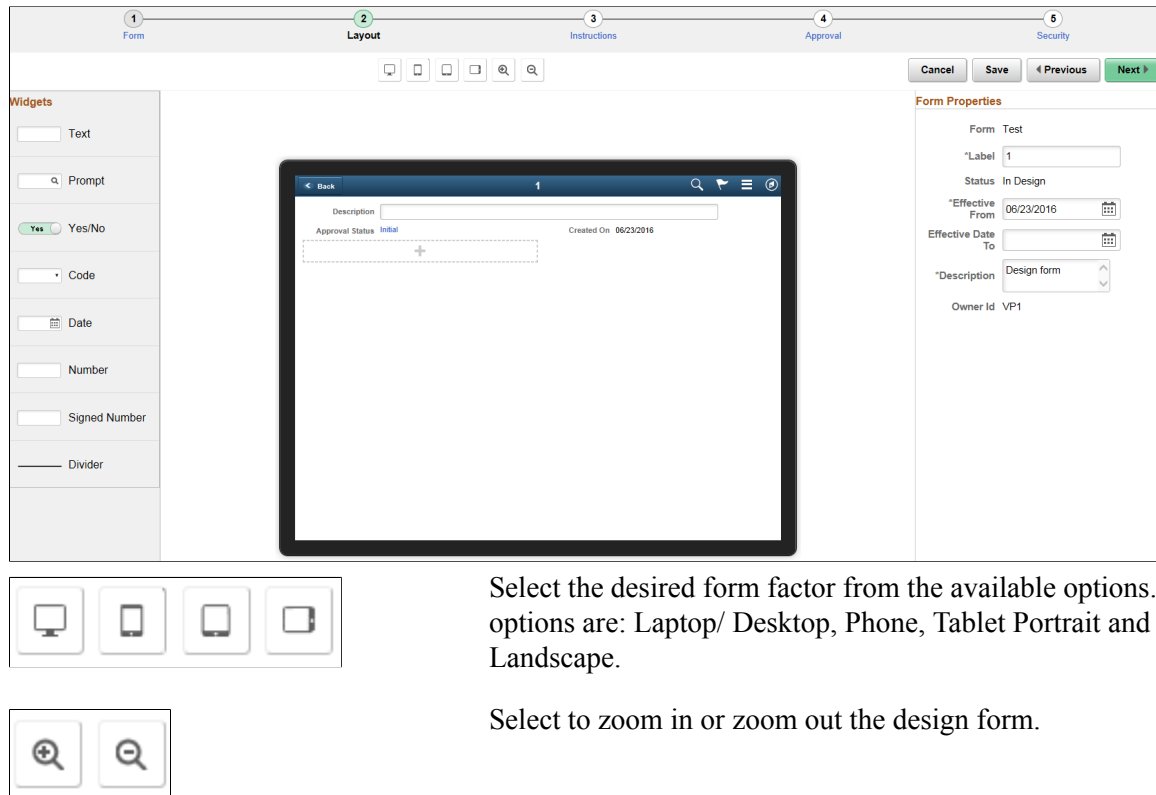
Status

The available status options are

- In Design
- Inactivated

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.

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.

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.

Form	Description	Approval Status	Created Datetime	Submitted Datetime
Project Postpone Request	Postpone Project IMPLEMENTATION by 2 Month	Initial	06/15/16 4:43PM	
Tuition Reimbursement Request	Oracle Database 12c Bootcamp	Cancelled	06/14/16 5:26PM	06/14/2016 5:28PM

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.

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.

The screenshot shows the 'Employee Self Service' interface with a 'Pending Approvals' header. On the left is a sidebar with a 'View By' dropdown set to 'Type' and a list of categories: All (13), Forms (4), Payment Request (3), Purchase Order (2), Treasury Deals (1), and Treasury Settlements (3). The main area displays a table of pending forms.

Pending Approvals			
Forms 4 rows			
Forms APPLY	from Kenneth Schumacher test	Routed 07/19/2016	>
Forms APPLY	from Kenneth Schumacher New Room	Routed 07/19/2016	>
Forms APPLY	from Kenneth Schumacher test	Routed 07/25/2016	>
Forms APPLY	from Kenneth Schumacher test	Routed 07/25/2016	>

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.

The screenshot shows the 'My Approvals' page with the title 'APPLY'. At the top right are 'Save', 'Approve', and 'Deny' buttons. The form contains the following fields:

- *Description: Test
- Approval Status: Pending Approval
- Created On: 07/19/2016
- Name: Test
- More Information: (empty text area)

Below the form is an 'Attachments' section with the text 'There is no attachment uploaded.' and an 'Add Attachment' button.

Chapter 7

Configuring Toolbars

Understanding Toolbars

This section discusses:

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

Toolbar Elements

A toolbar contains these parts:

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

Title Area

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

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

See [Toolbar Definition - Description Page](#).

Button Bar

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

- PeopleTools actions

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

- Custom actions

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

- The Personalize action

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

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

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

See [Toolbar Definition - Button Page](#).

Component-Specific Data

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

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

See [Toolbar Definition - Content Page](#)

Toolbar Footer

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

Delivered Toolbars

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

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

Delivered Toolbar Buttons

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

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

Defining Toolbar Buttons

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

Page Used to Define Toolbar Buttons

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Toolbar Button Definition Page</u>	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.

Toolbar Button Definition

Button Details

Toolbar Button ID

HRS_ADD_APPLICATION

*Description

HRS Add Application

*Short Description

Applicatio

Class Method

AddApplication

Defined Button

Toolbar Label

Add Application

Content Name

PS_APPLICATION_ADD_ICN

Disabled

Description

Recruiting Solutions Add Application

Audit History

Date Created

06/22/11 2:17:43.000000PM

PPLSOFT

Last Modified

06/22/11 2:20:34.000000PM

PPLSOFT

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

Configuring Toolbars

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

This section discusses how to configure toolbars.

Pages Used to Configure Toolbars

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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

Image: Toolbar Definition - Description page

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

Toolbar Definition
Save | Previous | Next | Clone Personalize

Toolbar ID HRS_JO_360

Description | Buttons | Content | Focus Fields

Toolbar Details

*Toolbar Page Title

☒ Display Page Title

*Description

Comments

☐ Show Date and Time

*Display Option

*Width (in pixels)

Clone To

Toolbar Personalization

☒ Allow Toolbar Personalization Personalizations 0

Reset Toolbar Personalization

Toolbar Summary Area Layout

*Summary Layout

*# of Columns

*Width Type

Column 1 Width

Column 2 Width

Toolbar Control Properties

☒ Show Toolbar Footer

☐ Show PeopleTools Buttons

☐ Show PeopleTools Hyperlinks

Audit History

Date Created 06/21/11 4:42:30.000000PM PPLSOFT

Last Modified 05/03/12 10:19:25.000000AM PPLSOFT

Toolbar ID

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

Toolbar Details

Toolbar Page Title

Enter a page title that is displayed on the left side of the page above the toolbar buttons. A page title is not a required toolbar element, but it is recommended.

Display Page Title

Select to have the page title displayed. The default state for page title is set to *On*. Page title can be set dynamically through PeopleCode.

Description	Enter a description of the toolbar (for example, the name). This is a required field that is used to help users identify the toolbar on the Toolbar Definition component.
Show Date and Time	Select to have the date and time (in the user's time zone) appear on the toolbar when the user accessed the component associated with the toolbar.
Display Option	Select <i>Icon Only</i>, <i>Icon and Text Label</i>, or <i>Text Only</i>. 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 <i>Column</i> or <i>Row</i>. The summary information area will be displayed under the button bar only after a customer or contact has been selected. Depending on the application, the

summary area may contain other information besides customer information. The information in the content area is displayed in a two-column format, with the number of fields being configurable.

of Columns (number of columns)

You can select a one or two column display if you select columns for the summary layout. The recommended number of columns is 2.

Width Type

Define the width of the columns using either a pixel or percentage amount.

Column 1 Width and Column 2 Width

Enter the width of the item display area in pixels or as a percentage of the total toolbar width.

If pixel is used, be sure that the sum of width of the columns does not equal or exceed the toolbar width value (some border and spacing values make the total width less than the toolbar width specified).

If percentage is used, be sure that the width of all columns does not exceed 100%.

Toolbar Control Properties

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

Toolbar Definition - Button Page

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

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

Image: Toolbar Button Definition - Buttons page

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

Toolbar Definition

Save | Previous | Next | Clone Personalize

Toolbar ID HRS_JO_360

Description | **Buttons** | Content | Focus Fields

Primary Toolbar Buttons Personalize | Find | 1-4 of 4

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

Secondary Toolbar Buttons Personalize | Find | First 1-13 of 13 Last

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

Seq (sequence)

Enter sequence numbers to determine the order of the toolbar buttons.

Button Name

Select the button to place on the toolbar. Buttons that perform custom actions cannot necessarily be shared between components because these actions can be component-specific.

Use the separator image (a vertical line) as needed to group buttons.

User Can Hide

Select to allow users to show or hide the button from the toolbar on the Personalize Toolbar page.

You may not want to give users the ability to manipulate the visibility of some basic yet important toolbar functions, such as Save or Add. In this case, clear the check box of these buttons.

These buttons become required buttons that users cannot manipulate on the Personalize Toolbar page. They always show up in the toolbar.

Text Label

Specify the text that is displayed on the button (for primary toolbar buttons) or next to the button (for secondary toolbar buttons) if the toolbar is configured to show both button icon and text.

Alt. Label (alternate label)

Enter the text that users can see if they put the mouse over the button.

Access Key

If you enter an access key, the keyboard shortcut Alt + *access key* brings the system focus to the associated button.

You must terminate the access key with the enter key to execute the toolbar button function associated with the hotkey. Access key is disabled in toolbar footers.

Toolbar Definition - Content Page

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

Navigation

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

Image: Toolbar Definition - Content page

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

Toolbar Definition

Save | Previous | Next | Clone Personalize

Toolbar ID HRS_JO_360

Description Buttons **Content** Focus Fields

Toolbar Content										Personalize	Find	First	1-9 of 9	Last
*Display Item ID	Row	Item	Title	Width Pixels	Width %	Label Pixels	Label %	Length of text	Truncation Token	Wrap Data	Start New Row	Span Data		
BUSINESS_	2	2	Business Unit		35		15	50	...	☐	☐	☐	+	-
DEPARTME	3	2	Department		35		15	50	...	☐	☐	☐	+	-
HRS_SCH_	4	1	Hot Job		35		15	50	...	☐	☐	☐	+	-
JOB_OPEN	1	1	Job Opening ID		35		15	50	...	☐	☐	☐	+	-
JOB_OPEN	1	2	Status		35		15	50	...	☐	☐	☐	+	-
JOB_SEGM	4	2	Segmenting		35		15	50	...	☐	☐	☐	+	-
JOB_TITLE	3	1	Job Code		35		15	50	...	☐	☐	☐	+	-
POSITION_	4	1	Position Number		35		15	50	...	☐	☐	☐	+	-
POSTING_1	2	1	Job Posting Title		35		15	50	...	☐	☐	☐	+	-

Display Item ID

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

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

Toolbar Definition - Focus Fields Page

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

Navigation

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

Image: Toolbar Definition - Focus Fields page

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

Toolbar Definition

Save

Previous

Next

Clone

Personalize

Toolbar ID HRS_JO_360

Description

Buttons

Content

Focus Fields

Page Cursor Fields

Personalize

Find

First

1 of 1

Last

*Component	*Market	*Page Name	Page Hidden	*Record	*Field Name		
			☐				

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

- Component, Market, and Page Name**

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

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

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

Viewing the Toolbar at Runtime

Access any PeopleSoft page that uses the toolbar.

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

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

Manage Job Opening

Return | Recruiting Home | Search Job Openings | Create New | Clone | Refresh | Add Note | Interviews | No Category | Personalize

Job Opening ID 503708
 Job Posting Title Bring Your Arbitration Experience to Labor Relatio...
 Job Code 600060 (Manager-Employee Relations)
 Position Number 19000025 (Manager-Employee Relations)

Status 010 Open
 Business Unit GBIBU (Global Business Institute BU)
 Department 13000 (Finance and Administration)
 Job Family KADMIN (Administrative Support)

Applicants | Applicant Search | Applicant Screening | Activity & Attachments | Details

All (9) | Applied (1) | Reviewed (0) | Screen (0) | Route (0) | Interview (8) | Offer (0) | Hire (0) | Hold (0) | Reject (0)

Applicants ? | Personalize | Find | View All | 1-9 of 9 | Last

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

Select All | Deselect All | Group Actions

Return | Recruiting Home | Search Job Openings | Create New | Clone | Refresh | Add Note | Interviews | No Category | Top of Page

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

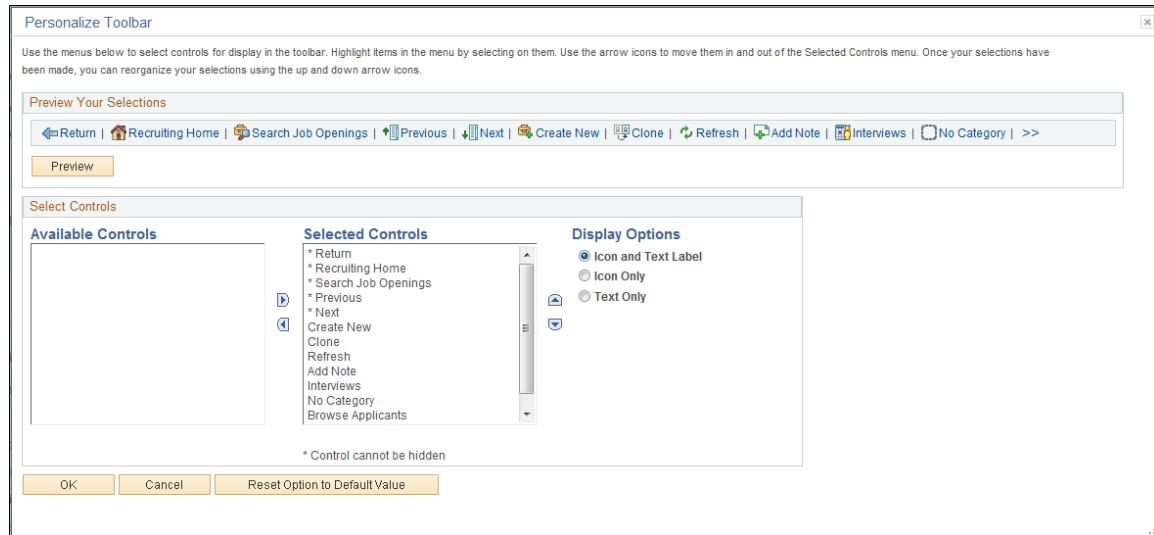
Use the Personalize Toolbar page (EOTL_TB_USER_PRSN) to set toolbar preferences.

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.

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 known 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.

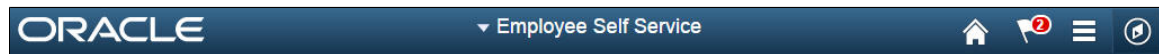
Understanding Banners in PeopleSoft Fluid User Interface

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.

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.



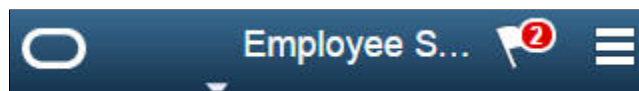
The banner on the tablet will display the following for all pages:

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.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Mobile Approval Options - General Settings Page</u>	HMAP_MBL_TYPE_SET	Configure the general settings for Mobile Approvals.
<u>Mobile Approval Options - Transactions Page</u>	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

Image: Mobile Approval Options - General Settings page

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

*Group ID	*Description	*Image		
FULLPART	Full/Part Time Status	PS_APPR_FULLPAF	+	-
LOCATION	Location Change	PS_APPR_LOCATIO	+	-
PROMOTE	Promote Employee	PS_APPR_PROMOT	+	-
REPCHG	Reporting Change	PS_APPR_REPORT	+	-
RETIRE	Retire Employee	PS_APPR_RETIRE_	+	-
SALARY	Ad Hoc Salary Change	PS_AD_HOC_APPR	+	-
TERMNATE	Terminate Employee	PS_APPR_TERMINA	+	-
TRANSFER	Transfer Employee	PS_APPR_TRANSFE	+	-

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.

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 propagated 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

General Settings Transactions

Approval Transactions

Personalize | Find | First 1-35 of 35 Last

Transaction	Handlers	Actions	Options	Images	

*Order	*Transaction ID	*Transaction Name	*Process ID	Allow Mass Approvals	Transaction Group		
1	PROMOTE	Promote Employee	PromoteEmployee	☐			
2	REPCMG	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	AbsenceCancellation	☐			
9	FULLPART	Full/Part Time Status	FTPTChangeEmployee	☐			
10	PERFORM	Performance	PerformanceManagement	☐			
11	LOCATION	Location Change	LocationChange	☐			
12	ADHOC SAL	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.

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.

General Settings Transactions

Approval Transactions

Personalize | Find | First 1-35 of 35 Last

Transaction Handlers Actions Options Images

*Order	*Transaction ID	Transaction Handler Class	Root Package ID		
1	PROMOTE		HR_PROMOTION		
2	REPCHG		HR_REPORT_CHG		
3	TRANSFER		HR_TRANSFER		
4	JOBOPEN		HRS_AWE_EVT_HNDLR		
5	JOBOFFER		HRS_AWE_EVT_HNDLR		
6	ABSENCE		GP_ABS_EVT_HANDLER		
7	ABSCANC				
9	FULLPART		HR_FULLPART		
10	PERFORM		EP_APPRAISAL		
11	LOCATION		HR_MGR_LOCATION		
12	ADHOC SAL		HR_SALARY_CHANGE		
17	RETIRE		HR_RETIRE		
18	TERMINATE		HR_TERMINATION		
99	EOFM				
100	TRANSPAY		HR_MSS_CT_APPR		

Root Package ID

The application package that holds the DataHandler, DetailDocument and SubPage classes for the transaction.

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	REPCMG	☒	☒	☐	☐	☐	
3	TRANSFER	☒	☒	☐	☐	☐	
4	JOBOPEN	☒	☒	☒	☐	☐	
5	JBOFFER	☒	☒	☒	☐	☐	
6	ABSENCE	☒	☒	☒	☐	☐	
7	ABSCANC	☒	☒	☐	☐	☐	
9	FULLPART	☒	☒	☐	☐	☐	
10	PERFORM	☒	☒	☐	☐	☐	
11	LOCATION	☒	☒	☐	☐	☐	
12	ADHOC SAL	☒	☒	☐	☐	☐	
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.

Image: Mobile Approval Options - Transactions page: Options tab

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

*Order	*Transaction ID	Require Comments for Deny	Show Terminated Transactions
1	PROMOTE	☐	☐
2	REPCMG	☐	☐
3	TRANSFER	☐	☐
4	JOBOPEN	☐	☐
5	JOB OFFER	☐	☐
6	ABSENCE	☐	☐
7	ABSCANC	☐	☐
9	FULLPART	☐	☐
10	PERFORM	☐	☐
11	LOCATION	☐	☐
12	ADHOC SAL	☐	☐
17	RETIRE	☐	☐
18	TERMINATE	☐	☐
99	EOFM	☐	☐

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.

*Order	*Transaction ID	*Small Image	Medium Image	Large Image
1	PROMOTE	PS_APPR_PROMOTE_M_FL		
2	REPCMG	PS_APPR_REPORTING_M_FL		
3	TRANSFER	PS_APPR_TRANSFER_M_FL		
4	JOBOPEN	PS_APPR_JOB_OPENINGS_M_FL		
5	JOB OFFER	PS_APPR_JOB_OFFER_M_FL		
6	ABSENCE	PS_ABSENCE_REQUEST_M_FL		
7	ABSCANC	PS_CANCEL_ABSENCE_M_FL		
9	FULLPART	PS_APPR_FULLPART_M_FL		
10	PERFORM	PS_APPR_PERFORMANCE_M_FL		
11	LOCATION	PS_APPR_LOCATION_M_FL		
12	ADHOC SAL	PS_AD_HOC_APPROVE_M_FL		

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 Approvals

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

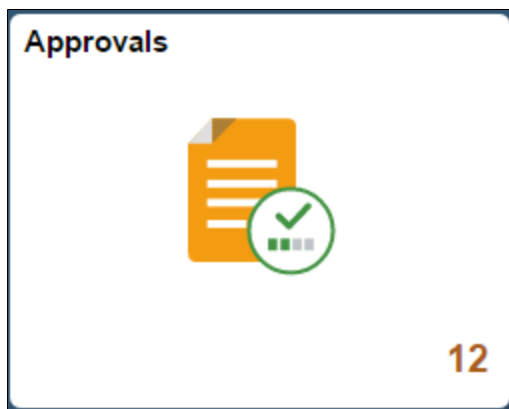
Use the Approvals tile (HMAP_APPR_TILE_FL) to review pending and historical approval requests that are associated with the logged-in manager.

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.

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.

Pending Approvals

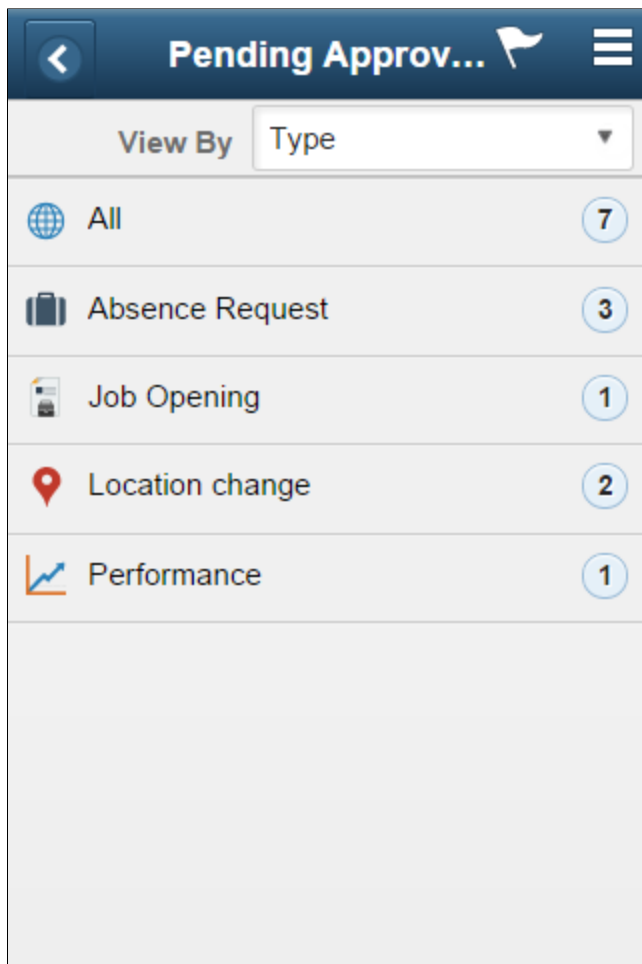
View By Type All

- Type
- Date Routed
- From
- Person

Category	Item	Status	Action
All			7 Rows
Absence Request	Location change Jessica Livingstone	To Arizona Operations Routed 05/23/2014	>
Job Opening	Performance Chris Cameron	Exceeds Expectations 01/01/2013 To 12/31/2013 Routed 05/28/2014	>
Location change	2 Job Opening Manager-Finance	Hiring Manager - Rosanna Channing Routed 08/07/2014	>
Performance	1 Absence Request Chase Calder	Bereavement 09/10/2014, 1 Days Routed 09/10/2014	>
	Absence Request Christelle Stevenson	Vacation 09/26/2014, 8 Hours Routed 09/10/2014	>
	Absence Request Christelle Stevenson	Vacation 09/30/2014, 8 Hours Routed 09/10/2014	>
	Location change Fiona Thompson	To Delaware Operations Routed 09/10/2014	>

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)

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.

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.

The screenshot shows the 'Pending Approvals' page for an 'Ad Hoc Salary Change' request. The sub-banner includes a back arrow, the title 'Pending Approvals', the request title 'Ad Hoc Salary Change', and navigation icons. Below the banner, the requester's profile 'Jessica Livingstone, Clerk-File' is shown on the left, and 'Approve' and 'Deny' buttons are on the right. The main content area is divided into several sections:

- Summary:** Displays 'Request Date 10/27/2014' and 'Requester Christelle Stevenson'.
- Proposed Changes:** A table comparing salary information before and after approval.

Salary Information	After Approval	Before Approval
Hourly Salary	12.02 USD	9.62 USD
- Requester Comments:** A text area containing the message: 'Please approve a salary change for Jessica.'
- Approver Comments:** A text area with the placeholder 'Please enter comments here.'
- Approval Chain:** Titled 'Salary Change Approval Chain', it shows a 'Pending' status and a route to the 'PosnSupervisor' (Rosanna Channing, By Position Supervisor).

At the bottom left, there is a 'Salary Details' link with a right-pointing arrow.

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.

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.

Pending Approvals																											
View By Type		Absence Request																									
- All 7 Absence Request 3 - Job Opening 1 - Location change 2 - Performance 1		☐ Select All ☒ ☐ ☐ <table> <tr> <td>Absence Request</td> <td>Bereavement 09/10/2014, 1 Days</td> <td>Routed 09/10/2014</td> <td>></td> </tr> <tr> <td>☒ Chase Calder</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Absence Request</td> <td>Vacation 09/26/2014, 8 Hours</td> <td>Routed 09/10/2014</td> <td>></td> </tr> <tr> <td>☒ Christelle Stevenson</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Absence Request</td> <td>Vacation 09/30/2014, 8 Hours</td> <td>Routed 09/10/2014</td> <td>></td> </tr> <tr> <td>☒ Christelle Stevenson</td> <td></td> <td></td> <td></td> </tr> </table> Approver Comments		Absence Request	Bereavement 09/10/2014, 1 Days	Routed 09/10/2014	>	☒ Chase Calder				Absence Request	Vacation 09/26/2014, 8 Hours	Routed 09/10/2014	>	☒ Christelle Stevenson				Absence Request	Vacation 09/30/2014, 8 Hours	Routed 09/10/2014	>	☒ Christelle Stevenson			
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Absence Request	Vacation 09/30/2014, 8 Hours	Routed 09/10/2014	>																								
☒ Christelle Stevenson																											

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.

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.

Approvals History			
View By	Type	All	48 Rows
All	48		
Absence Request	27		
Ad Hoc Salary Change	3		
Ad Hoc Salary Change	1		
Job Opening	2		
Location change	7		
Performance	1		
Promote Employee	2		
Promote Employee	1		
Reporting Change	1		
Terminate Employee	1		
Transfer Employee	1		
Transfer Employee	1		
History displays approvals for last 90 days.			
Absence Request	Bereavement 09/10/2014, 1 Days	Updated 09/15/2014	>
David Michelson	Approved on 09/15/2014		
Absence Request	Vacation 10/06/2014 to 10/08/2014, 24 Hours	Updated 09/10/2014	>
Christelle Stevenson	Denied on 09/10/2014		
Absence Request	Sick 09/26/2014, 8 Hours	Updated 09/10/2014	>
Vicki Zinn	Terminated on		
Absence Request	Vacation 10/20/2014 to 10/24/2014, 40 Hours	Updated 09/10/2014	>
David Michelson	Approved on 09/10/2014		
Absence Request	Vacation 09/15/2014, 8 Hours	Updated 09/10/2014	>
Christelle Stevenson	Approved on 09/10/2014		
Absence Request	Sick 09/09/2014, 8 Hours	Updated 09/10/2014	>
Christelle Stevenson	Approved on 09/10/2014		
Absence Request	Sick 09/01/2014, 8 Hours	Updated 09/10/2014	>
Vicki Zinn	Approved on 09/10/2014		
Absence Request	Sick 09/03/2014, 8 Hours	Updated 09/10/2014	>
Vicki Zinn	Approved on 09/10/2014		
Absence Request	Bereavement 09/10/2014, 1 Days	Updated 09/10/2014	>
Shawn Quilligan	In Process - Betty Locherty		
Absence Request	Sick 09/04/2014, 8 Hours	Updated 09/10/2014	>
Vicki Zinn	Approved on 09/10/2014		

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.

Image: Administer Approvals Menu Option

Administer Approvals menu option.

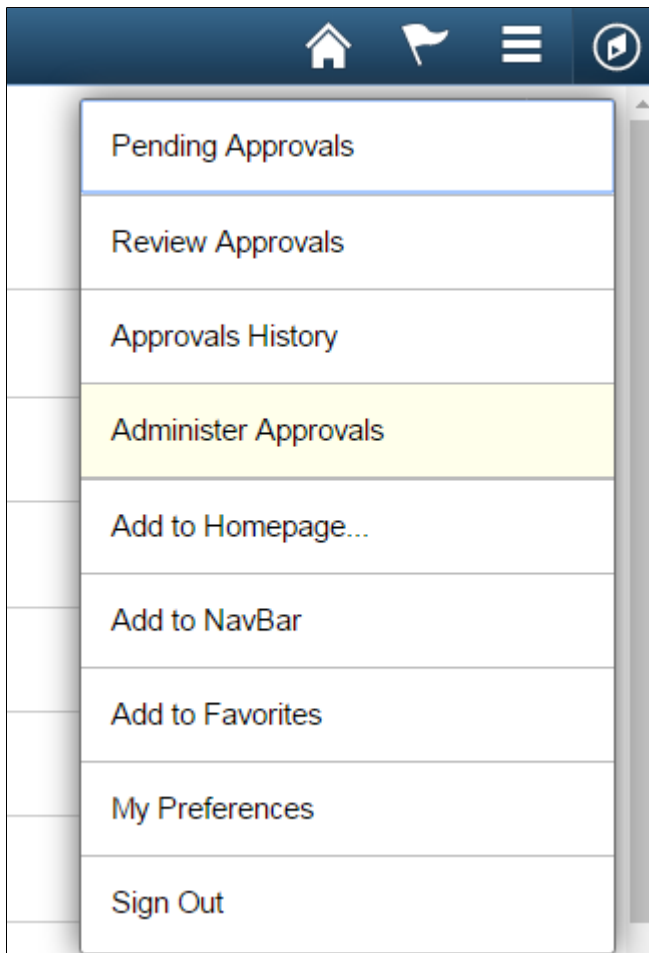
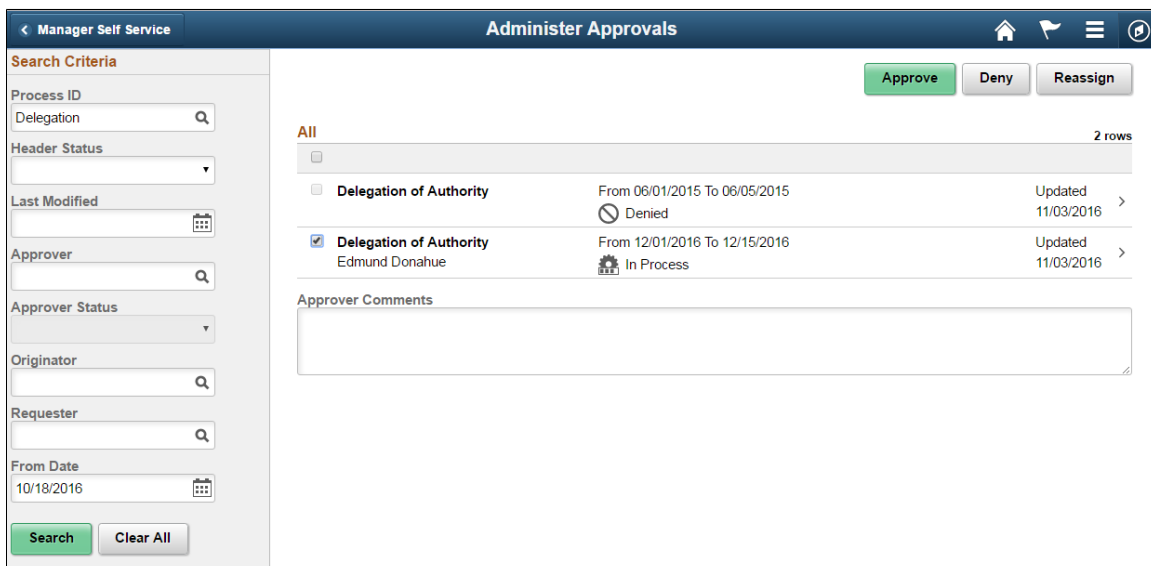


Image: Administer Approvals page

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

The screenshot displays the 'Administer Approvals' page under the 'Delegation of Authority' section. The page includes a top navigation bar with a home icon, a search icon, and a menu icon. Below the navigation bar, there are three buttons: 'Approve' (green), 'Deny' (grey), and 'More' (grey). The main content area is titled 'Summary' and contains the following information:

- Delegation From:** Edmund Donahue, Manager-Accounting (with a profile picture).
- Delegation To:** Rosanna Channing, Senior Accounting Manager (with a profile picture).
- From:** 12/01/16
- To:** 12/15/16
- Requestor:** Edmund Donahue
- Approver Comments:** A text area for comments.
- Approval Chain:** A link with a right arrow to view the approval chain.

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

administrators can approve, deny or perform more actions on the approval transaction. The More option includes Reassign, Pushback and Resubmit actions.

Setting Up and Working with Fluid Delegation

Understanding Delegation

Delegation is when a person authorizes another to serve as a his or her representative for a particular task or responsibility. With the Delegation feature, users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

Delegation of authority to perform managerial transactions is usually prompted by one of these scenarios:

- A manager takes leave and wants to delegate authority of managerial transactions to another person while away from the office.
- A senior executive does not have the time to process transactions and wants to delegate this authority to another person, such as an assistant.

For more information, see the video feature overview on PeopleSoft Fluid Delegation

<https://www.youtube.com/watch?v=-qkD6LgOGP8>

Note: By default, Fluid Delegation is enabled for all PeopleSoft applications. However, HCM applications can still choose to implement classic delegation. If classic Delegation Framework is enabled for your PeopleSoft HCM application, then refer the classic Delegation Framework documentation in the HCM Application Fundamentals book.

Delegation Terminology

The following terms are important to the understanding of Delegation feature and are used throughout these topics:

Delegation	The act of delegating one's authority to another user.
Delegator	A person that delegates authority to another user.
Proxy	A person granted authority to act on behalf of another user.
Delegate Initiation	The Delegation Framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf.
Delegate Approvals	The Delegation framework allows you to separate the task of initiating a transaction from approving the same transaction on

	someone's behalf. Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf.
Delegated Authority	The rights and privileges that are delegated from the delegator to the proxy.
Delegation Request	A request from the delegator to the proxy to take on delegated authority.
Delegation Period	The time range in which the delegated authority is in effect.
Delegation Administrator	The system administrator who is responsible for configuring, managing, and maintaining delegated authorities.
Revoke	When a delegator or delegation administrator withdraws delegated authority.

Delegation Framework

The core of the Delegation feature is the Delegation framework. The Delegation framework manages a proxy's authority over a delegated transaction. When a proxy has delegated authority, the Delegation framework temporarily assigns the proxy a unique role that is specific to the delegated transaction. The role enables the proxy to access the components and pages associated with the delegated transaction. When the proxy no longer has delegated authority, the Delegation framework removes that role and thus prevents the proxy from performing the transaction.

The Delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct report or another person lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
- Lateral delegation of authority to a peer either within the same division or in a different division within the reporting hierarchy

Integration with the Approval Framework

The Delegation framework integrates with the Approval Framework. This integration provides several benefits. First, the integration between the Delegation framework and Approval Framework makes the Approval Framework aware of delegated authorities in the system. Second, the Delegation framework uses the Approval Framework to manage the acceptance and rejection of delegation requests.

Delegation Request Creation Through Self-Service

The Delegation framework is a component of the PeopleSoft self-service solution. Users can create delegation requests for selected transactions through self-services pages.

When creating a delegation request, the delegator can:

- Delegate only the transactions to which they have access.

For example, an employee who is not a manager does not have access to manager self-service transactions and, therefore, cannot delegate manager-specific transactions.

- Delegate to only one proxy per delegation period per transaction.
- Delegate all transactions to a single proxy, or delegate different transactions to different proxies.

Delegation Administration

Delegation administrators can use the administrative components for delegation to perform several useful tasks. They can:

- Create delegation requests on behalf of delegators through the [Adding Delegation Requests by Administrator](#) component.
- Review delegation requests and, if necessary, revoke them on behalf of delegators through the [Administer Delegation Page](#)
- Process all delegation transactions in batch daily through the [Maintain Delegated Authorities Page](#).

Notifications

The system uses email and worklist notifications to notify managers and proxies of new delegation requests and transactions pending approval. The system creates a worklist item only on the proxy's worklist, not on the delegator's worklist (provided that you have set up worklist items as a preference for receiving notifications). The system sends email notifications for approval to the proxy and, if approval framework is configured correctly, the system also sends the delegator a courtesy email notification. Delegation administrators can use the Generic Templates component to configure different email templates for the proxy and delegator.

See [Reviewing Delivered Notification Templates for Delegation](#).

Requests Statuses and Delegation Statuses

The Delegation framework manages delegation requests through request statuses and delegation statuses. A request status defines the status of the delegation request. A delegation status defines whether a proxy's delegation authority is active or inactive. The combination of these two statuses determines how the Delegation framework handles delegations.

This table lists request statuses for delegation and describes how the Delegation framework handles a delegation depending on the delegation status associated with each request status:

<i>Request Status</i>	<i>Delegation Status</i>	<i>Description</i>
Submitted	Inactive	When a delegator creates a new delegation request the system sets the request status to <i>Submitted</i> and delegation status to <i>Inactive</i> .

<i>Request Status</i>	<i>Delegation Status</i>	<i>Description</i>
Accepted	Active	When a proxy accepts a delegation request, the system sets the request status to <i>Accepted</i>. The delegation status becomes <i>Active</i> only when the following two conditions occur: • The proxy accepts the delegation request. • The system date is greater than or equal to the From Date and less than or equal to the To Date of the delegation period. Once the delegation status becomes <i>Active</i>, the system reassigns all pending transactions from the delegator to the proxy. The system also assigns the proxy a temporary permission list and role for the transaction, which grants the proxy navigation access to the online transaction. If the To Date of the delegation request is blank, the request status remains <i>Active</i> until revoked by delegator or administrator.
Accepted	Inactive	If the proxy accepts the delegation request but the delegation request is future-dated, the delegation status remains <i>Inactive</i> until the system date is greater than or equal to the From Date.
Rejected	Inactive	When a proxy rejects a delegation request, the system sets the request status to <i>Rejected</i>. The delegation status remains <i>Inactive</i>.

<i>Request Status</i>	<i>Delegation Status</i>	<i>Description</i>
Ended	Inactive	When the delegation authority period for the proxy expires, the system sets the request status to <i>Ended</i> and changes the delegation status to <i>Inactive</i>. This change occurs when the system date is greater than the To Date of the delegation authority period. The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.
Revoked	Inactive	When the delegator revokes a delegation request or the delegation administrator revokes the delegation request on behalf of the delegator, the system sets the request status to <i>Revoked</i> and changes the delegation status to <i>Inactive</i>. The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.

Implementation Considerations for Delegation

When implementing Delegation functionality, you should consider the following:

The important considerations are:

- Should you enable delegation functionality?
- What transactions should you enable for delegation?
- What hierarchy should you enable for delegation?

You should also analyze the following security needs and create a plan that covers these needs:

- Analyze delivered permission lists and roles for delegation components to decide if the implementation will use the delivered objects or create new objects.
- Decide how to define a standard user profile for the delegation administrator that contains the relevant roles.

- Decide how to define a standard user profile for the delegator that contains the relevant roles.
- Decide how to define a standard user profile for the proxy that contains the relevant roles.
- Decide if the delegator and proxy should have the same or different profiles.

Steps to Set Up Delegation

To implement transactions in the delegation framework:

1. Register delegation transactions for workflow on the [Workflow Transactions Page](#).
2. Set up delegation permission lists and roles through PeopleTools Security components.
3. Define installation settings for delegation on the [Installation Settings Page](#).
4. Configure transactions for delegation on the [Configure Delegation Transaction Page](#).

Registering Workflow Transactions

This topic discusses how to register workflow transactions.

Page Used to Register Workflow Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Workflow Transactions Page	EO_TRANSACTIONS	Register workflow transactions for self-service transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category. For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

Workflow Transactions Page

Use the Workflow Transactions page (EO_TRANSACTIONS) to register workflow transactions for self-service transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category.

For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

Navigation

Enterprise Components > Delegation > Workflow Transactions

Image: Workflow Transactions page: Details1 tab

This example illustrates the fields and controls on the Workflow Transactions page: Details1 tab.

Workflow Transactions

Workflow Transactions

In the grid below, insert a row for each transaction that will use the Approval Workflow Engine (AWE) and the Delegation Framework. Transactions can not be registered in both the Workflow Transactions and the AWE and Delegation Transactions grids.

Approval Workflow Engine (AWE) and Delegation Transactions

Details1 Details2

Transaction Name	Category	Description		
Cash Advances	Expenses	Cash Advances	+	-
Expense Reports	Expenses	Expense Reports	+	-
Payment Request	Payables	Payment Request	+	-
Requisition	Procurement	Requisition	+	-
Time Adjustments	Expenses	Time Adjustments	+	-
Time Reports	Expenses	Time Reports	+	-
Travel Authorizations	Expenses	Travel Authorizations	+	-

Save Notify

Image: Workflow Transactions page: Details2 tab

This example illustrates the fields and controls on the Workflow Transactions page: Details2 tab.

Workflow Transactions

Workflow Transactions

In the grid below, insert a row for each transaction that will use the Approval Workflow Engine (AWE) and the Delegation Framework. Transactions can not be registered in both the Workflow Transactions and the AWE and Delegation Transactions grids.

Approval Workflow Engine (AWE) and Delegation Transactions

Details1 Details2

Transaction Name	Approval Process ID	Delegate Initiation	Delegate Approvals	Combine Partial	Limit Drill Up		
Cash Advances	CAApproval	☐	☒	☐	☐	+	-
Expense Reports	ERApproval	☐	☒	☐	☐	+	-
Payment Request	PaymentRequestApproval	☐	☒	☐	☐	+	-
Requisition	Requisition	☐	☒	☐	☐	+	-
Time Adjustments	TJApproval	☐	☒	☐	☐	+	-
Time Reports	TRApproval	☐	☒	☐	☐	+	-
Travel Authorizations	TAApproval	☐	☒	☐	☐	+	-

Save Notify

Transaction name

Enter the name of the self-service transaction in either one tab or the other, not both.

Category

Assign the self-service transaction to a category. You can set up categories in the Workflow Transaction Categories page.

Description

Enter a description of the self-service transaction.

Approval Process ID

When implementing the Approval Framework, you define a unique transaction registry ID, called a process ID, for each of your self-service transactions on the Register Transactions page. Select the approval process ID that you have defined for this self-service transaction. By creating this link between the self-service transactions and the Approval Framework, the self-service transactions can dynamically retrieve this approval process ID by transaction name and thus invoke the Approval Framework. The Approval Framework requires this parameter during processing.

Delegate Initiation

Select to enable delegation of transaction initiation for the corresponding self-service transaction that uses the Approval Framework. The transaction then becomes available for configuration as an initiate-type delegation transaction. Configure delegation transactions on the Configure Delegation Transaction page.

Delegate Approvals

Select to enable delegation of transaction approval for the corresponding self-service transaction. The transaction then becomes available for configuration as an approval-type delegation transaction. This functionality is available only for transactions that you register with the Approval Framework..

Note: If you select both the Delegation Initiation and the Delegate Approvals check boxes, you can configure the transaction for delegation of initiations and approvals. Configure delegation transactions on the Configure Delegation Transaction page.

Combine Partial

Select to have the system continue searching for a department manager even after it has found a partial position reports to manager. Deselect to have the system stop searching for the manager ID once it is found by one of the access types.

Limit Drill Up

Select to enable the system to continue to drill up an access type until a manager is found. Deselect this check box to allow the system to go up to the next level only.

Note: When implementing the Delegation framework, you must register all self-service transactions. Only the registered workflow transactions that you enable for delegation initiation or approval are available for subsequent delegation transaction setup.

Setting Up Permission Lists and Roles for Delegation

These topics provide an overview of permission lists and roles for delegation and discuss how to set up permission lists and roles.

Understanding Permission Lists and Roles for Delegation

Before configuring delegation transactions, you must set up permission list and role security for your delegation transactions. The PeopleSoft HCM application delivers as system data several permission lists that are required for use of the Delegation framework. You can attach these permission lists to roles where needed to enable users access to delegation functionality.

This table describes the delivered permission lists for the Delegation framework:

Permission List Name	Description	Roles Assigned to Permission List
HCCPDL1000	Enables HCM users to access the delegation setup components that are part of the Delegation Setup Center page and the delegation administrative components that are part of the Approvals and Delegation page.	HCM Delegation Admin (administrator)
HCCPDL1100	Enables HCM users to access the Manage Delegation page, which is the home page for self-service transactions.	Manager Employee
EODL1000	Enables Enterprise Objects users to access the delegation setup components that are part of the Delegation Setup Center page and the delegation administrative components that are part of the Approvals and Delegation page.	EODL_Administrator
EODL1100	Enables Enterprise Objects users to access the Manage Delegation page, which is the home page for self-service transactions.	Manager Employee

In addition to permission lists, you need to define the delegation administrator role and assign the HCCPDL1000 permission list to it. Once assigned to a user, this role enables that designated delegation administrator access to the delegation setup and administrative components. The PeopleSoft HCM system delivers the HCM Delegation Admin role as system data for this purpose. This role already has the HCCPDL1000 permission list assigned to it.

PeopleSoft HCM applications that use delegation functionality deliver many transactions that are preconfigured for the Delegation framework. These transactions are preconfigured with a unique permission list and role for each component where the proxy can perform the delivered delegated transaction. When a proxy status becomes active, the system inserts the unique role for that delegation transaction into the proxy's user profile. The role contains the permission list that enables the proxy access to the component for performing the delegated transaction. When the proxy status becomes inactive, the system removes that role from the proxy's user profile. To configure delegation transactions, use the Configure Delegation Transaction page to associate to the transaction the unique role and the component where the transaction is performed. The unique permission list is associated with the role in PeopleTools security.

See [Configuring Delegation Transactions](#).

When configuring transactions for delegation you must use a unique role and permission list for each component that you associate with a delegated transaction. You must attach the permission list to portal

security for the component and associate the unique role with the unique permission list. You might also need to run the Portal Security Sync process (PeopleTools > Portal > Portal Security Sync) to ensure that the permission list is associated with the portal navigation.

Warning! Do not use an existing role to configure a delegation transaction because the delegation framework grants and revokes the role from the proxy's security profile according to the proxy's delegated authority over a transaction. This will cause a proxy who already has access to the specified component to lose access to that component entirely when the delegation framework revokes the delegated authority.

Related Links

[Configuring Delegation Transactions](#)

Setting Up Permission Lists and Roles

Set up permission list and role security for your delegation transactions.

See *PeopleTools: Security Administration*.

Defining Delegation Installation Settings

This topic discusses how to define delegation installation settings.

Pages Used to Define Delegation Installation Settings

Page Name	Definition Name	Usage
Installation Settings Page	EODL_INSTALL_PG	Define delegation installation settings. This task is typically performed by the delegation administrator after someone has set up permission lists and roles for delegation.
Delegation Installation Settings Page	HCDL_SYS_SETUP	Configure the Delegation Installation settings for the HCM application.

Installation Settings Page

Use the Installation Settings page (EODL_INSTALL_PG) to define delegation installation settings.

This task is typically performed by the delegation administrator after someone has set up permission lists and roles for delegation.

Navigation

Enterprise Components > Delegation > Installation Settings

Image: Installations Settings page

This example illustrates the fields and controls on the Installation Settings page for PeopleSoft pillars other than HCM. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Settings' page. At the top, there's a navigation bar with 'Employee Self Service' and 'Installation Settings'. To the right of the navigation bar are icons for home, search, notifications, and a menu. Below the navigation bar are links for 'New Window', 'Help', and 'Personalize Page'. The main content area has a 'Days After Current Date' field with the value '7'. Below this is a 'Cascade Delegations' checkbox. The 'Application Override' section is highlighted in orange and contains two search fields: '*Root Package ID' with the value 'EODL' and '*Application Class Path' with the value 'DelegationDefaultImplementor'. At the bottom, there are 'Save' and 'Notify' buttons.

Days After Current Date

If the delegation's To date is blank or if you enter 0, then this number will be added from the current date.

Cascade Delegations

This is the system indicator for implementing cascading delegations. This has a higher precedence than the cascade delegations option on the Delegation Transaction page.

Root Package ID

Choose the Root package of the implementing Application Class. This is limited to only root packages that have classes that implement `DelegationImplementor` or `DelegationDefaultImplementor`.

Application Class Path

The path and Application Class name of the pillar's implementing Application Class. This is limited by classes under the Root Package ID.

Image: Installation Settings page for HCM

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

The screenshot shows the 'Installation Settings' page within the 'Manager Self Service' interface. The page has a blue header with navigation links: 'New Window', 'Help', and 'Personalize Page'. The main content area includes a 'Days After Current Date' input field with the value '7', a 'Cascade Delegations' checkbox which is unchecked, and an 'Application Override' section. This section contains two text input fields: '*Root Package ID' with the value 'HCSC_DELEGATION_FL' and '*Application Class Path' with the value 'DelegationImplementor'. Below these fields is a 'Configure Application' button. At the bottom left of the page are 'Save' and 'Notify' buttons.

Days After Current Date

If the delegation's To date is blank or if you enter 0, then this number will be added from the current date.

Cascade Delegations

This is the system indicator for implementing cascading delegations. This has a higher precedence than the cascade delegations option on the Delegation Transaction page.

Root Package ID

Choose the Root package of the implementing Application Class. This is limited to only root packages that have classes that implement DelegationImplementor or DelegationDefaultImplementor.

Application Class Path

The path and Application Class name of the pillar's implementing Application Class. This is limited by classes under the Root Package ID.

Configure Application

Click this button to go to the Configure Application page to configure the delegation installation settings for the application.

Delegation Installation Settings Page

Use the Delegation Installation Settings page (HCDL_SYS_SETUP) to configure the delegation installation settings for the HCM application. Other areas of PeopleSoft does not have this setting.

Navigation

Click the Configure button on the Installation Settings page.

Image: Delegation Installation Settings Page

This example illustrates the fields and controls on the Delegation Installation Settings Page. You can find definitions for the fields and controls later on this page.

Use Fluid Delegation

Enables Fluid delegation in the application. By default this check-box is selected.

Administrator Role

Select the role that you want to designate as the delegation administrator. The delegation framework routes errors to this role. The PeopleSoft system delivers the HCM Delegation Admin role as system data for this purpose. You can select that role or any other role.

Enabled Hierarchies

Use this group box to define options for how self-service users can select a proxy when delegating a transaction. Your selections here determine the available proxies that the system displays on the Select Proxy By Hierarchy page when users create delegation requests. These settings apply to all transactions that are using the Delegation framework. For example, you cannot specify that the system display

available proxies for time-off requests by supervisor ID and available proxies for promotions by Reports To Position.

All Persons

Select this check box to enable open selection of the proxy when users are creating a delegation request. The system displays the Search by Name link on the Select Proxy By Hierarchy page. When users click this link, the system displays the Select Proxy By Name page, where users can search for and select as proxy any active person in the system with a Job Data record. By default, the system selects this check box.

Specific Hierarchies

Click this check box to require delegators to select a proxy based on a specific hierarchy. You can only select one hierarchy. The hierarchy that you select applies to all delegation requests across the system regardless of the transaction type. When self-service users search for a proxy by hierarchy, they can search up the hierarchy as well as down the hierarchy.

Your choices are:

- **By Dept Security Tree:** Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- **By Supervisor ID:** Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.
- **By Supervisor ID:** Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.
- **By Reports To Position:** Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position.

This option is available only if you have enabled the Manage Positions business process on the Installation Table - HCM Options page.

- **By Part Posn Mgmt Supervisor:** Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial position management. The system searches for reporting relationship based on Report To values first, and then for Supervisor ID values.

This option is available only if you have enabled the Manage Positions business process on the Installation Table - HCM Options page.

- **By Part Posn Mgmt Dept Mgr ID:** Defines the reporting relationship by the Reports To field on the Work Location page (JOB_DATA1) and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use partial position management. The system searches for reporting relationship based on Report To values first, and then for Department Manager ID values.
- **By Group ID:** Determines data access using the group ID set up in the Group Build feature.

If you select this option, you must select a valid group ID in the field that the system displays to the right. You define group IDs using the Group Build - Group Definition component.

These hierarchies relate to direct reports functionality and are the same as those found in the Access Type field on the Target Information page of the Direct Reports Setup component.

If you select the Specific Hierarchies check box and the All Persons check box, then this hierarchical selection of proxy becomes a preference rather than a requirement because the delegator has the option to either select from the list or search for any active proxy in the system.

Include

Select the organizational relationships that should be included in the list of current people when performing a delegation. Persons with the relationship of Employee are automatically included in the list, however you can also choose to include the following people when they are active with a Job Data record.

- Contingent Workers
- Persons of Interest

Configuring Delegation Transactions

These topics provide an overview of delivered delegation transactions and discuss how to configure delegation transactions.

Page Used To Configure Delegation Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Configure Delegation Transaction Page</u>	EODL_TXN_SETUP	Configure transactions for delegation. This task is performed by delegation administrators after setting up delegation installation settings so that the transaction becomes available for delegation configuration.

Configure Delegation Transaction Page

Use the Configure Delegation Transaction page (EODL_TXN_SETUP) to configure transactions for delegation.

This task is performed by delegation administrators after setting up delegation installation settings so that the transaction becomes available for delegation configuration.

Navigation

Enterprise Components > Delegation > Delegation Transaction

Image: Configure Delegation Transaction page

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

Transaction Name

Displays the name of the transaction. If you are adding a new value, the system prompts you to select a value from the list of transactions that have been configured for workflow *and* selected for delegation initiation or approval on the Workflow Transactions page. Transactions that do not meet these criteria are not available for delegation configuration.

Transaction Type

Displays whether the configuration of the transaction is for delegation initiation or approval. The Delegation framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. If you are adding a new value, the system prompts you to select either:

- *Initiate*: Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf.

- *Approve*: Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf.

Although both options are available for the selected transaction, the value that you select is valid only if you have selected the corresponding Delegate Initiation or Delegate Approvals check box on the Workflow Transactions page.

Description

Enter the description of the delegation transaction configuration. The system uses this description throughout the delegation pages when displaying related transactions. As a default, the system uses the concatenation of the transaction type and transaction name. We strongly recommend that you always assign a meaningful description.

Effective Date and Status

Enter the effective date of the transaction and whether it is active or inactive within the Delegation framework. By entering new effective-dated rows, you can enable or disable the transaction, as necessary. When entering a new row, the system uses the system date for the effective date by default.

Security

Use this group box to establish security access for proxies that are delegated authority to the given transaction. While a delegation transaction is active, the Delegation framework temporarily assigns the specified role to the proxy and grants the proxy access to the specified component.

Role Name

Select the role that contains the permission list for the relevant component where one processes the given transaction. Each transaction that you enable for delegation must have a unique role and associated permission list that are solely for delegation purposes.

When a proxy's delegated authority becomes active, the system temporarily assigns this role to the proxy's user profile so that the proxy can access the transaction component while having delegation authority. When the proxy's delegation authority ends, the system deletes this role from the proxy's user profile. Thus, the proxy no longer has access to the transaction component.

If an approval transaction requires that the approver be in a particular role, then the proxy who is delegated authority over that transaction must have the same role to approve the transaction. For example, if promotion approval requires that the approver be a manager, then the proxy who is delegated authority to approve promotions must also be a manager to successfully approve a promotion request.

This field prompts from roles set up in the Roles component.

Warning! You must use a unique role for each component that you associate with a delegated transaction.

See [Understanding Permission Lists and Roles for Delegation](#).

Component Name

Select the object name of the component where users can process requests for the given transaction. When a user creates a delegation request, the system checks the delegator's user profile to determine if the delegator has the authority to access this component. The system permits the creation of a delegation request for the transaction only if the delegator has security access. Refer the Delivered Delegation Transactions tables below to determine the components to be used for the related transactions to be enabled for delegation.

Optional Parameters

Use this group box when you need to create a link on the Delegation pages that will take the user to a product specific page to complete the delegation process.

Use the Display Link Label fields for retrieving the link labels from the message catalog.

Message Set Number and Message Number

Enter the number that will identify the label that should be used for the link that will appear on the Delegation Detail page. This label is maintained at the product specific

Note: For more information about application-specific message numbers, refer to the application-specific documentation.

Use Delegation Event Handler Class fields to identify the product specific application classes.

Root Package ID

Select the application package that owns the component to which the person will be directed when he or she clicks the link in the Delegation pages.

Path

Enter the class that will take the user to the product specific component to finished the delegation process.

Use Delegation Options fields to configure additional parameters in delegation.

Cascade Delegation

Choose if the delegated transactions can be cascaded.

Include Delegator

Choose if the delegator should also be included as an approver for the transaction.

Delivered Delegation Transactions for HCM

This table lists the delivered delegation transactions for PeopleSoft HCM

Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
Delegate_ePerformance_Dev	delegate_ePerformaceDevDoc_Upd	EP_CURRENT_MY_DVL	Delegate the ability to update development documents.

Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
Delegate_ePerformance_Doc	delegate_ePerformaceDoc_Update	EP_CURRENT_MY_PRF	Delegate the ability to update performance documents.
EP_APPRAISAL	Delegate_PerformancDoc_Approve	EP_APPRAISAL_APPR	Delegate the approval of performance documents.
GP_ABS_EESS_BAL	Delegate Employee Absence Bal	GP_ABS_EESS_BAL	Delegate the initiation of employee absence balance inquiries.
GP_ABS_EESS_HIST	Delegate Employee Absence Hist	GP_ABS_EESS_HIST	Delegate the initiation of employee absence history inquiries.
GP_ABS_EESS_REQ	Delegate Employee Absence Rqst	GP_ABS_EESS_REQ	Delegate the initiation of employee absence requests.
GP_ABS_MGRSS_BAL	Delegate Manager Absence Bal	GP_ABS_MGRSS_BAL	Delegate the initiation of manager absence balance inquiries.
GP_ABS_MGRSS_HIST	Delegate Manager Absence Hist	GP_ABS_MGRSS_HIST	Delegate the initiation of manager absence history inquiries.
GP_ABS_MGRSS_REQ	Delegate Manager Absence Rqst	GP_ABS_MGRSS_REQ	Delegate the initiation of manager absence requests.
GP_SS_ABS_APPR_L	Delegate Manager Absence Appr	GP_SS_ABS_APPR_L	Delegate the approval of manager absence requests.
HGA_ESS_ABS_BALANCE_FLU	Delegate Empl Abs Bal Fluid	HGA_SS_BAL_FLU	Delegate the initiation of employee absence balance inquiries in fluid.
HGA_ESS_ABS_CANCEL_FLU	Delegate Empl Abs Cancel Fluid	HGA_SS_REQCAN_FLU	Delegate the initiation of employee absence cancellations in fluid.
HGA_ESS_ABS_HISTORY_FLU	Delegate Empl Abs Hist Fluid	HGA_SS_REQHIST_FLU	Delegate the initiation of employee absence history inquiries in fluid.
HGA_ESS_ABS_REQUEST_FLU	Delegate Empl Abs Req Fluid	HGA_SS_REQ_FLU	Delegate the initiation of employee absence requests in fluid.

Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
HGA_SS_MBAL_FLU	Delegate Manager Abs Bal Fluid	HGA_SS_BAL_FLU	Delegate the initiation of manager absence balance inquiries in fluid.
HGA_SS_MREQCAN_FLU	Delegate Mrg Cancel Abs Fluid	HGA_SS_REQCAN_FLU	Delegate the initiation of manager absence cancellations in fluid.
HGA_SS_MREQHIST_FLU	Delegate Mrg Abs Hist Fluid	HGA_SS_REQHIST_FLU	Delegate the initiation of manager absence history inquiries in fluid.
HGA_SS_MREQ_FLU	Delegate Manager Abs Req Fluid	HGA_SS_REQ_FLU	Delegate the approval of manager absence requests in fluid.
HR_CP_CAREERPLAN	Delegate Manage Career Plan	HR_CP_REDIRECT	Delegate the initiation of manager career plans.
HR_CP_MGR_PRO_CHART	Delegate Career Prog Chart	HR_CP_REDIRECT_CHA	Delegate the initiation of employee career progression charts.
HR_EE_INF_MGR	Delegate_View_Employee_Info	HR_EE_INF_MGR	Delegate the initiation of employee information inquiries.
HR_FULL_PART_CHG (Approve)	Delegate_FullPart_Approve	HR_FULLPART_APPR	Delegate the approval of changes in full-time and part-time status.
HR_FULL_PART_CHG (Initiate)	Delegate_FullPartStat_Initiate	HR_MGR_FULL_PART	Delegate the initiation of changes in full-time and part-time status.
HR_LOCATION_CHANGE (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of location changes in Guided Self Service.
HR_LOCATION_CHANGE (Initiate)	Delegeate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of location changes in Guided Self Service.
HR_LOCATION_CHG (Approve)	Delegate_Location_Approval	HR_MGR_LOC_APPR	Delegate the approval of location changes.
HR_LOCATION_CHG (Initiate)	Delegate_LocChange_Initiate	HR_MGR_LOCATION	Delegate the initiation of location changes.

Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
HR_PROMOTION (Approve)	Delegate_Promotion_Approve	HR_PROMOTE_APPR	Delegate the approval of promotions.
HR_PROMOTION (Initiate)	Delegate_Promotion_Initiate	HR_PROMOTE_MGR	Delegate the initiation of promotions.
HR_REPORT_CHG (Approve)	Delegate_ReportingChg_Approve	HR_MGR_REPORT_APPR	Delegate the approval of reporting changes.
HR_REPORT_CHG (Initiate)	Delegate_ReportingChg_Initiate	HR_MGR_REPORT_CHNG	Delegate the initiation of reporting changes.
HR_RETIRE (Approve)	Delegate_Retire_Approve	HR_RETIRE_APPR	Delegate the approval of employee retirements.
HR_RETIRE (Initiate)	Delegate_Retire_Initiate	HR_RETIRE_EE	Delegate the initiation of employee retirements.
HR_TBH_JOB	Delegate Add TBH	HR_TBH_JOB	Delegate the initiation of a template-based hire for an end-user.
HR_TBH_STATUS	Delegate TBH Status	HR_TBH_STATUS	Delegate the initiation of template-based hire statuses.
HR_TERM (Approve)	Delegate_Terminate_Approve	HR_EE_TERM_APPR	Delegate the approval of employee terminations.
HR_TERM (Initiate)	Delegate_Terminate_Initiate	HR_EE_TERMINATE	Delegate the initiation of employee terminations.
HR_TRANSFER (Approve)	Delegate_Transfer_Approve	HR_TRANSFER_APPR	Delegate the approval of transfers.
HR_TRANSFER (Initiate)	Delegate_Transfer_Initiate	HR_TRANSFER_MGR	Delegate the initiation of transfers.
JobOffer	Delegate_JobOffer_Approve	HRS_RECRUIT_CONSOL	Delegate the approval of job offers.
JobOpening	Delegate_JobOpening_Approve	HRS_RECRUIT_CONSOL	Delegate the approval of job openings.
TL_MSS_EE_SECH_PRD (Approve)	Delegate Manage AppRpt Time	TL_MSS_EE_SRCH_PRD	Delegate the approval of managing reported time.

Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
TL_MSS_EE_SECH_PRD (Initiate)	Delegate Manage Report Time	TL_MSS_EE_SRCH_PRD	Delegate the initiation of managing reported time.
TL_OT_MNGR_LIST (Approve)	Delegate Approve Overtime	TL_OT_HISTORY_LIST	Delegate the approval of overtime.
TL_OT_MNGR_LIST (Initiate)	Delegate Manage Overtime Req	TL_OT_MNGR_LIST	Delegate the initiation of overtime requests.
TL_SRCH_APPRV_GRP	Delegate Manage App Pay Time	TL_SRCH_APPRV_GRP	Delegate the approval of payable time.
WCSCompConfirmer	Delegate Update Compensation	WCS_ECM_MSS_HOME	Delegate the initiation of confirming compensation proposals.
WCSCompReviewer	Delegate Update Compensation	WCS_ECM_MSS_HOME	Delegate the initiation of reviewing compensation proposals.
WCSCompSubmitter	Delegate Update Compensation	WCS_ECM_MSS_HOME	Delegate the initiation of submitting compensation proposals.
WCS_ECM_AWE_HOME	Delegate Approve Compensation	WCS_ECM_AWE_HOME	Delegate the approval of compensation.
W3EB_APPR_SUMMARY	Delegate Manage Appr Document	W3EB_APPR_SUMMARY	Delegate the approval of life event documents.

Delivered Delegation Transactions for PeopleSoft Financials and Supply Chain Management

This table lists the delivered delegation transactions for PeopleSoft Financials and Supply Chain and their configuration

Transaction Name	Component Name	Delegation Transaction Description
Payment Request	PR_APPROVAL	Delegate the approval of payment requests.
Requisition	PV_REQ_APPROVAL	Delegate the approval of Requisitions.
Structure Request	EOAWMA_MAIN_FL	Delegate the approval of fluid financial structure request.

Transaction Name	Component Name	Delegation Transaction Description
Cash Advances	EX_ADV_APPR	Delegate approval of cash advances.
Expense Reports	EX_SHEET_APPR	Delegate approval of expense reports.
Time Adjustments	EX_TADJ_APPR	Delegate approval of time adjustments.
Time Reports	EX_TIME_APPR	Delegate approval of time reports.
Travel Authorizations	EX_TAUTH_APPR	Delegate approval of travel authorizations.
Vendor Approval	APPROVE_VENDOR	Delegate the approval of vendor.

Adding Delegation Requests by Administrator

This topic discusses how to add delegation requests by administrator.

Page Used to Add Delegation Requests by Administrator

Page Name	Definition Name	Usage
<u>Administer Create Delegation Page</u>	EODL_ADMIN_SEL_FL	Add delegation requests that administrators create on behalf of delegators.

Administer Create Delegation Page

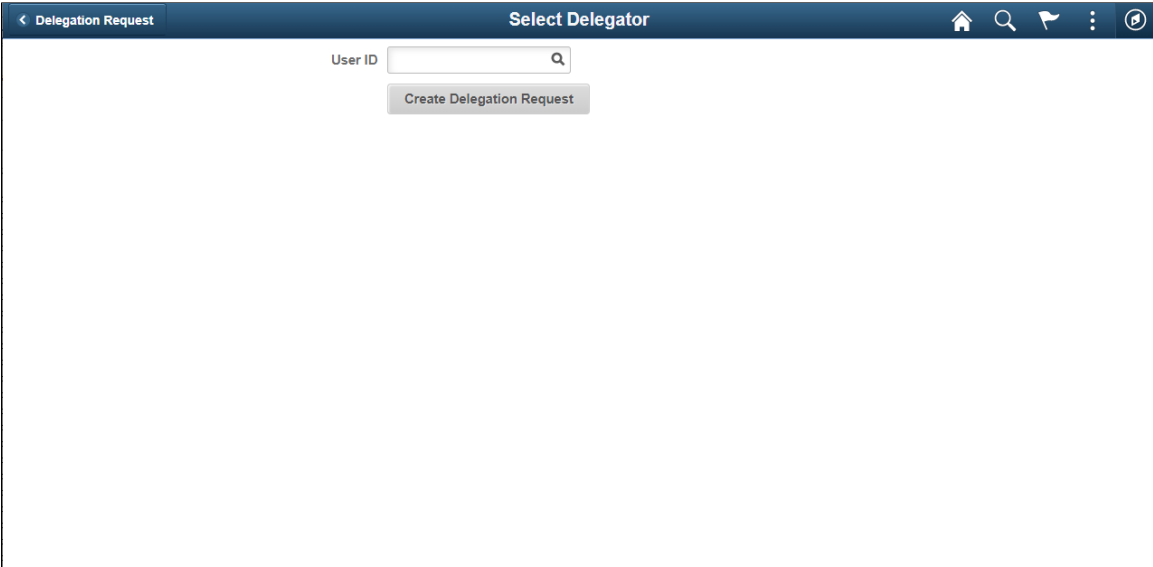
Use the Administer Create Delegation page (EODL_ADMIN_SEL_FL) to add delegation requests that administrators create on behalf of delegators.

Navigation

Enterprise Components > Delegation > Administer Create Delegation

Image: Administer Create Delegation page

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



Note: To prevent situations of cascading or circular delegation chains, after the Delegation framework passes delegated authority over a transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The Delegation framework only passes authority over transactions from initial delegator to initial proxy.

Note: When a user adds a delegation request, the system checks for an Alternate User ID field value on the User Profile - Workflow page. The delegation request overrides the alternate user ID for transactions in the delegation request. If an alternate user ID exists and the dates of the delegation and alternate ID overlap, the system issues a warning message.

User ID	Choose the User on behalf of whom the delegation request needs to be created by the administrator.
Create Delegation Request	Click this button to initiate the delegation guided process. For more details on the guided process, see Create Delegation Request - Delegation Dates Page .

Administering Delegations

This topic discusses how to administer delegations.

Page Used to Administer Delegations

Page Name	Definition Name	Usage
<u>Administer Delegation Page</u>	EODL_ADMIN_DLG	Administer delegation requests. Administrators can review details of selected delegation requests and, if necessary, revoke them on behalf of delegators.

Administer Delegation Page

Use the Administer Delegation page (EODL_ADMIN_DLG) to administer delegation requests.

Administrators can review delegation requests and, if necessary, revoke them on behalf of delegators.

Navigation

Enterprise Components > Delegation > Administer Delegation

Image: Administer Delegation page

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

The screenshot displays the 'Administer Delegation' page. At the top, there is a navigation bar with 'Select Delegator' and 'Administer Delegation'. Below this, the 'Selection Criteria' section includes dropdown menus for 'Delegator', 'Proxy', and 'Transaction Name', along with date pickers for 'From Date' and 'To Date', and dropdowns for 'Request Status' and 'Delegation Status'. 'Search' and 'Clear' buttons are at the bottom of this section. The 'Search Results' section shows a table with 11 columns: Description, Delegator, Proxy, From Date, To Date, Request Status, Delegation Status, and Notify Delegator. The table contains 15 rows of delegation requests. At the bottom, there are 'Select All', 'Deselect All', and 'Revoke' buttons.

Description	Delegator	Proxy	From Date	To Date	Request Status	Delegation Status	Notify Delegator
Payment Request	VP1	Kenneth Schumacher	07/22/2019	07/29/2019	Submitted	Inactive	☐
Time Adjustments	RCHANNING	Rosanna Channing	08/06/2019	08/09/2019	Submitted	Inactive	☐
Requisition	RCHANNING	Rosanna Channing	08/06/2019	08/09/2019	Submitted	Inactive	☐
Time Adjustments	RCHANNING	Rosanna Channing	08/06/2019	08/09/2019	Submitted	Inactive	☐
Requisition	RCHANNING	Rosanna Channing	08/06/2019	08/09/2019	Submitted	Inactive	☐
Time Adjustments	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐
Payment Request	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐
Time Adjustments	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐
Payment Request	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐
Time Adjustments	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐
Payment Request	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐
Time Adjustments	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐
Payment Request	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐
Time Adjustments	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐
Payment Request	VP1	Kenneth Schumacher	08/09/2019	08/13/2019	Submitted	Inactive	☐

Note: If the delegator and proxy initiate duplicate transactions, then either the proxy, delegator, or delegation administrator can cancel the duplicate transaction or approvers can deny the duplicate transaction while approving the original transaction.

Maintain Delegated Authorities

Click this link to access the Maintain Delegated Authority page, where you can run a batch job to process delegation transactions.

Add Delegation Request

Click this link to access the Add Delegation Request page, where you can create delegation requests on behalf on delegators.

Selection Criteria

Use this group box to specify criteria for the delegation requests that you want to retrieve. To retrieve all delegation requests, click the Search button without specifying criteria. To narrow your search results, enter one or more criteria.

Delegator

Enter the delegator for whom you want to retrieve delegation requests. The system prompts you to select from delegators with existing requests.

Proxy

Enter the proxy for whom you want to retrieve delegation requests. The system prompts you to select from proxies with existing requests.

Transaction Name

Enter the transaction for which you want to retrieve delegation requests. The system prompts you to select from transactions that are part of existing requests.

From Date and To Date

Specify the specific from or to date for which you want to review delegation requests.

Request Status

Select the status of the requests that you want to retrieve. Request statuses are *Accepted*, *Ended*, *Rejected*, *Revoked*, and *Submitted*.

See [Understanding Delegation](#).

Delegation Status

Select the delegation status of the requests that you want to retrieve, either *Active* or *Inactive*.

See [Understanding Delegation](#).

Search

Click this button to retrieve delegation requests based on your selection criteria.

Clear

Click this button to deselect all selection criteria fields.

Search Results

The system displays delegation requests and details based on your search criteria.

Request Status

The system displays the status of the request : *Accepted, Ended, Rejected, Revoked, and Submitted*. Click this link to review further details of a delegation request.

Select All

Click this button to select the check boxes for all delegation requests in the search results.

Deselect All

Click this button to deselect all check boxes for the selected delegation requests in the search results.

Revoke

Click this button to revoke a delegation request on behalf of the delegator. The system revokes delegations for all requests that are selected in the search results. The system sends a notification to the proxy who is affected by the change and automatically reassigns all pending transactions back to the delegator.

Processing Batch Delegation Requests

This topic discusses how to process batch delegation requests.

Page Used to Process Batch Delegation Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Maintain Delegated Authorities Page</u>	EODL_BATCH	Process batch delegation requests in a daily batch.

Maintain Delegated Authorities Page

Use the Maintain Delegated Authorities page (EODL_BATCH) to process batch delegation requests in a daily batch.

Navigation

Enterprise Components > Delegation > Maintain Delegated Authorities

Image: Maintain Delegated Authority page

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

The screenshot shows the 'Maintain Delegated Authorities' page. The header includes 'Administer Delegation' and 'Maintain Delegated Authorities'. The page contains the following elements:

- Links: [Report Distribution List](#), [Go to Process Monitor](#), [New Window](#), [Help](#), [Personalize Page](#)
- Fields:
 - User ID: PS
 - Run Control ID: 1
 - As Of Date: 08/13/2019
- Buttons: [Process Request Dialog](#), [Save](#), [Notify](#), [Add](#), [Update/Display](#)

Click the Process Request button to run the Maintain Delegated Authority (EODL_BATCH)) Application Engine process. This batch program processes all delegation transactions as of the system date that appears on the run control page. The process activates all delegation transactions that were future-dated to become active on today's date, revokes all delegation requests that have expired as of today's date, and searches for inactive proxies. For all affected delegation transactions, the process updates the request status and delegation status as appropriate. The process also updates proxy navigation security, as needed.

Important! Run this process daily to maintain delegations and update invalid rows.

Working with Self-Service Delegation

These topics discuss working with self-service delegation.

Pages Used to Work With Self-Service Delegation

Page Name	Definition Name	Usage
Manage Delegation Page	EODL_LANDING_FL	View delegation activity associated with a user.
Manage Delegation - Learn More about Delegation Page	EODL_DLGT_INSTR_FL	View help for delegation. Users can view an instructive description of delegation functionality.
Create Delegation Request - Delegation Dates Page	EODL_DLGRQST_DT_FL	Enter delegation dates by specifying the From Date and To Date, which defines the delegation authority period for a transaction. By not specifying a To Date, users specify an open-ended delegation.

Page Name	Definition Name	Usage
Create Delegation Request - Delegates Page	EODL_PROXY_SEL_FL	Select a delegate/proxy.
Create Delegation Request - Transactions Page	EODL_TRANS_SEL_FL	Select transactions for delegation. Users can select one or more transactions to delegate.
Create Delegation Request - Review and Submit Page	EODL_DLGRQST_SM_FL	Submit a delegation request. Users can review the details of a delegation request and then submit the delegation request.

Manage Delegation Page

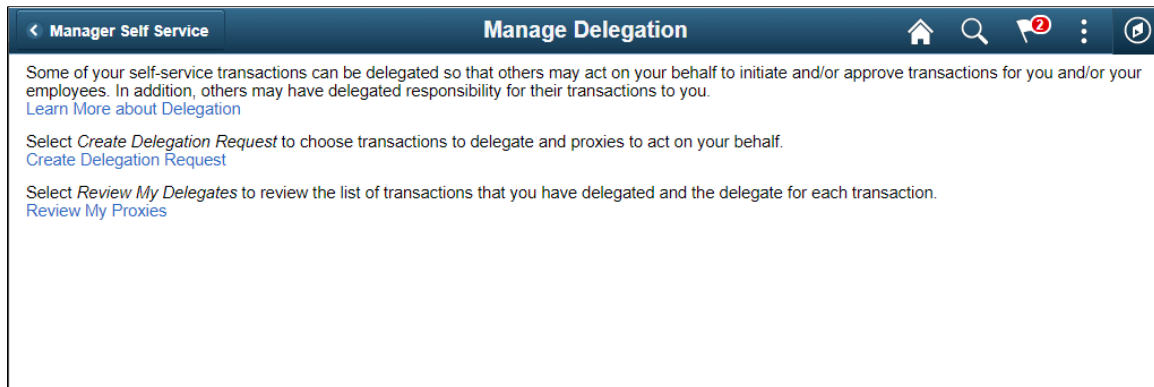
Use the Manage Delegation page (EODL_LANDING_FL) to view delegation activity associated with a user.

Navigation

Enterprise Components > Delegation > Manage Delegation

Image: Manage Delegation page

This example illustrates the fields and controls on the Manage Delegation page.



Users can view all delegation activity associated with themselves. They can create a delegation request, revoke delegation requests for which they have delegated transaction initiation or approval to a delegate/proxy, and accept or reject the delegation requests for which they are selected to serve as delegate/proxy. The system displays only the content and associated links that are applicable to the user at the time that user accesses the page. Specifically, the system displays:

- The Learn More about Delegation link and associated content for learning more about delegation, which is accessible to all users at all times provided that the system is using the Delegation framework.
- The Create Delegation Request link and associated content for creating delegation requests only if the user has navigation security access to transactions that are enabled for delegation through the delegation setup pages.
- The Review My Proxies link and associated content for reviewing delegates/proxies only if the user has active or inactive delegation requests.

- The Review My Delegated Authorities link and associated content for reviewing delegated authorities only if the user has been delegated authority to serve as a delegate/proxy.

Manage Delegation - Learn More about Delegation Page

Use the Manage Delegation - Learn More about Delegation page (EODL_DLGT_INSTR_FL) to view help for delegation.

Users can view an instructive description of delegation functionality.

Navigation

Click the Learn More about Delegation link on the Manage Delegation page.

Image: Manage Delegation - Learn More about Delegation page

This example illustrates the fields and controls on the Manage Delegation - Learn More about Delegation page.

Learn More about Delegation

Return

What is Delegation?

Depending upon how your System Administrator has setup your system, you may be able to delegate some or all of your Employee and/or Manager Self Service transactions to one or more people. When delegating transactions, you can specify whether you're delegating the authority to initiate a transaction, or approve a transaction.

For example, you may choose to delegate some or all of your transactions for the following reasons:

- You know that you will be away from the office for an extended period of time, and thus will not be able to manage transactions for you or your employees. You can delegate your transactions to someone else for a specific period of time.
- You prefer to have an assistant process all of your transactions. You can delegate all of your transactions to someone else for an indefinite period of time.

There are three links on Delegation Home Page - one for each way of managing delegation:

- **Create Delegation Request** - To create a delegation request so that your transaction(s) can be taken care of by a proxy.
- **Review My Proxies** - To view a list of transactions that you have delegated to proxies and to revoke the delegated authority of proxies.
- **Review My Delegated Authorities** - To view a list of transactions that have been delegated to you. You can either accept the request or reject the request.

FAQ

Who can I delegate transactions to?
Just about anyone. The other person does not have to be a manager, and they don't have to report to you.

What happens when I delegate Approval authority to someone?
When you delegate Approval authority to a proxy, this person can act on your behalf to approve pending transactions. The proxy will be notified of pending transactions (just as you are), and can execute the approval. In the event that the transaction must go up another level in the organization hierarchy, the next level approver(s) will be determined based upon your position in the hierarchy - not the proxy's.

Can I delegate a single transaction to more than one person?
No, you can not delegate the same transaction to more than one proxy for the same delegation period.

How do I specify a window of time for delegating transactions?
When you create delegation request, you'll need to specify From Date and To Date. A blank To Date indicates that the delegation is in effect indefinitely. A populated From Date indicates that the delegation is in effect from that date forward, until the To Date (if the To Date is populated).

Can I remove myself as a delegate for someone else?
When you receive a delegation request, you may reject the request. However, after you accept the request, you have to contact either your delegator or system administrator to revoke the request.

If someone has delegated a transaction to me, can I then delegate it to someone else?
No, cascading delegation is not allowed at this point.

Return

You can configure this page by accessing it through PeopleTools Application Designer.

Create Delegation Request - Delegation Dates Page

Use the Create Delegation Request - Delegation Dates page (EODL_DLGRQST_DT_FL) to enter delegation dates by specifying the From Date and To Date, which defines the delegation authority period for a transaction.

By not specifying a To Date, users specify an open-ended delegation.

Navigation

Click the Create Delegation Request link on the Manage Delegation page.

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Image: Create Delegation Request - Delegation Dates page

This example illustrates the fields and controls on the Create Delegation Request - Delegation Dates page.

Delegation Request

1 Delegation Dates 2 Delegates 3 Transactions 4 Review and Submit

Step 1 of 4: Delegation Dates

*Start Date 01/08/2020

End Date 01/13/2020

Leave blank for open-ended delegations

*Comment Delegation for Overtime Approval

Next >

Create Delegation Request - Delegates Page

Use the Create Delegation Request - Select Delegates page (EODL_PROXY_SEL_FL) to select a proxy/ delegate.

Navigation

Click the Next button on the Enter Dates page.

Image: Create Delegation Request - Select Delegates page

This example illustrates the fields and controls on the Create Delegation Request - Select Delegates page.

Delegation Request

1 Delegation Dates 2 **Delegates** 3 Transactions 4 Review and Submit

< Previous Next >

Step 2 of 4: Delegates

13 rows

Select All Clear All Add Delegate

	Name	Email ID	Phone
☒	Cynthia Adams	cynthia.adams@xyzcompany.com	925/694-7901
☐	GPCDETBetty Locherty	HCMGENUser1@ap6023fems.us.oracle.com	555/123-4567
☐	Jake Ball	jake.ball@hx1company.com	873-8737
☒	Jean Parsons	HCMGENUser1@ap6023fems.us.oracle.com	818/728-2450
☐	Kathy Wise		
☐	May Gee		

Users can select a delegate/proxy for transactions they are delegating. If the delegation administrator selects a specific hierarchy for the transaction on the Delegation Installation Settings page, the system displays valid delegates/proxies based on that selection, and users can select from this list. Valid delegates/proxies include persons who report directly or indirectly to the delegator, as well as all persons in the upward hierarchy—starting with the delegator's manager. If the delegation administrator selects the All Persons check box on the installation page, then the system displays the Search by Name link so that users can search for and select from any person in the system.

Create Delegation Request - Transactions Page

Use the Create Delegation Request - Transactions page (EODL_TRANS_SEL_FL) to select transactions for delegation.

Users can select one or more transactions to delegate.

Navigation

Click the Next button on the Delegates page.

Image: Create Delegation Request - Transactions page

This example illustrates the fields and controls on the Create Delegation Request - Transactions page.

Description
☐ Initiate Transfer
☐ Initiation Termination
☒ Manage Approve Overtime
☐ Manage Approve Payable Time
☐ Manage Approve Reported Time
☐ Manage Overtime Request
☐ Manage Report Time Fluid
☐ Manage Reported Time

The system displays only the transactions that are configured for delegation initiation or approval on the Configure Delegation Transactions page and for which the delegator has component access.

Users can delegate one or multiple transactions to another person in a single delegation request. When a delegate/proxy receives a delegation request for multiple transactions, he or she must accept or reject the entire request. The delegator, however, can revoke single transactions from a multiple transaction request. When a delegator revokes one or more transactions from a multiple transaction request, the system pulls the revoked transactions out of the multiple transaction request and creates individual revoked entries in the Approval Framework. The remaining transactions stay in the multiple transaction request. If only one transaction remains after revoking, the system disbands the group and displays an individual rather than multiple delegation request. This functionality preserves the accuracy of the multiple transaction status.

Create Delegation Request - Review and Submit Page

Use the Create Delegation Request - Review and Submit page (EODL_DLGRQST_SM_FL) to review and submit a delegation request.

Users can review the details of a delegation request and then submit the delegation request.

Navigation

Click the Next button on the Select Transactions page.

Image: Create Delegation Request - Review and Submit page

This example illustrates the fields and controls on the Create Delegation Request - Review and Submit page.

Delegation Request

1 Delegation Dates 2 Delegates 3 Transactions 4 Review and Submit

← Previous Submit

Step 4 of 4: Review and Submit

Delegation Details

Start Date 01/08/2020

End Date 01/13/2020

Comment Delegation for Overtime Approval

Delegates Cynthia Adams
Jean Parsons

Transactions Manage Approve Overtime

The system displays the delegation period, the selected delegate/proxy, and the selected transactions. When a transaction is set up with product specific delegation requirements on the Configure Delegation Transaction page, a link will appear after the transaction. When no information is entered in the Optional Parameters section of the Configure Delegation Transaction page, the link is not available. Select the product specific link for a transaction to have the system open the product specific component to continue the delegation request.

When users click the Submit button, the system automatically sends an email notification to the delegate/proxy to either accept or reject the delegation request if Approval Framework is set up.

To prevent situations of cascading or circular delegation chains, after the Delegation framework passes delegated authority over a transaction to a delegate/proxy, the delegate/proxy cannot delegate authority over that transaction to another user. The Delegation framework only passes authority over transactions from initial delegator to initial delegate/proxy.

Image: Create Delegation Request — Confirmation page

This example illustrates the fields and controls on the Create Delegation Request — Confirmation page.

The screenshot shows the 'Delegation Request' confirmation page. The header bar is blue with an 'Exit' button and a flag icon. Below the header is a progress bar with four steps: 1. Delegation Dates, 2. Proxies, 3. Transactions, and 4. Review and Submit (highlighted in green). A 'Previous' button is on the right. The main content area has three sections: 'Delegation Details' showing 'From Date 08/12/2019', 'To Date 08/30/2019', and 'Delegation for Expense Approval.'; 'Proxies' showing 'Betty Locherty'; and 'Transactions' showing 'Expense Reports'. At the bottom are links: 'Create Another Delegation', 'My Proxies', and 'Manage Delegation'.

Note: When a user adds a delegation request, the system checks for an Alternate User ID field value on the User Profile - Workflow page. The delegation request overrides the alternate user ID for transactions in the delegation request. If an alternate user ID exists and the dates of the delegation and alternate ID overlap, the system issues a warning message.

My Delegates Page

Use the My Delegates page (EODL_MY_PROXIES_PG) to manage delegates/proxies for delegation.

Users can manage their delegates/proxies by search for and updating the status of their delegation requests.

Navigation

Click the Review My Proxies link on the Manage Delegation page.

Image: Review My Proxies — My Delegates page

This example illustrates the fields and controls on the Review My Proxies — My Delegates page.

The screenshot shows the 'My Delegates' page with a navigation bar at the top. Below the navigation bar, there are tabs for 'Active', 'Accepted', 'Ended', 'Rejected', 'Revoked', and 'Submitted'. The 'Active' tab is selected. Below the tabs, there is a 'Revoke' button and a search icon. The main content area displays a table with the following columns: 'Transactions', 'Delegates', 'Start Date / End Date', and 'Request Status'. The table contains four rows of delegation requests, each with a checkbox in the 'Transactions' column and a right arrow in the 'Request Status' column.

Transactions	Delegates	Start Date / End Date	Request Status
☐ Approve Transfer	Jake Ball	01/09/2020 01/31/2020	Submitted >
☐ Approve Promotion	Betty Locherty	01/09/2020 01/27/2020	Submitted >
☐ Approve Location Change	Jake Ball	01/09/2020 01/24/2020	Submitted >
☐ Approve Job Offer, Manage Approve Overtime, Absence Cancellation	Cynthia Adams, Jean Parsons	01/08/2020 01/13/2020	Submitted >

Users can change their mind by revoking delegation requests for which they have delegated transaction initiation or approval to a delegate/proxy. To revoke the delegation request, users must select the check box for the delegation request and then click the Revoke button. The system changes the request status to *Revoked* and automatically sends an email notification to the delegate/proxy about the status of the delegation request.

Reviewing Delivered Notification Templates for Delegation

This table lists the delivered delegation notifications, describes each notification, describes the trigger for each notification, and lists the recipients:

Template Name	Notification Description	Trigger	Recipients
DelegationAccept	States that the proxy has accepted the delegation request submitted by the delegator.	Proxy accepts delegation request.	To: Delegator CC: Proxy
DelegationAdminAdd	States that the administrator, on behalf of delegator, has submitted a delegation request to the proxy.	Delegation administrator adds and submits delegation request.	To: Proxy CC: Delegator
DelegationAdminRevoke	States that the administrator, on behalf of delegator, has revoked a delegation request that was assigned to the proxy.	Delegation administrator revokes delegation request.	To: Proxy CC: Delegator

Template Name	Notification Description	Trigger	Recipients
DelegationBatch	States that delegation authority has been made active or inactive for the delegator and transactions listed. Also states that security has been updated to allow the proxy access to the transactions.	Delegation administrator runs the Maintain Delegated Authorities batch process.	To: Proxy CC: Delegator
DelegationError	States that a submitted delegation request has encountered an error.	Delegator submits a delegation request but an error occurs.	To: Delegator
DelegationNotifyAdmin	States that the system has identified that a proxy is inactive for at least one day for a delegation request that has been accepted.	Delegation administrator runs the Maintain Delegated Authorities batch process.	To: Delegator CC: Delegation Administrator
DelegationReject	States that a proxy has rejected a delegation request submitted by a delegator.	Proxy rejects delegation request.	To: Delegator CC: Proxy
DelegationRequest	States that a delegator or an administrator on behalf of the delegator has submitted a delegation request to the proxy.	Delegator creates and submits a delegation request.	To: Proxy CC: Delegator
DelegationRevoke	States that a delegator or an administrator on behalf of the delegator has revoked a delegation request that was assigned to the proxy.	Delegator revokes a delegation request.	To: Proxy CC: Delegator

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](#)

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
<u>CAVF Configuration Setup Page</u>	EOATT_CONFIG_DTLS	Set up the Comments and Attachments View configuration.
<u>CAVF Configuration ID Component Mapping Page</u>	EOATT_MAPCO_PG	Configure the transaction page and to specify where to display the comments and attachments.
<u>CAVF Configuration ID Page Composer Mapping Page</u>	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

Image: CAVF Configuration Setup screenshot 1 of 2

CAVF Configuration Setup screenshot 1 of 2

CAVF Configuration Setup

Configuration IDAP_PR_ATTACH

*DescriptionPayment Request Attachments

*Product AreaFAPPayables

*Date Source ViewAP_PR_ATTACH_VW

Default Attributes

File Attachment Server Details

DataSet 1

Preview

Field Details

PersonalizeFindFirst1-7 of 7Last

Field Name	Sequence Number	Field Type	Key ?	Display ?	Header ?	Field Label ID	Label Type	Field Label		
REQUEST_ID	1	Transaction	☒	☒	☒		Long	Request ID	+	-
SCM_ATTACH_ID	2	Attachment	☒	☐	☐			Attachment Id	+	-
ATT_VERSION	3	Attachment	☒	☐	☐			Att Version Wrk	+	-
ATTACHSYSFILENAME	4	Attachment	☒	☐	☐			Unique Sys Filename	+	-
ATTACH_DESCR	5	Attachment	☐	☒	☐		Long	Attachment Description	+	-
OPRDEFNDESC	6	Attachment	☐	☒	☐	ENTERED_BY	Shor	Entered By	+	-
ATTACHUSERFILE	7	Attachment	☐	☒	☐		Long	Attached File	+	-

DataSet 1 Header Title

Msg SetMsg Num

Attachment Defaults

☒ Display Sequence Number☒ Display Attachment Type Icon

Line Level Defaults

☐ Show Line Title☐ Line Title From Field Value

Line Title

Comment Defaults

☐ Comment Title From Field Value☐ Display Sequence Number

Comment TitleAttachments

Image: CAVF Configuration Setup screenshot 2 of 2

CAVF Configuration Setup screenshot 2 of 2

DataSet 2

Preview

Field Details

PersonalizeFindFirst1 of 1Last

Field Name	Sequence Number	Field Type	Key ?	Display ?	Header ?	Field Label ID	Label Type	Field Label		
			☐	☐	☐				+	-

DataSet 2 Header Title

Msg SetMsg Num

Attachment Defaults

☒ Display Sequence Number☒ Display Attachment Type Icon

Line Level Defaults

☐ Show Line Title☐ Line Title From Field Value

Line Title

Comment Defaults

☐ Comment Title From Field Value☒ Display Sequence NumberAfter title

Comment Title

SaveReturn to SearchPrevious in ListNext in ListRefresh

AddUpdate/Display

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

File Attachment Server Details

Configuration IDAP_PR_ATTCH

☒ Default Server

Attachment Server TypeDB

Administer File Attachments

Server/Record Name/URL IdPV_ATT_DB_SRV

PATHNAME

OK

Cancel

Refresh

Configuration ID	CAVF Configuration Setup ID.
Default Server	For PeopleSoft FSCM, this check box 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.

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.

Image: CAVF Preview Page

CAVF Preview Page

CAVF Preview Page

Configuration ID

AP_PR_ATTCH

[Return to Configuration Setup](#)

Request ID

View In

Classic

▼

View Mode

Comments and Attachments

▼

Help Text

Preview Data

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.

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

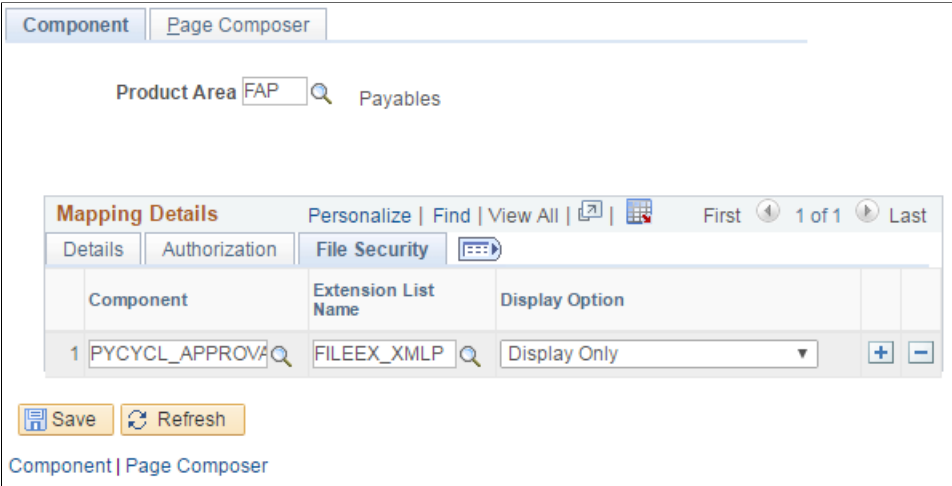
Select the User List Source. Available options are Application Class, Query, Role, SQL Definition.
- Application Class/Query/Role/SQL Definition

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).

Image: CAVF Mapping to Page Composer — Details

CAVF Mapping to Page Composer — Details

Component

Page Composer

Product Area Payables

Mapping Details

Personalize | Find | View All | First 1 of 1 Last

Details

Authorization

File Security

AWE Process ID	Page	Configuration ID 1	View Mode 1	Configuration ID 2	View Mode 2
1 PaymentRequestAp	EOAWMA_MAIN_FL	AP_PR_ATTCH	Comments and Attachmer	AP_PR_ATTCH	Comments and Attachmen

Save

Refresh

Component | Page Composer

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

Component

Page Composer

Product Area Payables

Mapping Details

Personalize | Find | View All | First 1 of 1 Last

Details

Authorization

File Security

AWE Process ID	Page	User List Source	Role Name	App Class Method	Access Type
1 PaymentRequestAp	EOAWMA_MAIN_FL	Role	ADMINISTRATOR		Comments and Attachr

Save

Refresh

Component | Page Composer

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.

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.

Component | Page Composer

Product Area Payables

Mapping Details Personalize | Find | View All | First 1 of 1 Last

Details | Authorization | **File Security**

AWE Process ID	Page	Extension List Name	Display Option
1	PaymentRequestAp	EOAWMA_MAIN_FL	FILEEX_XMLP

Display Only

Save Refresh

Component | Page Composer

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.

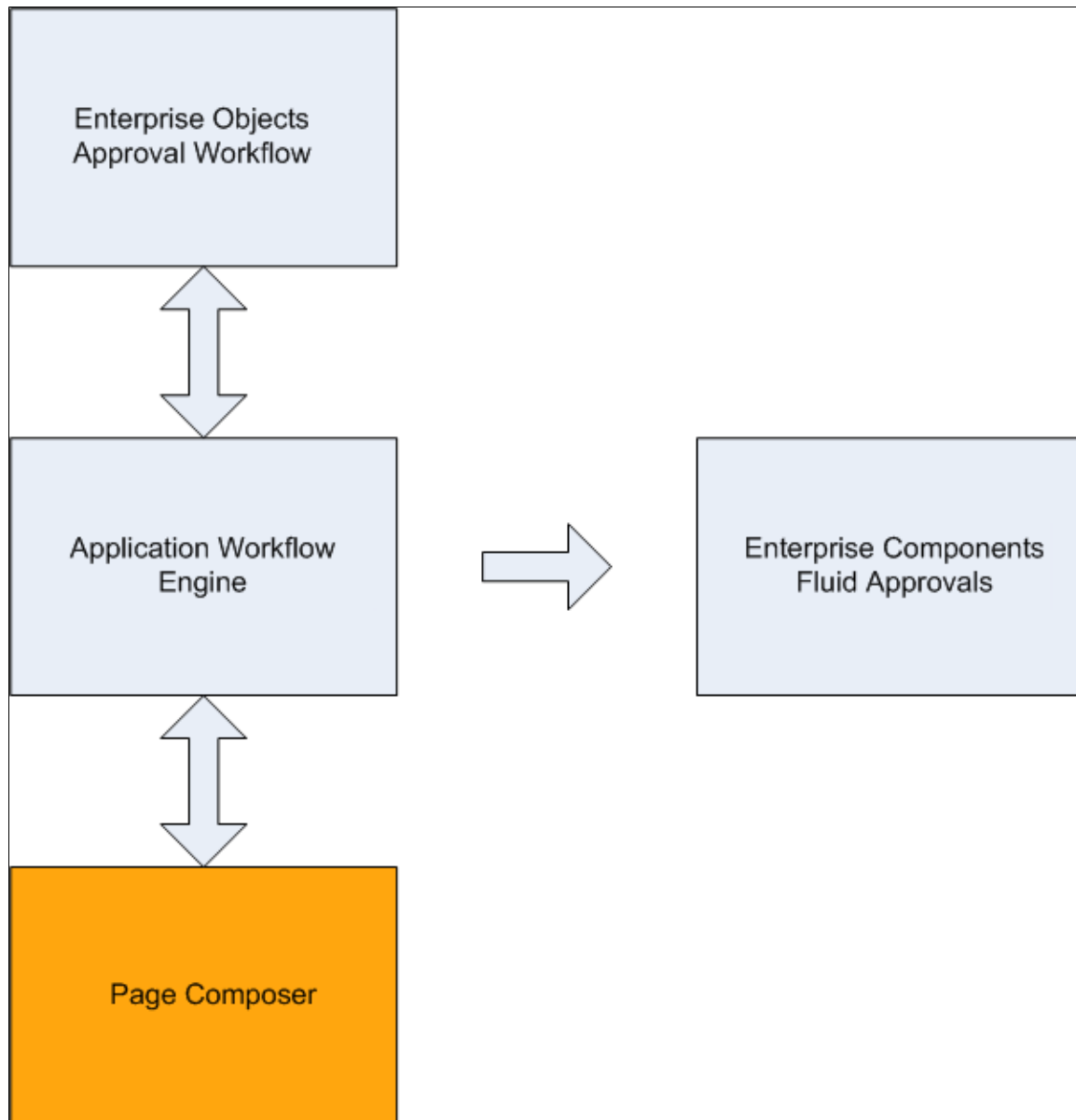
Page Composer

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

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.

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

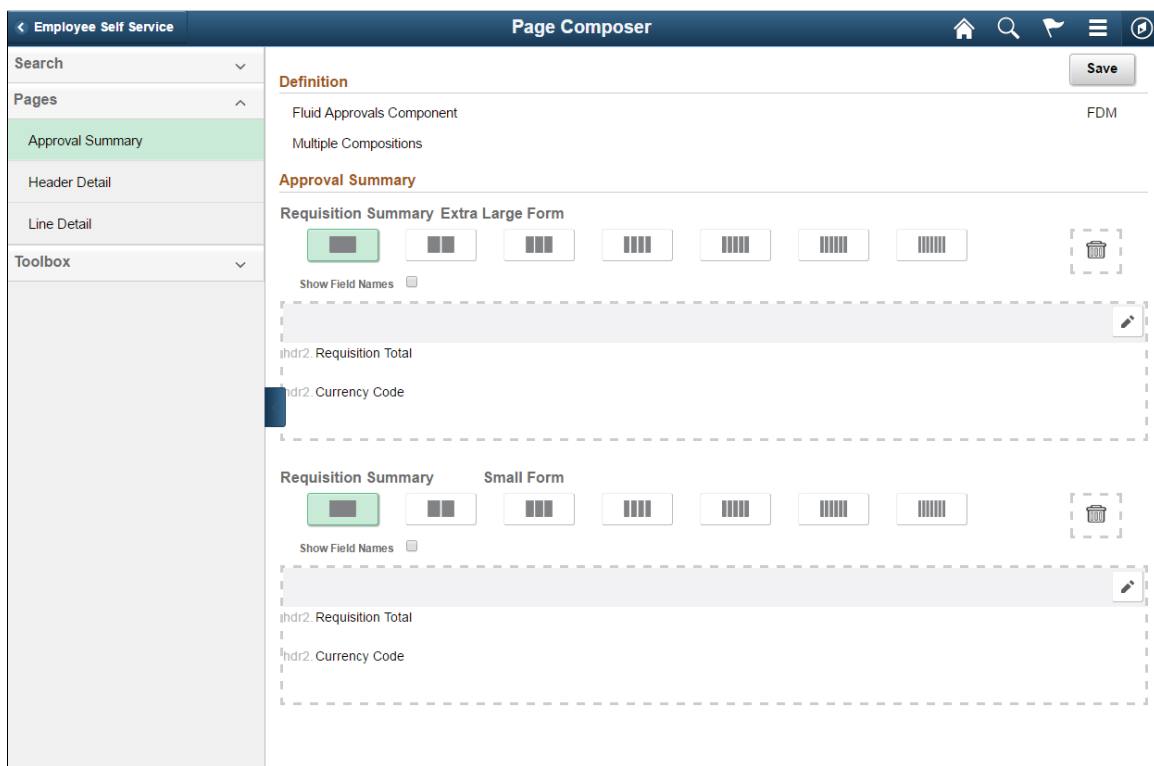
Use the Page Composer page (EOPC_MAIN_FL) to create page compositions..

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.

Search

Image: Search panel

Search panel

The image shows a 'Search' panel with the following components:

- Search** (title bar with an expand/collapse arrow)
- *Definition** (section header)
- APPROVALS** (text in the search input field)
- Object Type** (dropdown menu)
- System Source** (section header)
- Search** (green button)
- Clear** (gray button)
- Pages** (expandable section with a downward arrow)
- Toolbox** (expandable section with a downward arrow)

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.

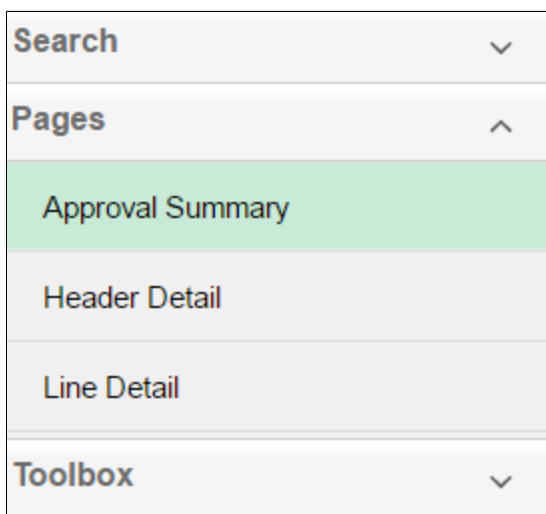
System Source

Search based on the system source.

Pages

Image: Pages panel

Pages panel



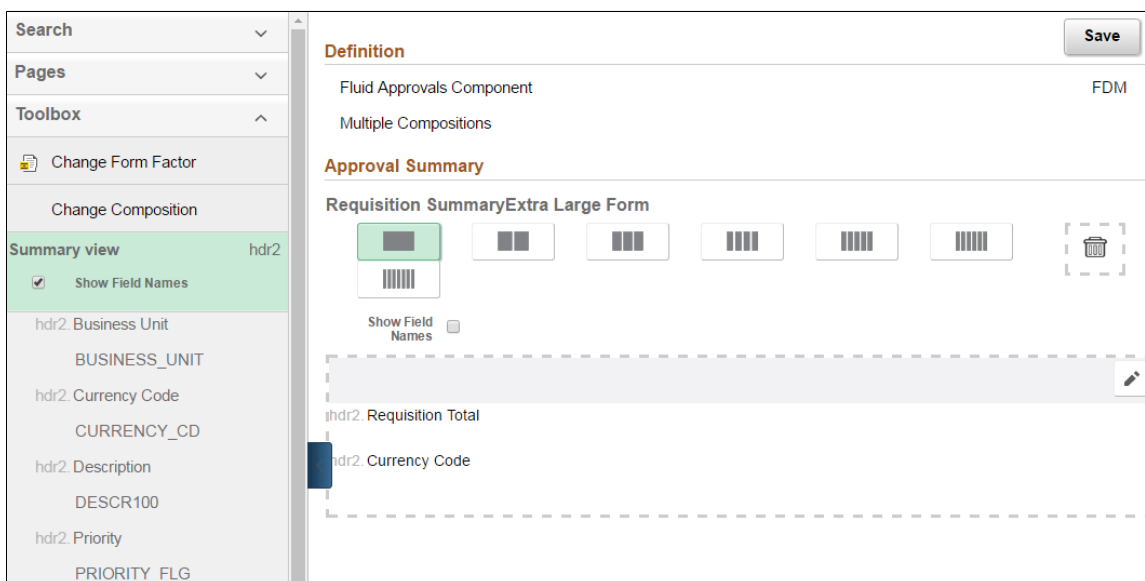
The Page Composer allows users to compose and configure the view of three sections in the Fluid approval pages.

- 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.

Change Form Factor

Change the form factor. Available form factors are Large, Medium, Small and X-Large.

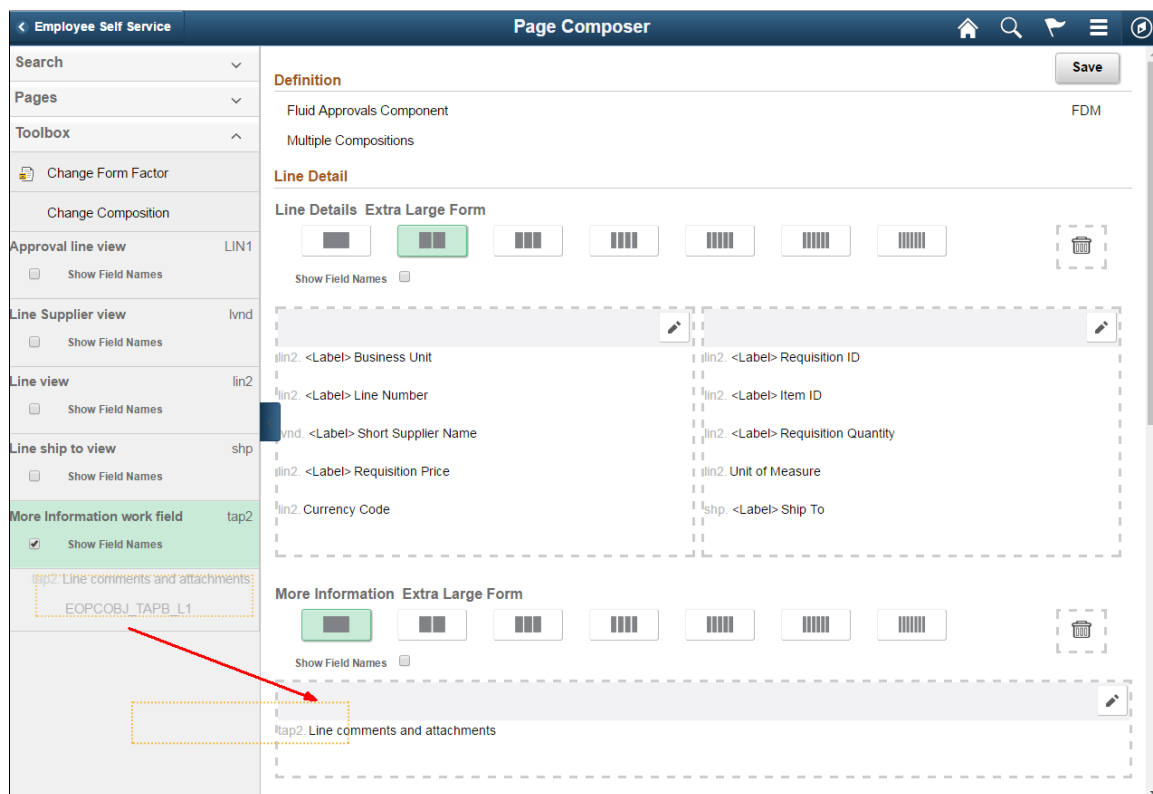
Change Composition

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.

Pages Used to Register Components in Page Composer

Page Name	Definition Name	Usage
<u>Registration Page</u>	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 screenshot displays the 'Registration' page in the Page Composer interface. The left sidebar contains search filters for 'Definition' (set to APPROVALS), 'Object Type' (set to FDM), and 'System Source' (set to FDM). The main content area shows the 'Definition' tab for 'Fluid Approvals Component' (FDM). Below this, the 'Detail' section lists 'APPROVALS' and 'Fluid Approvals Component'. The 'Pages and Sections' tab is active, showing a table of registered sections. The table has columns for Description, Edit, Display Type, Page Name, Form Factor, and Sequence. The sections listed include 'Requisition Summary', 'Summary', 'More Information', 'Requisition Header Detail - 3', 'Requisition Header Detail - 4', 'Requisition Header Detail - 5', and 'Lines'.

Description	Edit	Display Type	Page Name	Form Factor	Sequence
Requisition Summary	Edit	Page	EOAWMA_RSLT_SBF	Small	1
Requisition Summary	Edit	Page	EOAWMA_RSLT_SBF	X-Large	1
Summary	Edit	Page	EOAWMA_TXNHDTL_FL	Small	1
More Information	Edit	Page	EOAWMA_TXNHDTL_FL	Small	2
Requisition Header Detail - 3	Edit	Page	EOAWMA_TXNHDTL_FL	Small	3
Requisition Header Detail - 4	Edit	Page	EOAWMA_TXNHDTL_FL	Small	4
Requisition Header Detail - 5	Edit	Page	EOAWMA_TXNHDTL_FL	Small	5
Lines	Edit	Page	EOAWMA_TXNHDTL_FL	Small	6

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

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 Fields	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.

Image: Page Composer Registration Labels

Page Composer Registration Labels.

Registration

Definition

Fluid Approvals Component FDM

Multiple Compositions

Detail

APPROVALS Fluid Approvals Component [Edit](#)

Type	Component	Multiple Composition...	Composition Key Fields
Object Name	EOAWMA_MAIN_FL	Yes	1. EOAWPRCS_ID
Add View Record	EOAWPRCS_VW		
Search View Record	EOAWPRCS_EOPCVW		

Pages and Sections

&General &Reserved Field **&Labels** &Keys / Source Records / Field Events Show All

Description	Form Factor	Short Page Description	Long Page Description		
Requisition Summary	Small	Approval Summary	Approval Summary	+	-
Requisition Summary	X-Large	Approval Summary	Approval Summary	+	-
Summary	Small	Header Detail	Header Detail	+	-
More Information	Small	Header Detail	Header Detail	+	-
Requisition Header Detail - 3	Small	Header Detail	Header Detail	+	-
Requisition Header Detail - 4	Small	Header Detail	Header Detail	+	-
Requisition Header Detail - 5	Small	Header Detail	Header Detail	+	-
Lines	Small	Header Detail	Header Detail	+	-
Summary	X-Large	Header Detail	Header Detail	+	-

24 rows

Short Page Description

Short Page Description.

Long Page Description

Long Page Description.

Image: Page Composer Registration Keys/Source Records/Field Events

Page Composer Registration Keys/Source Records/Field Events.

Employee Self Service **Registration** Save

Search

Definition: APPROVALS

Object Type: ▼

System Source: FDM

Search Clear

Definition

Fluid Approvals Component FDM

Multiple Compositions

Detail

APPROVALS Fluid Approvals Component Edit

Type Component Multiple Composition... Yes Composition Key Fields

Object Name EOAWMA_MAIN_FL Add View Record EOAWPRCS_VW 1. EOAWPRCS_ID

Search View Record EOAWPRCS_EOPCVW

Pages and Sections 24 rows

&General &Reserved Field &Labels **&Keys / Source Records / Field Events** Show All

Description	Form Factor	Composition Key Fields	Application Source Records	Field Events
Requisition Summary	Small	Composition Key Fields	Application Source Records	Field Events
Requisition Summary	X-Large	Composition Key Fields	Application Source Records	Field Events
Summary	Small	Composition Key Fields	Application Source Records	Field Events
More Information	Small	Composition Key Fields	Application Source Records	Field Events
Requisition Header Detail - 3	Small	Composition Key Fields	Application Source Records	Field Events
Requisition Header Detail - 4	Small	Composition Key Fields	Application Source Records	Field Events
Requisition Header Detail - 5	Small	Composition Key Fields	Application Source Records	Field Events
Lines	Small	Composition Key Fields	Application Source Records	Field Events
Summary	X-Large	Composition Key Fields	Application 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.

Image: Application Source Records

Application Source Records.

Cancel **Application Source Records** Done

Requisition Summary

Application Source Record + -

*Record PV_REQ_SUM_VW Record Alias hdr2 Buffer Level 2 Message Set Numb... 18036 Message Numb... 14123

Key Fields 3 rows

&General &Label Show All

	*Field Name	Key Sequence	App Class Path
1	BUSINESS_UNIT	1	
2	REQ_ID	2	
3	REQ_STATUS	3	

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.

Chapter 12

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 and Fluid 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. The Page and Field Configurator supports two type of Configurations: Standard and Masking.

In Standard configuration, 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.

In Masking configuration, a user can mask page fields and search fields based on a chosen Mask profile.

Note: The configuration can be applied only to a registered component in the system.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Page Configuration Page</u>	EOCC_CONFIGURE	Use this page to capture the page and field configuration and criteria.
<u>User List Page</u>	EOCC_CONFIG_USER	Use this page to capture the list of users and/or roles to which the configuration defined in the Page Configuration page should be applied to.
<u>Map to Portal Registry Page</u>	EOCC_MAP_EVENT	Use this page to map the configuration to the Portal Registry.

Page Name	Definition Name	Usage
<u>Validate Page Configurations Page</u>	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 and/or roles 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.

Define the Page and Field Configuration

To define the page and field configuration, from the Page and Field Configuration search page, choose the Add New Value tab.

Navigation

Enterprise Components >Page and Field Configuration > Add New value

Image: Add New Value for Page and Field Configuration

Add New Value for Page and Field Configuration

The screenshot shows the 'Page and Field Configurator' window. At the top, there's a navigation bar with 'Manager Self Service' and 'Page and Field Configurator'. Below this, the title 'Page and Field Configurator' is displayed. The main area has two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are three input fields: 'Component Name' with a search icon, 'Market' with a dropdown arrow, and 'Configuration Type' with a dropdown arrow showing 'Standard'. A green 'Add' button is at the bottom left. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

Component Name Choose the component for which a new configuration needs to be done.

Market Choose the component market.

Configuration Type Choose the configuration type for the component. Available values are *Standard* and *Masking*

Note: Only users with the role PFC Data Masking Admin can see the configuration type. The PeopleTools version needs to be 8.57.11 or higher.

To configure the component for Standard Configuration Type, see [Page Configuration Page](#)

To configure the component for Masking Configuration Type, see [Masking Data in Page and Field Configurator](#)

Page Configuration Page

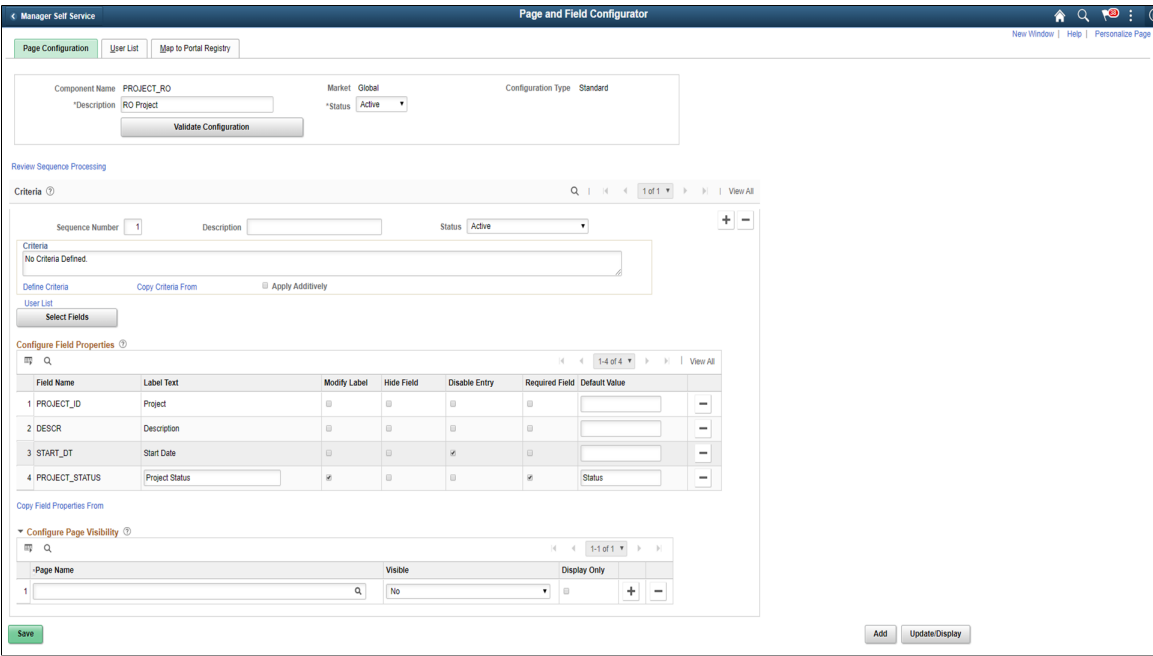
Use the Page Configuration page (EOCC_CONFIGURE) to define the changes needed for the component.

Navigation

Enterprise Components >Page and Field Configuration > Page and Field Configurator >Page Configuration

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.

Configuration Type Displays whether this is a Standard or Masking 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. For more details, see

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.

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. However it works differently if Apply Additively check box is selected. For more information, see the Apply Additively section in this page. Please do not use sequence numbers from 81 to 99. These are reserved by Oracle.

- Description**
- Enter an appropriate description.
- Status**
- Select the Status of the Sequence.
- 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.

Define Criteria

Sequence Number1Description

Select Fields

Define Criteria

1-1 of 1

View All

	Page Field	*Criteria	Value	
1	Reason Code	Equals	RTC	-

OK

Cancel

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 using the Select Fields button.

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](#).

Apply Additively

Use the Apply Additively check box when you want to apply multiple sequences. When the Apply Additively check box is selected the component configuration is evaluated as follows:

The system evaluates sequences in ascending order starting with sequence 1. Once the criteria for a non-additive sequence (e.g. apply additively is not selected), the system proceeds to evaluate only the later sequences marked as Apply Additively.

As an example, assume sequences 1 through 4 are not applied additively, but sequences 5 through 10 are selected to apply additively. The system starts evaluation with sequence 1 and proceeds in ascending order. Assume sequence 1 and 2 criteria are not met, but sequence 3 criteria is met. The system would apply sequence 3 configuration then move to evaluating any subsequent sequences marked as Apply Additively. Sequence 5 would be evaluated next and if criteria is met, would be applied in addition to sequence 3. Sequence 4 would not be evaluated. Sequences 6-10 would also be evaluated for criteria since all are marked as Apply Additively. The display shown to the user would include all the sequences where criteria was satisfied.

If the same field is being modified in multiple sequences then both sequences will be applied. For example if a field in a sequence is marked as Disable Entry in one sequence and in another sequence which is applied additively it is marked as Modify label, then on applying the configuration that field will have the label modified as well as its text area disabled.

If a property of a field is modified on multiple sequences, then the property in the highest sequence gets applied. For example if for a field in sequence 1 you modify the label as abc and for the same field in sequence 6 you modify the label as xyz, then on applying the configuration, the label xyz will take effect.

Note: once a field has been set as disabled for entry, required for entry or hidden, then it cannot be undone in a subsequent sequence. Only labels and default values can be changed in subsequent sequences.

Masking configurations are applied after standard configurations. Masking configurations are applied additively.

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 Fields

Click the Select Fields button to open Select Field page. You can use this page to select an existing field from the component.

Note: 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.

You can select multiple fields from a primary page or from the secondary page of a primary page.

Image: Select Field page

Select Field page

Select Field

Select the page name from the list.

Primary Page: 03 - Budget and Incumbents

Secondary Page: 01 - Display In Other Currency

Search

Select the fields that need to be configured.

Page Fields

	Page Field Name	Record (Table) Name	Field Name
☒	From Amount	DERIVED_POPUP	FROM_AMOUNT
☒	From Currency Code	DERIVED_POPUP	FROM_CUR
☐	Rate Type	DERIVED_POPUP	RT_TYPE
☐	Dummy Name	RT_TYPE_TBL	DESCR
☐	Effective Date	DERIVED_POPUP	EFFDT
☐	To Currency Code	DERIVED_POPUP	TO_CUR
☐	Description	CURRENCY_CD_TBL	DESCR
☐	Conversion Rate	DERIVED_POPUP	RATE_VISUAL
☐	Exchange Rate Detail	DERIVED_POPUP	PB_EXCH_RT_DTL
☐	Converted Amount	DERIVED_POPUP	CONV_AMOUNT

OK Close

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.

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.

You should not default a value for a field that already has additional processing associated it such as field change.

Copy Field Properties From

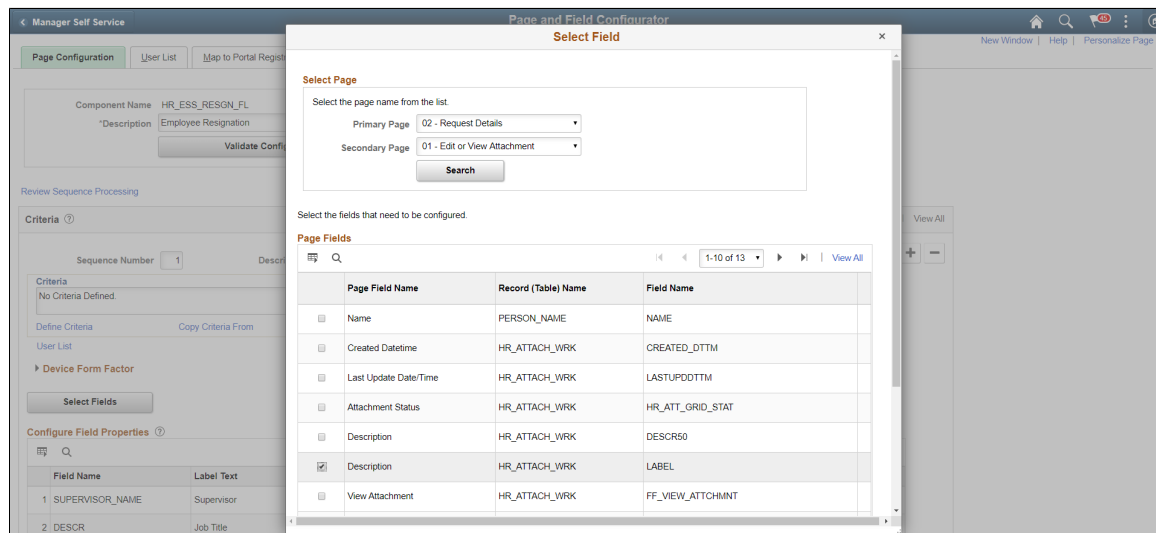
You can use this link and select a sequence number from which you can copy the field properties.

Configure Secondary Page

Use the Select link under Configure Field Properties to configure fields in secondary pages.

Image: Configure Secondary Page

Configure Secondary Page.



Primary Page

Choose the main page.

Secondary page

Choose the secondary page listed under the selected primary page.

Choose the field to be configured from the list of page field results.

Configure Page Visibility

The Configure Page Visibility section is used to hide or show 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*

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.

The screenshot displays the 'User List' configuration page within the 'Page and Field Configurator'. The top navigation bar includes 'Manager Self Service' and 'Page and Field Configurator'. The main content area has tabs for 'Page Configuration', 'User List' (selected), and 'Map to Portal Registry'. The configuration fields include 'Component Name' (POSITION_DATA_FL), 'Level' (Header Level), 'Market' (Global), and 'Configuration Type' (Standard). A dropdown menu for 'Applies To' is open, showing options: 'All With Excluded Roles/Users', 'Selected Users' (highlighted), 'Single Role With Exceptions', and 'Specific Roles With Exceptions'. Below this is a table titled 'Included Users' with columns 'User ID' and 'User Description'. The table contains one entry: 'RCHANNING' and 'Rosanna Channing'. At the bottom are buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Add', and 'Update/Display'.

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 with Excluded Roles/Users** – Select this option if you want to make the configuration applicable to all the users and roles in the system. On selecting this option, ‘Exclude Roles’ and ‘Excluded Users’ sections appear where you can add any exception User ID or Role.
- **Single 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.
- **Selected Users** – Select this option if you want to make the configuration applicable only to specific User IDs. On selecting this option, ‘Included Users’ section appears where you can add the User IDs to which the configuration needs to be applied.
- **Specific Role with Exceptions** — Select this option to make the Configuration applicable to specific roles and to exclude specific users in that role. Select this option to make the configuration applicable to one specific role and to exclude specific users in that role. On selection this option, Included Roles section appears where you select the roles and Excluded Users section appears where you can exclude specific users.

Role

Select the role to which the configuration needs to be applied.

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.

Page ConfigurationUser ListMap to Portal Registry

Component Name GM_PROPOSALMarket Global

▼ Map Configuration to Portal Registry ?

1-1 of 1

Select	Portal	Navigation
☐	EMPLOYEE	Root > Grants > Proposals > Maintain Proposal

▼ Advanced Options ?

☐ Enable Page Level Events

Apply ConfigurationRemove Mapping

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

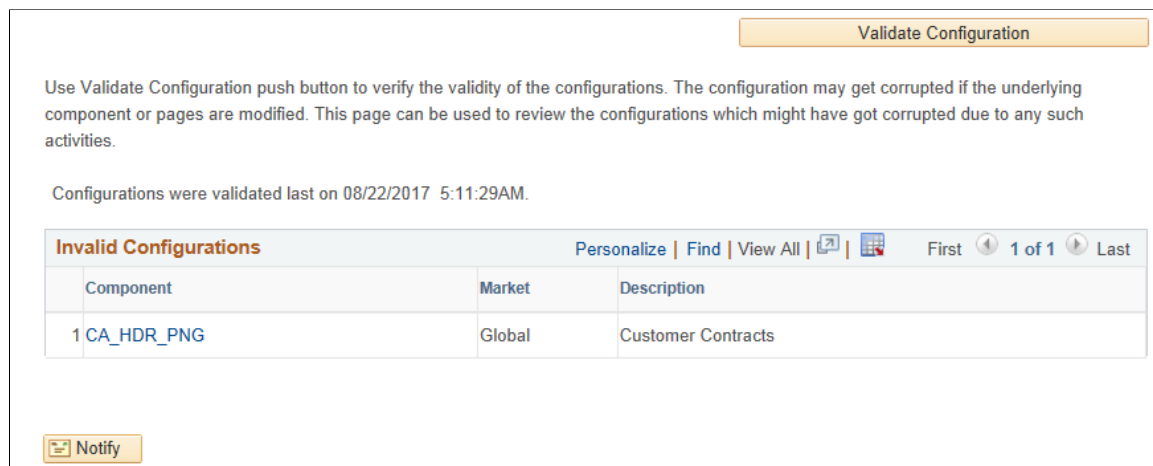
Use the Validate Page Configurations page (EOCC_CONFIG) to verify the validity of the configurations defined using the Page Configuration page. This component can be used to verify the validity of the configurations after any system update or application of fix or patch. Any changes to the page or page 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

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.

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.

Masking Data in Page and Field Configurator

To comply with Data Privacy regulations, organizations may mask personally identifiable and/or sensitive content in PeopleSoft, and expose them only to authorized persons. Page and Field Configurator uses Configuration Type value of Masking to allow masking of page fields and search fields.

Note: The PeopleTools version should be 8.57.11 or higher.

Note: For HCM systems, it is recommended that HCM specific data masking is disabled in the installation options and the Page and Field Configurator masking is used instead.

Understanding How to Mask the Fields in a Page using Page and Field Configurator

As a user, there are five steps to be completed to configure data masking in a page using Page and Field Configurator:

Define the mask profiles and apply the profile to the fields in the selected component using the Define Mask Profile page. This involves:

1. Define Mask Profile based on needs of the organization.
2. Define Field Groups to group fields with similar masking requirements.
3. In Page and Field Configurator, configure the fields to be masked using Mask Profiles defined in step 1.
4. Define the list of users to whom the configuration needs to be applied using the User List page.
5. Map the configurations to the corresponding portal registry entries using the Map Configuration to Portal Registry page.

Note: The configuration defined in a component will become effective only if the services defined by the utility are mapped to the corresponding portal registry entries.

For more details, see the image highlight video on Data Masking:



<https://www.youtube.com/watch?v=buFycBauNHE&t=364s>

Image: Example of component masking

The image depicts masking of sensitive fields for the Modify a Person component.

Manager Self Service

Modify a Person

New Window | Help | Personalize Page

Biographical Details

Contact Information

Regional

Rebekah Jones

Person ID K0G001

Name

Effective Date 06/15/1996

Format Type English

Display Name Rebekah Jones

View Name

Biographic Information

Date of Birth 03/20/XXXX

Date of Death

Birth Country

Birth Location

Waive Data Protection

Biographical History

Effective Date 06/15/1996

Gender Female

Highest Education Level A-Not Indicated

Marital Status

Language Code

Alternate ID

Full-Time Student

National ID

Country USA

National ID Type Social Security Number

National ID XXX-XX-1061

Primary ID

Save

Return to Search

Notify

Refresh

Add

Update/Display

Include History

Correct History

Biographical Details

Contact Information

Regional

Defining the Mask Profile in Page and Field Configurator

Pages Used to Define the Mask Profile

Page Name	Definition Name	Usage
Define Mask Profile Page	EOCC_MASK_PROFILE	Use this page to define Mask profiles.

Define Mask Profile Page

Use the Define Mask Profile page (EOCC_MASK_PROFILE) to set up data masking profiles which can be applied to the fields that are selected for masking in Page and Field Configurator.

Navigation

Enterprise Components > Page and Field Configuration > Define Mask Profile

Page and Field Configurator supports four types of masking configuration:

- Complete Masking.
- Trailing Character Type Masking (Partial Masking).
- Date Type Masking.
- Setup Table Based Masking.

To create a new Mask Profile, add a new value the Define Mask Profile search page

Oracle delivers one mask profile of each type as system data. Any new mask profile that you create should be migrated using data mover scripts before any masking configurations from Page and Field Configurator are migrated.

Image: Define a new Mask Profile

Define a new Mask Profile

Complete Masking

This type of masking masks all the characters of the field.

Image: Complete Masking in Define Mask Profile page

Complete Masking in Define Mask Profile page

Manager Self Service

Define Mask Profile

New Window | Personalize Page

Define Mask Profile

Mask Profile IDFULL MASKING

*Short DescriptionFullMask

Long DescriptionComplete Masking of Characters

☒ Default

Masking Parameters

*Masking TypeComplete

*Mask CharacterX☒ Retain Separators

Save

Add

Update/Display

- Short Description

Enter a short description for the mask profile ID
- Long Description

Enter a detailed description.
- Default

Select this box for a Mask Profile of type Complete to mark it as a system level default. This Mask Profile will be used for masking in case no Mask Profile is selected in Masking Configuration in Page and Field Configurator.
- Masking Type

Choose the Complete masking type to mask all the characters in the field.
- Mask Character

Choose the character that needs to replace the data in the field to mask it. X and * are the supported mask characters.
- Retain Separators

Select this if separators should be displayed while the rest of the data is masked. Supported separators are available as system data in the table EOCC_MASK_SEP.

Unmask Trailing Characters

This type of masking can be applied when you need to partially unmask some of the ending characters in a field. For example, credit card number.

Image: Unmask trailing characters

Unmask trailing characters

The screenshot shows the 'Define Mask Profile' form in the 'Manager Self Service' application. The form is titled 'Define Mask Profile' and has a sub-header 'PARTIAL MASKING'. The 'Mask Profile ID' is 'PARTIAL MASKING'. The '*Short Description' is 'PartMask' and the 'Long Description' is 'Last four Digits Unmasked'. Under the 'Masking Parameters' section, the '*Masking Type' is 'Unmask Trailing Characters', the '*Mask Character' is 'X', and the 'Length' is '4'. The 'Retain Separators' checkbox is checked. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Add', and 'Update/Display'.

Length

Choose the length or number of trailing characters that needs to be kept unmasked.

Date Masking

This type of masking can be applied for date fields and you can choose the parts of the date field that can be masked or left unmasked.

Image: Date type masking

Date type masking

The screenshot shows the 'Define Mask Profile' form in the 'Manager Self Service' application. The form is titled 'Define Mask Profile' and has a sub-header 'DATE_COMPLETE'. The 'Mask Profile ID' is 'DATE_COMPLETE'. The '*Short Description' is 'DATE_COMP' and the 'Long Description' is 'DATE_COMP'. Under the 'Masking Parameters' section, the '*Masking Type' is 'Date', the '*Mask Character' is '*', and the 'Retain Separators' checkbox is checked. Below this, there is a section titled 'Date Masking Options' with three checkboxes: 'Day', 'Month', and 'Year', all of which are checked. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Add', and 'Update/Display'.

Date Masking Options

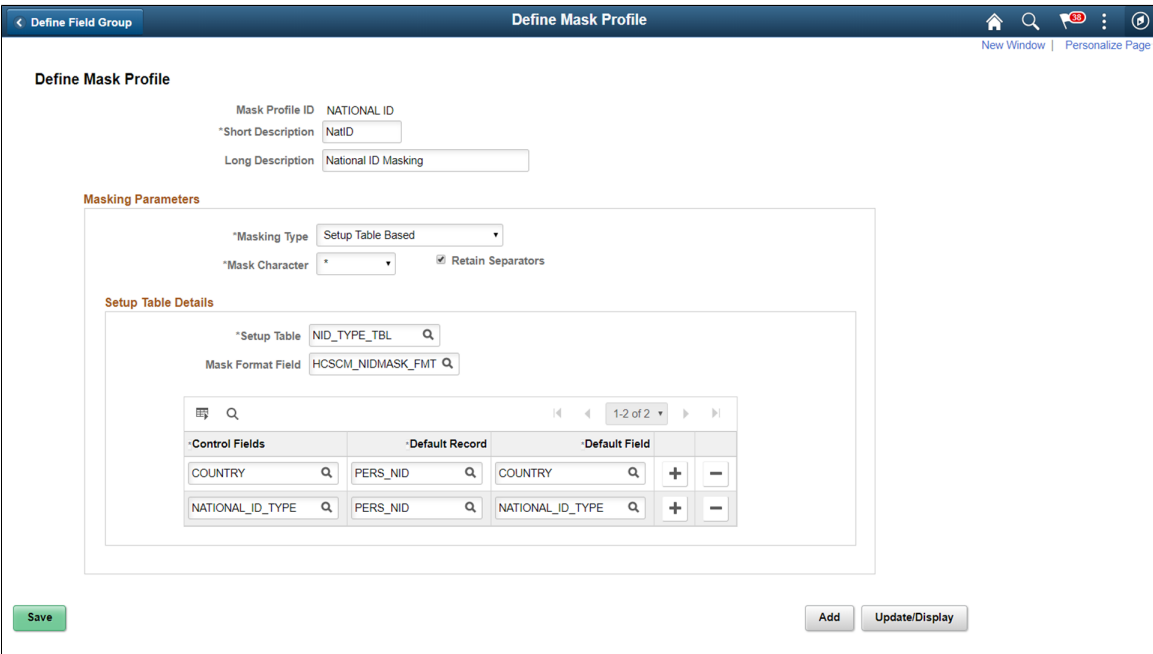
Select which part of the date (Day, Month or Year) needs to be masked.

Setup Table Based Masking

Use this masking profile to mask data from a defined setup table that has the masking format defined in it.

Image: Setup table based masking

Setup table based masking



Setup Table

Choose the Setup table that has the masking definition.

Mask Format Field

Choose the field that has the mask format in the setup table.

Control Fields

These fields in the Setup table determine the right mask format for a transaction.

Default Record

The default record to be displayed in Page and Field Configurator when a field is selected for masking. The Default Record can be overridden.

Default Field

The default field to be displayed in Page and Field Configurator when a field is selected for masking. The Default Field can be overridden.

Pages Used to Define Field Groups for Masking

Page Name	Definition Name	Usage
Define Field Group Page	EOCC_FIELD_GRP	Use this page to assign a default mask profile for a similar set of fields.

Define Field Group Page

Use the Define Field Group page (EOCC_FIELD_GRP) to assign a default Mask Profile to a similar set of fields.

Navigation

Enterprise Components > Page and Field Configuration > Define Field Group

Image: Define Field Group

Define Field Group

Define Field Group

Field Group NATIONAL_ID

*Default Mask Profile ID NATIONAL_ID

Select Fields

Field NameDefault Label

NATIONAL_IDNational ID

NID_SPECIAL_CHARNID as Stored

SSNSocial Security #

Save

Return to Search

Previous in List

Next in List

Add

Update/Display

- Default Mask Profile ID

Replace with the default Mask Profile. The default mask profile will be defaulted in Page and Field Configurator if any field from the field group is chosen for masking. The same field cannot be used in multiple field groups
- Field name

Choose the similar fields that are to be grouped under this field group.

Configuring Data Masking in Page and Field Configurator

Pages Used to Configure Masking using Page and Field Configurator

Page Name	Definition Name	Usage
Masking Page	EOCC_CONFIG_MASK	Use this page to configure masking for Page fields and Search Fields.
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.

Page Name	Definition Name	Usage
<u>Map to Portal Registry</u>	EOCC_MAP_EVENT	Use this page to map the configuration to the Portal Registry.

Masking Page

Use the Masking page (EOCC_CONFIG_MASK) to configure data masking for a component.

Navigation

Enterprise Components > Page and Field Configuration > Page and Field Configurator

In the Page and Field Configurator search page, search for an existing value which has a Masking Configuration Type or create a new value with the Masking Configuration Type.

Image: Masking page in Page and Field Configurator

Masking page in Page and Field Configurator

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.

Configuration Type

Displays whether this is a Standard or Masking 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. For more details, see [Validate Page Configurations Page](#)

Criteria

This functionality is the same as the Criteria for a Standard Page Configuration. For details, refer the Criteria Section in [Page Configuration Page](#)

Configure Masking

The Configure Masking section is used to configure page fields, search fields and prompt record fields for masking. Masking is supported for:

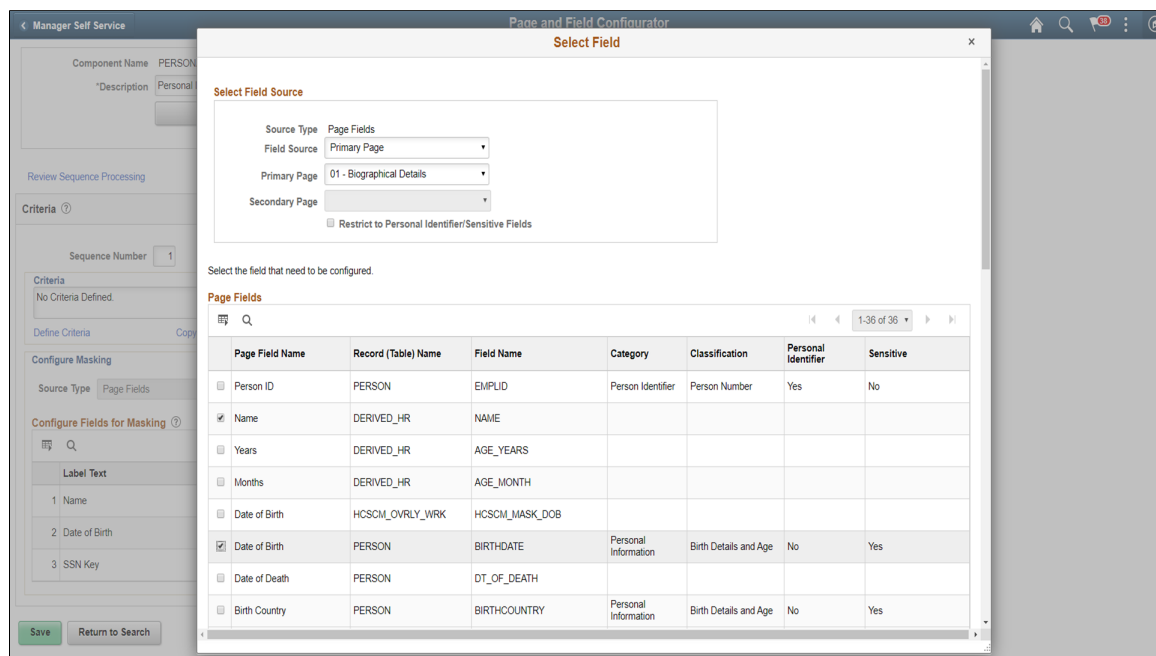
- Primary Page fields
- Secondary Page fields
- Search Record fields
- Prompt Record fields

Any drop-down field selected for masking will be fully masked with * character.

Choose the Select Fields button to list out all the available fields in that component. Masking is not supported for long fields.

Image: Select Fields for masking

Select Fields for masking



Source Type

Indicates the source of the fields that are available for masking. Source Type can be Page Fields or Search and Prompt Fields.

Field Source

Indicates the selected record type for masking. Based on the selected field source, all the field records will be listed for selection.

Page Type

Indicates whether the fields listed are from a primary page or from a secondary field.

Primary Page

Choose the main page to which the fields belong.

Secondary Page

Choose the secondary page from the main page.

Note: In addition to secondary pages which are part of the component structure, masking is also supported for secondary pages called from PeopleCode. To select fields from secondary pages called via PeopleCode for masking, the secondary page fields should be manually added to the Page Fields grid. For secondary pages called via PeopleCode, masking is supported only if the secondary page field is marked as Personal Identifier/Sensitive in Data Privacy Framework.

Restrict to Personal Identifier/Sensitive Fields

Choose this option if you want to list only the fields that have been classified as Personal Identifier or Sensitive in Data Privacy Framework. For more details, see [Understanding Data Privacy](#)

Choose the required field names and click OK.

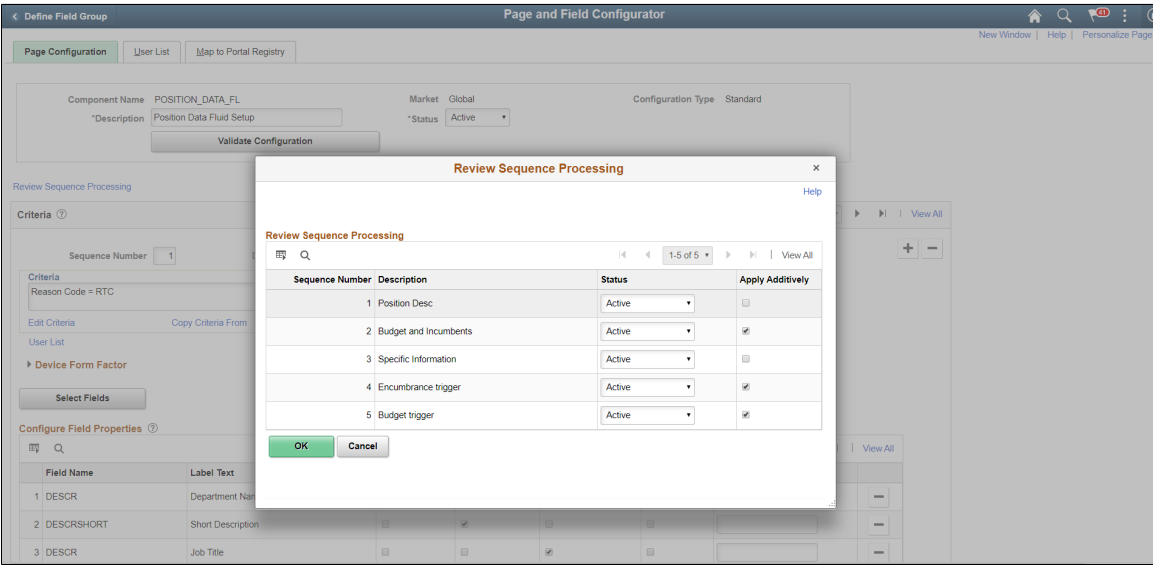
In Add mode, the page fields chosen for masking will be enabled for data entry. In other modes, fields chosen for masking will be enabled only if they are blank..

Review Sequence Processing

Use the Review Sequence Processing link at the beginning of the Criteria section to review the list of sequences. Here you can see the sequences which are applied additionally.

Image: Review Sequence Processing

This illustration shows the Review Sequence Processing page listing all the sequences.



Configure Fields for Masking

Once the fields are selected, they are listed in the Configure Fields for Masking grid. If the selected field is part of a Field Group, the Default Mask Profile from the Field Group is defaulted as the Mask Profile for the selected Field. If the field is not part of any Field Group, Mask Profile will be defaulted to the system level Default Mask Profile. Defaulted Mask Profile can be overridden for a Component Record Field by selecting the Mask Profile link.

Mask Field

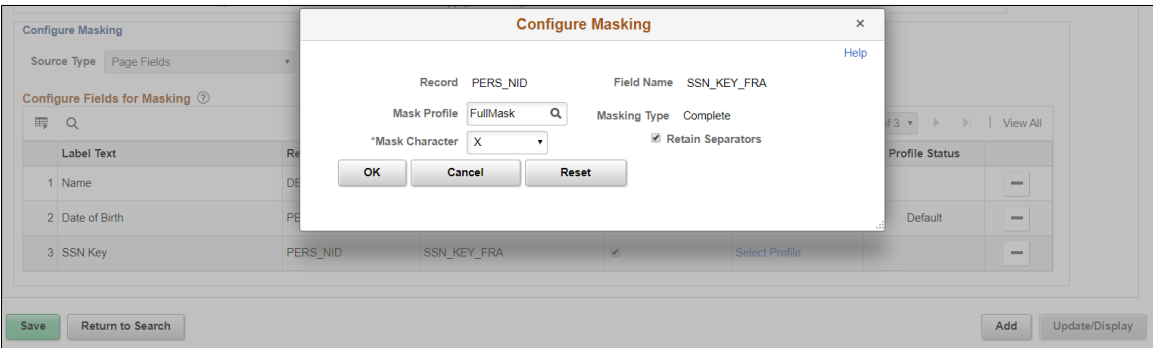
Choose this option to enable masking for that field

Mask Profile

Choose the mask profile for the particular field. The current profile is listed against the field. Mask Profile is defaulted on field selection if the field is part of a Field Group or a system level Mask Profile is present. If the Mask Profile is listed as *Select Profile* or if you want to change the current profile, click on it to change it.

Image: Choose Mask Profile

Choose Mask Profile



Once the mask profile is changed from the default profile, the Profile Status is displayed as Changed.

For more details on Mask Profile, see [Define Mask Profile Page](#)

Search Field Masking

Search fields are configured for masking in the same way as the page fields are configured as explained above. However, there are some differences with page field masking:

- Only the Mask profiles of Complete, Unmask Trailing Character and Date masking are supported for Search Fields masking.
- If a component uses pivot grid based search and the masked field is also a part of facet search, then the facet will be hidden.
- When a search field is chosen to be masked, then the List view will be hidden from Component Keyword search and Pivot Grid based search.
- A search field selected for masking will be masked in the search result and will be disabled as a search field.
- For Search fields, separators are supported only for non-date type masking.

Prompt Masking

Prompt masking provides a configurable option for masking sensitive/PII fields in Prompt records. Prompt record fields are configured for masking in the same way as the page fields are configured.

When you apply the configuration using the [Map to Portal Registry Page](#), the record-field property "Allow Search events for Prompt dialogs" is automatically selected. This is necessary to trigger the search event programs generated by Page and Field Configurator. If the masking configurations for the prompt record field is removed, the mentioned record-field property will be de-selected.

Once prompt masking is enabled and an unauthorized user clicks on the prompt lookup the prompt dialog shows the masked data in the column(s) identified for masking in the result grid. After the user selects a value from the prompt and the page is loaded, the field value on the page will be masked if the page field is also defined in Page and Field Configurator masking configuration.

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.

The functionality is the same for Standard and Masking configurations. For details on the User List page, see [User List Page](#)

Map to Portal Registry

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.

For more details refer the [Map to Portal Registry Page](#)

Chapter 13

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.



Click to view a video about [PeopleSoft Data Privacy](#)

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Maintain Category Page</u>	EODP_CTGRY_DTLS_FL	View and maintain categories.
<u>Maintain Classification Page</u>	EODP_CLSFCN_FL	View and maintain classifications.
<u>Maintain Data Privacy Settings Page</u>	EODP_RECFLD_MNT_FL	Maintain Data Privacy mappings for PeopleSoft Records and Fields.
<u>Select Reference Type Page</u>	EODP_GENPARM_SCF	Select to refresh or update references.
<u>References Last Run Page</u>	EODP_RF_LSTRUN_SCF	View the timestamps for the references which were last updated for each Reference type.
<u>View Reference Page — Component/ Page Tab</u>	EODP_VIEW_REF_FL	View Components/Pages where Record Fields configured in Maintain Data Privacy Settings page are used.
<u>Component Page Details for Standard page</u>	EODP_COMP_REF_SCF	View more details of the reference used.
<u>View Reference Page — Query Tab</u>	EODP_VIEW_REF_FL	View Queries where Record Fields configured in Maintain Data Privacy Settings are used.
<u>Query Details Page</u>	EODP_QRY_REF_SCF	Shows the details of connected query search result.
<u>View Reference Page — Reports Tab</u>	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.
<u>BIP Report Details Modal</u>	EODP_REPT_DTL_SCF	View BIP Report details based on the selected Query type.
<u>SQR Report Details Modal</u>	EODP_SQR_DTL_SCF	View the details of SQR programs. This also includes SQR Run Control Component and Navigation information.
<u>View Reference Page — Search Tab</u>	EODP_VIEW_REF_FL	View Search Definitions and Search Categories where Record Fields configured in Maintain Data Privacy Settings are used.
<u>Search Details Modal</u>	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.
<u>View Reference Page — Analytics Tab</u>	EODP_VIEW_REF_FL	View pivot grid reference to Records and Fields configured in Maintain Data Privacy Settings page.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Pivot Grid Details Modal</u>	EODP_PIVOT_DTL_SCF	View pivot grid details such as Query information and publish options for pivot grids.
<u>View Reference Page — Integration Tab</u>	EODP_VIEW_REF_FL	Lists the Services and Service Operations using messages that reference Record Fields configured in Maintain Data Privacy Settings page.
<u>Integration Details Modal</u>	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.

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.

Maintain Category

View Maintain Category
92 results found.

[+ Add](#)

92 rows

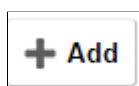
Category Code	Category	Classification	Personal Identifier	Sensitive	Delivered
ACCT01	Account Information	Account Name	Yes	Yes	Yes
ACCT01	Account Information	Account or Membership Number	Yes	Yes	Yes
ACCT01	Account Information	Bank Account Number	Yes	Yes	Yes
ACCT01	Account Information	Stock Account Number	Yes	Yes	Yes
ACCT01	Account Information	Unique Banking Key	Yes	Yes	Yes
ATCH01	Attachments	Applicant Information	Yes	Yes	Yes
ATCH01	Attachments	Banking Attachment	Yes	Yes	Yes
ATCH01	Attachments	Garnishment Information	Yes	Yes	Yes
ATCH01	Attachments	Tax Information	Yes	Yes	Yes
ATCH01	Attachments	Unclassified Attachment	Yes	Yes	Yes
COMP01	Compensation	Date or Time Since Last Increase	No	Yes	Yes
COMP01	Compensation	Pension and Retirement	No	Yes	Yes

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.

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.

Maintain Category

Category Code PERSON

Category Name National ID

Delete not enabled for System data and for those being used in other configurations

	Classification	Personal Identifier	Sensitive	
1	Nationality and Ethnicity	☐	☐	
2	National Identifier	☐	☐	

Add

Maintain Classification **Save**

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.

Image: Maintain Classification page

This example illustrates the fields and controls on the Maintain Classification page.

Maintain Classification

Delete button not enabled for Classifications used in categories

88 rows

Classification Name	
Account Name	
Account or Membership Number	
Bank Account Number	
Stock Account Number	
Unique Banking Key	
Applicant Information	
Banking Attachment	
Garnishment Information	
Tax Information	
Unclassified Attachment	
Date or Time Since Last Increase	
Pension and Retirement	

Add 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.

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.

Maintain Data Privacy Settings

References Last Run Details

+ Add

3360 rows

Record Name/Description	Field/Default Label	Category	Classification	Personal Identifier	Sensitive	Product	View References	Comments
ABSENCE_HIST EE Absence	BIRTH_DT Actual Birth Date	Personal Information	Birth Details and Age	☐	☒	Monitor Absence		
ABSENCE_HIST EE Absence	COUNSELLING Counseling	Health Information	Medical Details	☐	☒	Monitor Absence		
ABSENCE_HIST EE Absence	DOC_CONSULTED Doctor Consulted	Health Information	Medical Details	☐	☒	Monitor Absence		
ABSENCE_HIST EE Absence	EMPLID Empl ID	Person Identifier	Person Number	☒	☐	Monitor Absence		
ABSENCE_HIST EE Absence	EWOC_DT Expected Week of Child Birth	Personal Information	Birth Details and Age	☐	☒	Monitor Absence		
ABSENCE_HIST	INDUSTRIAL_INJURY	Health Information	Medical Details	☐	☒	Monitor Absence		

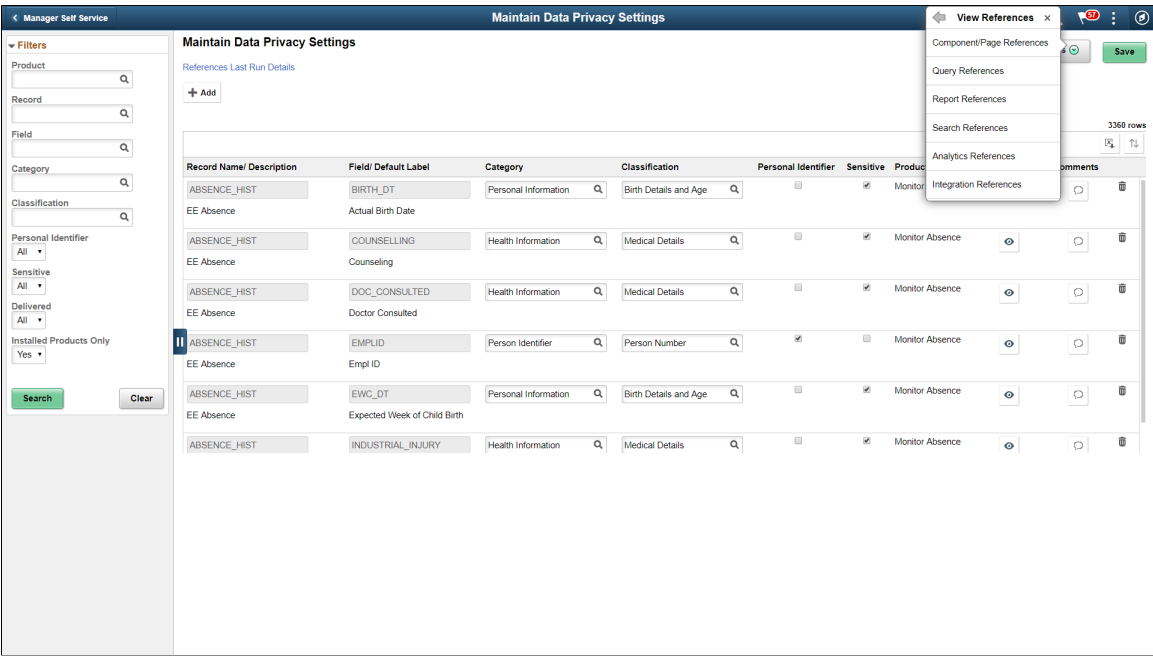
The left pane lists different filters available for Data Privacy Settings maintenance page. Available filters are:

- 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 Page](#) to 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.



Select to download the filtered Record Field Information.



Select to view reference for the Record Field combination.



Select to open Comments Modal Window 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.

Image: Select References Page

This example illustrates the Select References page.

Select Reference Type

Cancel Done

Component / Page Yes

Query Yes

Reports Yes

Search Yes

Analytics Yes

Integration Yes

▼ Refresh References

Refresh References No

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.

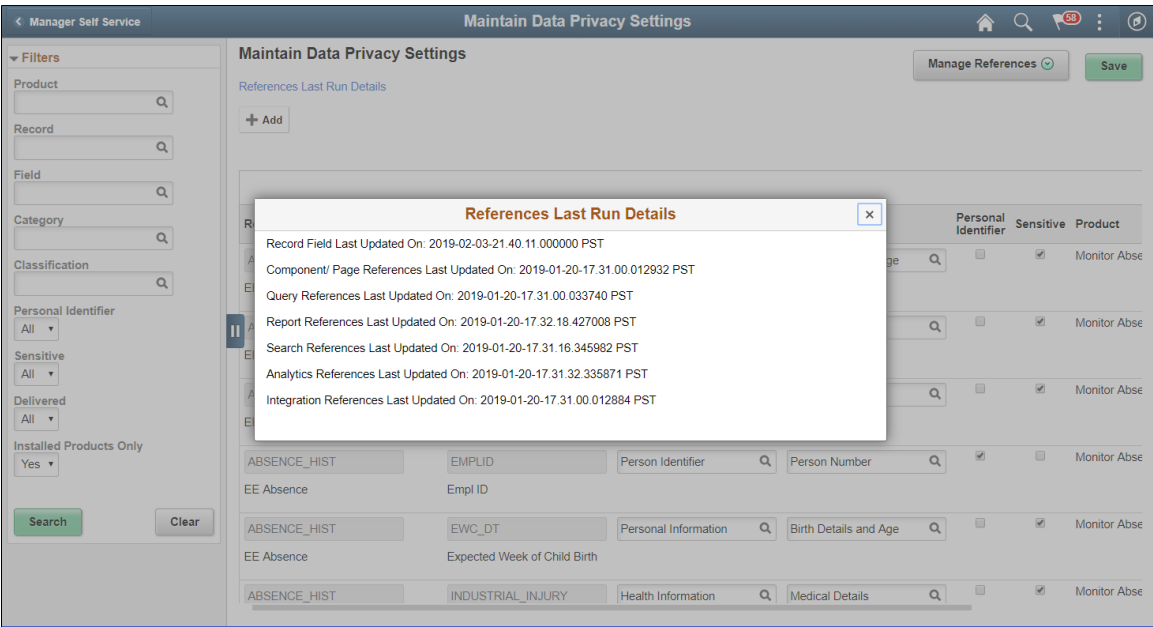
Navigation

Enterprise Components >Data Privacy Framework > Maintain Data Privacy Settings

Select Reference Last Run Details link.

Image: Reference Last Run Details Page

This example illustrates the Reference Last Run Details page.



Comments Modal Window

Use Comments Modal (EODP_RF_CMNT_SCF) to enter, review and update the comments for a Record Field Combination.

Image: Comments Modal Window

This illustration represents the comments modal for Record field.



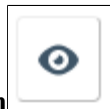
View References Page

The View References page displays 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

- 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.

Component	Page	Record	Field	Category	Classification	Personal Identifier	Sensitive	Product
Cost Rate JPN	&Cost Rate History	PERSON_NAME	NAME_INITIALS	Name Details	Person Name	Q	☒	HCM for Japan
Cost Rate JPN	&Cost Rate History	PER_ORG_ASGN_VW	EMPLID	Person Identifier	Person Number	Q	☒	HCM for Japan
Additional Appointment JPN	&Add Appt Management	PERSON_NAME	NAME_INITIALS	Name Details	Person Name	Q	☒	HCM for Japan
Additional Appointment JPN	&Add Appt Management	PER_ORG_ASGN_VW	EMPLID	Person Identifier	Person Number	Q	☒	HCM for Japan
Review Absence Calendar	Review Absence Calendar	PERSON_NAME	NAME_INITIALS	Name Details	Person Name	Q	☒	Monitor Absence
Review Absence Calendar	Review Absence Calendar	PER_ORG_ASGN_VW	EMPLID	Person Identifier	Person Number	Q	☒	Monitor Absence
Review Absence Calendar	Review Absence Calendar	PERSON_NAME	NAME_INITIALS	Name Details	Person Name	Q	☒	Monitor Absence
Review Absence Calendar	Review Absence Calendar	PER_ORG_ASGN_VW	EMPLID	Person Identifier	Person Number	Q	☒	Monitor Absence
Create/Update Absence	&Absence Data	ABSENCE_HIST	BIRTH_DT	Personal Information	Birth Details and Age	Q	☒	Monitor Absence
Create/Update Absence	&Absence Data	ORIG_HIR_PER_VW	ORIG_HIRE_DT	Employment Details	Hire and Service Dates	Q	☒	Monitor Absence
Create/Update Absence	&Absence Data	PERSON_NAME	NAME_INITIALS	Name Details	Person Name	Q	☒	Monitor Absence
Create/Update Absence	&Absence Data	PER_ORG_ASGN_VW	EMPLID	Person Identifier	Person Number	Q	☒	Monitor Absence
Create/Update Absence	&Absence Data	PER_ORG_ASGN_VW	HIRE_DT	Employment Details	Hire and Service Dates	Q	☒	Monitor Absence
Create/Update Absence	&Follow-up Action	ABSENCE_HIST	COUNSELLING	Health Information	Medical Details	Q	☒	Monitor Absence

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.

Image: Component/Page Details

This example illustrates the fields and controls on the Component/Page Details.

The screenshot shows a window titled "Component/Page Details" with a close button (X) in the top right corner. The window is divided into several sections:

- Component and Page Information:**
 - Component Name: IDENTIFICATN_DATA
 - Component Description: Identification Data
 - Page Name: CITIZEN_PASSPORT
 - Page Description: Citi&zenship/Passport
 - Product: HR Core Objects
- Record and Field Information:**
 - Record Name: CITIZENSHIP
 - Record Description: EE/Dependent Citizenship
 - Field Name: CITIZENSHIP_STATUS
 - Field Label: Citizenship Status
- Menu and Content References:** (2 rows)

Menu Name	Market	Portal Name	Content Reference Name	Navigation Path
ADMINISTER_WORKFORCE_(GBL)	Global	EMPLOYEE	HC_IDENTIFICATN_DATA_GBL5	Main Menu>Workforce Administration>Personal Information>Citizenship>Identification Data
ADMINISTER_WORKFORCE_(GBL)	Global	EMPLOYEE	HC_S201605031340179305090955	N/A
- Component Interface References:** (2 rows)

Component Interface Name	Description
CI_IDENTIFICATN_DATA	CI for IDENTIFICATN_DATA
UCB_IDENTIFICATN_DATA_SDU	Identification Data CI

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

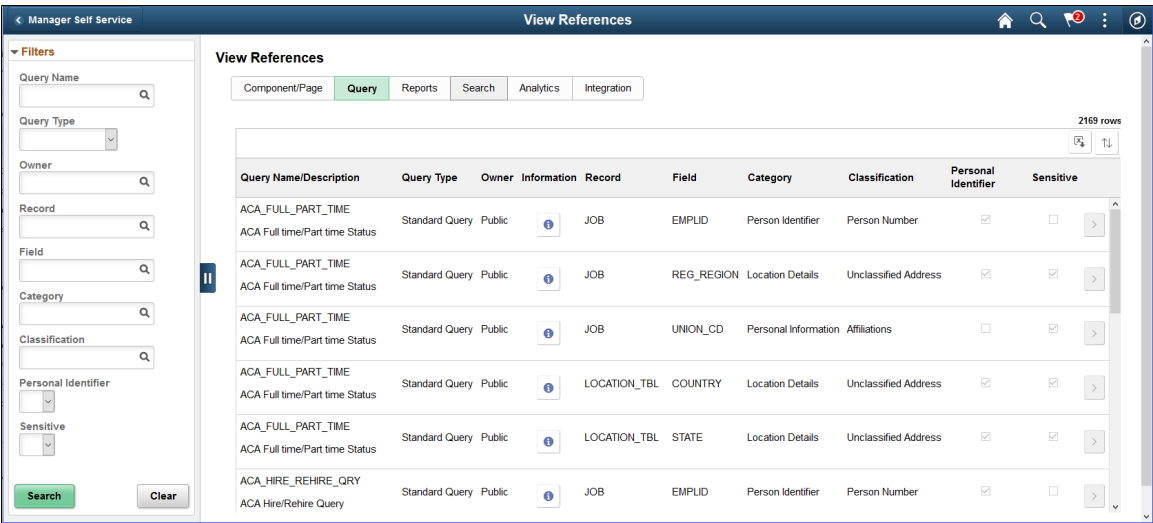
Use the View References (EODP_VIEW_REF_FL) Query tab to view references for Record Fields in Queries, Connected Queries and Composite Queries.

Navigation

Enterprise Components >Data Privacy Framework >View References >Query tab

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*.

Image: Query Details Page

This example illustrates the fields and controls in Query Details (EODP_QRY_REF_SCF) page.

Query Details

▼ Query Information

Connected Query

COMP_SRCH_COMPENSATION_CNTD

Product

eCompesation Manager Desktop

Record Name

HR_SS_BASE_VW

Field Name

ANNUAL_RT

1 row

Child Query Name	Information
COMP_SRCH_COMPENSATION_BASSAL	

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.

Image: Query tab with connected query search results

This example illustrates the search result for a type of connected query.

Manager Self Service

View References

View References

Component/PageQueryReportsSearchAnalyticsIntegration

228 rows

Query Name/Description	Query Type	Owner	Information	Record	Field	Category	Classification	Personal Identifier	Sensitive
BREREG02 BREREG02	Connected Query	Public		EMPL_PHOTO	EMPLID	Person Identifier	Person Number	☒	☐
COMP_SRCH_COMPENSATION_CNTD Compensation Connected Query	Connected Query	Public		COMP_SRCH_DR_VW	EMPLID	Person Identifier	Person Number	☒	☐
COMP_SRCH_COMPENSATION_CNTD Compensation Connected Query	Connected Query	Public		COMP_SRCH_DR_VW	SUPERVISOR_ID	User Credentials	User Global Identifier	☒	☐
COMP_SRCH_COMPENSATION_CNTD Compensation Connected Query	Connected Query	Public		HR_SRCH_JOB_VW	EMPLID	Person Identifier	Person Number	☒	☐
COMP_SRCH_COMPENSATION_CNTD Compensation Connected Query	Connected Query	Public		HR_SRCH_NAME_VW	EMPLID	Person Identifier	Person Number	☒	☐
COMP_SRCH_COMPENSATION_CNTD Compensation Connected Query	Connected Query	Public		HR_SRCH_NAME_VW	FIRST_NAME	Name Details	Person Name	☒	☐

Query Details Page

The Connected Query Details (EODP_QRY_REF_SCF) modal displays details of connected queries.

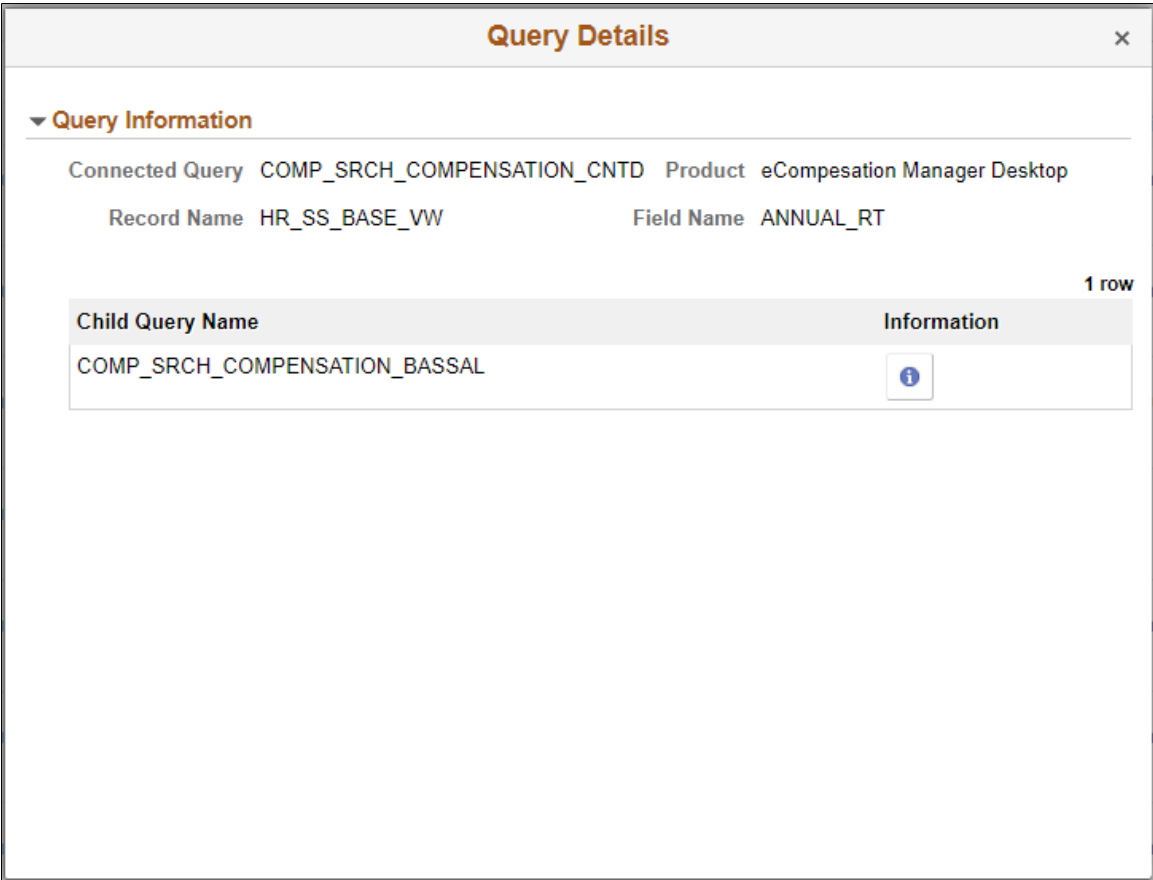
Navigation

Enterprise Components >Data Privacy Framework > View References >Query tab

Select the Query Type as Connected Queries and select the chevron for details.

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.

Image: View References — Reports Tab for BIP

This example illustrates the fields and controls on the View References — Reports Tab for Report Type BIP.

View References

Component/Page Query **Reports** Search Analytics Integration

220

Report Name/ Description	Report Type	Record	Field	Category	Classification	Personal Identifier	Sensitive
BRREG02 Employee Registry report BRA	BIP	EMPL_PHOTO	EMPLID	Person Identifier	Person Number	☒	☐
CARTRAIN Employee Career Training Plan	BIP	PERSON_NAME	NAME	Name Details	Person Name	☒	☐
ERE_RPT_ESP ERE Report ESP	BIP	ADDRESSES	ADDRESS1	Location Details	Business Address	☒	☐
ERE_RPT_ESP ERE Report ESP	BIP	ADDRESSES	STATE	Location Details	Business Address	☒	☐
ERE_RPT_ESP ERE Report ESP	BIP	EMAIL_ADDRESSES	EMAIL_ADDR	Contact Details	Business Email	☒	☐
ERE_RPT_ESP ERE Report ESP	BIP	EMAIL_ADDRESSES	EMPLID	Person Identifier	Person Number	☒	☐
ERE_RPT_ESP ERE Report ESP	BIP	JOB	EMPLID	Person Identifier	Person Number	☒	☐

Filters

Product

Report Name

Report Type **BIP**

Record

Field

Category

Classification

Personal Identifier

Sensitive

Installed Products Only **Yes**

Search **Clear**

Select Report Type as SQR to view references in SQR Reports.

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 Analyzer. For details, refer to *File Pre-Processor* topics in the *PeopleSoft Change Impact Analyzer* product documentation.

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 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 the Refresh option selected.

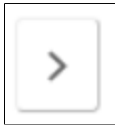
Warning! File Pre-processor is process intensive and may continue to run for some time.

Report Name/Description	Report Type	Record	Field	Category	Classification	Personal Identifier	Sensitive
ABS002 Absence Periods Report	SQR	ABSENCE_HIST	EMPLID	Person Identifier	Person Number	✓	☐
ABS002 Absence Periods Report	SQR	JOB	REG_REGION	Location Details	Unclassified Address	✓	✓
ABS002 Absence Periods Report	SQR	PERSON_NAME	NAME	Name Details	Person Name	✓	☐
ABS003 Time Lost due to Absence	SQR	JOB	REG_REGION	Location Details	Unclassified Address	✓	✓
ABS007NL Longterm Illnesses NLD	SQR	ABSENCE_HIST	EMPLID	Person Identifier	Person Number	✓	☐
ABS007NL Longterm Illnesses NLD	SQR	GP_ABS_EVENT	ABSENCE_REASON	Health Information	Medical Details	☐	✓
ABS007NL Longterm Illnesses NLD	SQR	GP_ABS_EVENT	EMPLID	Person Identifier	Person Number	✓	☐

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

- Sensitive
- Installed Products Only



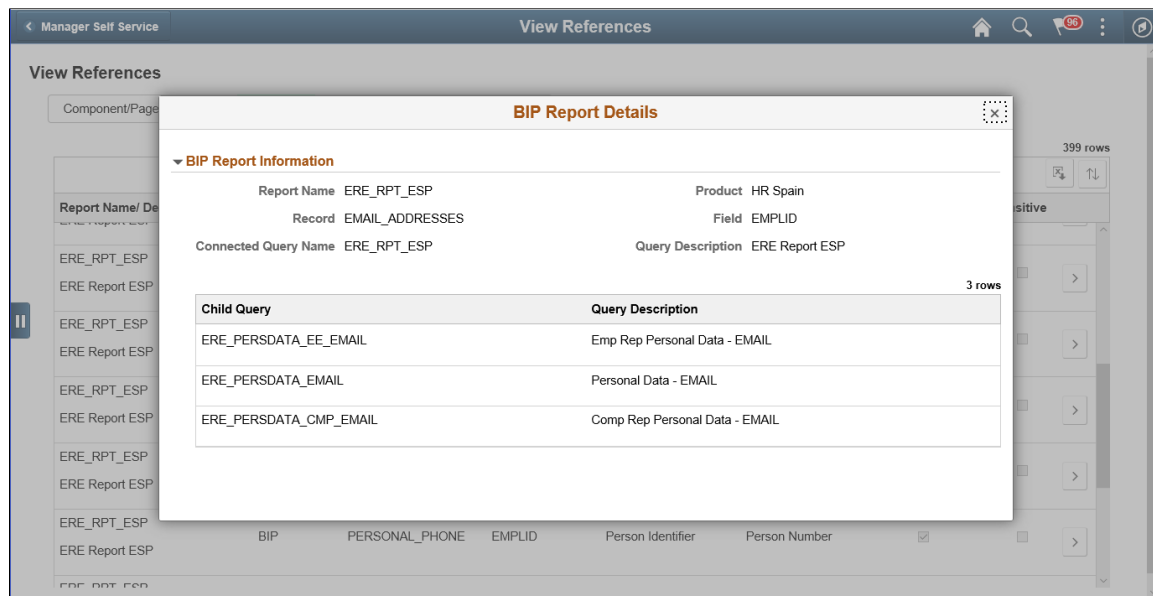
Select to open the report details of [BIP Report Details Modal](#) or [SQR Report Details Modal](#).

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.

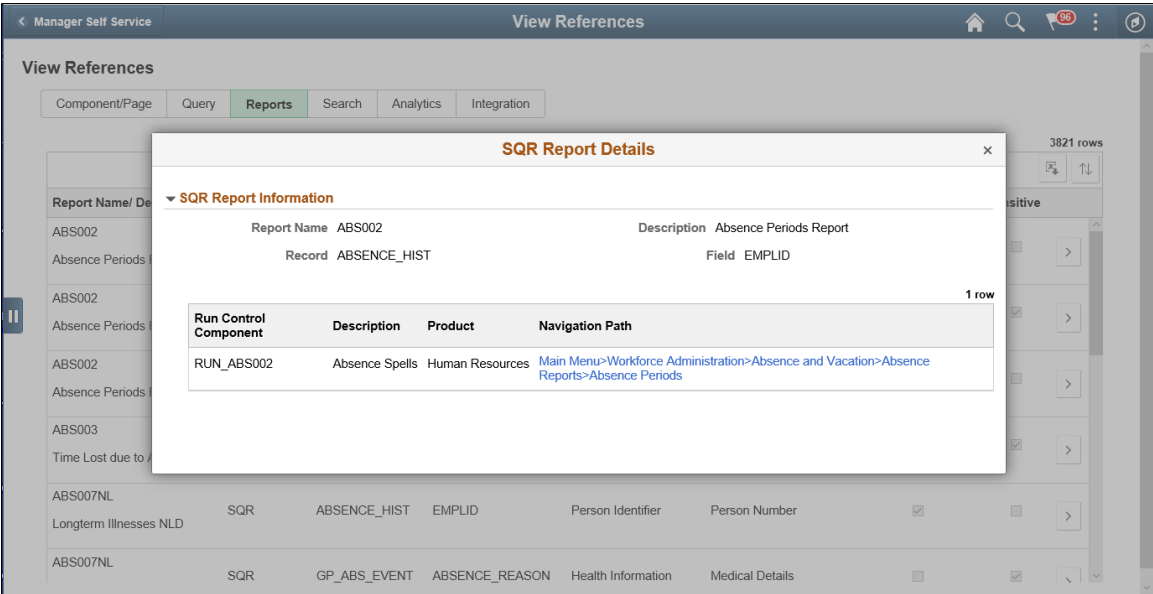


SQR Report Details Modal

The SQR Report Details Modal (EODP_SQR_DTL_SCF) displays details of Run Control components from which SQR Reports are run.

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.

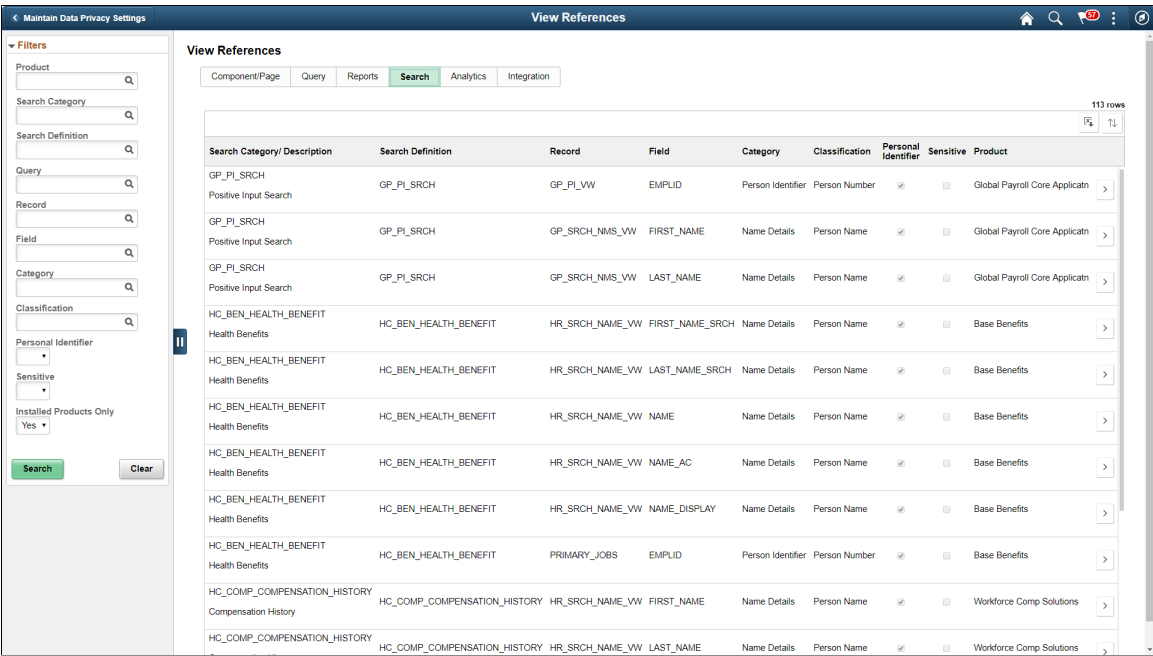
Navigation

Enterprise Components >Data Privacy Framework > View References >Search tab

Note: Query Expressions used in Search Definitions are excluded from Search References.

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.

Search Details Modal

The Search Details (EODP_SRCH_DTL_SCF) modal displays details of queries in each search definition.

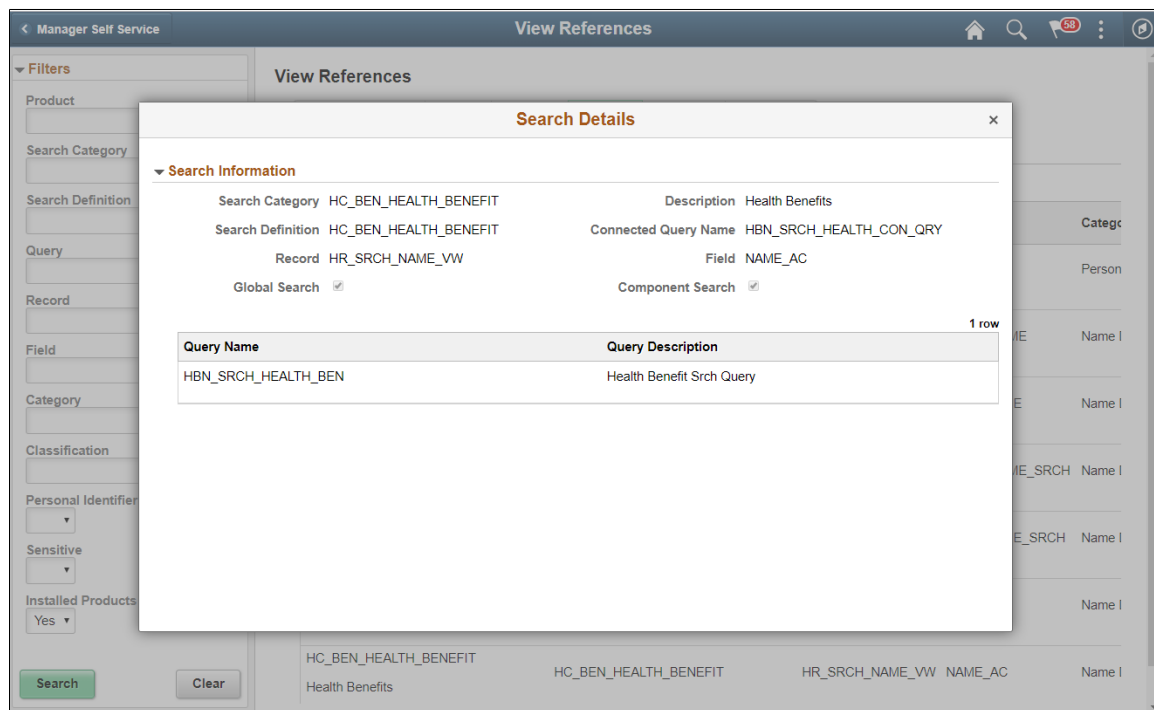
Navigation

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

Image: Component/Page

This example illustrates the fields and controls on the Analytics tab.

View References

Component/Page Query Reports Search **Analytics** Integration

13 rows

Pivot Grid Name/ Title	Data Source Type/ Data Source Value	Record	Field	Category	Classification	Personal Identifier	Sensitive	Product
ACA_FULL_PART_TIME	PSQUERY	JOB	EMPLID	Person Identifier	Person Number	☒	☐	Time and Labor
ACA Full/ Part Time Status	ACA_FULL_PART_TIME	JOB	UNION_CD	Personal Information	Affiliations	☐	☒	Time and Labor
ACA_HIRE_REHIRE	PSQUERY	JOB	EMPLID	Person Identifier	Person Number	☒	☐	Time and Labor
ACA New Hire/ Rehire	ACA_HIRE_REHIRE_QRY	JOB	UNION_CD	Personal Information	Affiliations	☐	☒	Time and Labor
PY_WC_CHK_CAN	PSQUERY	PAY_CHECK	STATE	Location Details	Unclassified Address	☒	☒	Payroll
Employee Cheque Data	PY_WC_CHK_HIST_CAN	PAY_CHECK	STATE	Location Details	Unclassified Address	☒	☒	Payroll
PY_WC_CHK_HIST_CAN	PSQUERY	PAY_CHECK	STATE	Location Details	Unclassified Address	☒	☒	Payroll
Comparative Cheques	PY_WC_CHK_HIST_CAN	PAY_CHECK	STATE	Location Details	Unclassified Address	☒	☒	Payroll
PY_WC_CHK_HIST_USA	PSQUERY	PAY_CHECK	STATE	Location Details	Unclassified Address	☒	☒	Payroll
Comparative Checks	PY_WC_CHK_HIST_USA	PAY_CHECK	STATE	Location Details	Unclassified Address	☒	☒	Payroll
SCH_AENRL_ERRORS	PSQUERY	PERSON_NAME	NAME	Name Details	Person Name	☒	☐	TL Scheduling
Scheduled Enrollment Errors	SCH_AENRL_ERRORS	PERSON_NAME	NAME	Name Details	Person Name	☒	☐	TL Scheduling
SCH_AENRL_PREVIEW	PSQUERY	PERSON_NAME	NAME	Name Details	Person Name	☒	☐	TL Scheduling
Schedule Assign Enrollments	SCH_AENRL_PREVIEW	PERSON_NAME	NAME	Name Details	Person Name	☒	☐	Time and Labor

The left panel have Filters listed as follows:

- Product
- Pivot Grid Name
- Data Source Type
- Data Source Value
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive
- Installed Products Only



Select to open the Pivot Grid Details Modal.

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.

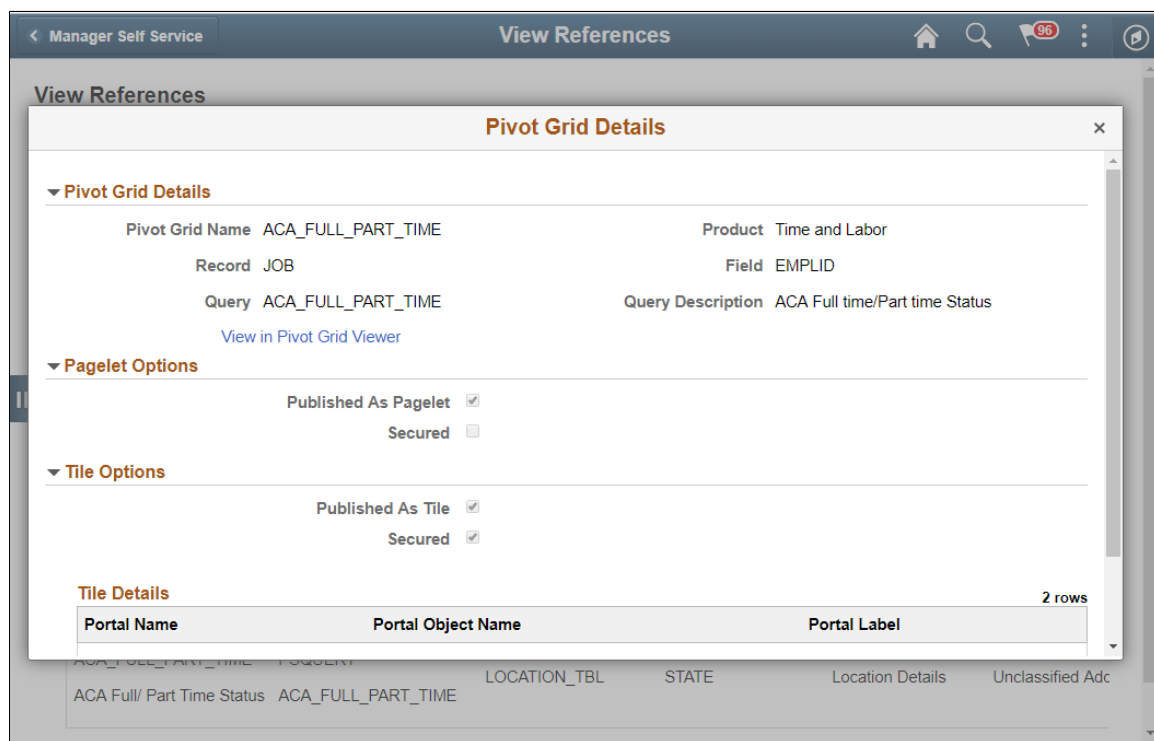
Navigation

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

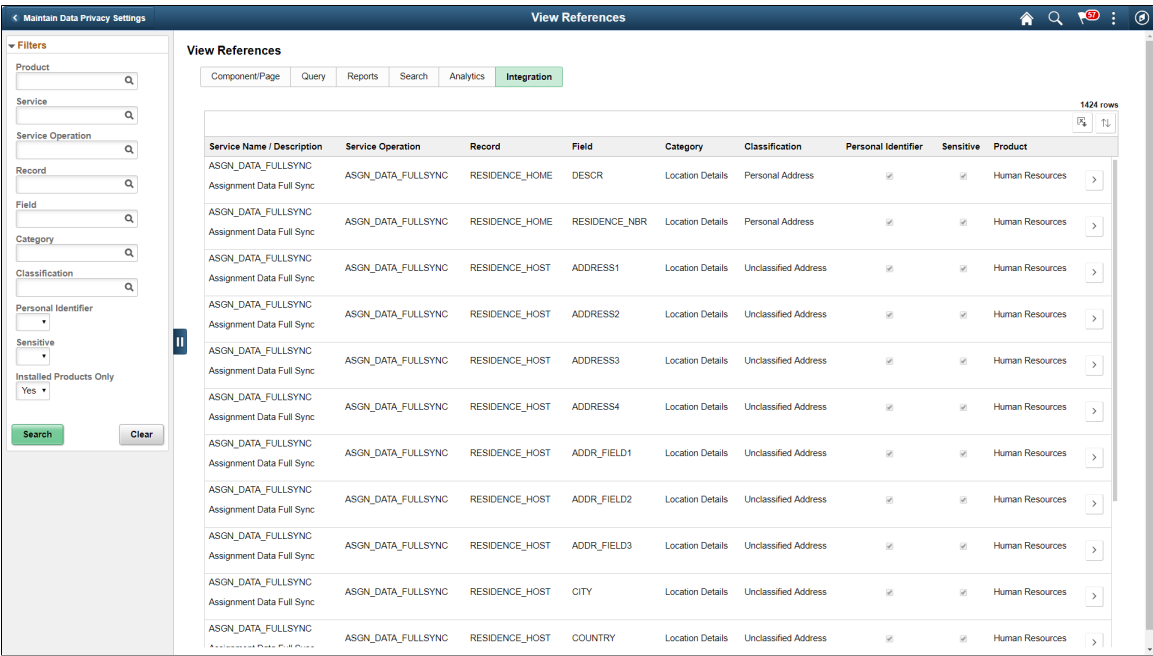
Use the Integration (EODP_VIEW_REF_FL) tab to view references to Integration Broker related objects.

Navigation

Enterprise Components >Data Privacy Framework > View References >Integration tab

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.

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.

Integration Details

Service and Service Operation Information

Service

ASGN_DATA_FULLSYNC

Description

Assignment Data Full Sync

Service Operation

ASGN_DATA_FULLSYNC

Description

Assignment Data Full Sync

Default Version

VERSION_1

Type

Asynchronous - One Way

Queue Name

VAR_COMP_PAYROLL_INTERFACE

Product

Human Resources

Record and Field Information

Record Name

RESIDENCE_HOST

Record Description

EE Assgnmt-Host Residence Cntrl

Field Name

ADDRESS2

Field Label

Address Line 2

Message Information

1 row

Message Name	Message Version	Parameter Name
ASGN_DATA_FULLSYNC	VERSION_1	REQUEST

Enabling Query Data Masking

PeopleSoft provides ability for data protection in PS Query and ensures that only authorized users have access to sensitive data used in the query.

Understanding Query Masking

Query Masking provides a configurable option for masking sensitive fields used in the PS Queries. Only authorized users will have the access to view and/or run the PS Query using sensitive data.

When a user runs a query, the system checks:

- If the Query Masking feature is enabled in the system.

- If the fields used in the query are identified as Personally Identifiable Information (PII) or Sensitive in the Data Privacy Framework.
- If the current user is authorized to view the PII and/or Sensitive fields.

Note: Data Privacy Framework maintains all the sensitive record fields in the product and the roles that have access to these fields. You can mark a field as sensitive using [Maintain Data Privacy Settings Page](#) and define the roles that have access to specific fields using [Authorized Roles Page](#). For more information, see [Understanding Data Privacy](#).

You can enable the query masking feature using [System Settings Page](#). If the Query Masking feature is not enabled, then there is no change in the PS Query behavior.

This does not impact or change the Query Security requirements for a user to access a PS Query.

In a query, the sensitive field could be part of the query SELECT, WHERE or ORDER BY clause. For an unauthorized user:

- If a sensitive field is in the SELECT statement of the PS Query, then the sensitive column output will be masked.
- If a sensitive field is in the WHERE or ORDER BY clause, then PS Query will stop query execution and will NOT return any output.

Pages Used to Enable Query Data Masking

Page Name	Definition Name	Usage
Authorized Roles Page	HCSCM_AUTHROLE	Identify PeopleSoft Roles and define access to sensitive record fields.
Synchronize Data Page	EODP_QRYMSK_RUN_FL	Synchronize data privacy mappings defined in Data Privacy Framework with the Query system and the authorized roles.
Exclude Fields Page	EODP_QMSK_EXCLU_FL	Identify fields that should be excluded from the Data Sync process.
System Settings Page	EODP_QRYSWITCH_FL	Enable/disable Query Masking system setting.
Query Masking Utility Page	EODP_QRMSK_UTILITY	Generate User Access reports.

Authorized Roles Page

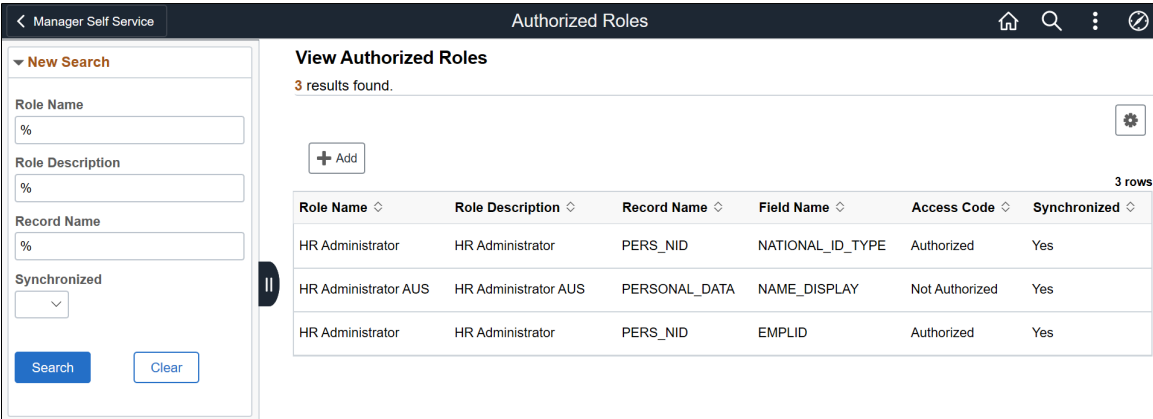
Use the Authorized Roles page (HCSCM_AUTHROLE) to identify PeopleSoft Roles and their access to sensitive record fields.

Navigation

Enterprise Components >Data Privacy Framework >Query Masking >Authorized Roles

Image: Authorized Roles Page

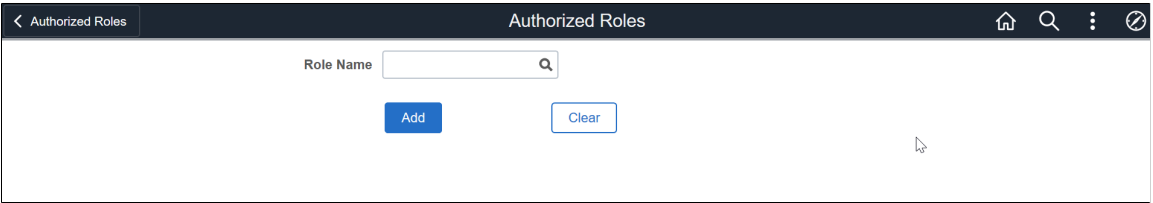
This example illustrates the Authorized Roles page.



To newly configure a role, click the Add button.

Image: Authorized Roles Page – Add (1)

This example illustrates the Authorized Roles page when you click the Add button.

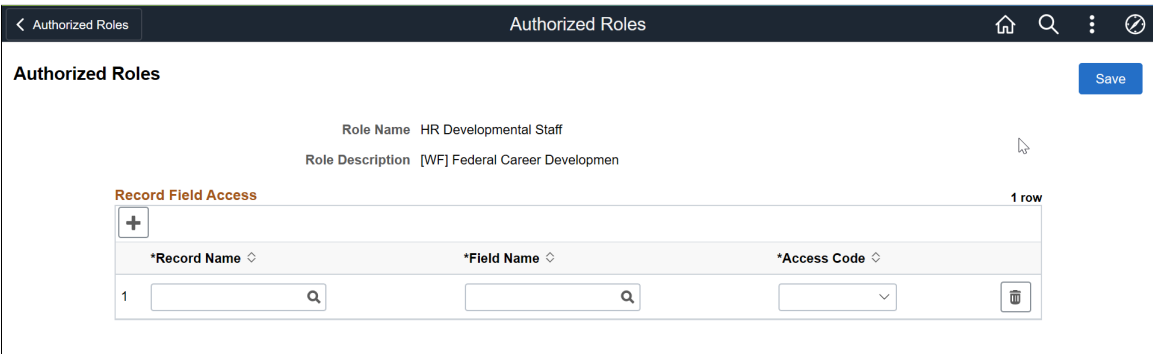


Role Name Select the role to be authorized.

To enter further details, select the role and click Add.

Image: Authorized Roles Page – Add (2)

This example illustrates the Authorized Roles page to enter more details.



Record Name Search and select the record name of the field that displays any sensitive information.

Field Name Search and enter the field name from the lookup that displays any sensitive information.

Access Code

Select to indicate if the role has access to this field.

- **Authorized:** Only the identified PeopleSoft role is authorized to view the information in the specified record field.
- **Not Authorized:** PeopleSoft roles set to 'Not Authorized' are restricted from viewing that information in the specified record field.

Note: If a sensitive record field is not defined here for any PeopleSoft role, then none of the users will have access to view the information in PS Query.

For more information, refer [Query Masking Examples](#) that illustrate the PS Query behavior.

Synchronize Data Page

Use the Synchronize Data page (EODP_QRYMSK_RUN_FL) to synchronize:

- Data privacy mappings in Data Privacy Framework with the Query system.
- Authorized roles and their access to sensitive record fields.

Navigation

Enterprise Components >Data Privacy Framework >Query Masking >Run Data Sync >Synchronize Data

Image: Synchronize Data Page

This example illustrates the Synchronize Data page.

The screenshot displays the 'Run Data Sync' page in the Manager Self Service interface. The page has two tabs: 'Synchronize data' (active) and 'Exclude Fields'. Below the tabs, a message states: 'Run the process to synchronize Data Privacy Mappings and Authorized Roles.'

System Settings

Query Masking Status: Enabled

Synchronize Data Privacy Settings

*Refresh Type: Full (dropdown)
 Run Option: One Time (dropdown)
 *Start Date: 02/18/2020 (calendar icon)
 *Run Type: Schedule (dropdown)
 *Start Time: 9:00AM
 Process Monitor (link) Run (button)

Process Run Schedule

Last Run Date/Time: 02/18/2020 9:40:57PM
 Last Run by: PS

Queued Processes

2 rows

Process Instance	Next Run Date/Time	
326082	02/19/2020 5:00:00PM	[trash icon]
326147	02/19/2020 5:00:00PM	[trash icon]

Save (button)

System Setting

Query Masking Status

Displays the query masking system status. For enabling or disabling the query masking functionality, see [System Settings Page](#).

Synchronize Data Privacy Settings

Refresh Type

Select refresh type to determine synchronization method. Options are:

- Full: Select this option to synchronize all sensitive record fields in Data Privacy Framework and Authorized Roles data with the Query system.
- Incremental: Select this option to synchronize the changes in Data Privacy Framework and Authorized Roles data with the Query system.

Run Type

Select run type to set process run schedule. Options are:

- Run Now: Select this option to run the process immediately.
- Schedule: Select this option to run the process at the specified data and time or based on the defined recurrence.

Run Option

Select the run option. This field is available only if you select Run Type as 'Schedule'. Options are:

- One Time: Select this option run the sync process once, at the specified start date and time.
- Recurrence: Select this option to define a recurrence for the sync process.

Process Recurrence ID

Select the required Recurrence ID from the lookup. This field is available only if you select the Run Option as 'Recurrence'.

Note: Recurrences are defined in Process Scheduler.

Start Date and Start Time

Specify the start date and time for the sync process.

These fields are available only if you select Run Option as 'One Time'.

Process Run Schedule

Last Run Date/Time

Displays last date and time of process run.

Last Run by

Displays the last user that ran the sync process.

Queued Processes

Lists the process runs that are scheduled with date and time. A request can be cancelled.

Note: PeopleSoft recommends to schedule the sync process during low system usage hours. This is because the process updates internal tables and may sometimes result in data sync problems due to online transactions.

Exclude Fields Page

Use the Exclude Fields page (EODP_QMSK_EXCLU_FL) to identify the fields that should be excluded from the Data Sync process.

Note: All the record fields in the Data Privacy Mappings for the identified fields will not be part of the sync process.

Navigation

Enterprise Components >Data Privacy Framework >Query Masking >Run Data Sync >Exclude Fields

Image: Exclude Fields Page

This example illustrates the Exclude Fields page.

Field Name			
1	EMAILID	+	-
2	NATIONAL_ID	+	-

Field Name

Select the field name from the lookup.

System Settings Page

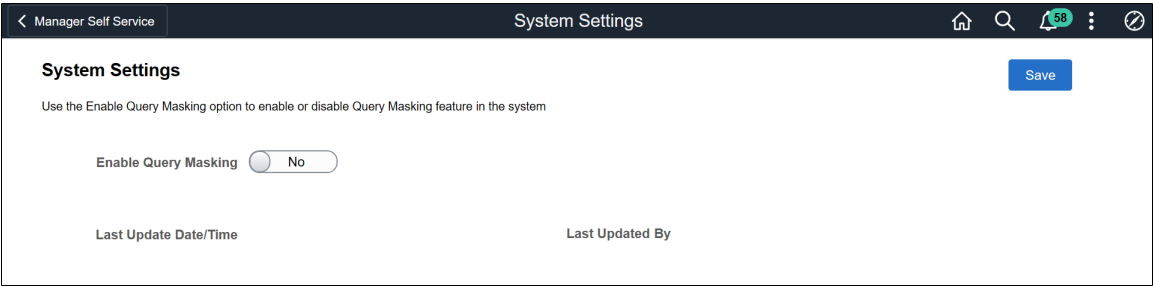
Use the System Settings page (EODP_QRYSWITCH_FL) to enable or disable Query Masking feature.

Navigation

Enterprise Components >Data Privacy Framework >Query Masking >System Settings

Image: System Settings Page

This example illustrates the System Settings page.



Enable Query Masking

Use this option to enable or disable Query Masking feature in the system.

Query Masking Utility Page

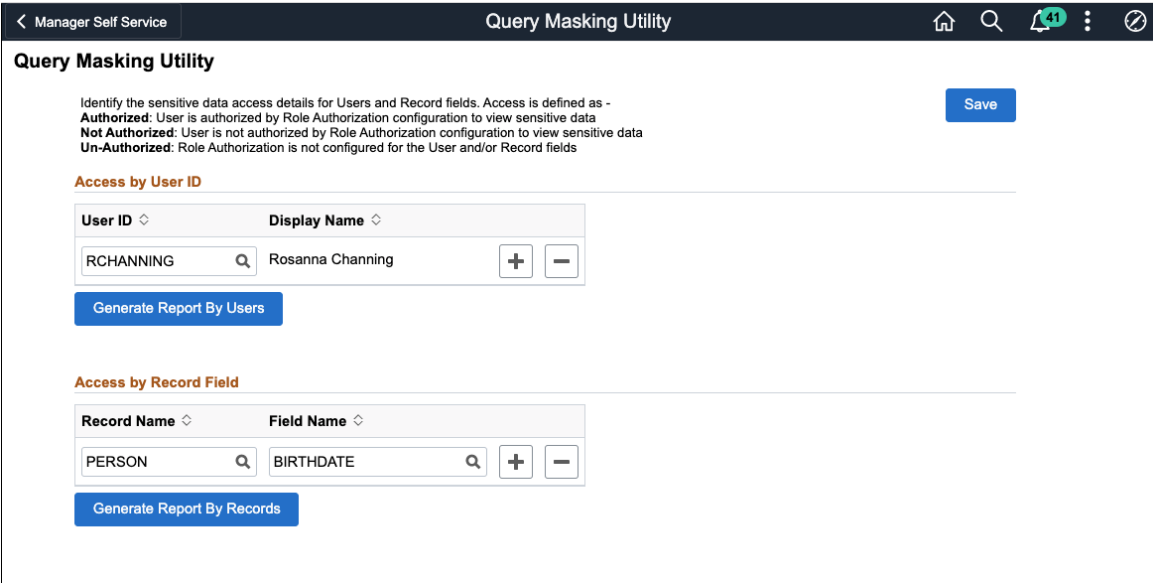
Use the Query Masking Utility page (EODP_QRMSK_UTILITY) to identify the sensitive data access details by users and record fields.

Navigation

Enterprise Components >Data Privacy Framework >Query Masking >Query Masking Utility

Image: Query Masking Utility Page

This example illustrates the Query Masking Utility page.



Access by User ID

User ID

Select the User ID(s) to generate the access details report.

Display Name

Displays the name of the user based on the selected user ID.

Generate Report By Users

Click the button to generate sensitive data access details for the selected user.

Image: Sample Output Report

Report by User Access

EODP_QRYACCESS_BYUSERID- User Access

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1510 kb)

View All First 1-100 of 4811 Last

Row	User ID	Role Name	Descr	Record	Field Name	Access Code	Authorized
1	RCHANNING	NA	Not Applicable	ABSENCE_HIST	BIRTH_DT	N	Un-Authorized
2	RCHANNING	NA	Not Applicable	ABSENCE_HIST	COUNSELLING	N	Un-Authorized
3	RCHANNING	NA	Not Applicable	ABSENCE_HIST	DOC_CONSULTED	N	Un-Authorized
4	RCHANNING	NA	Not Applicable	ABSENCE_HIST	EMPLID	N	Un-Authorized
5	RCHANNING	NA	Not Applicable	ABSENCE_HIST	EWIC_DT	N	Un-Authorized
6	RCHANNING	NA	Not Applicable	ABSENCE_HIST	INDUSTRIAL_INJURY	N	Un-Authorized
7	RCHANNING	NA	Not Applicable	ABSENCE_HIST	SHPL_ABS_MAT_WEEK	N	Un-Authorized
8	RCHANNING	NA	Not Applicable	ABSPARDE_VW1_UK	EMPLID	N	Un-Authorized
9	RCHANNING	NA	Not Applicable	ABS_HIST_DET	EMPLID	N	Un-Authorized
10	RCHANNING	NA	Not Applicable	ABS_HIST_DET	ILL_PERCENT_NLD	N	Un-Authorized
11	RCHANNING	NA	Not Applicable	ABS_HIST_DET	THERAPY_HOURS_NLD	N	Un-Authorized
12	RCHANNING	NA	Not Applicable	ABS_NOTIF_NLD_VW	EMPLID	N	Un-Authorized
13	RCHANNING	NA	Not Applicable	ABS_SUM_DEPT_VW	EMPLID	N	Un-Authorized
14	RCHANNING	NA	Not Applicable	ACA_CONSENT_DTL	LASTUPOOPRID	N	Un-Authorized
15	RCHANNING	NA	Not Applicable	ACA_DEPENDENT	BIRTHDATE	N	Un-Authorized
16	RCHANNING	NA	Not Applicable	ACA_DEPENDENT	NAME_AC	N	Un-Authorized
17	RCHANNING	NA	Not Applicable	ACA_DEPENDENT	NAME_DISPLAY	N	Un-Authorized
18	RCHANNING	NA	Not Applicable	ACA_DEPENDENT	SSN	N	Un-Authorized
19	RCHANNING	NA	Not Applicable	ACA_DEPND_BENEF	NAME	N	Un-Authorized
20	RCHANNING	NA	Not Applicable	ACA_DEF_IMO_CH1D	EMPLID	N	Un-Authorized
21	RCHANNING	NA	Not Applicable	ACA_EMPLOYEE	CONTACT_PHONE_ACA	N	Un-Authorized
22	RCHANNING	NA	Not Applicable	ACA_EMPLOYEE	EMPLID	N	Un-Authorized
23	RCHANNING	NA	Not Applicable	ACA_EMPLOYEE	LASTUPOOPRID	N	Un-Authorized
24	RCHANNING	NA	Not Applicable	ACA_EMPLOYEE	NAME_AC	N	Un-Authorized
25	RCHANNING	NA	Not Applicable	ACA_EMPLOYEE	NAME_DISPLAY	N	Un-Authorized

Access by Record Field

Record Name

Select record name of the field that displays any sensitive information.

Field Name

Select the field name from the lookup that displays any sensitive information.

Generate Report By Record Fields

Click the button to generate list of authorized user and roles that have access to the selected record fields.

Image: Sample Report Output

Report by User Record Fields

EODP_QRYACCESS_BYFIELD- Record Field Access

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (927 kb)

View All First 1-100 of 3070 Last

Row	User ID	Role Name	Descr	Record	Field Name	Access Code	Authorized
1	ADIAZ	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
2	ADJAMPET	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
3	ALEE	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
4	AMANZONI	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
5	ANAYAR	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
6	AZGLAR	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
7	B-BARET400	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
8	B-BARET401	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
9	B-BARET402	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
10	B-BARET403	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
11	B-BARET404	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
12	B-BARET405	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
13	B-BARET406	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
14	B-BARET407	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
15	B-BARET408	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
16	B-BARET409	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
17	B-BARET410	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
18	B-BARET411	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
19	B-BARET412	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
20	B-BARET413	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
21	B-BARET414	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
22	B-BARET415	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
23	B-BARET416	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
24	B-BARET417	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized
25	B-BARET418	HR Administrator	HR Administrator	PERSON	BIRTHDATE	Y	Authorized

Note: In the generated report, the ‘Authorized’ column indicates the access of a user to a record-field.

- Authorized: User is authorized by Role Authorization configuration to view sensitive data.
- Not Authorized: User is not authorized by Role Authorization configuration to view sensitive data.

- Un-Authorized: Role Authorization is not configured for the User and/or Record fields.

Query Masking Examples

This section discusses a few examples to illustrate Query Masking behavior.

Example: 1

Consider three PeopleSoft users: User A, User B and User C.

The table given below lists the PeopleSoft roles assigned to each user.

<i>User A</i>	<i>User B</i>	<i>User C</i>
HR Administrator	HR Administrator	Payroll Administrator
Payroll Administrator	Benefits Administrator	Benefits Administrator

For the HR Administrator role, the Role Authorization configuration is as given below.

Image: Role Authorization Page

Role Authorization configuration for HR Administrator

Role Name

HR Administrator

Role Description

HR Administrator

Record Field Access

2 rows

+

*Record Name ▾	*Field Name ▾	*Access Code ▾	
1 PERSON	BIRTHDATE	Authorized ▾	
2 PERS_DATA_EFFDT	MAR_STATUS	Authorized ▾	

Now, when User A, User B and User C run the following query.

Image: Query

Query

```

Query SQL
SELECT A.EMPLID, TO_CHAR(A.BIRTHDATE,'YYYY-MM-DD'), A.BIRTHCOUNTRY, B.MAR_STATUS, B.SEX
FROM PS_PERSON A, PS_PERS_DATA_EFFDT B, PS_PERALL_SEC_QRY B1
WHERE ( B.EMPLID = B1.EMPLID
AND B1.OPRID = 'PS'
AND ( A.EMPLID = B.EMPLID
AND B.EFFDT =
(SELECT MAX(B_ED.EFFDT) FROM PS_PERS_DATA_EFFDT B_ED
WHERE B.EMPLID = B_ED.EMPLID
AND B_ED.EFFDT <= SYSDATE) ))

```

For User A and User B, the PS Query output will be as shown below.

Image: Query Output Page

Query Output for User A and User B

Empl ID	Birthdate	Birth Country	Mar Status	Gender
KC0027	01/11/1962	***	S	*
K1LB14	09/21/1960	***	S	*
K1LB15	09/21/1960	***	S	*
K2ARG000001	08/14/1960	***	V	*
K2ARG000002	09/15/1968	***	S	*
K2ARG000003	05/02/1965	***	M	*
KUL101	09/23/1963	***	S	*
K2ARG000007	08/15/1980	***	M	*
K2ARG000008	03/02/1984	***	S	*
K2ARG000009	05/01/1975	***	E	*

As Birthdate and Marital Status access codes are defined as “Authorized” for HR Administrator role, User A and User B can view those values in the output.

As User C does not have HR Administrator role, the Birthdate and Marital Status column values are masked.

Note: The Birth Country and Gender column values are also masked as these fields are not defined in the role authorization set up for HR administrator role.

Image: Query Output Page

Query Output for User C

Empl ID	Birthdate	Birth Country	Mar Status	Gender
KC0027	*****	***	*	*
K1LB14	*****	***	*	*
K1LB15	*****	***	*	*
K2ARG000001	*****	***	*	*
K2ARG000002	*****	***	*	*
K2ARG000003	*****	***	*	*
KUL101	*****	***	*	*
K2ARG000007	*****	***	*	*
K2ARG000008	*****	***	*	*
K2ARG000009	*****	***	*	*

Example 2

Consider that the same users run another Query.

Image: Query

Query

Query SQL
SELECT A.EMPLID, B.NAME
FROM PS_DIVERS_ETHNIC A, PS_PERSONAL_DATA B, PS_PERALL_SEC_QRY B1
WHERE (B.EMPLID = B1.EMPLID
AND B1.OPRID = 'PS'
AND (A.EMPLID = B.EMPLID
AND A.ETHNIC_GRP_CD = 'CAUCAS'))

Here, the PS Query uses a Sensitive field ETHNIC_GRP_CD in the WHERE-Clause.

User A, User B and User C do not have any role that authorizes them to access the ETHNIC_GRP_CD information. Unlike the first query, PS Query stops execution and returns an error stating ‘ You have insufficient access to retrieve this data’.

This PS Query behavior protects sensitive information from access through data inference.

Example 3

Consider the same users from the previous example.

In this example, for the HR Administrator role, the Role Authorization configuration is as given below.

Image: Role Authorization Page

Role Authorization configuration for HR Administrator role.

Role Name HR Administrator			
Role Description HR Administrator			
Record Field Access		Record Field Access	3 rows
+			
*Record Name	*Field Name	*Access Code	
1 PERSON	BIRTHCOUNTRY	Not Authorized	
2 PERSON	BIRTHDATE	Authorized	
3 PERS_DATA_EFFDT	MAR_STATUS	Authorized	

Here, the PERSON.BIRTHCOUNTRY is set to access code “Not Authorized”. This explicit specification of Not Authorized access to a record field would restrict any user with HR Administrator role from accessing the record field information.

Note: All other users in the system without the HR Administrator role will now be able to access the information.

When User A, User B and User C run the query, as per the “Not Authorized” access behavior explained previously, both User A and User B will not have access to PERSON.BIRTHCOUNTRY field.

Image: Query Output Page

Query Output for User A and User B

Empl ID	Birthdate	Birth Country	Mar Status	Gender
KC0027	01/11/1962	***	S	*
K1LB14	09/21/1960	***	S	*
K1LB15	09/21/1960	***	S	*
K2ARG000001	08/14/1960	***	V	*
K2ARG000002	09/15/1968	***	S	*
K2ARG000003	05/02/1965	***	M	*
KUL101	09/23/1963	***	S	*
K2ARG000007	08/15/1980	***	M	*

However, for User C who does not have the HR Administrator role, the Birth Country will be displayed.

Image: Query Output Page

Query Output for User C

Empl ID	Birthdate	Birth Country	Mar Status	Gender
KC0027	*****	CAN	*	*
K1LB14	*****	USA	*	*
K1LB15	*****	USA	*	*
K2ARG000001	*****	ARG	*	*
K2ARG000002	*****	ARG	*	*
K2ARG000003	*****	ARG	*	*
KUL101	*****	USA	*	*
K2ARG000007	*****	ARG	*	*

Note: A detailed review of all users and the associated roles is necessary before setting a “Not Authorized” access.

Security Automation

Understanding Security Automation

The PeopleSoft Security 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 processes to be run for security updates for Permission Lists, Roles and Menus.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Manage Permissions Page</u>	EOPM_SUPD_PERM	Set security metadata for new permissions or change the security for existing permissions.
<u>Manage Roles Page</u>	EOPM_SUPD_ROLE	Set security metadata for new roles or change the security for existing roles.
<u>Manage Menus Page</u>	EOPM_SUPD_MENU	Set security metadata for new menus or change the security for existing menus.

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.

Peoplesoft Update Manager
Manage Permissions

Filter By

Status ☐ is not

Permission List

BUG Number

Filter

Show All Rows

Filter By Update Flag

☐ Selected

☐ Deselected

☒ All Rows

Added or Changed Permission Lists

Personalize | Find | View 100 | First 1-20 of 523 Last

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_IB_AGFL	22581972	Set Permissions
☐	HCCPSS2300	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_IB_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
☐	HCCSPCMPINT	Applied	CI	CL_HRMH_MATRIX_SETUP		22383464	Set Permissions
☐	HCCPHR9425	Applied	Page	SETUP_HRMS	HRMH_MTRX_TYPE_DEF	22383464	Set Permissions
☐	HCCPTLS2000	Applied	Page	TL_MANAGER_FL	TL_EMP_PRES_FLU	22349322	Set Permissions
☐	HCCPBN1000	Delivered	CI	CL_ACA_DEP_DATA_SRC		21820815	Set Permissions

Save Notify Add Update/Display

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.

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 permissions.

+/-

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

Image: Manage Roles page

This example illustrates the fields and controls on the Manage Permissions page.

Peoplesoft Update Manager

Manage Roles

Filter By

Status ☐ Is not

Role Name

BUG Number

Filter

Show All Rows

Filter By Update Flag

☐ Selected

☐ Deselected

☒ All Rows

Add or Delete Permission Lists from a Role

Personalize | Find | View All | | First 1-12 of 12 Last

Select for Update	Status	*Role Name	*Permission List	Action	BUG Number	Date Processed	Process Instance	Description	Last Update Date/Time	Updated By User
☐	Delivered	Standard Non-Page Permissions	HCSPADS	Delete	21813153	11/02/2015		Standard Non-Page Permissions role should not have	12/11/2015 12:35:06AM	PPLSOFT
☐	Delivered	Benefits Administrator	HCCPBAC1000	Add	21933382				12/11/2015 12:35:06AM	PPLSOFT
☐	Applied	eProfile Manager Fluid	EOAW2000	Delete	21078819	05/14/2015	47455	eProfile Manager Fluid role should not have the EOAW2000 (Mobile Approvals Administrator) permission list. This provides managers access to the Mobile Approval Options setup page.	05/13/2015 11:32:19PM	PPLSOFT
☐	Applied	TL Administrator Compensation	HCCPHR4160	Add	20381961	01/22/2015	38479		01/22/2015 1:49:07AM	PPLSOFT
☐	Applied	HR Administrator BRA	HCCPTL10BR	Add	18495676	10/20/2014	32063	New permission list for BRA User	10/20/2014 9:02:05AM	PPLSOFT
☐	Applied	GP Pivot Administrator	HCCPGPAMPPIVOT	Add	17962997	08/28/2014	26623		08/28/2014 2:54:01AM	PPLSOFT
☐	Applied	AM Pivot Administrator	HCCPAMPG01	Add	18179237	08/27/2014	25900	Absence Pivot Grnd Administrator	08/21/2014 2:15:45AM	PPLSOFT
☐	Applied	AM Pivot Administrator	HCCPAMPG03	Add	18179237	08/27/2014	25900	Employee Refresh	08/21/2014 2:15:45AM	PPLSOFT
☐	Applied	AM Pivot User	HCCPAMPG02	Add	18179237	08/27/2014	25900	Absence Pivot Grnd User	08/21/2014 2:15:45AM	PPLSOFT
☐	Applied	AM Pivot User Fluid	HCCPAMPG04	Add	18179237	08/27/2014	25900	Absence Pivot Grnd User Fluid	08/21/2014 2:15:45AM	PPLSOFT
☐	Applied	HR Administrator SGP	HCCPHR33SG	Add	18650387	07/14/2014	20738		07/09/2014 12:04:13AM	PPLSOFT
☐	Applied	Recruitment Administrator	HCCPRS1320	Add	16384909	06/25/2013	2042	Access to job posting global search is being granted to Recruiting Administrator role.	06/25/2013 1:52:58AM	PPLSOFT

Save

Notify

Add

Update/Display

- Select for Update

Select the check box to select the role for AE execution.
- Status

Displays 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 Menu 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

Image: Manage Menus Page

This example illustrates the fields and controls on the Manage Menus page.

Peoplesoft Update Manager

Manage Menus

Filter By

Status ☐ is not

Menu Name

BUG Number

Filter

Show All Rows

Filter By Update Flag

☐ Selected

☐ Deselected

☒ All Rows

Add or Delete Objects from a Menu

Personalize | Find | View 100 | First 1-20 of 289 Last

Select for Update	Status	*Menu Name	*Menu Bar Name	*Item Name	Action	BUG Number	Details	Date Processed	Process Instance	Description	Last Update Date/Time	Updated By User	+/-
☐	Applied	EL_MANAGER_FL	USE	HR_MSS_CT_IB_AGFL	Add	22581972	Details	02/12/2016	72738		02/12/2016 1:03:44AM	PPLSOFT	
☐	Applied	EL_MANAGER_FL	USE	HR_MSS_CT_CMP_AGFL	Add	22581972	Details	02/12/2016	72738		02/12/2016 1:03:44AM	PPLSOFT	
☐	Applied	EL_MANAGER_FL	USE	HR_MSS_CT_SBM_AGFL	Add	22581972	Details	02/12/2016	72738		02/12/2016 1:03:44AM	PPLSOFT	
☐	Applied	DEFINE_PAYROLL_RULES_OBL	UTILITIES	GPSC_ELM_SRCH_FL	Add	22246162	Details	02/11/2016	72713	New component for Global Payroll Element Browser	02/11/2016 1:14:21AM	PPLSOFT	
☐	Applied	DEFINE_PAYROLL_RULES_OBL	UTILITIES	GPSC_ELM_BRV_FL	Add	22246162	Details	02/11/2016	72713	New viewer component for Global Payroll Element Browser	02/11/2016 1:14:21AM	PPLSOFT	
☐	Applied	EOPM_MENU	USE	EOPM_SUPD_SCRIPT	Add	50000001	Details	01/18/2016	72149		01/11/2016 6:08:44AM	PPLSOFT	
☐	Applied	EL_EMPLOYEE_FL	USE	HR_VET_STATUS_FL	Add	22163019	Details	12/22/2015	71512		12/22/2015 12:52:51AM	PPLSOFT	
☐	Applied	EL_EMPLOYEE_FL	USE	HR_IR_EE_FL	Add	22163019	Details	12/22/2015	71512		12/22/2015 12:52:51AM	PPLSOFT	
☐	Applied	EL_EMPLOYEE_FL	USE	HR_DISABILITY_FL	Add	22163019	Details	12/22/2015	71512		12/22/2015 12:52:51AM	PPLSOFT	
☐	Applied	EL_MANAGER_FL	USE	HR_MTRX_APPRV_FL	Add	22384035	Details	01/22/2016	72287		12/21/2015 1:35:06AM	PPLSOFT	
☐	Applied	EL_EMPLOYEE_FL	USE	HR_MTRXTILE_FL	Add	22383980	Details	01/29/2016	72427		12/20/2015 11:30:22PM	PPLSOFT	
☐	Applied	EL_EMPLOYEE_FL	USE	HRMH_MTRX_INFO_FL	Add	22383980	Details	01/29/2016	72427		12/20/2015 11:30:22PM	PPLSOFT	
☐	Applied	EL_EMPLOYEE_FL	USE	HRMH_CREAT_TEAM_FL	Add	22383980	Details	01/29/2016	72427		12/20/2015 11:30:22PM	PPLSOFT	
☐	Applied	EL_EMPLOYEE_FL	USE	HRMH_MTRX_TRAN_FL	Add	22383980	Details	01/29/2016	72427		12/20/2015 11:30:22PM	PPLSOFT	
☐	Applied	HRSC_HIDDEN_FL	TASKS	HR_MGR_SEL_FLU	Add	22390215	Details	01/13/2016	72038	New Component for Manager View As feature	12/18/2015 12:34:46PM	PPLSOFT	
☐	Applied	SETUP_HRMS	HRMS_COMMON	HRMH_MTRX_TYPE_DEF	Add	22383464	Details	01/06/2016	72371		12/17/2015 10:34:57AM	PPLSOFT	
☐	Applied	TL_MANAGER_FL	USE	TL_EMP_PRES_FLU	Add	22349322	Details	12/18/2015	71398		12/15/2015 10:28:51PM	PPLSOFT	
☐	Delivered	ACA_MANAGE_ANNUAL_RPTO_1	PROCESS	ACA_CREATE_XML	Add	21933392	Details	12/04/2015			12/11/2015 12:35:06AM	PPLSOFT	
☐	Delivered	ACA_MANAGE_ANNUAL_RPTO_1	SETUP	ACA_XMIT_PARAMS	Add	21933392	Details	12/04/2015			12/11/2015 12:35:06AM	PPLSOFT	

Select for Update Select the check box to select the role for AE execution.

Status Displays 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.

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

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 <i>Page</i> in the context of supplemental data setup.
Supplemental Data Record	Logical data model for supplemental data. Also referred to as <i>Record</i> in the context of supplemental data setup.
Supplemental Data Store	The physical table where supplemental data is stored. Also referred to as <i>Data Store</i> or <i>Data Store Record</i> .
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:

<i>Base Record</i>	<i>Supplemental Data Storage Record</i>
WM_WO_HDR	WM_WO_HDR_SD

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_SUPPLDATA_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

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

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.
<u>Define Record - Record Page</u>	SD_RECDEFN	Defines the supplemental data record associated with the base record and identifies where to store this record.
<u>Define Record - Fields Summary Page</u>	SD_RECFLD	Maps fields to the data storage fields.
<u>Define Record - Fields Detail Page</u>	SD_RECFLD_DTL	Defines a field's detail information.
<u>Define Display Group Page</u>	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.

Page Name	Definition Name	Usage
<u>Assign Display Group Page</u>	SD_PAGE_GRP	Assigns one or more display groups to a supplemental data-enabled component and page.
<u>Assign Display Group - Conditions Page</u>	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.

The screenshot shows the 'Record' tab selected in the top navigation bar. The main form contains the following fields and controls:

- Record:** PS_HAZARD_WASTE
- *Status:** A dropdown menu set to 'Activated'.
- Base Record:** WM_WO_TSK
- Description:** A text field containing 'Hazardous Waste' with a small icon to its right.
- *Data Store Record:** A text field containing 'WM_WO_TSK_SD' with a magnifying glass icon to its right.
- Recycle Cache:** An unchecked checkbox.

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.

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.

Record

Fields Summary

Fields Detail

Record PS_HAZARD_WASTE

Status Activated

Fields

Personalize | Find | View All |  

First  1-6 of 6  Last

	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

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.

The screenshot shows the 'Define Record - Fields Detail' page for the record 'PS_HAZARD_WASTE'. The page has tabs for 'Record', 'Fields Summary', and 'Fields Detail'. The 'Fields Detail' tab is active. The page displays the following information:

- Record:** PS_HAZARD_WASTE
- Status:** Activated
- Field Name:** DATE
- Field Status:** Activated
- Description:** (Empty text box)
- *Field Label:** Generate Date
- Required:** ☐
- Long Label:** (Empty text box)
- Use Type:** Date
- Field Length:** 10
- Mapped to:** SD_DATE_1
- Uppercase:** ☐

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*

- *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

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

Define Display Group

Display Group PS_HAZARD_WASTEBase Record WM_WO_TSK

Description

100 characters remaining

Label Hazardous Waste*Occurs 3

Left Column

Personalize | Find | View All | First 1-3 of 3 Last

*Sequence	*Record	*Field Name	Label		
1	PS_HAZARD_WAS	DATE		+	-
2	PS_HAZARD_WAS	DESCR		+	-
3	PS_HAZARD_WAS	NOTES		+	-

Right Column

Personalize | Find | View All | First 1-3 of 3 Last

*Sequence	*Record	*Field Name	Label		
1	PS_HAZARD_WAS	QTY		+	-
2	PS_HAZARD_WAS	UOM		+	-
3	PS_HAZARD_WAS	WASTE_CD		+	-

Reorder

☐ Recycle Cache

- 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.

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

Assign Display Group

Component Name WM_WOMarket Global

Enabled PagesFind | View AllFirst1 of 3Last

Page Name WM_TSK_SD_SECBase Record WM_WO_TSK

Display GroupsPersonalize | Find | View All | First1 of 1Last

*Sequence	*Display Group	*Use	User-friendly Text	Edit	Clear		
1	PS_HAZARD_W	Editable	Hazardous Asset is Yes				

Reorder

☐ Recycle Cache

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

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

Assign Display Group

Component WM_WO Market Global

Page Name WM_TSK_SD_SEC Display Group PS_HAZARD_WASTE

[Switch to Advanced Mode](#)

Conditions First 1 of 1 Last

Term	Operator	Value
Hazardous Asset	is	Yes

Done Cancel

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.

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.

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.

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.

- 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.

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.	<i>#(URL.HOMEPAGE)</i> : returns the URL for the HOMEPAGE URL object.
IMG	Image Object Name	Returns the URL to the image object.	<i>#(IMG.LOGO)</i> : returns the URL to the LOGO image.
HTML	HTML Object Name	Returns the HTML content or text of the HTML object.	<i>#(HTML.COMMON_HEADER)</i> : 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	<i>#(MSG.6550,1)</i> : 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.	<i>#(CUSTOMER.NAME1)</i> returns the value of the NAME1 field in the CUSTOMER record (customer name). <i>#(CUST_DATA.BAL_AMT)</i> returns the BAL_AMT amount formatted since the BAL_AMT field in the CUST_DATA record is currency controlled. <i>#(CUSTOMER.CUST_LOGO)</i> returns the URL to the CUST_LOGO image (given that CUST_LOGO is an image field and stores the customer's logo).

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.

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.

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.

Setting Up Configurable Analysis Framework

Pages Used to Set Up Configurable Analysis Framework

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Analysis Handler Registry Page</u>	CAF_HANDLER_TBL	Register application classes used as handlers in Configurable Analysis Framework (CAF).
<u>Analysis Configuration Page</u>	CAF_CONFIG_TBL_GEN	Define data analysis.
<u>Entity Configuration Page</u>	CAF_CONFIG_TBL_ENT	Define the entity for the analysis.
<u>Factor Configuration Page</u>	CAF_CONFIG_TBL_FCT	Define the factors for the analysis.
<u>Define Factor Page</u>	CAF_FACTOR_SEC	Add factors to the Factor Analysis page.
<u>Factor List Configuration Page</u>	CAF_CONFIG_TBL_FLS	Create a pre-selected list of factors that are available to all users.
<u>Copy Factor Lists Page</u>	CAF_CNF_FL_SEL_SEC	Copy a factor list from other users.
<u>Related Action Configuration Page</u>	CAF_CONFIG_TBL_ACT	Define configured related actions for different levels of data.
<u>Define Related Action Page</u>	CAF_ACTION_SEC	Add a related action to the Related Action Configuration page.
<u>Miscellaneous Page</u>	CAF_CONFIG_TBL_MSC	Perform administrative tasks.
<u>Analysis Access Control Page</u>	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

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 Package Name
APPLCS_FACTOR_TEST	Factor Handler	Application Class Factor Test Handler	CAF_TEST	HANDLER
APPLCS_SUBFACTOR_TEST	Factor Handler	App Class Subfactor Test Handler	CAF_TEST	HANDLER
CUST_ACTION	Action Handler	Customer Action Handler	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 Inquiry	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 start with "PS_"

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

*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

*Handler ID	*Qualified Package/Class Path	*Application Class ID	Owner ID
APCLS_FACTOR_TEST	HANDLER	AppClass	
APCLS_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*

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.

Analysis ConfigurationEntity ConfigurationFactor ConfigurationFactor List ConfigurationRelated Action ConfigurationMiscellaneous

Analysis ID CUSTOMER_360Analysis Type SystemFluid ConfigurationActive

Analysis Configuration

*Analysis TitleComprehensive Customer View

DescriptionComprehensive Customer View227 characters remaining

Display Menu NameCUST360_SEARCH

Analysis HandlerPS_CUST_COMPARE_CONFIG_HANDLECustomer Analysis Comparison Handle

Analysis Handler Parameter

Owner ID FARReceivables

Analysis Options

Support Analysis Mode

Support Entity Group Actions

Support Flagged Entity

Analysis Access Control

Set up Access Control

Note: Unsaved changes may not be reflected in the Analysis Access Control page.

Copy Configuration To...Delete Configuration

SaveReturn to SearchPrevious in ListNext in ListNotify

AddUpdate/Display

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.

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.

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.

Analysis ConfigurationEntity ConfigurationFactor ConfigurationFactor List ConfigurationRelated Action ConfigurationMiscellaneous

Analysis ID RTBL_ANALYSIS_1Analysis Type System

Entity Configuration

*Entity Label Scenario

*Entity Label (Plural) Scenarios

*Entity Record Name RTBL_CAF_TST_VW

*Description Field RTBL_SCENARIO

Entity Handler RTBL_ENTITY_HANDLER

Entity Handler Parameter

Key Separator

RTBL Entity Handler

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

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, <i>NAME1</i> 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.

Analysis ConfigurationEntity ConfigurationFactor ConfigurationFactor List ConfigurationRelated Action ConfigurationMiscellaneous

Analysis ID RTBL_ANALYSIS_1Analysis Type System

Factor Configuration

*Factor Label Metric*Factor Label (Plural) Metrics

Factors

Define

*Factor ID	*Factor Type	*Factor Name	*Used in Mode	*Status	
LEDGER SCENARIO INQUIRY	Component	Ledger Scenario Inquiry	Both	Active	+ -
NET PROFIT MARGIN	Application Class	Net Profit Margin	Both	Active	+ -
RTBL_ANALYSIS_DEPT	Pivot Grid Pagelet	Expense by Department	Both	Active	+ -
RTBL_ANALYSIS_LED	Pivot Grid Pagelet	Expense by Scenario	Both	Active	+ -
SCENARIO_DETAILS	Field List	Summary Information	Both	Active	+ -
TRIAL BALANCE	Application Class	Trial Balance	Both	Active	+ -

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 <i>Measure</i> and <i>Measures</i> .

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 .

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.

The screenshot shows the 'Define Factor' page within the 'Analysis Configuration' section. The page has a title bar with a close button. The main content area is divided into several sections:

- Factor Information:**
 - *Factor ID: (with a checkmark icon)
 - *Factor Type: (dropdown menu)
 - *Factor Name:
 - Description: (with a checkmark icon)
 - 254 characters remaining
- Factor Options:**
 - *Used in Mode: (dropdown menu)
 - Width:
 - Height:
 - Factor Handler: (with a magnifying glass icon) Ledger Scenario Inquiry
 - Handler Parameter:
 - Entity Key Map:
- Component Options:**
 - *Menu Name: (with a magnifying glass icon)
 - *Component Name: (with a magnifying glass icon)
 - *Page Name: (with a magnifying glass icon)
 - *Menu Action: (with a magnifying glass icon)

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*

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

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.

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.

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.

Factor Options

*Used in Mode

Comparison

Width

350

Height

330

Factor Handler

Handler Parameter

Entity Key Map

VENDOR_SETID=SETID

Pivot Grid Pagelet Options

Pagelet Width

350

Pagelet Height

250

*Pagelet ID

EP_DISCOUNTS_LOSTTAKEN_FL

Discounts Lost/Taken (Fluid)

Pivot Grid prompt fields

Personalize | Find |

First 1-6 of 6 Last

	Unique Prompt Name	Query Prompt Name	*ValueType	Record (Table) Name	Field Name
1	BIND3	Display Currency	My Personalizat	S360_USER_PREF	DISPLAY_CURR
2	BIND4	Rate Type	My Personalizat	S360_USER_PREF	RT_TYPE
3	BIND5	From Year	Global Date		Year of
4	BIND6	From Month	Global Date		Month of
5	BIND7	To Year	Global Date		Year of
6	BIND8	To Month	Global Date		Month of

OK Cancel

Image: Pivot Grid Prompt Fields for Fluid CAF (2 of 2).

Pivot Grid Prompt Fields for Fluid CAF (2 of 2).

Personalize Find					First	1-6 of 6	Last	First	1-6 of 6	Last
*ValueType	Field Name	Global Date Operation		Constant						
My Personalizat	LAY_CURR	Not Applicable						+	-	
My Personalizat	YPE	Not Applicable						+	-	
Global Date		Year of Global Date From						+	-	
Global Date		Month of Global Date From						+	-	
Global Date		Year of Global Date To						+	-	
Global Date		Month of Global Date To						+	-	

Unique Prompt Name The Pivot Grid prompt fields defined in Pivot Grid Wizard.

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.

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.

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.

The screenshot shows a web form titled 'Analysis Configuration' with a sub-header 'Define Related Action'. The form contains the following fields and controls:

- *Action ID:** Text input field containing 'AC1'.
- *Action Name:** Text input field containing 'My Personalization'.
- *Action Level:** Dropdown menu with 'Analysis' selected.
- *Action Type:** Dropdown menu with 'App Class' selected.
- *Action Handler:** Text input field containing 'RTBL_ACTION_HANDLER'.
- Active:** Check box that is checked.
- Handler Parameter:** Empty text input field.
- Search:** A magnifying glass icon next to the 'Analysis Action Handler' text.

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 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 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.

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.

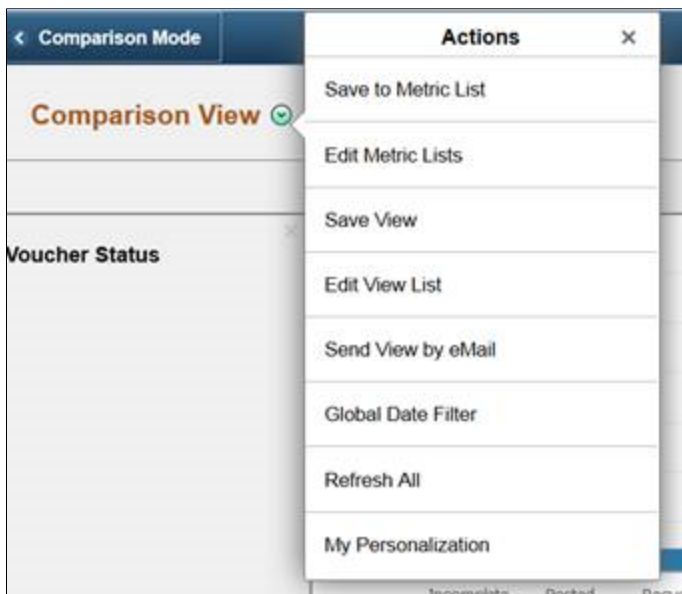
To create an Analysis Related Action My Personalization:

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.

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.

Analysis ID RTBL_ANALYSIS_1 Analysis Type System

Reset Last Session

If there are errors from factors or entities that prevent user's last session to be automatically loaded, this can be used to reset user's last session so it won't automatically be loaded. Leave User Id blank to reset last session for all users.

User ID

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.

- 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

Analysis Access Control

Analysis ID RTBL_ANALYSIS_1Analysis Type System

Access Control

PersonalizeFindPrint

First1 of 1Last

Enabled	*Access Level	All Factors	Factors	Select Factors	All Actions	Related Actions	Select Actions
☒	Public	☐					

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.

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
<u>Analysis Display Page (Comparison Mode)</u>	CAF_DISPLAY	Compare data for multiple entities in a tabular or grid format.
<u>Analysis Display Page (Analysis Mode)</u>	CAF_DISPLAY	Analyze data for one entity.
<u>Fluid Analysis Display Page (Comparison Mode)</u>	CAFNUI_DISPLAY_FL	Compare data for multiple entities in Fluid.
<u>Fluid Analysis Display Page (Analysis Mode)</u>	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.

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.

- 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).

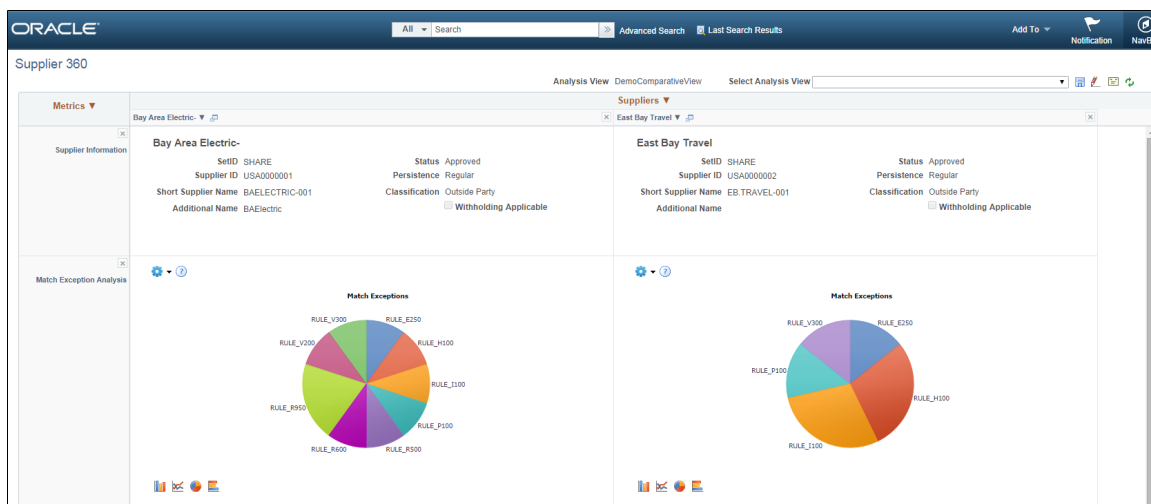
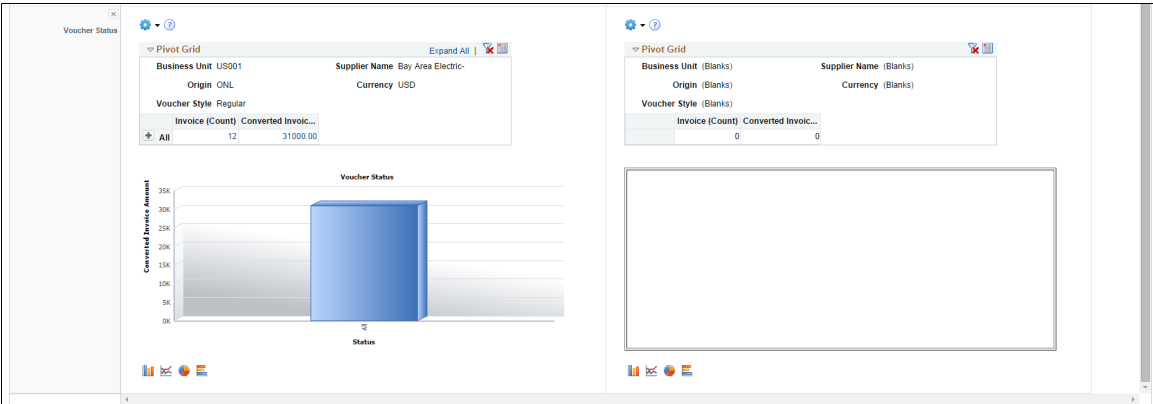


Image: Analysis Display Page (Comparison Mode) (2 of 2)

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.

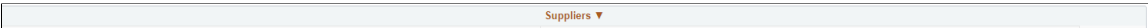
If a user makes a change to one area, the system synchronizes the other two areas. For example, if a user rearranges the entities using drag-n-drop or the Choose Displayed <Entities> option, the corresponding columns in the Factor Data areas are rearranged

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.

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).



(checkbox)

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 *Clear 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.

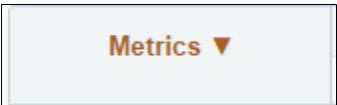
Users can re-position the entity name columns by using the Entity Chooser option or by dragging the column to the new position.

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)

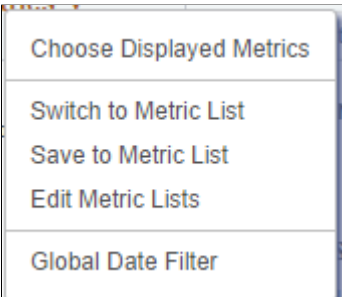
This example illustrates the Factor Header when in Comparison mode.



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.

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.

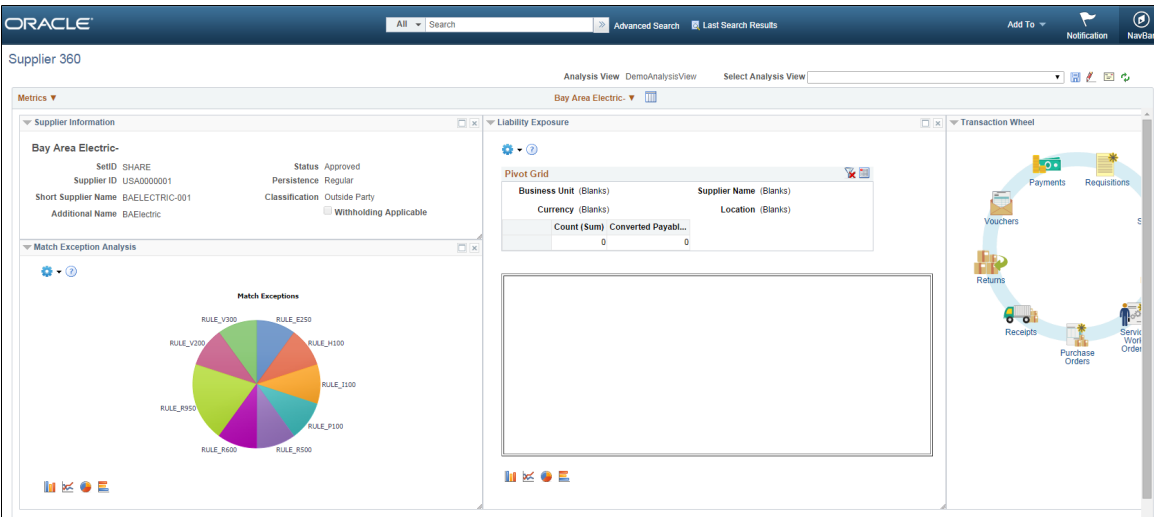
(More drop down)	Click the More drop down to select related actions. Each factor data cell can have factor related actions, which are determined from the factor handler or the Related Action Configuration Page .
(Action button)	Click the Action button to access embedded related actions for the factor data.

Analysis Display Page (Analysis Mode)

Use the Analysis Display page (Analysis Mode) (CAF_DISPLAY) to analyze data for one entity.

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.

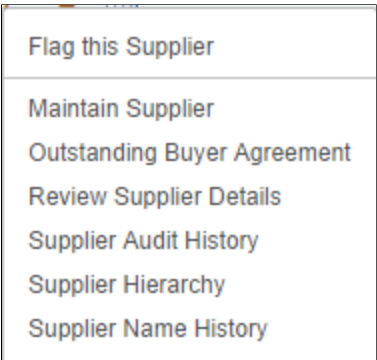
It shows the factor data for the entity. Factors can be added, removed, resized, repositioned, minimized, and maximized by the user.

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

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)

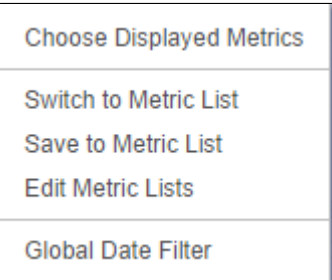
Click this icon to switch to comparison mode.

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.

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 = Analysis. 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.

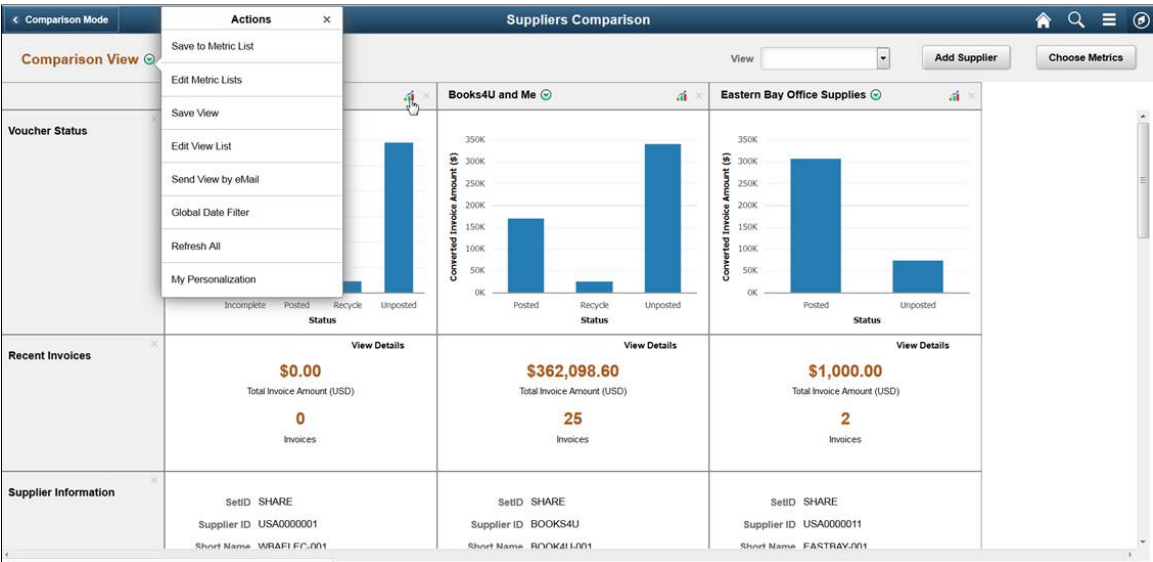
- Send View by eMail. Allows users to send an eMail to other users including the link to the current view display.

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:

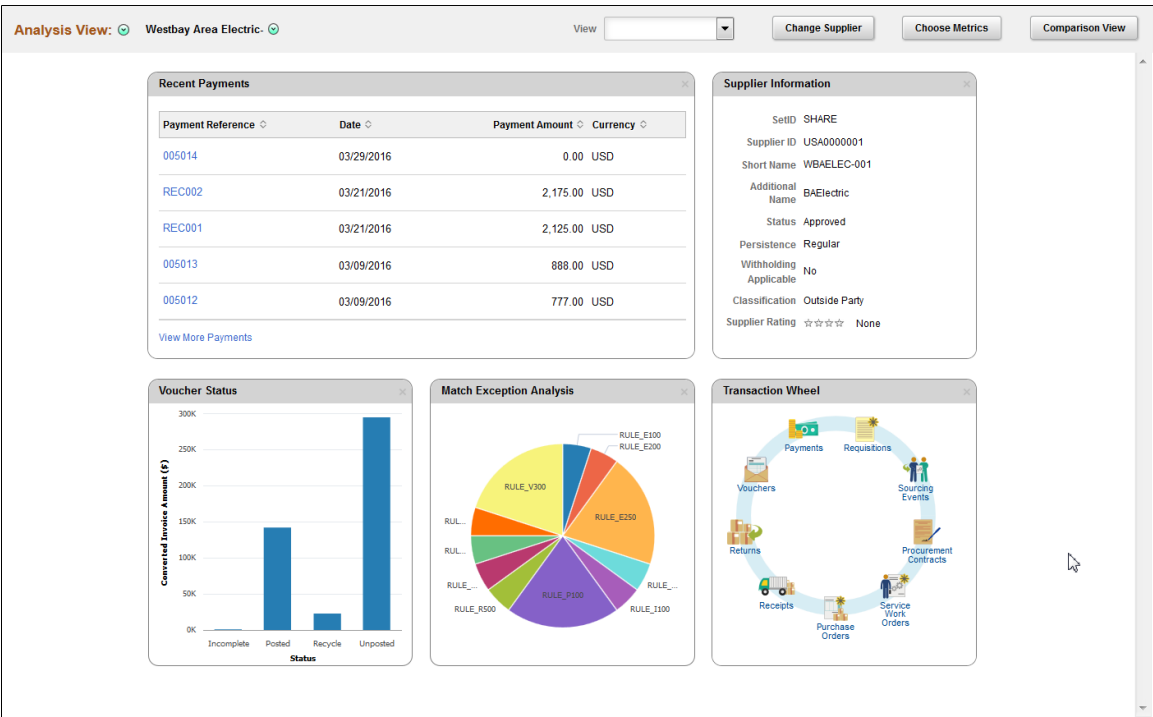
Comparison Title	Name of the comparison.
Add Entity	Allows adding and removing entities to the comparison.
Analysis Mode	Transfer to the Analysis mode, and the entity will be analyzed in Analysis mode.
Remove Factor	Allows removing the entire row of a factor or the entire column.
Flagged Entity Indicator	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.

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.

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.

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.

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.

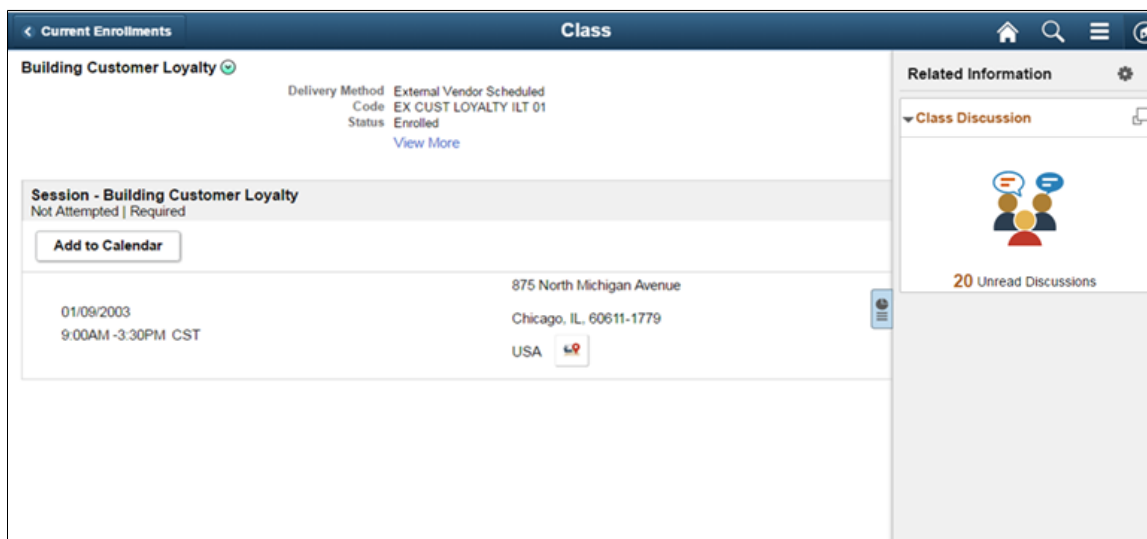
Assigning Default Discussion as a Related Content Tile

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.



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

Assign Related Actions

Configure Related Content | **Configure Related Actions** | Configure Layout

Assign services to be used as Related Actions. Select the service target to determine where the service will be displayed. Use the Configure link to define the parameter mappings and options for the service.

Portal Name: EMPLOYEE
Content Reference: [My Expense Reports](#)

Component Level Related Actions

Assign Component Level Related Actions to be added to the Drop-down menu and Search Actions menu.

Personalize | Find | View All | 1 of 1 | First | Last

Enable	Service Type	Select	Service ID	Service Label	*Service Target	Bulk Action	Configure
☒	Service				Target Content		Configure

Page Level Related Actions

Assign Page Level Related Actions to be added to a field level contextual menu.

Personalize | Find | View All | 1-4 of 4 | First | Last

Enable	Page	Service Type	Select	Service ID	Service Label	Service Target	Bulk Action	Page Field Menu	Configure
☒	EX_EXP_LIST_FL	Service		EOFD_EXPENSE_REPORTS	Discuss	Replace Window		Action	Configure
☒	EX_EXP_LIST_FL	Service		EX_EMAIL_NOTIFY_FL	Send Notification	User Defined		Action	Configure
☒	EX_EXP_LIST_FL	Service		EX_EXP_LIST_COPY	Copy To New Report	User Defined		Action	Configure
☒	EX_EXP_LIST_FL	Service		EX_EXP_LIST_DEL	Delete Report	User Defined		Action	Configure

Return to Manage Related Content Configuration page

[Save](#) [Notify](#)

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 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

Configure Service

Page Name: EX_EXP_LIST_FL
 Service ID: EOFD_EXPENSE_REPORTS
 Service Label: Expense Reports

Map Parameters

Parameter Name	Parameter Label	Required Flag	Mapping Type	Select	Mapping Data	Mapping Details	Display in field menu
1 EOFD_COMPONENT	Component	☐	System Variable	☐	%Component		☐
2 EOFD_MARKET	Market	☐	System Variable	☐	%Market		☐
3 EOFD_DSCN_TYPE	Discussion Type	☐	Fixed Value	☐	EXPENSE_REPORT		☐
4 EOFD_EXPENSE_REPORT_ID	Expense Report ID	☐	Page Field	☐	Report ID		☐

Menu Options

Page Field Menu Action

Service Filter

Package Path Class ID

Select Security Options

☒ Public Access
☐ Related Content Provider Security

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.

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

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

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.

Role ID	Role Description	Close / Reopen Discussion	Edit Subject	Add / Remove Participants	Assign Role
1 C	Creator	☐	☐	☐	☐
2 A	Administrator	☒	☒	☒	☒
3 P	Participant	☐	☐	☐	☐

2. Select the Allow Create check-box, so that the user can create new discussions.

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

Assign Related Actions

Assign services to be used as Related Actions. Select the service target to determine where the service will be displayed. Use the Configure link to define the parameter mappings and options for the service.

Portal Name: EMPLOYEE
Content Reference: My Expense Reports

Component Level Related Actions

Assign Component Level Related Actions to be added to the Drop-down menu and Search Actions menu.

Personalize | Find | View All | 1 of 1 | First | Last

General	Instance Information	...
Enable	Service Type	Select
☒	Service	Service ID
		Service Label
		*Service Target
		Target Content
		Bulk Action
		Configure

Page Level Related Actions

Assign Page Level Related Actions to be added to a field level contextual menu.

Personalize | Find | View All | 1-4 of 4 | First | Last

General	Instance Information	...
Enable	Page	Service Type
☒	EX_EXP_LIST_FL	Service
		Select
		Service ID
		Service Label
		Service Target
		Bulk Action
		Page Field Menu
		Configure

Return to Manage Related Content Configuration page

Save Notify

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.

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

Configure Service

Page Name: EX_EXP_LIST_FL
 Service ID: EOFD_EXPENSE_REPORTS
 Service Label: Expense Reports

Map Parameters ? Personalize | Find | View All | First 1-4 of 4 Last

Parameter Name	Parameter Label	Required Flag	Mapping Type	Select	Mapping Data	Mapping Details	Display in field menu
1 EOFD_COMPONENT	Component	☐	System Variable	☐	%Component		☐
2 EOFD_MARKET	Market	☐	System Variable	☐	%Market		☐
3 EOFD_DSCN_TYPE	Discussion Type	☐	Fixed Value	☐	EXPENSE_REPORT		☐
4 EOFD_EXPENSE_REPORT_ID	Expense Report ID	☐	Page Field	☒	Report ID		☐

Menu Options ?

Page Field Menu Action

Service Filter ?

Package Path Class ID

Select Security Options

☒ Public Access
☐ Related Content Provider Security

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:

- 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.

The screenshot shows a web interface for scheduling notifications. At the top, there's a tab labeled 'Notifications'. Below the tab, on the left, is the text 'Run Control ID: 12'. To the right of this text are two links, 'Report Manager' and 'Process Monitor', followed by an orange 'Run' button. Below these elements is a dropdown menu with the label '*Notification type'. At the bottom of the interface, there are four buttons: 'Save' (with a floppy disk icon), 'Notify' (with a document icon), 'Add' (with a plus icon), and 'Update/Display' (with a pencil icon).

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.

Image: Process Scheduler Request modal window

Process Scheduler Request modal window

Process Scheduler Request

User ID VP1

Run Control ID 1

Server Name

Run Date

05/17/2017

Recurrence

Run Time

1:32:58AM

Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	Discussion Notifications	EOFD_EML	Application Engine	Web	TXT	Distribution

OK

Cancel

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.

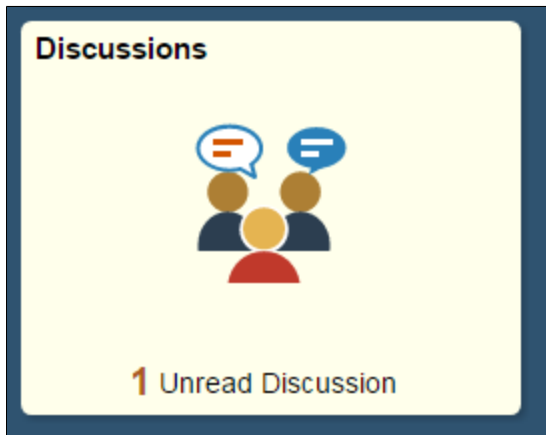
Navigation

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.

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

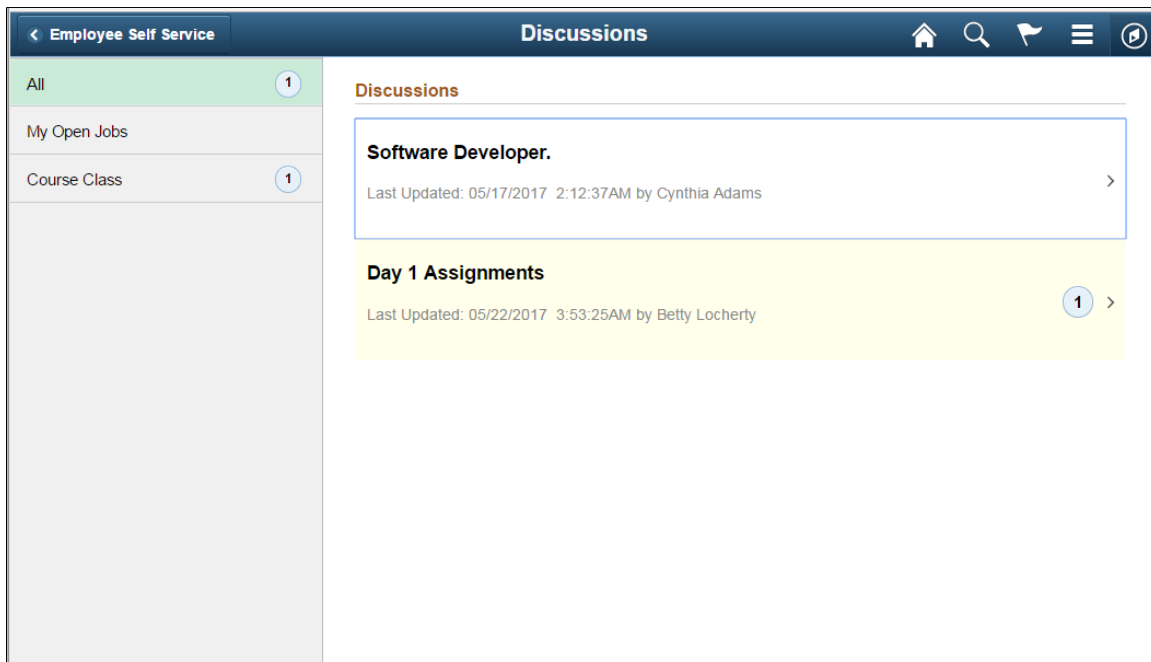
Use the Discussion page (EOFD_MAIN_LIST_FL) to access a list of discussion types which are having active discussions.

Navigation

Click the Discussion tile on the Employee Self Service homepage.

Image: Discussions page

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



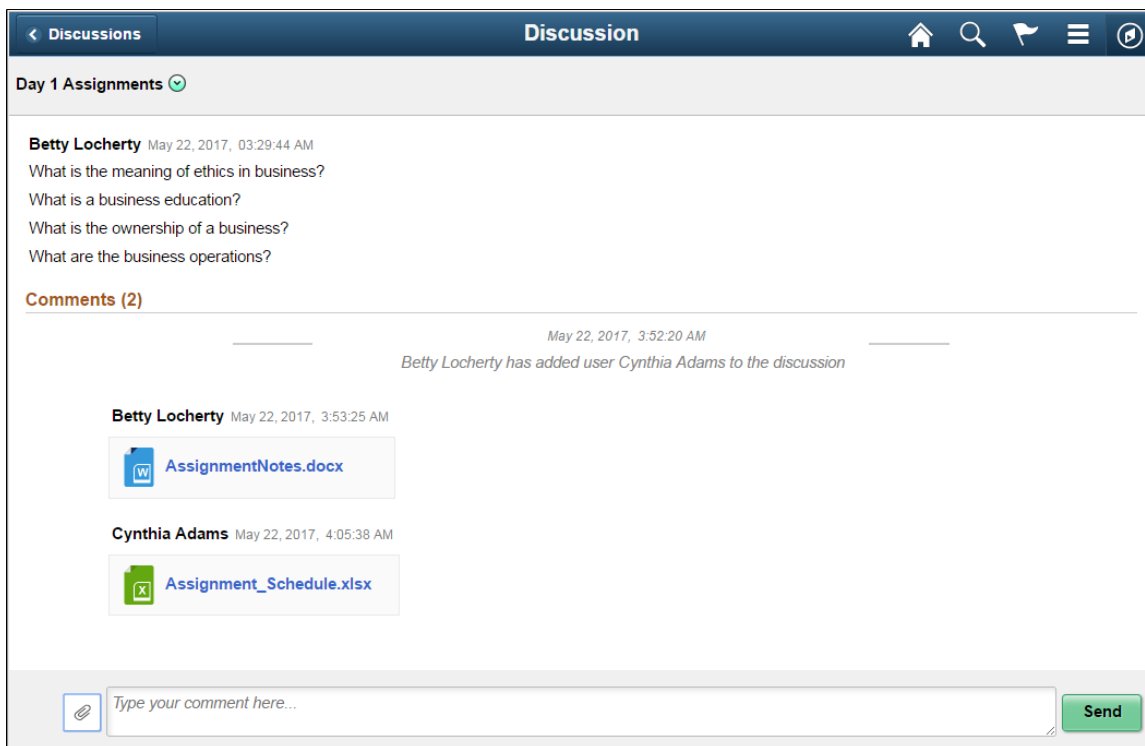
Only top fifty discussions are displayed on selection of any discussion type. To view all the discussions, click the View More link.

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.

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

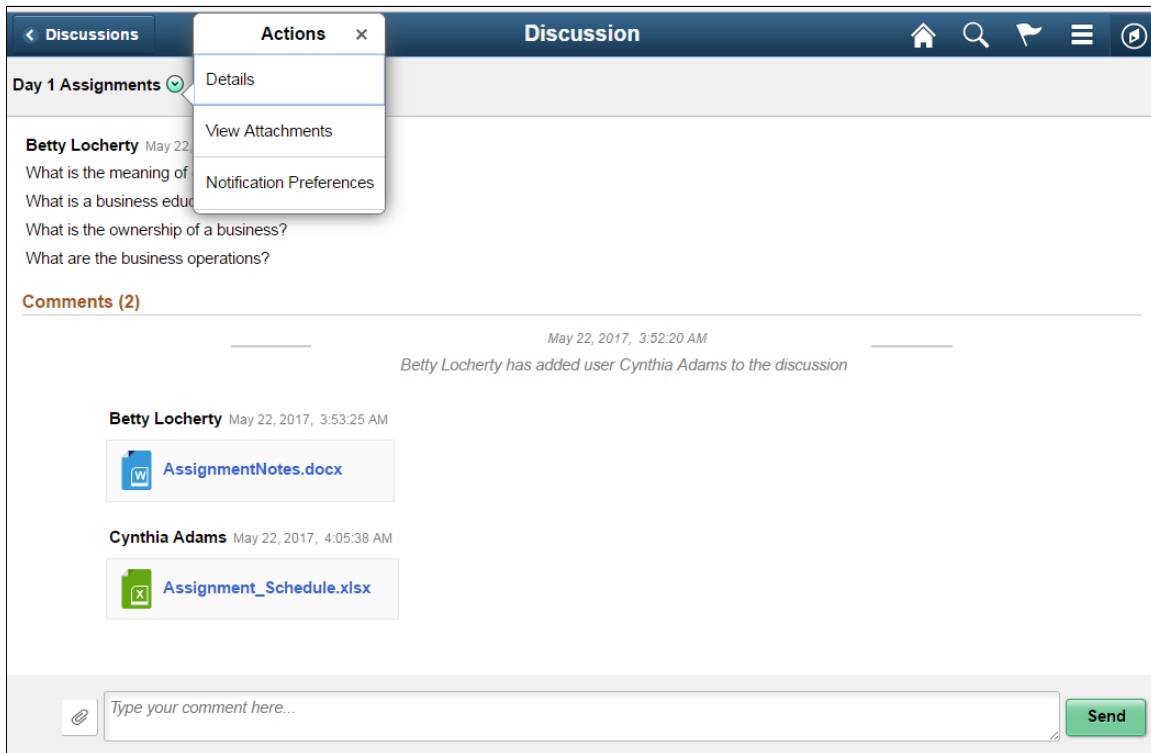
In Discussions page, you can perform three actions on any discussions.

- Details
- View Attachments
- Notification Preferences

Click on the Related Action item. You can view the actions on Discussions page as shown.

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.

Image: Discussion Details Page

Discussion Details Page

Cancel

Discussion Details

Done

*Subject

Day 1 Assignments

Description

What is the meaning of ethics in business?
 What is a business education?
 What is the ownership of a business?
 What are the business operations?

Status

Open

▼ Participants

2 rows

+

Select All

Select	Participant Type	User/Group	Role Description
☐	User	Cynthia Adams	Participant
☐	User	Betty Locherty	Creator

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

Cancel

Discussion Attachments

Done

Attachments

2 rows

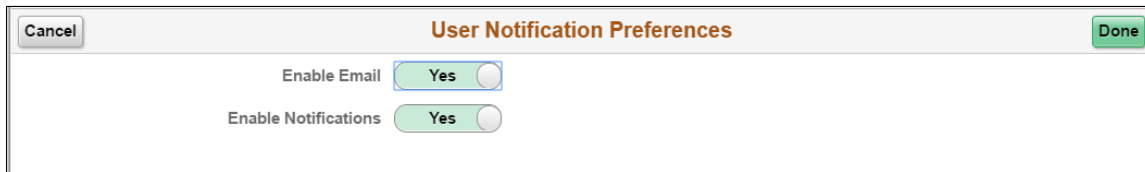
	User Description ▾	Uploaded Date-Time ▾	Attachments ▾
1	Cynthia Adams	05/22/2017 4:05:38AM	Assignment_Schedule.xlsx
2	Betty Locherty	05/22/2017 3:53:25AM	AssignmentNotes.docx

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.

Image: User Notification Preferences Page

User Notification Preferences Page



The image shows a dialog box titled "User Notification Preferences". It has a "Cancel" button on the top left and a "Done" button on the top right. Inside the dialog, there are two settings, each with a label and a toggle switch:

- Enable Email**: The toggle switch is set to "Yes" and is highlighted with a blue border.
- Enable Notifications**: The toggle switch is also set to "Yes".

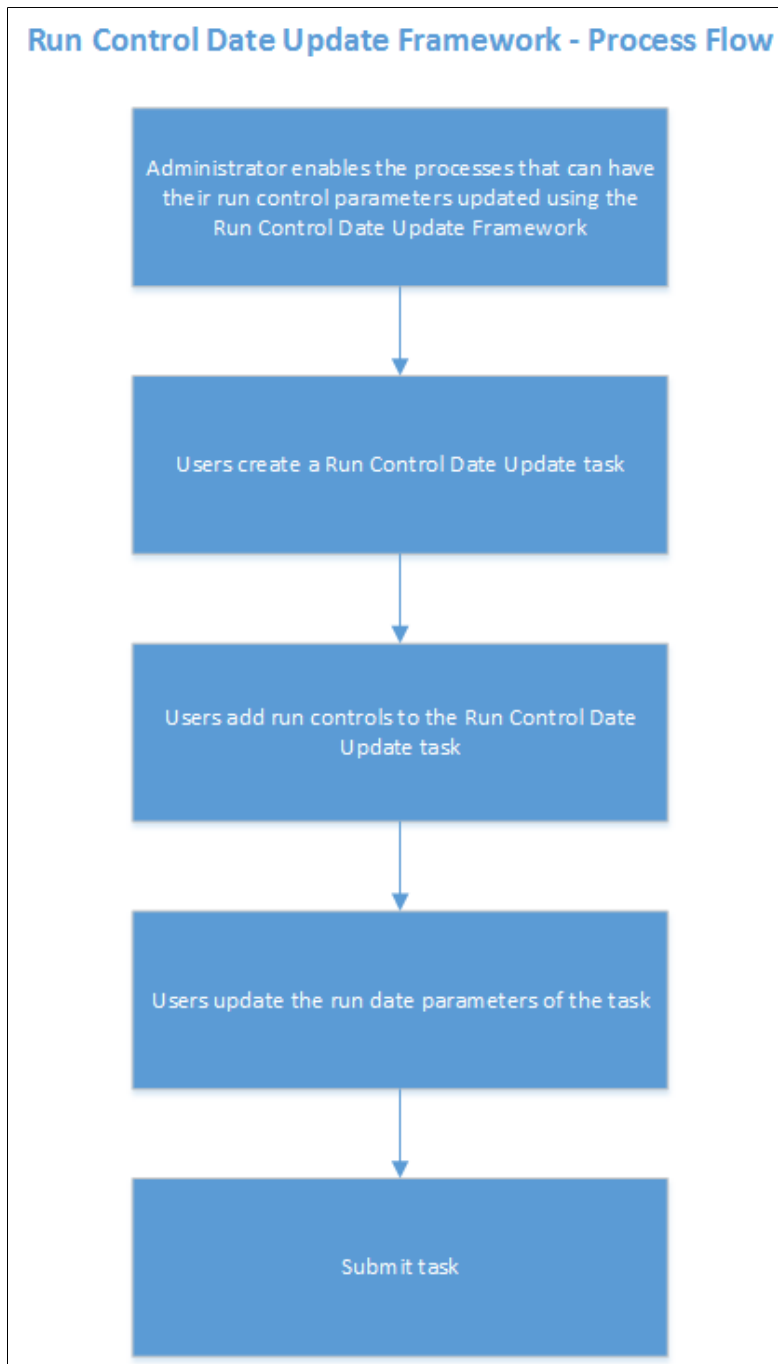
Run Control Date Update Framework

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.

Image: Run Control Date Update Framework — Process Flow

The diagram depicts the functional diagram of the Run Control Date Update Framework



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

Run Control Update Registry

Search Filters

*Process Type: Application Engine

*Owner: FGL

*Process Name: FS_CFCONFIG Run Full Configuration

Search

Select All Deselect All

Select Processes and Run Controls

Select	Process Type	Process Name	Component Name	Registered
☐	Application Engine	FS_CFCONFIG	FS_CF_TEMPLATE	Unregistered
☒	Application Engine	FS_CFCONFIG	RUN_CF_CONFIG	Unregistered
☐	Application Engine	FS_CFCONFIG	STANDARD_CF_TMPLT	Unregistered

Edit Run Control Registry

Save Notify

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.

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

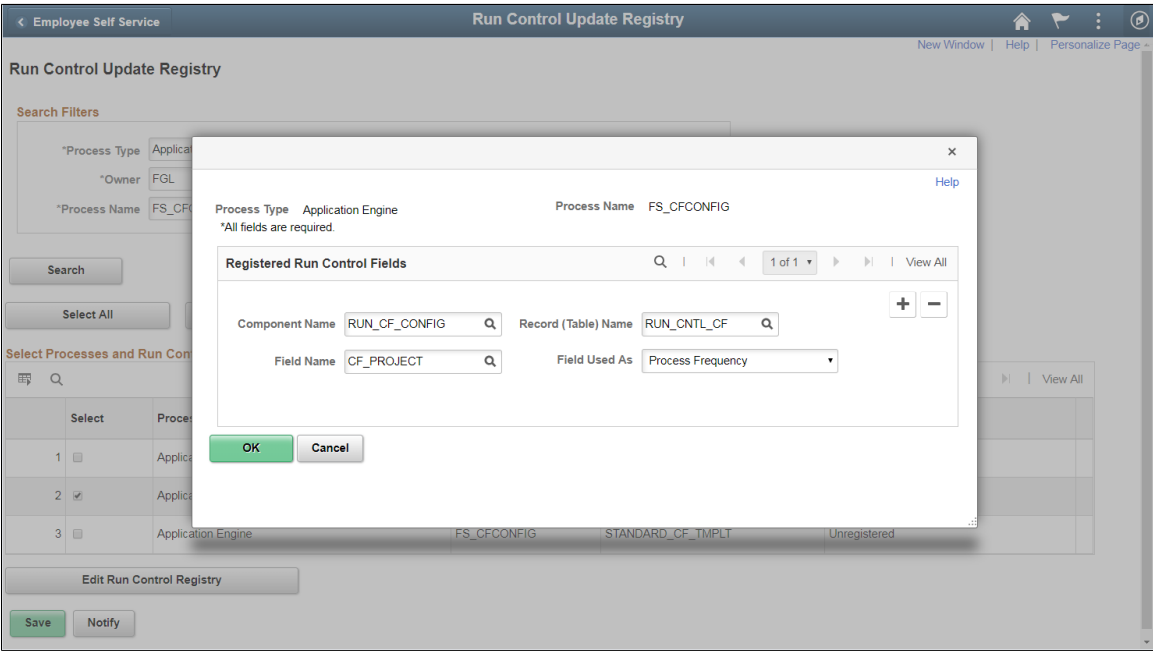
Use the Edit Run Control Registry pagelet to include or specify the fields in the Run Control that is registered for Run Control Date Update.

Navigation

On the Run Control Update Registry page, click the Edit Run Control Registry button.

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.

Page Name	Definition Name	Usage
<u>Define New Values Page</u>	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

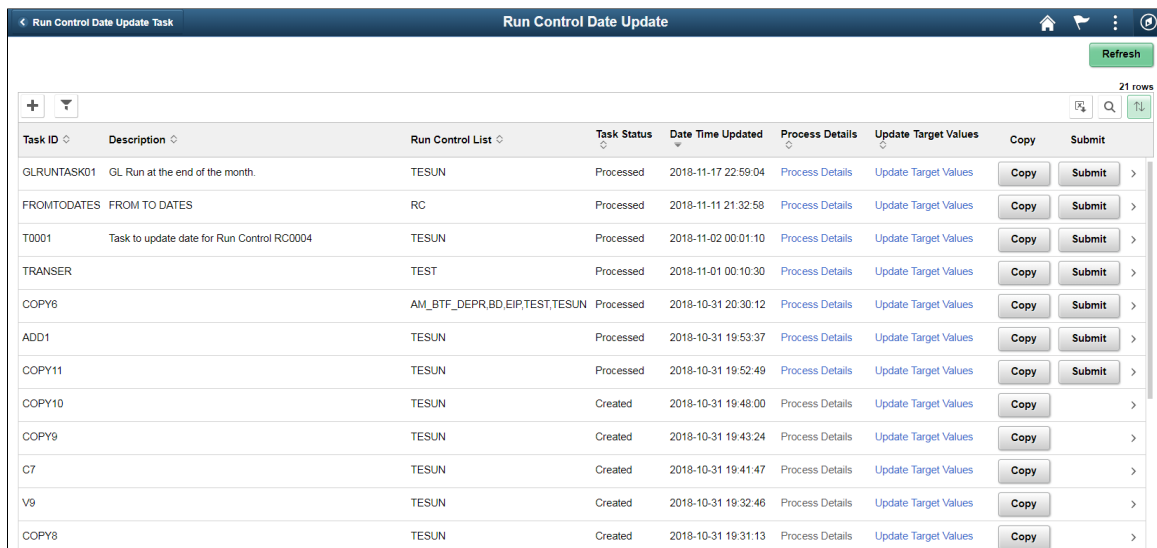
The Run Control Date Update page is delivered as a tile on your home page or dashboard. To access the tile, browse to:

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.



Task ID	Description	Run Control List	Task Status	Date Time Updated	Process Details	Update Target Values	Copy	Submit
GLRUNTASK01	GL Run at the end of the month.	TESUN	Processed	2018-11-17 22:59:04	Process Details	Update Target Values	Copy	Submit
FROMTODATES	FROM TO DATES	RC	Processed	2018-11-11 21:32:58	Process Details	Update Target Values	Copy	Submit
T0001	Task to update date for Run Control RC0004	TESUN	Processed	2018-11-02 00:01:10	Process Details	Update Target Values	Copy	Submit
TRANSER		TEST	Processed	2018-11-01 00:10:30	Process Details	Update Target Values	Copy	Submit
COPY6		AM_BTIF_DEPR,BD,EIP,TEST,TESUN	Processed	2018-10-31 20:30:12	Process Details	Update Target Values	Copy	Submit
ADD1		TESUN	Processed	2018-10-31 19:53:37	Process Details	Update Target Values	Copy	Submit
COPY11		TESUN	Processed	2018-10-31 19:52:49	Process Details	Update Target Values	Copy	Submit
COPY10		TESUN	Created	2018-10-31 19:48:00	Process Details	Update Target Values	Copy	
COPY9		TESUN	Created	2018-10-31 19:43:24	Process Details	Update Target Values	Copy	
C7		TESUN	Created	2018-10-31 19:41:47	Process Details	Update Target Values	Copy	
V9		TESUN	Created	2018-10-31 19:32:46	Process Details	Update Target Values	Copy	
COPY8		TESUN	Created	2018-10-31 19:31:13	Process Details	Update Target Values	Copy	



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.



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.

Image: Create A task page

Create A task page

✕ Exit

Run Control Date Update Task

1

Create A Task

2

Select Run Controls

3

Define New Values

Next >

*Task ID

GLRUNTASK01

Description

GL Run at the end of the month.

Select Run Control IDs

1 row

*Run Control ID

TESUN

+

-

Save For Later

- 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.

Image: Select Run Controls page

Select Run Controls page

Run Control Date Update Task

1 Create A Task 2 **Select Run Controls** 3 Define New Values

Task ID GLRUNTASK01
Description GL Run at the end of the month.

Select All Deselect All

Select Run Controls

3 rows

Select	Run Control ID	Process Type	Process Name	Description	Component Name	Description
☒ Yes	TESUN	SQR Report	GLS7011	Journal Error Report	RUN_GLS7011	Journal Edit Errors
☒ Yes	TESUN	Application Engine	GL_JP	GL Journal Posting	JOURNAL_POST_REQ	Journal Post Request
☒ Yes	TESUN	Application Engine	GL_JEDIT	PS/GL Journal Edit	JOURNAL_EDIT_REQ	Journal Edit Request.

Save For Later

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

✕

Exit

Run Control Date Update Task

1

Create A Task

2

Select Run Controls

3

Define New Values

< Previous

Submit

Task ID

GLRUNTASK01

Description

GL Run at the end of the month.

Fiscal Year

Q

From Year

Q

To Year

Q

From Period

Q

To Period

Q

As Of Date

Absolute Value

01/31/2019

From Date

To Date

Tree Effective Date

Request Date Option

Process Frequency

Always Process

Save For Later

- 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.

Working with the Acknowledgement Framework

Understanding the Acknowledgement Framework



PeopleSoft Acknowledgement Framework

Several business processes require employers to capture the acknowledgement or acceptance of candidates and employees as they, agree to terms and conditions, and attest to the validity of information provided.

The Acknowledgement Framework gives customers the ability to create configurable acknowledgements and agreements across PeopleSoft products. The flexibility of the setup allows customers to create text boxes, agreements or acknowledgment consents.

The feature also includes validation and automated audit trails. Digital signature is not a part of this framework. The Acknowledgement page created using the Acknowledgement Framework can be added as a step within fluid activity guides for the various business processes in an organization.

Setting Up the Acknowledgement Framework

This topic discusses how to set up the Acknowledgement Framework.

Pages Used to Set Up Acknowledgement Framework

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Acknowledgement Category Page</u>	ESIGN_CATEGORY	Create the Acknowledgement category and configure its user security.
<u>Acknowledgement Configuration Page</u>	ESIGN_DTL	Create an Acknowledgement Configuration.
<u>Review Acknowledgements Page</u>	ESIGN_ADMIN_SUM_FL	Review the Acknowledgements.

Acknowledgement Category Page

Use the Acknowledgement Category page (ESIGN_CATEGORY) to categorize acknowledgements as per business requirement and to control the access rights of users for a category of acknowledgements.

Navigation

Enterprise Components > Acknowledgement > Acknowledgement Category

Image: Add Acknowledgement Category page

Add Acknowledgement Category page.

The screenshot shows a web application interface for adding an acknowledgement category. At the top, there is a dark blue header bar with a left navigation menu containing a back arrow and the text 'Review Acknowledgements'. The main header area displays 'Acknowledgement Category' in white text, along with icons for home, search, notifications (a red circle with the number 2), a menu, and a refresh button. A 'New Window' link is visible on the right. Below the header, the page title 'Acknowledgement Category' is displayed. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted in green. Below these buttons, there is a 'Category' label and a text input field containing the word 'BENEFITS'. A green 'Add' button is positioned below the input field. At the bottom of the page, there are two links: 'Find an Existing Value' and 'Add a New Value'.

Image: Acknowledgement Category page

Acknowledgement Category page

Category BENEFITS

Description Benefits Category

Configure Security ?

1-2 of 2

Role Name	Can Edit Configuration	Can View Responses		
Acknowledgement Administrator	☒	☐	+	-
Benefits Administrator	☒	☒	+	-

Review Acknowledgement Search Options ?

☒ Acknowledgement ID

☐ User ID Field Label Prompt Table

☒ From/Through Date

☒ Acknowledged By Field Label Prompt Table

Save Return to Search Previous in List Next in List Add Update/Display

To add a new acknowledgement category, use the Add New value tab in the Acknowledgement Category search page.

Category

Add the Acknowledgement Category

Description

Add the Acknowledgement Category description.

Use the Configure Security section to set the user security for the acknowledgement category.

Role Name

Choose the user roles that need can access the acknowledgements in this acknowledgement category.

Can Edit Configuration

Select the check-box to allow users in this user role to edit the acknowledgement configuration.

Can View Responses

Select the check-box to allow users in this user role to view the acknowledgement responses.

Use the Review Acknowledgement Search Options section to configure the search options in the Review Acknowledgements page.

Acknowledgement ID

Select the check-box if the Acknowledgement ID field needs to be displayed in the Review Acknowledgements search page.

User ID

Select the check-box if the User ID field needs to be displayed in the Review Acknowledgement search page.

Field label

Enter the customized label for the User ID field.

Prompt Table	Select the table that is used to provide a prompt list when a user enters a value into the User ID search field in the Review Acknowledgement page..
From/Through Date	Select the check-box if the From and Through date needs to be displayed in the Review Acknowledgements search page.
Acknowledged By	Select the check-box if the search filter for users who have acknowledged needs to be displayed in the Review Acknowledgements search page.
Field Label	Choose the custom field label for the Acknowledged by field.
Prompt Table	Select the table that is used to provide a prompt list when a user enters a value into the Acknowledged By search field in the Review Acknowledgement page..

Acknowledgement Configuration Page

Use the Acknowledgement Configuration page (ESIGN_DTL) to create an Acknowledgement Configuration.

Navigation

Enterprise Components >Acknowledgement >Configure Acknowledgement

Note: Users with the ‘Acknowledgement Administrator’ role will have access to the Acknowledgment Configuration page.

Image: Acknowledgement Configuration page

Acknowledgement Configuration page.

Acknowledgement Configuration

Acknowledgement ID: OB2

Acknowledgement Details

*Effective Date: 12/15/2019 *Status: Active Preview

*Description: Acknowledgement for OnBoarding Short Description:

Long Description: Create an Acknowledgement step for the Onboarding process Employee will not be able to review or edit sensitive details without providing the acknowledgement.

*Category: HIRE_RETIRE_EMP OnBoarding & OffBoarding

Acknowledgement Fields

Sequence Number	Field Name	Field Label	Edit Value	Field Alignment	Required		
10	TEXT_BOX1	Text Area 1				+	-
20	TERMS_HYPERLINK	Terms and Conditions		Center		+	-
30	AGREE_CHECKBOX	I Agree		Center		+	-

Audit Trail Details

Section Header: Updated by

Audit Trail Fields

Field Name	Field Label	Enable	Display
USER_ID	User ID	☒	☐
DTTM_STAMP	Date/Time Stamp	☒	☐
IP_ADDRESS	IP Address	☐	☐

Verify Identity

☐ Enable Verify Identity

Save Add Update/Display Include History Correct History

Acknowledgement Details

Acknowledgement ID

Displays the ID under which the configuration is saved. This value is entered as the Parameter Value in the [Categories - Steps Page](#) during the activity guide creation.

Note: A configuration created under an Acknowledgement ID can be updated only if it is not used in any activity guide instance.

Effective Date

Enter the effective date for this configuration.

Note: The Acknowledgment page, when used in an activity guide, is displayed based on the configuration effective as of the activity guide instance creation date.

If an Acknowledgement configuration is already in use in an activity guide instance, then it is available only in the display mode and cannot be edited.

Status

Choose the appropriate value to indicate the status of the configuration. Available values are Active and Inactive.

Preview link

Click this link to preview the Acknowledgement page created based on the saved configuration. The preview is displayed in a new browser tab.

(Long and Short) Description

Enter descriptions to indicate the purpose of the Acknowledgement Configuration.

Category

Choose the category for this acknowledgement.

Acknowledgement Fields - Field Details**Sequence Number**

Use the Sequence Number field to set the priority of the Acknowledgement fields, i.e. the order in which the fields are displayed in the Acknowledgement page.

This field must contain a unique value and the lowest number has the highest priority.

Field Name

Add fields to the configuration. The fields that can be added to the configuration are:

- Agreement check box.
- Date of Birth.
- Check Box 1.
- Display Name.
- First Name.
- Last Name.
- National ID.
- Postal Code.
- Radio Button.
- Terms and Conditions hyperlink.
- Up to a maximum of three Text Box fields.

Field Label

Displays the default label of the field. This label can be edited.

Edit Text

Click the Edit Text icon to open the contents of text fields for Text Box, and Terms and Conditions link, in a Rich Text Editor. All changes to the content and formatting for these text fields, including text alignment, can be set from within the Rich Text Editor.

Field Alignment

Use the Field Alignment drop down to set the field alignments. Available values are: Default, Left, Right and Center.

Note: The Default field alignment is set as per PeopleTools standards.

Required

Select the Required check box to set a field as mandatory. Fields marked as Required cannot be left blank by the user.

Acknowledgement Fields-Validation Details

Image: Acknowledgement Fields Validation Details

Acknowledgement Fields Validation Details.

Acknowledgement Fields ?

Field Details

Validation Details

||>

Sequence Number	Field Name	Root Package ID	Qualified Package/Class Path	Application Class ID	Method Name		
10	TEXT_BOX1					+	-
20	TERMS_HYPERLINK	ESIGN_AGPOSTPROCESS	:	AGPostProcess	ItemPostProcess	+	-
30	AGREE_CHECKBOX					+	-

Root Package ID

Enter the Root Package ID for the field.

Qualified Package/Class Path

Enter the Class path for the field.

Application Class ID

Enter the Application Class ID for the field.

Method Name

Enter the Method Name for the field.

Audit Trail Details

Section Header

Use the Section Header field to enter a heading for the audit trail details displayed at the bottom of the transactional page. For example: Updated By.

Note: This field is required only when the user chooses to display any of the audit trail fields on the transactional page.

Audit Trail Fields

Field Name

By default, the User ID and the Date/Time Stamp values are stored in the database for all Acknowledgement transactions. Only the IP Address is optional.

Field Label

Displays the default field labels. You can edit this label.

Enable

Select the Enable check box to capture the corresponding field as part of audit trail.

Note: The Enable check box can be selected only for the IP Address field. It will then capture the IP address of the device from which a user saves the transaction.

The User ID and Date/Time Stamp fields are delivered as enabled and cannot be unchecked.

Display

Select the check box to display the corresponding field as audit trail on the transactional page.

Note: Audit Trail fields are displayed only if the Enable check box is selected.

Enable Verify Identity**Enable Verify Identity**

Select this check box to enable user authentication when the user saves the Acknowledgement page.

The system will prompt the user for their PeopleSoft password when they save the Acknowledgement page.

Review Acknowledgements Page

Use the Review Acknowledgements page (ESIGN_ADMIN_SUM_FL) to search for and review the acknowledgements.

Navigation

Enterprise Components > Acknowledgement > Review Acknowledgements

Image: Review Acknowledgements page for Admin user

Review Acknowledgements page for Admin user.

Quick Search

Category: BENEFITS

Acknowledgement ID:

Empl ID:

From:

Through:

Acknowledgements 6 rows

Acknowledgement ID	Description	Acknowledged By	Date/Time
OE1	Open Enrollment	Rosanna Channing	11/10/2019 11:19:55PM
OE1	Open Enrollment	Cynthia Adams	11/27/2019 4:41:59AM
OE1	Open Enrollment		11/27/2019 5:31:07AM
OE1	Open Enrollment	Christelle Stevenson	11/27/2019 5:34:30AM
OE1	Open Enrollment	Derek Holsinger	11/27/2019 5:36:44AM
OE1	Open Enrollment	Brenton Francisco	11/27/2019 7:54:15AM

Category

Filter the search based on the acknowledgment category.

Acknowledgement ID

Filter the search based on an acknowledgment ID

Empl ID

Filter the search based on an employee ID

From

Filter the search based on a start date.

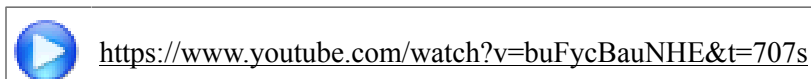
Through

Enter the end date for the period between which the acknowledgements were done.



Click the More button to view the details of the acknowledgement.

For more information, see the image highlights video on Acknowledge Framework Summary page.

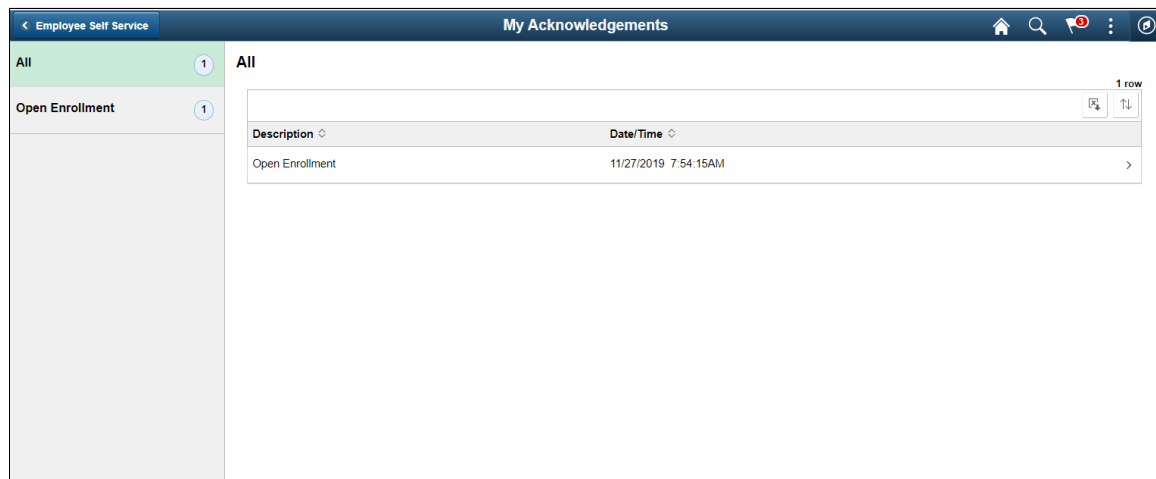


My Acknowledgements

Employees can use the My Acknowledgements tile in the Employee Self-Service home page to review acknowledgements that they did in the past.

Image: My Acknowledgements page for individual user.

Review Acknowledgements page for individual user.



Adding Acknowledgement Page as a Step in an Activity Guide

The Acknowledgement page can be used as a step in a activity guide. This section discuss the pages used to configure the Acknowledgement page as a step in an activity guide.

Pages Used to Add Acknowledgement Page 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 Acknowledgement step.
Activity Guide Templates Page	AGC_TMPL_SRCH_FL	Update a template to include the Acknowledgement step.
Activity Guide Composer - General Information Page	AGC_TMPL_GNRL_FL	Enter the activity guide template category into which the Acknowledgement step is added.
Activity Guide Composer - Select Steps Page	AGC_TMPL_STEP1_FL	Select the Acknowledgement step to be included in an activity guide.
Activity Guide Composer - Organize and Configure Steps Page	AGC_TMPL_STEP2_FL	Position the Acknowledgement step in the activity guide template.

Categories - Steps Page

Use the Categories - Steps page (AGC_CAT_TBL5) to modify an existing category to include the Acknowledgement step.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Steps

Image: Categories - Steps Page

This example illustrates the fields and controls on the Categories - Steps page (1 of 2).

CategorySecurityContextActionsImagesAssigneesStepsNotifications

Activity Guide Category ONBOARDING

Category

Effective Date01/01/1900
DescriptionOnBoarding
*Step Definition RuleNot Applicable

Steps

*StepACKNOWLEDGEMENT
*DescriptionAcknowledgement
*Long DescriptionEmployee needs to acknowledge this step before they can review/edit sensitive information
*Service TypePS Component
*Service IdEC_ACKNOWLEDGEMENT_FL
☒ Fluid
☐ Required

Post Processing PeopleCode

Root Package IdESIGN_AGPOSTPROCESS
Path:
Application Class IDAGPostProcess
Post Process MethodItemPostProcess

Service Type

Select PS Component to associate with the Acknowledgement step.

Service ID

EC_ACKNOWLEDGEMENT_FL

Fluid

Select the Fluid check box, to load the fluid page in the activity guide.

Post Processing PeopleCode

Root Package Id

Select ESIGN_AGPOSTPROCESS.

Path

Select :

Application Class ID

Select AGPostProcess..

Post Process Method

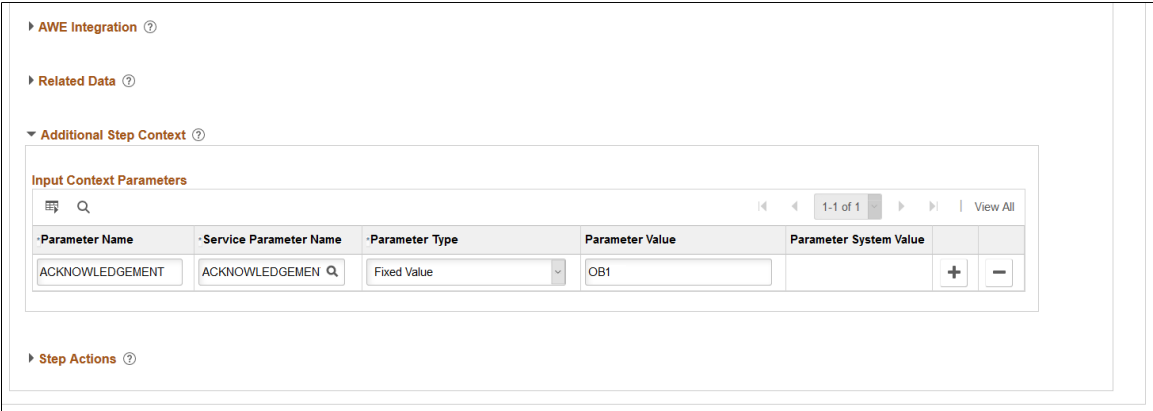
Enter ItemPostProcess.

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Image: Categories - Steps Page (2 of 2)

This example illustrates the fields and controls on the Categories - Steps Page (2 of 2).



Parameter Name	Acknowledgement _ID
Service Parameter Name	Acknowledgement _ID
Parameter Type	Fixed Value
Parameter Value	Enter the Acknowledgement ID created during Acknowledgement configuration using the Acknowledgement Configuration Page .

Note: You can add multiple Acknowledgement steps within the same activity guide category by using different parameter values (i.e., Acknowledgement IDs) and by giving a different step name.

Related Links

[Setting Up Activity Guide Categories](#)

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 Acknowledgement step.

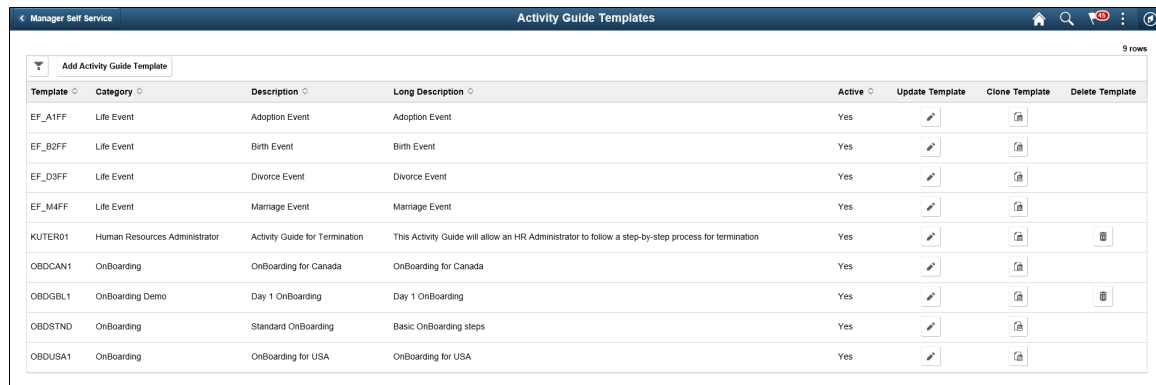
Note: You will only see templates you have administrator access to or where no security has been defined for the template.

Navigation

Enterprise Components >Activity Guide Composer >Templates >Activity Guide Templates

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			
OBDCA1	Onboarding	Onboarding for Canada	Onboarding for Canada	Yes			
OBOGBL1	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 [Add Activity Guide Template 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 Acknowledgement step is added.

Navigation

Enterprise Components >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.

Image: Activity Guide Composer - General Information page

This example illustrates the fields and controls on the Activity Guide Composer - General Information page.

Activity Guide Composer

Template: OBDUSA1
Effective Date: 1900-01-01

< Previous Next >

Introduction
● Visited

General Information
● Visited

Activity Guide Type
☐ Not Started

Security
☐ Not Started

Additional Actions
☐ Not Started

Sub Banner
☐ Not Started

Select Steps
☐ Not Started

Task: General Information

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

The Description entered here is displayed to the user in the Fluid Activity Guide Banner.

The Category selected will control the available options you can specify for the template. For example, the Category will control the steps you can add to the template.

Description: OnBoarding for USA
Long Description: OnBoarding for USA

Selected Category

Category	Description
OnBoarding	Category for OnBoarding activity guide templates

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 (see [Setting Up Activity Guide Categories](#)).

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 Acknowledgement step to be included in this activity guide.

Navigation

Enterprise Components >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.

Image: Activity Guide Composer - Select Steps page

This example illustrates the fields and controls on the Activity Guide Composer - Select Steps page.

Exit

Activity Guide Composer

Template: OBDUSA1

Effective Date: 2019-01-01

Previous

Next

Save

Introduction

General Information

Activity Guide Type

Security

Additional Actions

Sub Banner

Select Steps

Organize and Configure Steps

Task: Select Steps

For this step, you need to select the steps you want to include in your Activity Guide Template.

The Category specified for this Activity Guide is **OnBoarding** and the different steps that can be included for this template are displayed.

Total Steps for Template: 27

Available Steps

36 rows

Add Step	Added Step Count	Step Definition	Description	Long Description
Add Step	1	ACA 1095-Consent		The employee will provide consent using Form 1095-C Consent
Add Step	1	Acknowledgement		Employee needs to acknowledge this step before they can review/edit sensitive information
Add Step	0	Banking		Enter your bank account and payment distribution information.
Add Step	0	Benefits Enrollment		Start benefits enrollment and enroll for available benefits.
Add Step	1	Fluid Benefits Enrollment		Start fluid benefits enrollment and enroll for available benefits.

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 Acknowledgement 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 Acknowledgement step in the activity guide template.

Navigation

Enterprise Components >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.

Image: Activity Guide Composer - Organize and Configure Steps Page

This example illustrates the fields and controls on the Activity Guide Composer - Organize and Configure Steps page.

Step Type	Move Up	Move Down	Step Description	Configure Group Step	Configure Attributes	Configure Dependencies	Configure Page Text	Step Details	Delete Step
Step			Before You Start						
Step	▲	▼	Welcome						
Step	▲	▼	Acknowledgement						
Step	▲	▼	I-9						
Step	▲	▼	Disability						
Step	▲	▼	Veteran Status						
Step	▲	▼	Ethnic Groups						

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 Acknowledgement step right after the Welcome Video.

Best Practices While Using the Acknowledgement Step in Activity Guides

Here are a few best practices you can adopt while adding the Acknowledgement step in your activity guides. You can use any one of the options listed below to ensure that the activity guide user completes the Acknowledgement step.

- Suppressing the Mark Complete action: If your activity guide has a Mark Complete action, then suppressing that action for the Acknowledgement step ensures that the Mark Complete button is

not available to the activity guide user for that step. This can be set at the Category level using the Categories - Steps page.

Image: Categories - Steps page displaying the setting for suppressing the Mark Complete action

This example illustrates the Categories - Steps page displaying the setting for suppressing the Mark Complete action.

Steps ?

*Step: ACKNOWLEDGEMENT

*Description: Acknowledgement

*Long Description: Employee needs to Acknowledge this step before they can review/edit sensitive information

*Service Type: PS Component

*Service Id: HC_ACKNOWLEDGEMENT_FL

☒ Fluid

► Post Processing PeopleCode ?

► AWE Integration ?

► Related Data ?

► Additional Step Context ?

▼ Step Actions ?

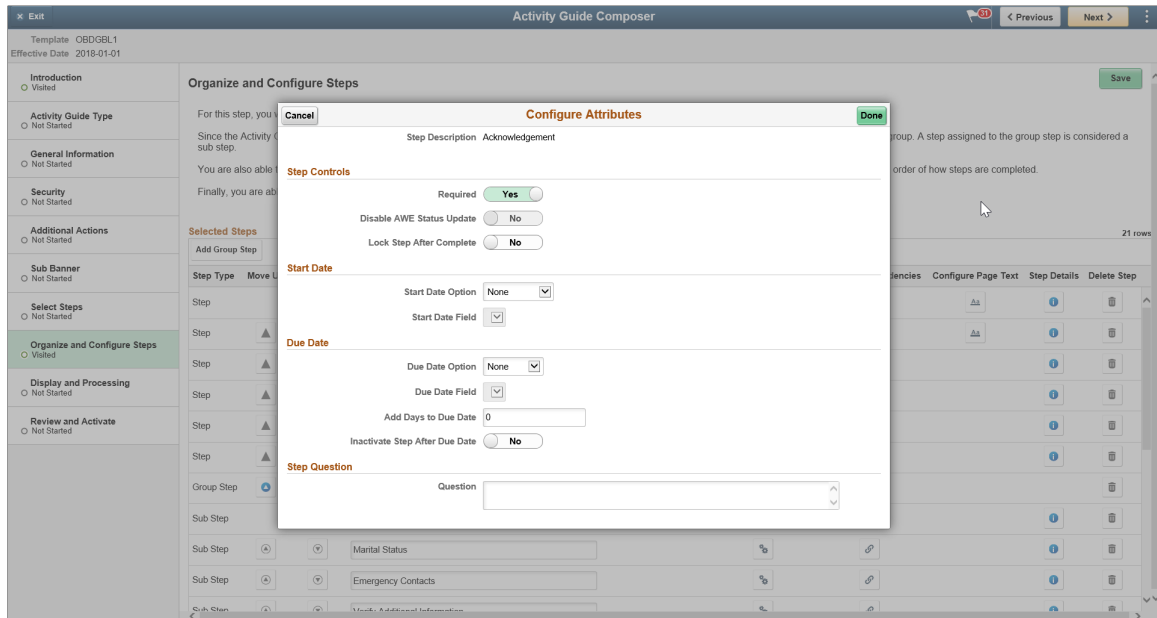
Actions

Action Method	Description	Active	Message Set Number	Message Number	Message Text
MarkComplete	SUPPRESS	No			

- Making the Acknowledgment step as Required: If Acknowledgement is made a Required step, then the user cannot complete the activity guide without executing this step. This can be set at the Template level using the Configure Attributes page.

Image: Configure Attributes page displaying the setting to make the Acknowledgement step as Required

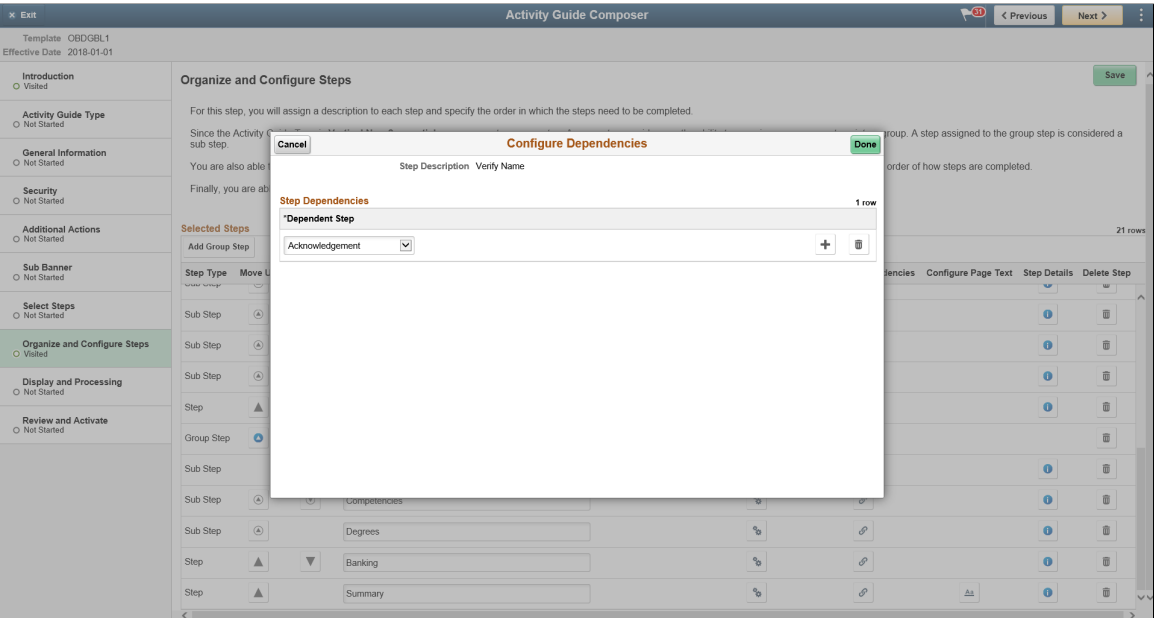
This example illustrates the Configure Attributes page displaying the setting to make the Acknowledgement step as Required.



- **Making the subsequent steps as Dependent:** If subsequent steps are made dependent on the Acknowledgement step, then the activity guide user cannot move to the next step without completing the Acknowledgement step. This can be set at the Template level using the Configure Dependencies page.

Image: Configure Dependencies page displaying the setting to make a subsequent step dependent on the Acknowledgement step

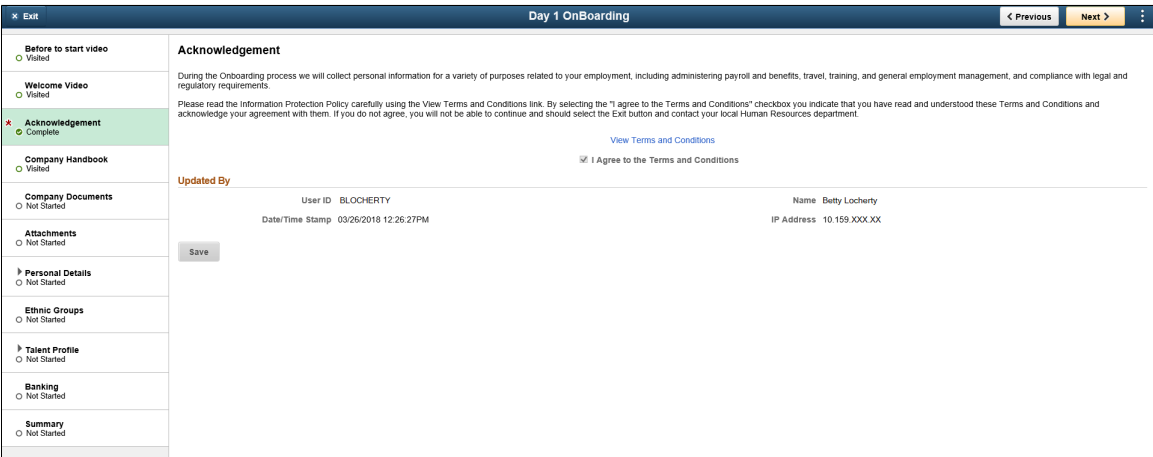
This example illustrates the Configure Dependencies page displaying the setting to make a subsequent step dependent on the Acknowledgement step.



Acknowledgement Step as Displayed in an Activity Guide

Image: Acknowledgement step as displayed in an Activity Guide

This example illustrates the Acknowledgement step as displayed in an Activity Guide.



Questionnaire Framework

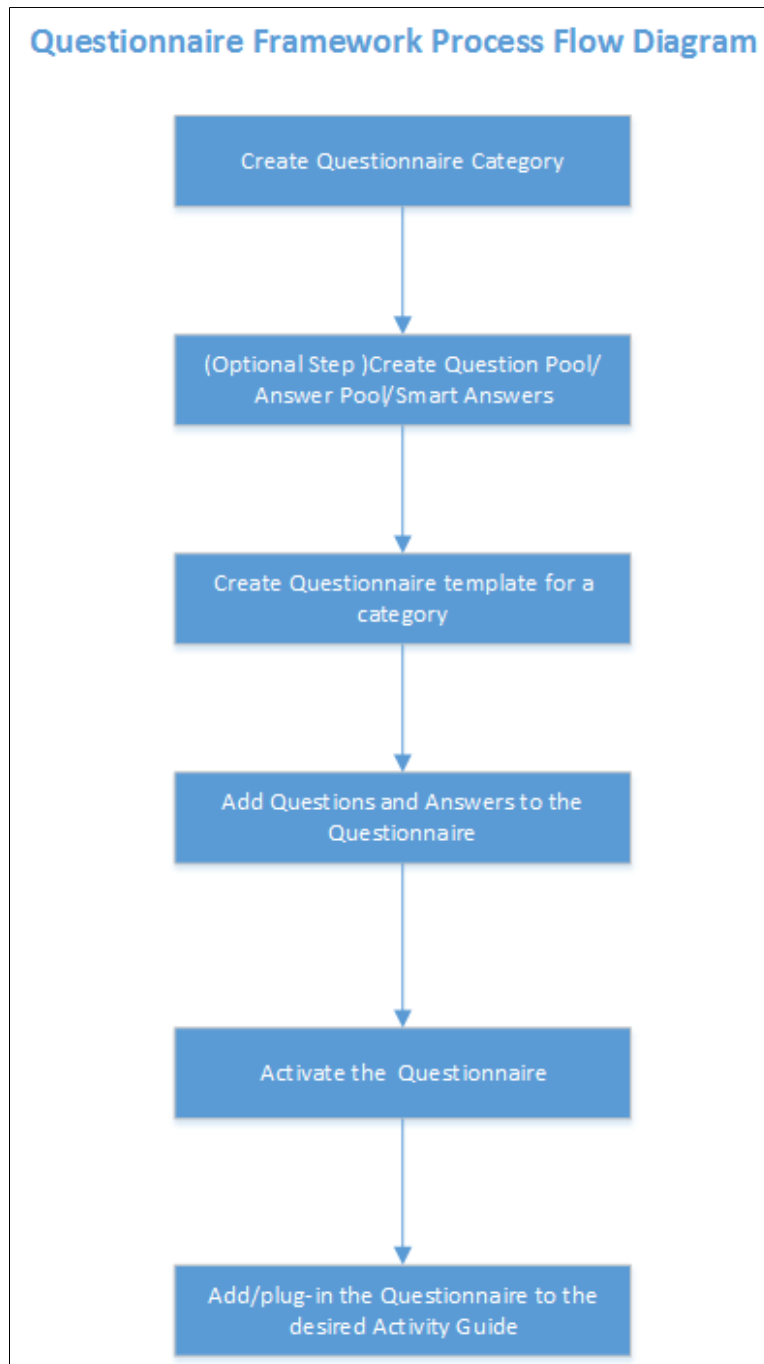
Understanding Questionnaire Framework

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:

Image: Questionnaire Framework Process Flow

Questionnaire Framework Process Flow



Understanding Security in Questionnaire Framework

Roles

The Questionnaire Framework delivers the following Roles:

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

These topics discuss configuring and creating questionnaires using the Questionnaire Framework.

Pages Used to Configure Questionnaire Framework

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.

Page Name	Definition Name	Usage
<u>Answer Pool Page</u>	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.
<u>Smart Answers Page</u>	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.
<u>Manage Questionnaires Page</u>	EOQF_TMPL_SRCH_FL	Manage the list of existing questionnaires like update, delete, clone, preview or create new questionnaires.
<u>Define Questionnaire Page</u>	EOQF_QSTNR_DEFN_FL	Define a new questionnaire and provide access level to it.
<u>User Instructions Page</u>	EOQF_INSTRUCTN_FL	Set instructions for the audience of the questionnaire.
<u>Add Question Page</u>	EOQF_ADD_QSTN_FL	Ability to add a question and link an answer based on permissions set at the questionnaire category level.
<u>Format Questionnaire - Organize Question Page</u>	EOQF_QSTNGRPDEF_FL	Organize and group the questions.
<u>Format Questionnaire - Organize Question Groups Page</u>	EOQF_QSTNGRPSEQ_FL	Organize the question groups.
<u>Preview Questionnaire Page</u>	EOQF_QSTNR_PRVW_FL	Preview the Questionnaire.
<u>Questionnaire Options Page</u>	EOQF_QSTNR_OPTN_FL	Set the questionnaire options.
<u>Update Question Answer Pool Page</u>	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.
<u>Activate Questionnaire Page</u>	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

Image: Questionnaire Category page

Questionnaire Category page.

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 page

Create Questionnaire Category page.

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. This is the template available in Activity Guide Composer specific to Questionnaire Framework. The steps in the Questionnaire template are configured as per this template.

QST0000 is the system delivered Activity Guide Template for Questionnaire Framework. For more details, see [Managing Activity Guide Templates](#)

System Data	This indicates that the questionnaire category is system delivered.
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

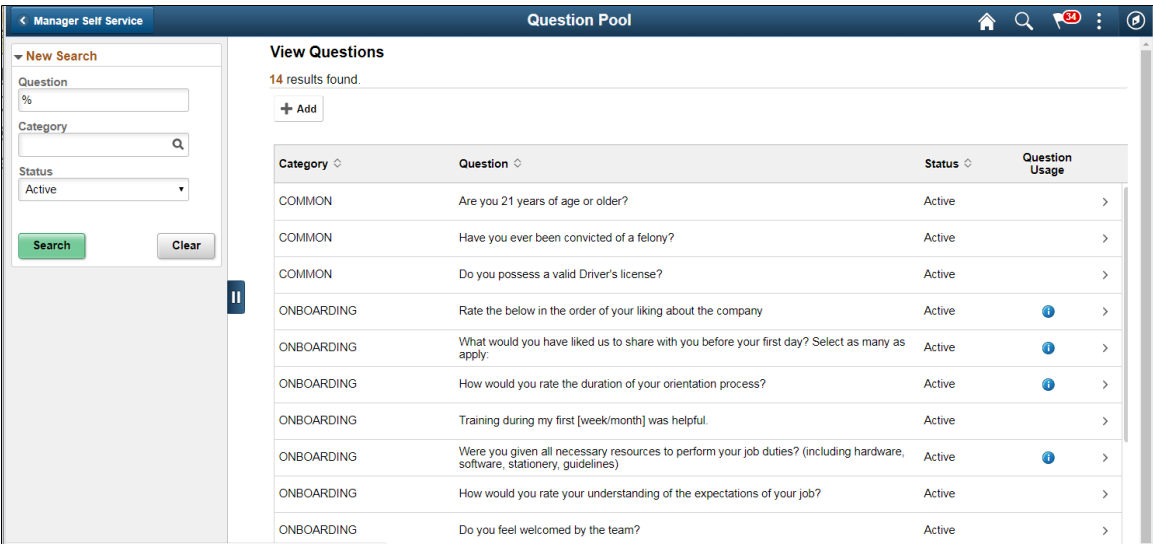
Use the Question Pool page (EOQF_QUESTION_FL) to add questions to a pool which can later be used when creating a questionnaire.

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.

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.

Question Pool

Question

45

Create Question

Save and Add New

Save

*Category

COMMON

*Question

How did you come to know about this job opening?

*Status

Active

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

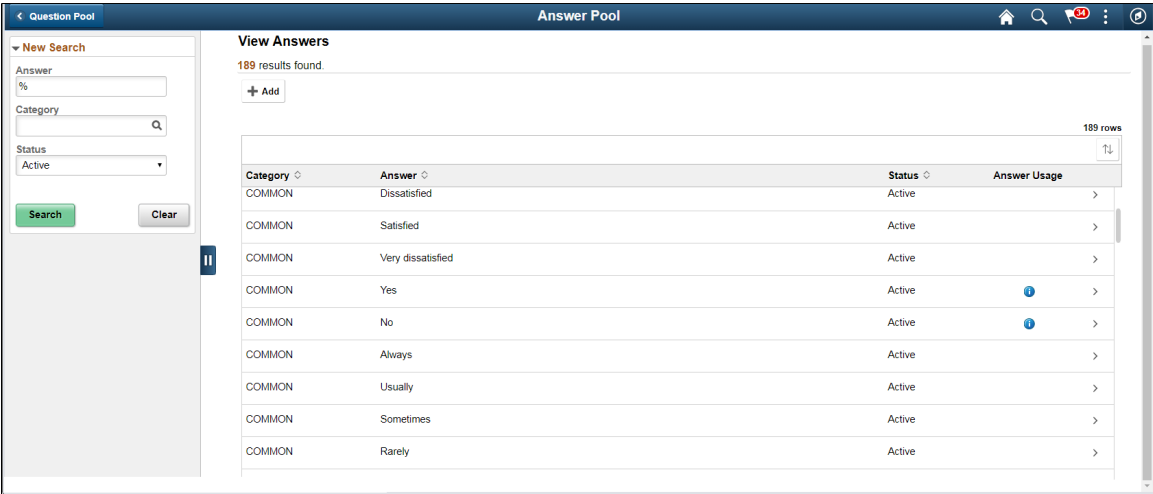
Use the Answer Pool page (EOQF_ANSWER_FL) to add answers which can be later added to the questionnaire.

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
- Displays the category of the particular answer.
- Answer
- Shows the 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.

Image: Create Answer page

Create Answer page.

The screenshot shows the 'Create Answer' page. At the top, there's a dark blue header bar with a left navigation menu containing 'Answer Pool' and 'Answer'. The 'Answer' tab is selected. On the right of the header are icons for home, search, flags, and a profile. Below the header, the page title 'Create Answer' is on the left, and two buttons, 'Save and Add New' and 'Save', are on the right. The main form area contains three labeled fields: '*Category' with a dropdown menu showing 'COMMON', '*Answer' with a large text input area, and '*Status' with a dropdown menu showing 'Active'. Below these fields is a checkbox labeled 'System Data'.

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

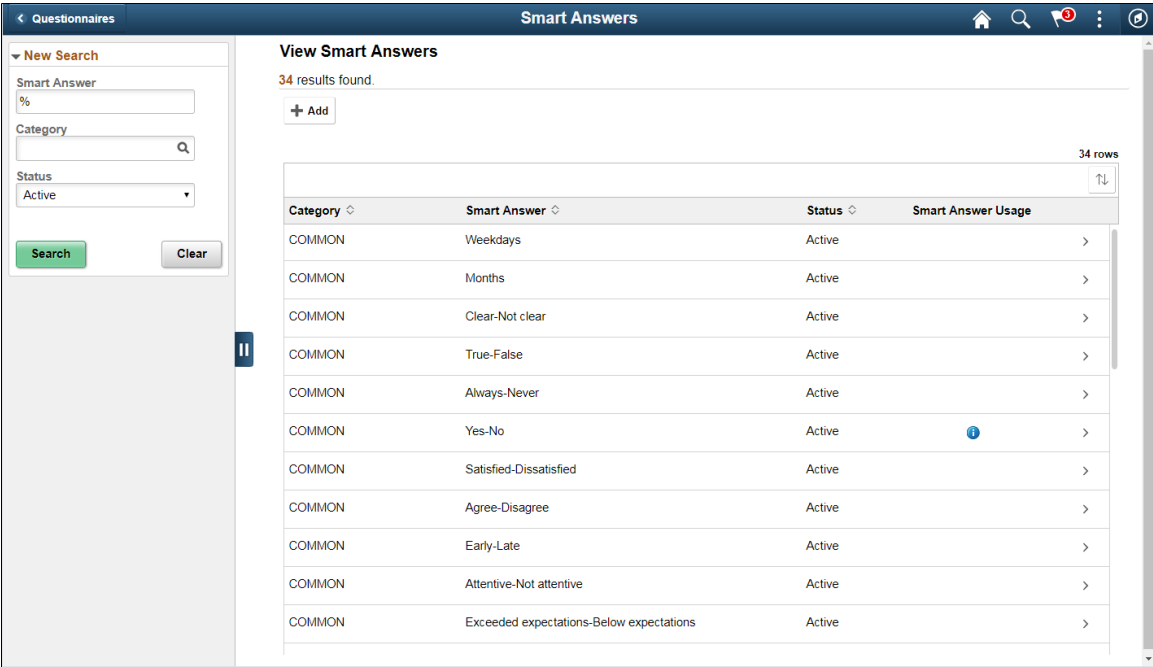
Use the Smart Answers page (EOQF_SANS_FL) to create a group of answers that may be used repeatedly in the questionnaire.

Navigation

Enterprise Components > Questionnaire Framework > Smart Answers

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 Shows the category of the particular smart answer.

Smart Answer Displays the 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.

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

Image: Manage Questionnaires page

Manage Questionnaires page.

Category	Questionnaire Code	Questionnaire Name	Description	Active	Update Questionnaire	Delete Questionnaire	Questionnaire Usage	Clone Questionnaire	Preview Questionnaire
ONBOARDING	EMPONBOARDINGSURVEY	Employee Onboarding Survey	Survey to get feedback from your employees and learn how you can improve the way you onboard new hires.	Yes					

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.

Image: Create Questionnaire page

Create Questionnaire page

The screenshot shows a 'Create Questionnaire' dialog box. At the top, there is a title bar with three buttons: 'Cancel' on the left, 'Create Questionnaire' in the center, and 'Done' on the right. Below the title bar, the dialog contains three input fields. The first field is labeled '*Questionnaire Name' and is a text input. The second field is labeled '*Questionnaire Code' and is also a text input. The third field is labeled '*Category' and is a dropdown menu with a small downward arrow on the right side.

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.

Image: Define Questionnaire page

Define Questionnaire page.

Update Questionnaire

Category: ONBOARDING
Questionnaire Name: Employee Onboarding Survey

Step 1 of 8: Define Questionnaire
Define your questionnaire and add an optional description for your reference. Users will only see the questionnaire name.

Define your Questionnaire

*Questionnaire Name: Employee Onboarding Survey

*Questionnaire Code: EMPONBOARDINGSURVEY

*Category: ONBOARDING

Description: Survey to get feedback from your employees and learn how you can improve the way you onboard new hires.

*Access: Public

Audit Information

Created By: SAMPLE 12/10/2018 8:31:09PM
Last Updated By: SAMPLE 12/10/2018 8:43:23PM

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.

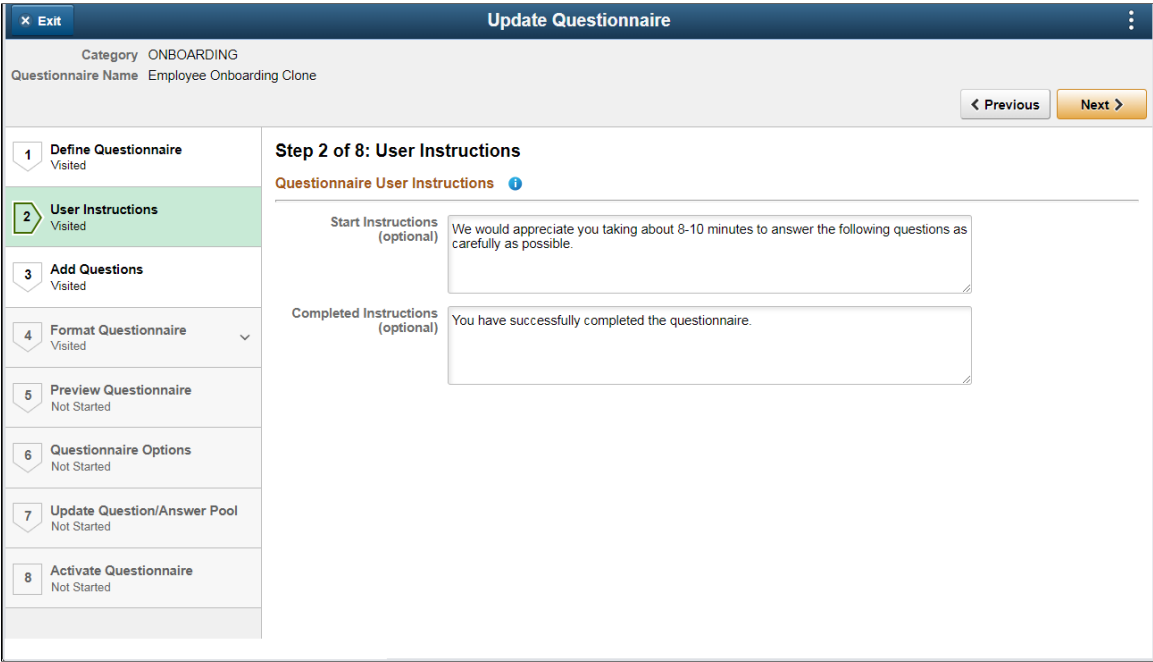
Note: You can click any of the steps in the left-hand pane to access that particular step in the guided process if you had already visited that step.

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.

Image: Add Questions page

Add Questions page.

Update Questionnaire

Category: ONBOARDING
Questionnaire Name: Employee Onboarding Survey

< Previous Next >

Step 3 of 8: Add Questions

Use Existing Question Add New Question

Employee Onboarding Survey

1. What would you have liked us to share with you before your first day? Select as many as apply:

- ☐ Company Policies
- ☐ Your team members names and roles
- ☐ Dress code
- ☐ Organizational chart

2. Were you given all necessary resources to perform your job duties? (including hardware, software, stationery, guidelines)

- ☐ I was barely given any resources.
- ☐ I was given some resources, but had to ask for the rest.
- ☐ Yes, I was given everything I needed in advance.
- ☐ I was given most of the necessary resources.

Mention the missing resources.

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.

Image: Use Existing Question page

Use Existing Question page

Use Existing Question

Search Questions

Category

Search Results

Category	Question
☐ ONBOARDING	Do you feel welcomed by the team?
☐ ONBOARDING	How would you rate your understanding of the expectations of your job?
☐ ONBOARDING	Training during my first [week/month] was helpful.

Click the Create New Question button to add a new question to the questionnaire. This opens up the Add New Question page.

Image: Add New Question page

Add new Question page.

Cancel

Add New Question

Save

Enter your new question then select a question type to add an answer.

Create New Question

Add your question in the box below.

*Question

*Question Type

Multiple Choice

☐ Required Question

Add Answer

You can prefill your answers by using Smart Answers, or select an existing answer, or manually add answers.

Smart Answers

Use Existing Answer

Answer Order	Answer	Correct Answer	Default Points	Enable Comment	Comment Label	Comments Required
		☐		☐		☐
		☐		☐		☐
		☐		☐		☐

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](#)

Use the Use Existing Answer button to add an answer from the Answer pool.

Image: Use Existing Answer page

Use Existing Answer page.

Use Existing Answer

Cancel Done

Search Answer

Category

Search Results

Category	Answer
☐ ONBOARDING	Other
☐ ONBOARDING	Company Policies
☐ ONBOARDING	Work Culture
☐ ONBOARDING	Management
☐ ONBOARDING	I was barely given any resources.
☐ ONBOARDING	I was given some resources, but had to ask for the rest.
☐ ONBOARDING	I was given most of the necessary resources.
☐ ONBOARDING	Yes, I was given everything I needed in advance.
☐ ONBOARDING	There was no orientation. I did not have any formal orientation process

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.

Image: Edit and Delete options for each Question

Edit and Delete options for each question.

The screenshot shows the 'Update Questionnaire' window for the 'Employee Onboarding Survey'. The left sidebar contains a progress list with 8 steps: 1. Define Questionnaire (Visited), 2. User Instructions (Visited), 3. Add Questions (Visited and highlighted), 4. Format Questionnaire (Not Started), 5. Preview Questionnaire (Not Started), 6. Questionnaire Options (Not Started), 7. Update Question/Answer Pool (Not Started), and 8. Activate Questionnaire (Not Started). The main area is titled 'Step 3 of 8: Add Questions' and includes buttons for 'Use Existing Question' and 'Add New Question'. Below this, the survey title 'Employee Onboarding Survey' is displayed. Two questions are listed: Question 1 is a multiple-choice question about sharing information before the first day, with options like 'Company Policies', 'Your team members names and roles', 'Dress code', and 'Organizational chart'. Question 2 is a radio button question about resources provided for job duties, with options ranging from 'I was barely given any resources' to 'I was given most of the necessary resources'. Each question has edit and delete icons on the right. A text box for 'Mention the missing resources.' is at the bottom.

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.

Image: Organize Questions page

Organize Questions page.

Update Questionnaire

Category: ONBOARDING
Questionnaire Name: Employee Onboarding Survey

< Previous Next >

Step 4 of 8: Format Questionnaire - Organize Questions
Here you can sequence the order of your questions, or create new groups of questions.

Recruitment Process

Order	Question	
1	Were you asked relevant questions during your interview process?	Move
2	Is there something we could have done to improve the recruitment process?	Move

Onboarding
Please answer the following questions about your OnBoarding process

Order	Question	
1	What would you have liked us to share with you before your first day? Select as many as apply.	Move
2	Were you given all necessary resources to perform your job duties? (including hardware, software, stationery, guidelines)	Move
3	How would you rate the duration of your orientation process?	Move
4	What could we change or add to improve our onboarding process?	Move
5	What was your joining date?	Move
6	Rate the below in the order of your liking about the company	Move

Ungrouped Questions

Group Your Questions

Order	Question	
1	Were any topics not covered in Orientation that you think should be included?	Move

Save

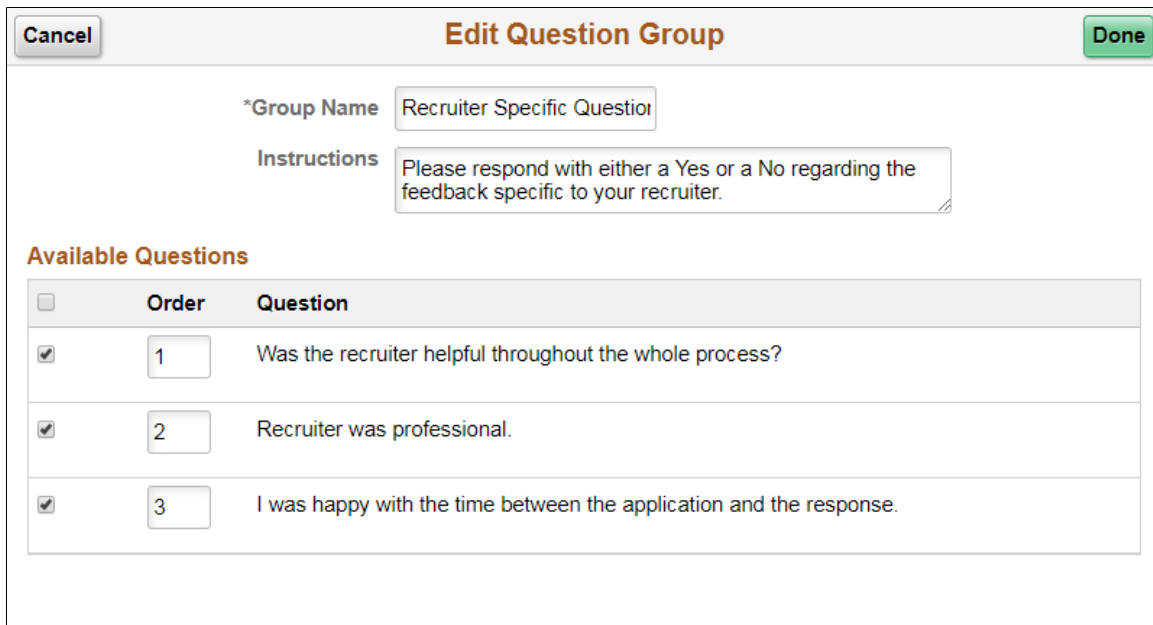
Use the Order column to specify the order in which you want the questions to appear within the question group. Once done, use the Refresh icon to arrange the questions in the order specified.

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.

Image: Edit Question Group page

Edit Question Group page.



Edit Question Group

***Group Name** Recruiter Specific Question

Instructions Please respond with either a Yes or a No regarding the feedback specific to your recruiter.

Available Questions

☐	Order	Question
☒	1	Was the recruiter helpful throughout the whole process?
☒	2	Recruiter was professional.
☒	3	I was happy with the time between the application and the response.

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

Image: Move Question page

Move Question page.

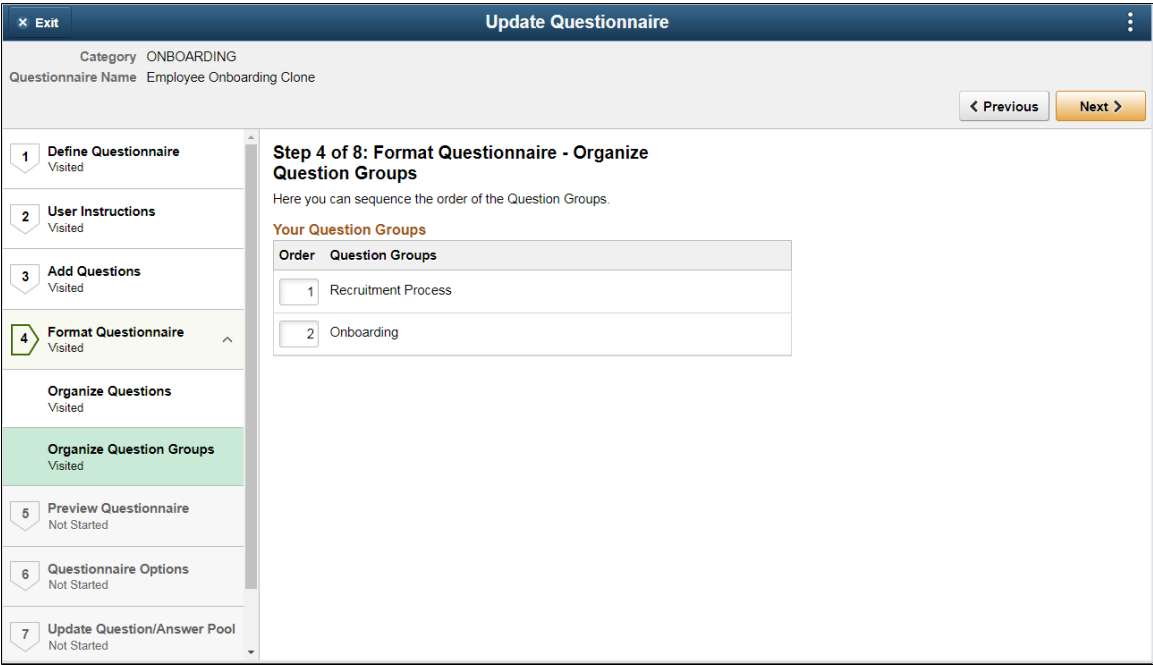
The screenshot shows the 'Update Questionnaire' interface for the 'Employee Onboarding Survey'. The left sidebar lists steps 1 through 8, with 'Format Questionnaire' (Step 4) selected. The main area is titled 'Step 4 of 8: Format Questionnaire - Organize Questions' and includes a 'Save' button. It displays two sections: 'Recruitment Process' and 'Onboard'. The 'Recruitment Process' section contains a list of questions with 'Move' buttons. A 'Move Question' dialog box is open, showing the question 'Were you asked relevant questions during your interview process?' and a dropdown menu to select the target question group, which is currently set to 'Onboarding'. The dialog also has 'Cancel' and 'Done' buttons.

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.

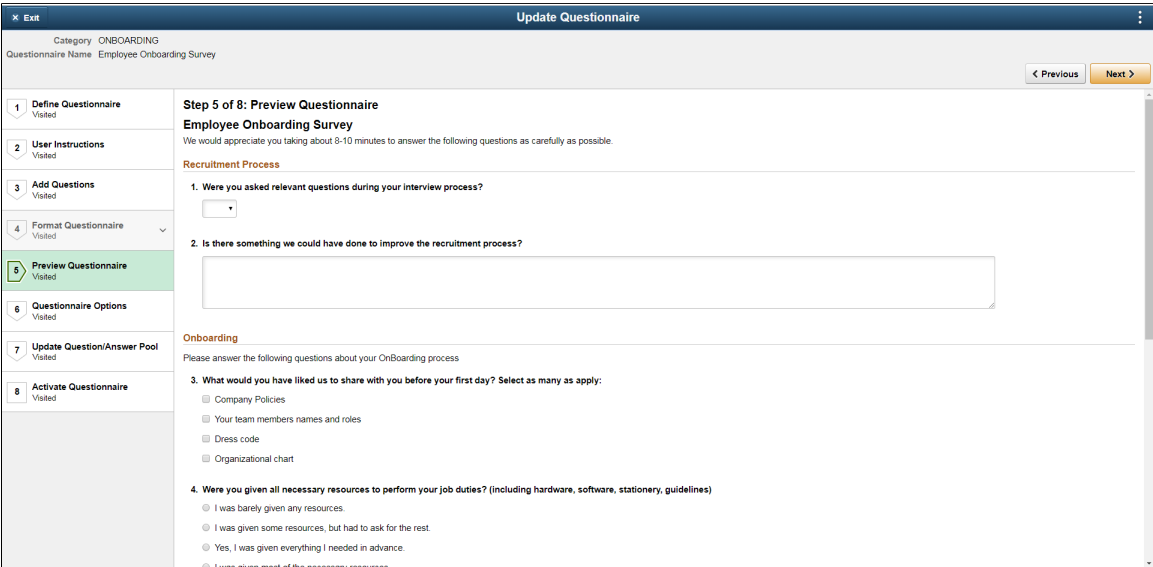


Preview Questionnaire Page

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 page

Preview Questionnaire page.

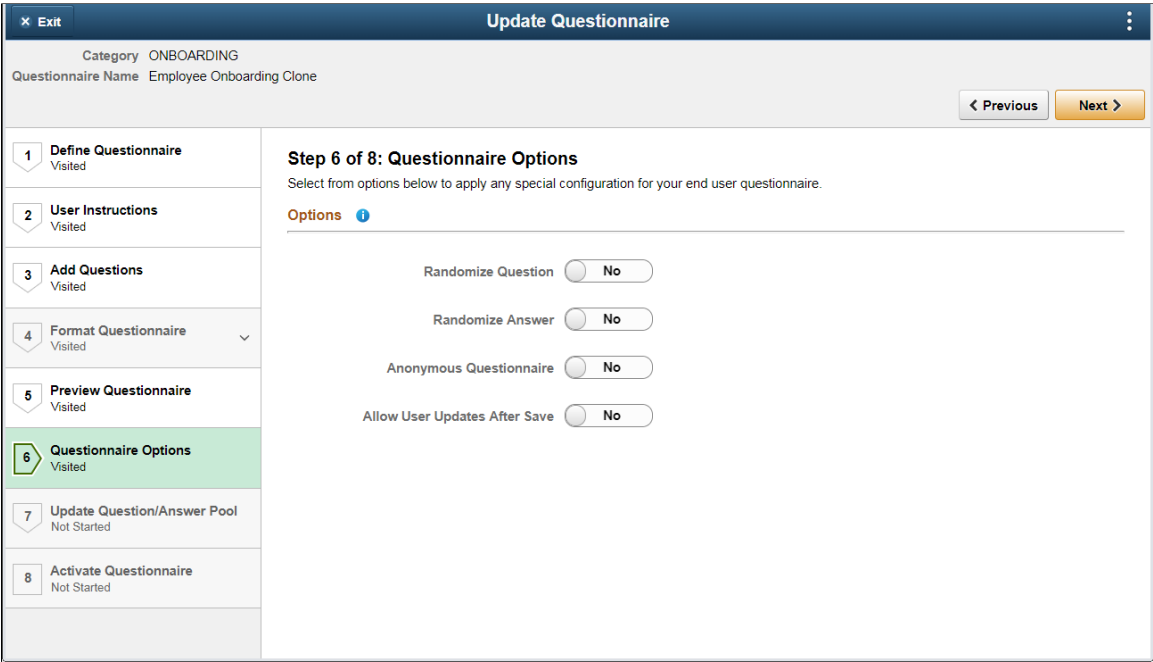


Questionnaire Options Page

Use the Questionnaire Options page (EOQF_QSTNR_OPTN_FL) to set additional options for the questionnaire.

Image: Questionnaire Options page

Questionnaire Options page.



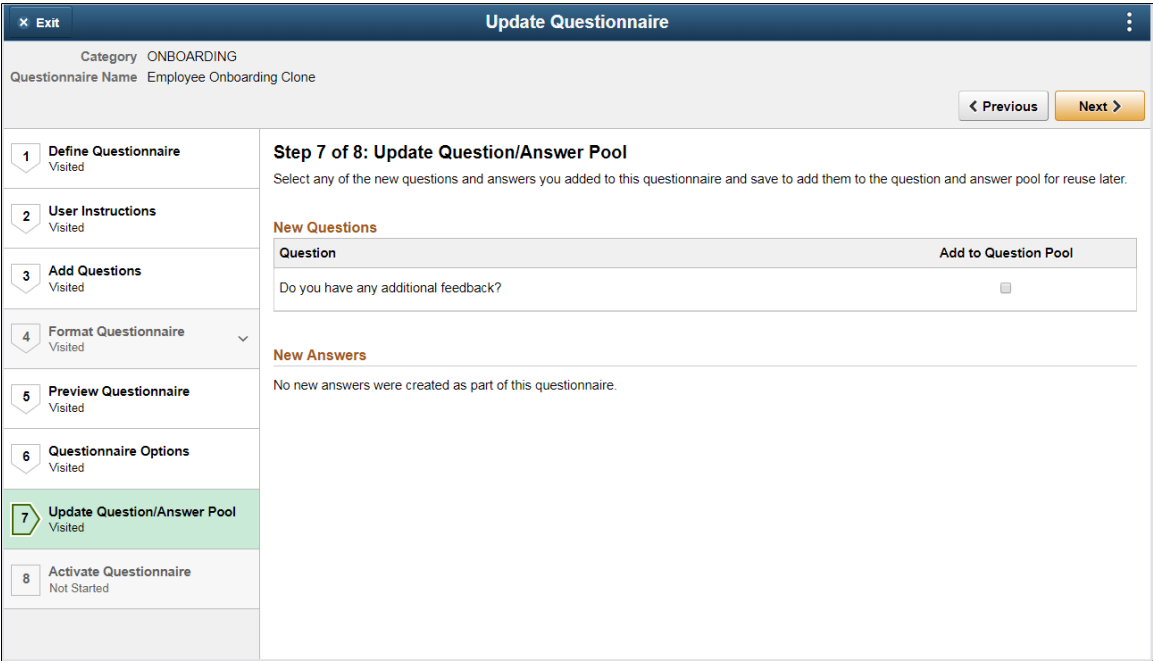
Randomize Question	Randomize the order of the questions within any question group in the questionnaire.If there is no question group , then randomize the questions within the questionnaire.
Randomize Answer	Randomize the order of answers within a question.
Anonymous Questionnaire	Allows users to answer 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.

Image: Update Question/Answer Pool page

Update Question/Answer Pool page,



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.

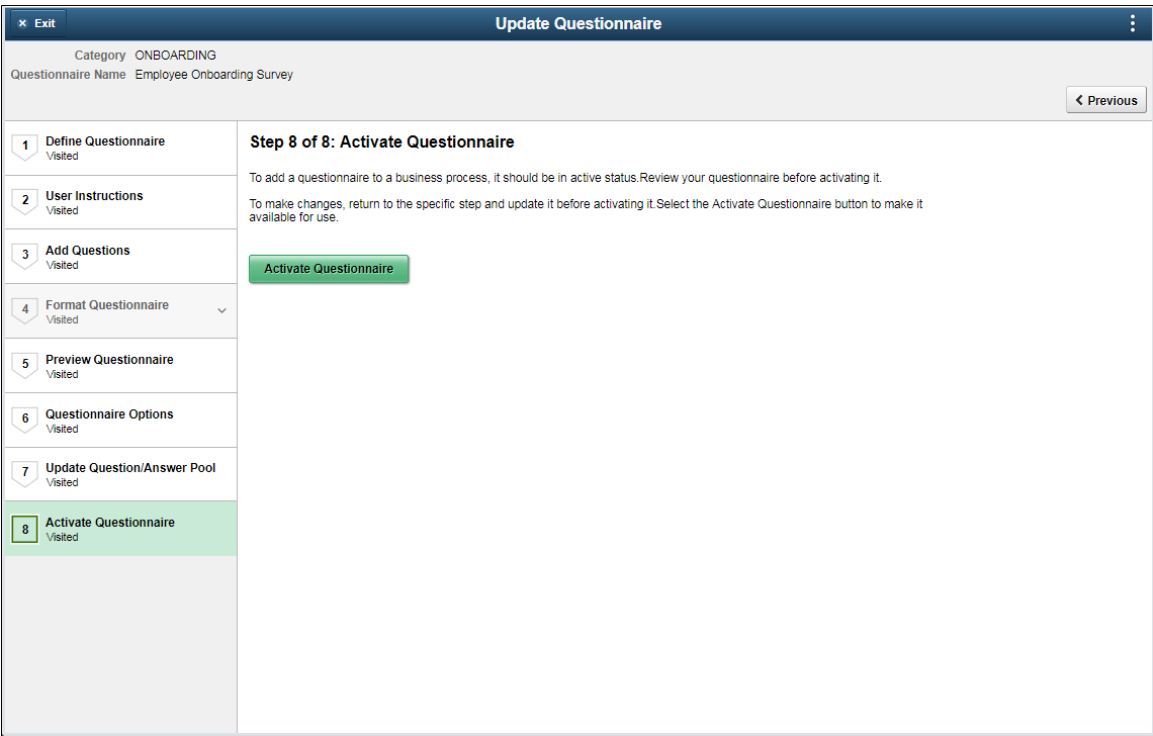
Note: This page is visible based on the permission levels provided in the Category. If the user has access to add question and answer to the pool, only then this page is accessible. Else the user will not see the data in this page

Activate Questionnaire Page

Use the Activate Questionnaire page (EOQF_QSTNR_STS_FL) to activate the questionnaire.

Image: Activate Questionnaire page

Activate Questionnaire page



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
<u>Categories - Steps Page</u>	AGC_CAT_TBL5	Modify an existing category to include the Questionnaire step.
<u>Activity Guide Templates Page</u>	AGC_TMPL_SRCH_FL	Update a template to include the Questionnaire step.
<u>Activity Guide Composer - General Information Page</u>	AGC_TMPL_GNRL_FL	Enter the activity guide template category into which the Questionnaire step is added.
<u>Activity Guide Composer - Select Steps Page</u>	AGC_TMPL_STEP1_FL	Select the Questionnaire step to be included in an activity guide.

Page Name	Definition Name	Usage
<u>Activity Guide Composer - Organize and Configure Steps Page</u>	AGC_TMPL_STEP2_FL	Position the Questionnaire step in the activity guide template.

Categories - Steps Page

Use the Categories - Steps page (AGC_CAT_TBL5) to modify an existing category to include the Questionnaire step.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Steps

Image: Categories - Steps page

This example illustrates the fields and controls on the Categories - Steps page.

Service Type

Select PS Component to associate with the Questionnaire step.

Service ID

Select 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.

Path	Select .:
Application Class ID	Select AGPostProcess.
Post Process Method	Enter ItemPostProcess.

Image: Additional Step Context section of the Categories - Steps page

This example illustrates the fields and controls in the Additional Step Context section of the Categories - Steps page.

Additional Step Context ?

Input Context Parameters

Parameter Name	Service Parameter Name	Parameter Type	Parameter Value	Parameter System Value
EOQF_CATEGORY	EOQF_CATEGORY	Fixed Value	ONBOARDING	
EOQF_QSTNR_CODE	EOQF_QSTNR_CODE	Fixed Value	EMPOBDSURVEY	

Step Actions ?

Parameter Name	Select EOQF_CATEGORY.
Service Parameter Name	Select EOQF_CATEGORY.
Parameter Type	Select 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.

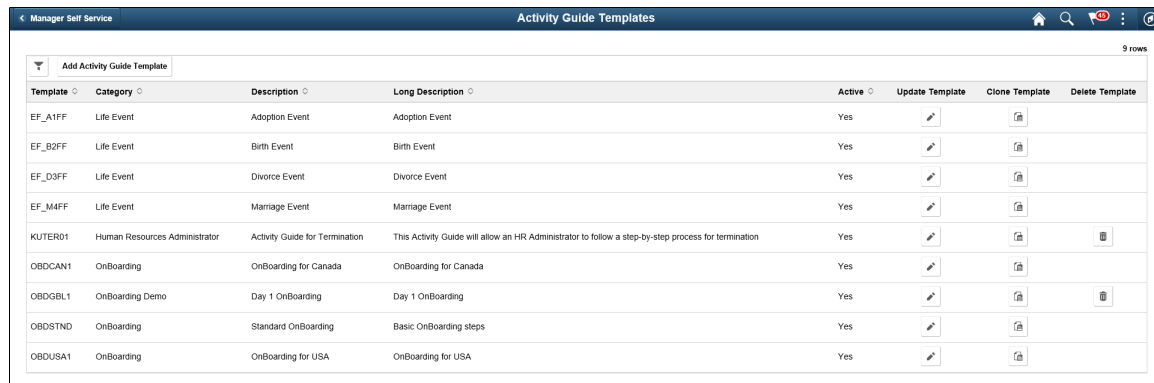
Note: You will only see templates you have administrator access to or where no security has been defined for the template.

Navigation

Enterprise Components >Activity Guide Composer >Templates >Activity Guide Templates

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			
OBDCA1	Onboarding	OnBoarding for Canada	OnBoarding for Canada	Yes			
OBOGBL1	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

Click this button to access the Activity Guide Templates page to create a new activity guide template.

Update Template

Click this 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

Enterprise Components >Activity Guide Composer >Templates >Activity Guide Templates

- 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.

Image: Activity Guide Composer - General Information page

This example illustrates the fields and controls on the Activity Guide Composer - General Information page.

Activity Guide Composer

Template: OBDUSA1
Effective Date: 1900-01-01

< Previous Next >

Introduction
● Visited

General Information
● Visited

Activity Guide Type
☐ Not Started

Security
☐ Not Started

Additional Actions
☐ Not Started

Sub Banner
☐ Not Started

Select Steps
☐ Not Started

Task: General Information

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

The Description entered here is displayed to the user in the Fluid Activity Guide Banner.

The Category selected will control the available options you can specify for the template. For example, the Category will control the steps you can add to the template.

Description: OnBoarding for USA
Long Description: OnBoarding for USA

Selected Category

Category	Description
OnBoarding	Category for OnBoarding activity guide templates

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

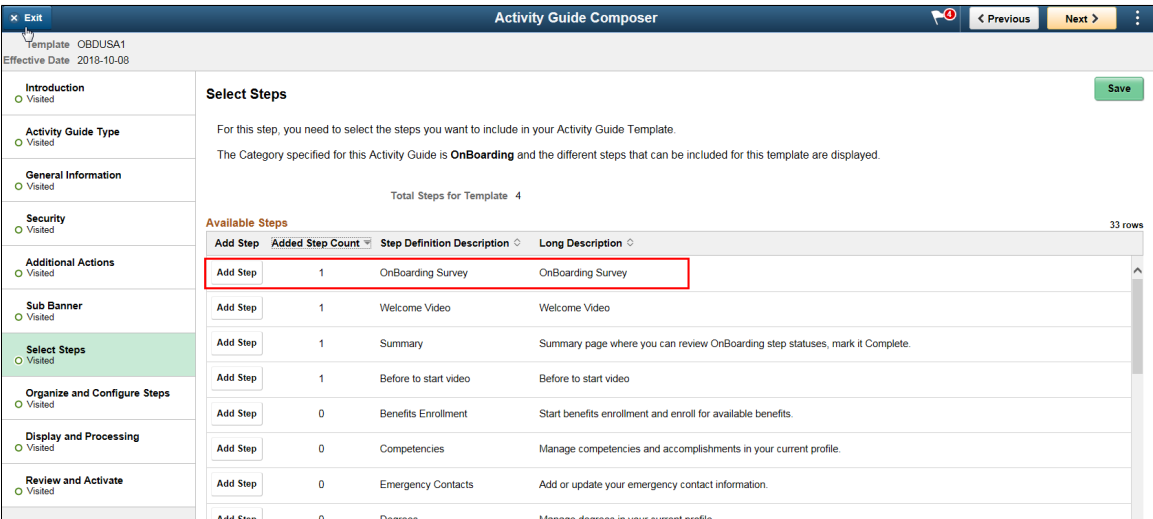
Enterprise Components >Activity Guide Composer >Templates >Activity Guide Templates

- 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.

Image: Activity Guide Composer - Select Steps page

This example illustrates the fields and controls on the Activity Guide Composer - 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

Enterprise Components >Activity Guide Composer >Templates >Activity Guide Templates

- 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

Image: Activity Guide Composer - Organize and Configure Steps page

This example illustrates the fields and controls on the Activity Guide Composer - Organize and Configure Steps page.

Step Type	Move Up	Move Down	Step Description	Configure Attributes	Configure Dependencies	Configure Page Text	Step Details	Delete Step
Step	▼	▼	Before You Start					
Step	▲	▼	Welcome					
Step	▲	▼	OnBoarding Survey					
Step	▲		Summary					

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.

Working with the Activity Guide Composer

Understanding the Activity Guide Composer

PeopleTools Fluid Activity Guides provide your workers with a simplified and streamlined approach to completing a business process, such as an employee's OnBoarding process or life event change. Activity guides allow you to define guided procedures for a user or group of users to complete and will track and maintain the user's progress as he or she completes the steps.

Defining a fluid activity guide requires a number of components that need to be configured by a technical resource who becomes responsible for managing and maintaining the activity guide configuration. The Activity Guide Composer framework is designed to improve the deployment and management of fluid activity guides by separating the technical and functional configuration. The benefits of this is a reduction in technical resources and enabling your functional process owners to manage and maintain their activity guides. In addition, the Activity Guide Composer framework also provides utilities and configurable steps that are commonly utilized in activity guides.

The following videos provide demonstrations of features and how to use the Activity Guide Composer:



[Image Highlights, PeopleSoft HCM Update Image 23: Activity Guide Composer](#)



[PeopleSoft Activity Guide Composer](#)

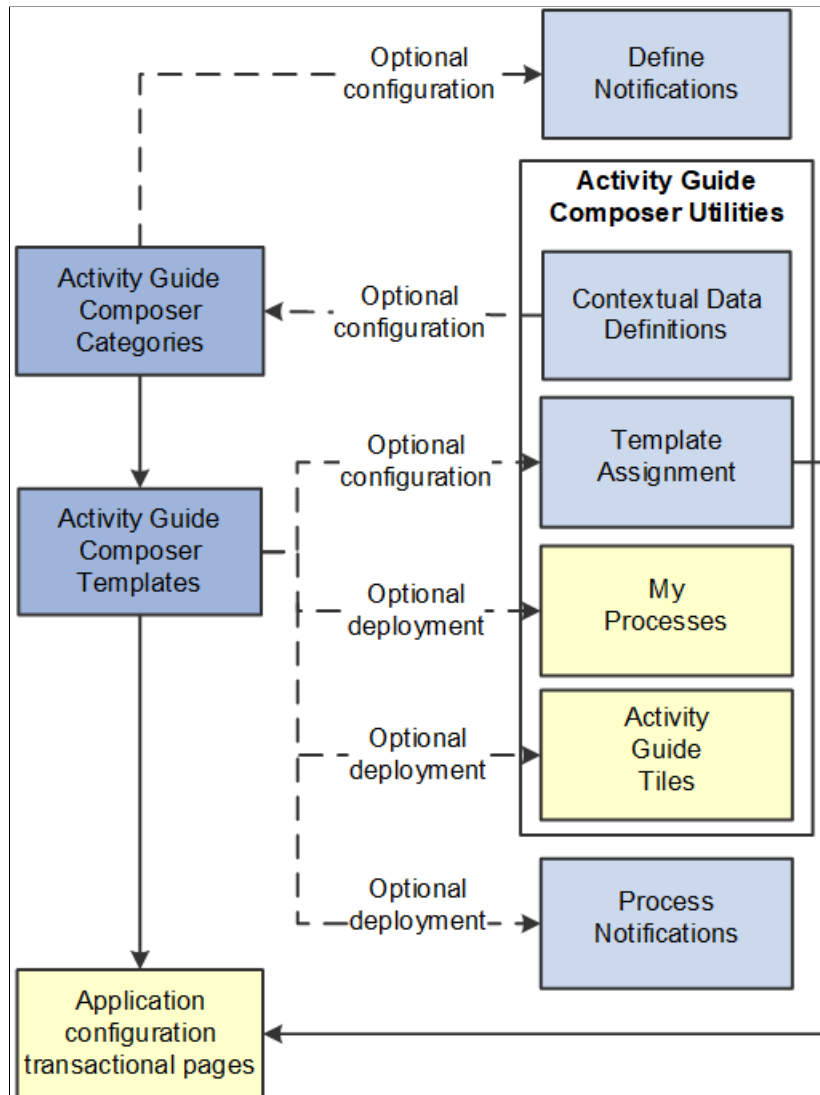


[Image Highlights, PeopleSoft HCM Update Image 31: Activity Guide Composer-Multi User Guides](#)

Setting Up Activity Guides

Image: Setting Up and Using the Activity Guide Composer Features

To fully utilize the benefits of the Activity Guide Composer, you will want to perform the following tasks to support your activity guide needs:



- Set up Activity Guide Categories using the Categories (AGC_CAT_TBL) component.

Categories contain the technical configuration managed by technical resources and consist of one time technical setup. Here you will define the context records and fields, actions the user may take, images the activity guide may display in the fluid sub banner, and the steps that may be pulled into a template.

For more information, see the [Setting Up Activity Guide Categories](#) topic.

- Create Activity Guide Templates using the Templates (AGC_TMPL_SRCH_FL) component.

Activity guide templates are created and managed by template administrators—functional personnel who are very familiar with your organization's HR transaction processes. Using this component, administrators will create and maintain activity guide templates using the data established in the

activity guide category. They can also clone existing activity guided templates that can then be reconfigured for a different business process.

For more information, see the [Managing Activity Guide Templates](#) topic.

- (Optional) Define notifications using the Define Notifications (AGC_CAT_NOTIF_TBL) component.

Notifications define push or email content that is sent to assignees when a template is configured to notify participants that an activity guide process needs their attention. If you enable notifications for your templates, use Process Notifications to send activity guide notifications to your assignees.

For more information, see the [Working with Activity Guide Notifications](#) topic.

- (Optional) Define Contextual Data for a Category using the Contextual Data (AGC_CTXDTA_TBL) component.

Contextual data is data that can be derived from the context data defined for an activity guide category. The derived contextual data can be utilized in the sub banner of the fluid activity guide, in page text, or in a date field to configure the start and due date for a step.

Note: This setup is optional. However, if you choose to use contextual data in your categories and templates, this step should be completed prior to setting up your categories.

For more information, see the [Setting Up Activity Guide Utilities for Contextual Data](#) topic.

- (Optional) Configure the following Activity Guide Utilities tables and define rules to assign templates to your workers using Template Assignment:

- Search Key Source Tables (AGC_SRCHREC_TBL):

View the criteria fields that retrieve data from the source table.

- Search Key (AGC_SRCHKEY_TBL)

Identify source tables and fields to be used in the search keys prompt configuration when you define a Template Assignment definition.

- Template Assignment (AGC_TMA_TBL)

Determine the search keys and values that will be used to determine which template the system should assign to a worker.

- Test Template Assignment (AGC_TMA_TEST)

Test to validate that a template assignment is set up correctly.

The PeopleSoft features, such as HCM OnBoarding, take advantage of this functionality by enabling you to select to have the system assign templates to individuals based on the rules you configured using these Template Assignment tables.

For more information on setting up template assignment rules, see the [Setting Up Activity Guide Utilities for Template Assignment](#) topic.

- (Optional) Deploy activity guides or create tiles from which individuals can access activity guides using the My Processes (AGC_MYAG_FL) or Activity Guide Tiles (AGC_TILE_TBL) components.

For more information, see the [Deploying and Managing Activity Guide Processes](#) topic.

Using Activity Guides

PeopleSoft Enterprise Components provides your organization with various means to deploy activity guides to your workers. The following are examples of end user transactional pages or utilities that use the Activity Guide Composer templates as their structure:

- Customize tiles using the Activity Guide Tiles page (AGC_TILE_TBL1) — Allows administrators to create tiles where users or assignees can work on activity guide processes. See also [Activity Guide Tiles Page](#)
- My Processes (AGC_MYAG_FL) — Provides a component where users can initiate activity guide processes, outside of the delivered pages, which guide the users through business transactions while displaying contextual information. See also [Deploying and Managing Activity Guide Processes](#).
- Product transactional pages — Depending on the PeopleSoft application, some business process deliver pages from which users can access activity guides. For instance, some examples available in HCM include:
 - OnBoarding — Grants new workers a central location to provide personal information needed to complete the employment process. .
 - Fluid Life Events — Enables employees to quickly enter life event changes that may impact their benefits offerings.
 - Open Enrollment — Enables employees to enroll or review their benefit plans annually during the Open Enrollment period.
 - Position Management — Allows administrators access to view, update, and create positions using the fluid pages.

Setting Up Activity Guide Categories

Categories contain the technical components that are utilized to define an activity guide template. For example, categories contain the technical definition of one or more steps that can be included in an activity guide.

To create and update activity guide categories, use the Categories (AGC_CAT_TBL) component. To clone an activity guide category, see [Cloning Activity Guide Categories](#).

These topics provide an overview of categories and discuss setting up activity guide categories.

Pages Used to Set Up Activity Guide Contextual Data and Categories

Page Name	Definition Name	Usage
<u>Categories - Category Page</u>	AGC_CAT_TBL1	Create an activity guide category and enter an effective date, description, and long description.
<u>Categories - Security Page</u>	AGC_CAT_TBL6	Determine who has access to maintain and use the activity guide category.
<u>Categories - Context Page</u>	AGC_CAT_TBL2	Define the context for the activity guide category.
<u>Categories - Actions Page</u>	AGC_CAT_TBL3	Define action items that would enable the user to perform additional actions, such as exit an activity guide or mark a step complete
<u>Categories - Images Page</u>	AGC_CAT_TBL4	Identify images that can be displayed in the sub banner of the fluid activity guide.
<u>Categories - Assignees Page</u>	AGC_CAT_TBL7	Identify assignees that will be assigned to the steps.
<u>Categories - Steps Page</u>	AGC_CAT_TBL5	Associate steps to a related content service that navigates the user to an application transaction page to perform a specific task or review instructions to perform a manual task.
<u>Categories - Notifications Page</u>	AGC_CAT_TBL8	Configure the notification settings for the category
<u>Preview Notification Page</u>	AGC_CAT_NOTIF_SEC	View the notification text or message that will be sent to an assignee.

Understanding Categories

A Category definition contains the properties, contextual data, steps, and other options that can be included in an activity guide template. You will use the [Categories - Category Page](#) to associate these steps to a related content service that navigates the user to an application transaction page to perform a specific task. Not all steps need be included in a template, but all possible steps must be included in the category to be considered for a template. For example, you may have a step for workers to add their address, another to enter dependent data, one for US worker to grant W-2 and W-2c consent, and a step for Canadian workers to grant T4/T4 slip consent. The template administrator will then determine which steps to include in a template. In this scenario, the template administrator would create two templates, one for the US workers and one for the Canadian workers, and only include the steps relevant to workers in that country.

The PeopleSoft applications may deliver some Activity Guide categories. Delivered categories can be modified to suit your organization's needs; however, to include more steps to the delivered categories, insert a new effective dated row or use the [Clone Category Page](#) to clone a category to add the steps.

Note: When you include additional steps in a category, you will need to clone or insert a new effective dated row in the templates that use this category with an effective date equal to or greater than the effective date of the category to see the category change in the template. The system will not automatically insert the step into the template, but you can now opt to include this new step into the template.

Categories - Category Page

Use the Categories - Category page (AGC_CAT_TBL1) to create an activity guide category and enter an effective date, description, and long description.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Category

Image: Categories - Category Page

This example illustrates the fields and controls on the Categories - Category page.

The screenshot displays the 'Categories - Category Page' interface. At the top, there are tabs for 'Category', 'Security', 'Context', 'Actions', 'Images', 'Assignees', 'Steps', and 'Notifications'. The 'Category' tab is active. Below the tabs, the page title is 'Activity Guide Category ONBOARDING'. A 'Category Attributes' section contains a table of fields. The fields and their values are: '*Effective Date' (01/01/2020), '*Description' (OnBoarding), '*Long Description' (Category for OnBoarding activity guide templates), '*Root Package ID' (HR_OBD), '*Path' (OnBoardingProcessor), '*Instance Creation Class Id' (InstanceProcess), '*Instance Create Method' (InstanceCreation), 'Object Owner ID' (Human Resources), and 'Data Type Code' (Customer Data). The table has a search icon and a 'View All' link. There are also '+' and '-' buttons for adding or removing rows.

Note: The PeopleSoft applications may deliver several activity guide categories as system data. In these cases, the fields for these categories are display only. To update a delivered category, insert a new effective dated row or use the [Clone Category Page](#) to clone the category. Alternatively, you can create your own categories.

Effective Date

Enter an effective date that is earlier than or equal to the effective date of the activity guide templates you plan to create. The effective date of the activity guide template will determine what effective dated category configuration will be available when defining a template.

Root Package ID

Enter the ID of the application package that contains the instance creation and action class to be invoked at instance creation.

The activity guide composer framework delivers the *AGC_PROCESS_AG* instance creation method.

Path	Enter a path that uses a specific class within the root package.
Instance Creation Class Id	Enter the name of the application class that contains the method to be invoked at instance creation. The activity guide composer framework delivers the <i>ActivityGuideCreation</i> instance creation method that you can utilize and extend for your category.
Instance Create Method	Enter the name of the method to be invoked to initialize the activity guide instance. The activity guide composer framework delivers the <i>InstanceCreation</i> instance creation method that you can utilize and extend for your category. The system executes the instance creation class and method when a new instance of an activity guide template is generated by the user. This application class and method can contain specific business logic to modify the newly created activity guide instance. For example, it can contain logic to set the start and due date for each step in the activity guide. See also, <i>PeopleTools: Portal Technology</i>, “Developing and Deploying Activity Guides”.
Object Owner ID	Select the application owner of the object. The owner ID helps determine the team that created or modified the object. You can define unique owner IDs for your organization by entering field translate values for the OBJECTOWNERID field using PeopleSoft Application Designer. For more information about object owner IDs, see the product documentation for <i>PeopleTools: Application Designer Developer's Guide</i>.
Data Type Code	Displays that this is either delivered <i>System Data</i> or your own <i>Customer Data</i> .

Categories - Security Page

Use the Categories - Security page (AGC_CAT_TBL6) to determine who has access to maintain and use the activity guide category.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Security

Image: Categories - Security Page

This example illustrates the fields and controls on the Categories - Security page.

Activity Guide Category ONBOARDING

Category

Effective Date 01/01/2020
Description OnBoarding

Category Security ?

Security Access	Role Name
1 Administer Category	OnBoarding Administrator
2 Add Templates	OnBoarding Administrator

Define your category security by associating security access to a security role.

Security Access

Select a security access type. Options include:

- *Administer Category*: Provides access to update and maintain the activity guide category.
- *Add Templates*: Provides access to add new templates for the activity guide category.

Note: The ability to update and maintain a template is controlled by the *Administrator* security access type on the template [Activity Guide Composer - Security Page](#).

Role Name

Identify the role or roles that should be associated with the access type.

Note: This security role must be defined in the user's profile (PeopleTools >Security >User Profiles >Roles) to gain appropriate access to the activity guide category.

Categories - Context Page

Use the Categories - Context page (AGC_CAT_TBL2) to define the context for the activity guide category.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Context

Image: Categories - Context Page (1 of 2)

This example illustrates the fields and controls on the Categories - Context page showing the Context Record and Fields tab.

Activity Guide Category ONBOARDING

Category

Effective Date 01/01/2020
Description OnBoarding

Context Data ?

Context Record and Fields Prompt Edit and Display

Record Name	Field Name	Description	Display Order	Key Field	Value		
HR_OBD_CONTEXT	EMPLID	Employee ID	2	☒		+	-
HR_OBD_CONTEXT	EMPL_RCD	Empl Record	3	☒		+	-
HR_OBD_CONTEXT	OPRID	User ID	1	☒		+	-

Image: Categories - Context Page: Prompt Edit and Display tab

This example illustrates the fields and controls showing the Prompt Edit and Display tab on the Categories - Context page.

Context Data ?

Context Record and Fields Prompt Edit and Display

Record Name	Field Name	Edit Type	Prompt Table	Prompt Description Field		
HR_OBD_CONTEXT	EMPLID	No Table Edit			+	-
HR_OBD_CONTEXT	EMPL_RCD	No Table Edit			+	-
HR_OBD_CONTEXT	OPRID	No Table Edit			+	-

Image: Categories - Context Page (2 of 2)

This example illustrates the fields and controls on the Categories - Context page, Derived Contextual Data and Context Display Page sections.

Derived Contextual Data ⓘ

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1-3 of 3

View All

Contextual Data	Contextual Data Field Id	Record Name	Field Name	Use in Sub Banner	Use in Page Text	Use in Start/Due Date Option		
Employee Job Data	Job Code Description	JOBCODE_TBL	DESCR	☒	☒	☐	+	-
Employee Job Data	Hire Date	JOB	HIRE_DT	☐	☐	☒	+	-
Employee Person Data	Display Name	PERSONAL_DATA	NAME_DISPLAY	☒	☒	☐	+	-

Context Display Page ⓘ

Display Page Attributes

Q

1 of 1

View All

*Context Display

*Description

*Long Description

*Root Package ID

*Path

*Context Display Class

*Context Display Method

Context data consists of a record and field that are assigned values to provide context to your activity guide template. For example, an employee OnBoarding activity guide template is specific to an employee joining the company. Context data key fields defined here are used to uniquely identify instances of the activity guide template.

Note: The PeopleSoft applications may deliver several activity guide categories as system data. In these cases, the fields for these categories are display only. To update a delivered category, insert a new effective dated row or use the [Clone Category Page](#) to clone the category. Alternatively, you can create your own categories.

Context Data: Context Record and Fields Tab

Use the context fields defined for the activity guide category for the system to uniquely identify the instances of an activity guide template. For example, an HR administrator activity guide requires the operator ID, employee ID, and employee record number to uniquely identify an instance of that activity guide created by the administrator for a specific employee.

You can designate a maximum number of five key context fields, not including *OPRID* and *SEQUENCENO*, which can also be specified as keys.

Display Order

Enter a sequence number when a user is expected to perform data entry of the context keys to start an activity guide. This will assign each context field a display sequence and then you can configure it with the *Prompt Table* edit type to control valid values entered by the user.

Key Field Indicate if this is a key field.

Context Data: Prompt Edit and Display Tab

Edit Type Select an edit type to ensure that the user enters a valid value. For example, if the user is expected to perform data entry of the context keys to start an activity guide, then you can configure it with the *Prompt Table* edit type to control valid values entered by the user. Edit type options include:

- *No Table Edit*
- *Prompt Table*
- *Translate Table*
- *Yes/No*

Prompt Description Field Select the field name that should display for the prompt value selected.

Derived Contextual Data

Contextual data is data that can be derived from the context data fields specified for the activity guide category. Valid Contextual Data and Field Ids are defined on the [Contextual Data - Definition Page](#).

This data can be used in these areas when defining an activity guide template:

- Sub Banner of the fluid activity guide.
- Page text for the Information Only, Summary, or Video steps (for example, you can display the employee's name based on the context field EMPLID or job code description based on the EMPLID and EMPL_RCD).
- A data field for the start and due date option of a step. (For example, the employee's hire date is based on the context fields EMPLID and EMPL_RCD and you can define the start date of the step to use a data field like hire date, or you can set the due date for the step to be a specific number of days after the data field hire date).

Use in Sub Banner, Use in Page Text, and Use in Start/Due Date Option Select the check boxes to indicate the areas where you want to have the option to use the contextual data field.

Context Display Page

Use this section to configure context data that can display through a popup page link from the sub banner. When defining a fluid activity guide template, the [Activity Guide Composer - Sub Banner Page](#) provides a Popup Display Option. With this option, the sub banner displays one row of primary context data as a link and up to three rows of context data are displayed in a popup window.

Important! This popup page can display context data along with other non-editable data and informational text. However, it cannot have links, buttons, or other controls that will take the user out of the fluid activity guide. The context display page needs to be a fluid page residing in a PeopleSoft fluid component.

Context Display	Enter a unique and descriptive name to identify the context display page.
Description and Long Description	Enter an appropriate description and detailed description identifying the intent of this context data.
Root Package ID	Select the ID of the application package that contains the method to be invoked at instance creation. The context display page is defined by the application package PeopleCode that generates a URL to a PeopleSoft fluid component. The PeopleSoft fluid component referenced in the URL needs to be defined in Application Designer with the appropriate logic to retrieve and display data. It is important that the PeopleSoft fluid component is accessible to the end users of the activity guide template.
Path	Select the names of each subpackage in the application class hierarchy that defines the location of the application class. Separate subpackage names by a colon. If the class is defined in the top-level application package, enter or select the colon.
Context Display Class	Enter the name of the application class that contains the method to be invoked at instance creation.
Context Display Method	Enter the method name in the application class ID to be invoked to initialize the activity guide instance.

Related Links

[View Example \(Sub Banner\) Page](#)

[Configure Sub Banner Page](#)

[Configure Attributes Page](#)

[Configure Page Text Page](#)

Categories - Actions Page

Use the Categories - Actions page (AGC_CAT_TBL3) to define action items that would enable the user to perform additional actions, such as exit an activity guide or mark a step complete.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Actions

Image: Categories - Actions Page

This example illustrates the fields and controls on the Categories - Actions page.

Note: The PeopleSoft applications may deliver several activity guide categories as system data. In these cases, the fields for these categories are display only. To update a delivered category, insert a new effective dated row or use the [Clone Category Page](#) to clone the category. Alternatively, you can create your own categories.

Use this page to identify all the possible actions that can be included in a template. Only those actions defined here will be available for selection for templates using this category. The template administrator chooses which actions are included in a template on the [Activity Guide Composer - Additional Actions Page](#) step.

Action Class

Select an action class for this category. The activity guide composer framework delivers the *NavActionControls* action class that contains examples of action methods that you can use or copy for your activity guide category. This is derived from the Root Package ID you select on the [Categories - Category Page](#). The PeopleSoft application delivers the *AGC_PROCESS_AG* application package for the Activity Guide Composer.

Actions

Identify the actions that can appear in the Actions List menu (prior to PeopleTools 8.57) or as a button in the sub banner (PeopleTools 8.57 or higher) of the fluid activity guide.

Typically, there are three types of actions you configure for the activity guide category: Mark Complete, Cancel, and Continue Later.

Actions perform specific logic for your activity guide process. After you select the action and prior to the system performing this logic, the application will display a Yes/No warning message that you specified for the action. The logic for this

action resides in specific methods that exist in the action application class and method you have specified.

Action Method

Enter a method name.

Note: The method name *ExitAGProcess* is reserved. If you define an action with method name *ExitAGProcess*, this action will not show in the Actions List menu. It is used to plug-in a logic to the Template Exit button.

Note: A single component activity guide requires method *SubmitAGProcess* to save all the steps in the activity guide that belong to a single component. This reserved method is used to render a Submit button on the last step of a single component activity guide. By default, the method will save any data entry performed on the step(s) in the activity guide. The method can also contain additional application logic required when the activity guide is submitted. To set up a category to use a single component, see the [Categories - Steps Page](#).

Message Set Number and Message Number

Select a message set number and a message number that you want to appear as the warning message when a user performs this action. Message sets and number settings come from the PeopleTools message set catalog.

Categories - Images Page

Use the Categories - Images page (AGC_CAT_TBL4) to identify images that can be displayed in the sub banner of the fluid activity guide.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Images

Image: Categories - Images Page

This example illustrates the fields and controls on the Categories - Images page.

Note: The PeopleSoft applications may deliver several activity guide categories as system data. In these cases, the fields for these categories are display only. To update a delivered category, insert a new effective dated row or use the [Clone Category Page](#) to clone the category. Alternatively, you can create your own categories.

Use this page to identify all the possible images that can be included in a template sub banner. Only those images defined here will be available for selection for templates using this category. The template administrator has the option of selecting one image to display in the fluid sub banner of a template on the Activity Guide Composer - Sub Banner step: [Configure Sub Banner Page](#) step.

Image Type

Select an image type. Each type requires different information to be specified for the image. Options include:

- *Application Class*: This image type requires the application package, path, class, and method that contains the logic to dynamically return a URL to a image at runtime based on the instance's context data.
- *Image Catalog*: This image type requires an image name.
- *Static URL*: This image type requires a URL ID. URL IDs are defined in PeopleTools under Administration.

Application Class Field Definitions

These fields are available when you select *Application Class* as the image type:

Root Package ID	Select the name of the application package that contains the method to be invoked to dynamically return a URL to an image.
Path	Select the path to the application class hierarchy that defines the location of the application class. If class is defined at the top-level of application package, select colon.
Image Class	Select the name of the application class that contains the method to be invoked to dynamically return a URL to an image.
Method Name	Enter the method name in the application class ID that dynamically returns a URL to an image based on the instance's context data.

Image Catalog Field Definition

This field is available when you select *Image Catalog* as the image type:

Image Name	Select the name of the static image that the activity guide should display for this step. After you enter the image name, the image will display below the field.

Static URL Field Definition

This field is available when you select *Static URL* as the image type:

URL Identifier	Select the URL identifier that defines where you store the image.

Categories - Assignees Page

Use the Categories - Assignees page (AGC_CAT_TBL7) to identify assignees that will be assigned to the steps.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Assignees

Image: Categories - Assignees Page

This example illustrates the fields and controls on the Categories - Assignees page.

The screenshot shows the 'Categories - Assignees' page. At the top, there are tabs for Category, Security, Context, Actions, Images, Assignees (selected), Steps, and Notifications. Below the tabs, the page title is 'Activity Guide Category OFFBOARDING'. The main content area is divided into two sections: 'Category' and 'Assignees'. The 'Category' section shows 'Effective Date: 04/06/2020' and 'Description: OffBoarding'. The 'Assignees' section has a search bar and a list of assignees. The first assignee is 'ADMIN' with a description 'Administrator' and a long description 'HR Administrator'. The 'Assignee Type' is set to 'Role' and the 'Role Name' is 'OffBoarding Admin User'.

Use this page to define assignees using an application package or role.

When you enter assignee information on this page, these page will display the following sections:

- [Categories - Steps Page](#) will display the Default Step Assignments collapsible section where you can identify a default assignee value for individual steps.
- [Configure Attributes Page](#) within the Templates component for each step will display the Assignee section to identify the assignees for individual steps.

Assignee

Enter a unique identifier for the assignee ID.

Description and Long Description

Enter an appropriate description and detailed description identifying the assignee type. The system uses the Description text to display valid options when associating an assignee to a step on the [Configure Attributes Page](#).

Assignee Type

Select an assignee type. Options include:

- *Application Package*: the application package specified needs to derive a single user ID or security role that identifies the assignee.
- *Role*: the role must be associated with the user's profile.

Root Package ID

This field is available when you select *Application Package* in the Assignee Type field.

Enter the ID of the application package that contains action class to be invoked.

Path

This field is available when you select *Application Package* in the Assignee Type field.

Select the path to the application class hierarchy that defines the location of the application class. If class is defined at the top-level of application package, select colon.

Application Class ID

This field is available when you select *Application Package* in the Assignee Type field.

Select the name of the application class that contains the method.

Assignee Method

This field is available when you select *Application Package* in the Assignee Type field.

Enter the method name in the application class ID that contains the method to return one user ID or security role that will be assigned a step of the activity guide.

Role Name

This field is available when you select *Role* in the Assignee Type field.

Select a PeopleTools security role. All user's that have this role associated with their user profile will be considered as the assignee.

The following video provides an overview of Activity Guide Composer - multi user guides:



[Image Highlights, PeopleSoft HCM Update Image 31: Activity Guide Composer-Multi User Guides](#)

Categories - Steps Page

Use the Categories - Steps page (AGC_CAT_TBL5) to associate steps to a related content service that navigates the user to an application transaction page to perform a specific task or review instructions to perform a manual task.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Steps

Image: Categories - Steps Page (1 of 3)

This example illustrates the fields and controls on the Categories - Steps page (1 of 3).

Category Security Context Actions Images Assignees **Steps** Notifications

Activity Guide Category: MANAGEPOSITION

Category [Search] | 1 of 2 | View All

Effective Date: 04/06/2020
 Description: Manage Positions
 *Step Definition Rule: Steps from single component saved as single transaction

Steps [Search] | 1 of 5 | View All

*Step: BUDGET_INCUMB [Add] [Remove]

*Description: Budget Incumbents
 *Long Description: Budget Incumbents
 *Service Type: PS Component
 *Service Id: POSITION_DATA6
☒ Fluid
☐ Required

▼ **Post Processing PeopleCode** [Help]

Root Package Id [Search]
 Path [Search]
 Application Class ID [Search]
 Post Process Method [Text]

Image: Categories - Steps Page (2 of 3)

This example illustrates the fields and controls on the Categories - Steps page (2 of 3).

▼ **AWE Integration** [Help]

AWE Process Id [Text]
 Root Package Id [Search]
 Path [Search]
 Application Class ID [Search]
 Approval Method Name [Text]
 Denial Method Name [Text]

▼ **Related Data** [Help]

Data Field 1 [Text]
 Data Field 2 [Text]
 Data Field 3 [Text]
 Data Field 4 [Text]
 Data Field 5 [Text]
 Yes/No Data Field 1 ☐
 Yes/No Data Field 2 ☐
 Yes/No Data Field 3 ☐
 Yes/No Data Field 4 ☐
 Yes/No Data Field 5 ☐

Image: Categories - Steps Page (3 of 3)

This example illustrates the fields and controls on the Categories - Steps page (3 of 3).

Additional Step Context ?

Input Context Parameters

Q

|<<1-1 of 1>>|>View All

Parameter Name	Service Parameter Name	Parameter Type	Parameter Value	Parameter System Value		
	Q				+	-

Step Actions ?

Actions

Q

|<<1-1 of 1>>|>View All

Action Method	Description	Active	Message Set Number	Message Number	Message Text		
		No	Q	Q		+	-

Default Step Assignments ?

Assignments

Q

|<<1-1 of 1>>|>View All

Assignee	Description	Long Description		
MANAGER Q	Manager	For this assignee, the app package method will return the user ID of the manager of the employee who created the process instance.	+	-

Note: The PeopleSoft applications may deliver several activity guide categories as system data. In these cases, the fields for these categories are display only. To update a delivered category, insert a new effective dated row or use the [Clone Category Page](#) to clone the category. Alternatively, you can create your own categories.

Use this page to identify all the possible steps that can be included in a template. Only those steps defined here will be available for selection for templates using this category. The template administrator chooses which steps are included on a template on the [Activity Guide Composer - Select Steps Page](#) step.

Step Definition Rule

This field will have two drop-down field values:

- *Not Applicable* (Default)
- *Steps from single component saved as single transaction*

When this option is selected, then the activity guide category will be defined to support single component activity guides. Single component activity guides function differently than other types of activity guides. Each step represents a page from the same PeopleSoft component. Also all the data entered on the steps are saved when the user submits the activity guide.

Single component activity guides have restrictions on how they are defined. These restrictions are noted below for specific step attributes.

Note: If steps already exist for the activity guide category and this value is *Step from single component save as single transaction*, then validations will be performed to ensure steps are valid for a single component activity guide. This value cannot be changed when invalid steps exist for the activity guide category.

Service Type

Select the type of related content service you want to associate with the step. Valid values are:

- *Application Class*
- *Manual*
- *Non PeopleSoft URL*
- *PS Component*
- *PS Query*
- *PS Script*

The Service Type is restricted to *PeopleSoft Component* and Services is restricted to related content services with the type of *PeopleSoft Component* that are fluid only. If one step is defined with a Service, then any new steps added will find the Service field restricted to only services with the same PeopleSoft component.

Note: If the Step Definition Rule on the category is set to *Steps from a single component saved as single transaction*, then the user is expected to define at least one action that has the method defined as SubmitAGProcess.

For more information on related content services, see the product documentation for *PeopleTools: Portal Technology*.

Service Id

Enter the ID of the related content service that you want to associate with the step. For example, if you select *PS Component* in the Service Type field, use this field to enter the object ID of the component you want users to access for the step.

Note: If set for single component, the this will be restricted to Service Ids that have the service type of PS Component. If a step is already defined for the category, then the Service Id will be restricted to Service Ids that reside in the same PeopleSoft component.

Fluid

Select to indicate that this is a fluid page.

Required

Enabled if the Step Definition Rule is defined as *Steps from single component saved as single transaction*.

Select to indicate the step is required. This will force the user defining the activity guide template to include the step to save the single component activity guide.

The following video provides an overview of Activity Guide Composer - Single Component:



[Image Highlights, PeopleSoft HCM Update Image 29: Activity Guide Composer - Single Component](#)

Depending on the requirements of the application transaction, there are a number of additional configuration options that you can define for the step using these sections:

Post Processing PeopleCode

Post processing PeopleCode is triggered after the application transaction component is saved in the activity guide. This PeopleCode can contain additional logic that needs to be performed as a result of the application transaction saving. Typically, the logic updates the activity guide status of the step.

AWE Integration

Use this section to configure AWE integration for application transactions that use the AWE Approval process. Integration with AWE Approval enables you to control the status of the step when the approval is either approved or denied.

When you configure this step in the activity guide category with AWE Integration, the Disable AWE Status Update field is enabled on the Activity Guide Composer - Organize and Configure step: [Configure Attributes Page](#) for this step, allowing the template administrator to turn off the AWE Integration that updates the status of the step.

Understanding How AWE Works Within a Step when Using the Activity Guide Composer

The application utilizes the Activity Guide System Options page (PeopleTools >Portal >Activity Guide >Activity Guide System Options) to render the approval chain that is available via a link on the fluid activity guide step.

Note: If you do not configure this information, the user cannot see the approval chain and status for the activity guide step that AWE configured and triggered for the step.

PeopleTools delivers AWE step configuration examples that you can use in Application Package *PTAI_UTILITIES* and Class *AWEUtilities*, which contain the following methods:

- *AWEComplete*
- *AWEDenied*
- *AWEResubmit*
- *AGProcessTerminate*

Each method uses the PeopleTools Activity Guide API to update the status of the step. You specify the method called in the following fields located in this section of the Categories - Steps configuration:

- Approval Method Name

- Denial Method Name

Typically, the Approval Method updates the status to *Complete*. The Denial Method may keep the status of the step as *In Progress* for resubmitting, *Denied*, or may even terminate or cancel the activity guide all together.

See also PeopleTools documentation for *Portal Technology*, “Developing and Deploying Activity Guides,” Enhancing Activity Guides, Defining Activity Guide system Options.

Related Data

Enter specific data fields that you want to associate with a step. The related content service defined for the step uses logic to retrieve and utilize the data that is stored at the step level.

Additional Step Content

Use this section to map additional non-key context data fields to related content service parameters, as needed.

Step Actions

Use this section to define actions for the step.

If the method name of the action is the same as an action selected for the activity guide template, then the effect is to override the action definition with the configuration specified here. For example, you can use the Active status to make a specific action inactive for the step or display a different message.

If the method name of the action differs from action defined for the activity guide template, then the action specified is available in addition to those defined for the activity guide template.

Default Step Assignments

Note: This section is available only when assignee data is specified on the [Categories - Assignees Page](#).

Select default assignees for a step from the list of values defined on the Assignee page. The default assignees defined in the activity guide category step will automatically be assigned to the step when added to the activity guide template, [Configure Attributes Page](#).

The following video provides an overview of Activity Guide Composer - multi user guides:



[Image Highlights, PeopleSoft HCM Update Image 31: Activity Guide Composer-Multi User Guides](#)

Summary Page Options

Note: This section is available only when related content service *HC_AGC_SUMMARY_FL* is specified.

Select to enable the Summary button and define the label for the button on the standard summary page.

Note: If the Summary button is enabled, you will need to implement the button function in the Application Class and define it in the Post Process PeopleCode section.

Video Page Options

Note: This section is available only when related content service is *HC_AGC_VIDEO_FL*.

Enter the video URL ID and text transcript for the video step. You will also need to define the URL ID in the PeopleTools URL Maintenance page.

The Activity Guide Composer delivers the following content services, which can be used for template steps:

- *HC_AGC_INFO_FL*
- *HC_AGC_VIDEO_FL*
- *HC_AGC_SUMMARY_FL*

Categories - Notifications Page

Use the Categories - Notifications page (AGC_CAT_TBL8) to configure the notification settings for the category.

Navigation

Enterprise Components >Activity Guide Composer >Categories >Notifications

Image: Categories - Notifications Page

This example illustrates the fields and controls on the Categories - Notifications page.

Activity Guide Category OFFBOARDING

Category

Effective Date 04/06/2020
Description OffBoarding
☒ Enable Notifications

Notifications ?

Notification Options

☒ Email Notification
☒ Push Notification

Default Notifications

Enable	Notification Type	Notification	Description	Preview
☒	Initial	HR_OFFBOARD_INIT_NOTIFICATION	OffBoarding Process Start	Preview
☐	Overdue			Preview
☒	Reminder	HR_OFFBOARD_REMINDER	OffBoarding Process Reminder	Preview

Notification Priority

☒ Initial
☐ Overdue

Use this page to enable notifications for a category and define default notification settings. These settings can be overridden in the activity guide template but only if notifications is enabled on this page.

Enable Notifications

Select this check box to configure notifications for the category. When you select this option, the remaining fields on this page become available

Note: When this option is deselected, then notifications cannot be used in the activity guide template.

Notification Options

When you have enabled notifications for this category, you must select one or both of the following options:

Email Notification

Select this option to have the system send an email message to the assignee informing him or her that an activity guide process has one or more steps that require attention.

Push Notification

Select this option to have the system send an alert message to the assignee via the Notifications functionality. Notifications will appear on the banner once they have been processed.

Note: Push of email notification options must be set at the category level. You cannot override these options at the template level.

Default Notifications

Identify the default notification types for this category and enter the corresponding notification values.

Enable

Select the default notification types for this category .

- *Initial:* Notification will be sent only once when the step (s) first become available to the assignee. The initial notification will not be sent to the initiator of the activity guide process.
- *Overdue:* Notification will be sent when a step is incomplete and has become overdue.
- *Reminder:* Notification will be sent as a reminder when the step is incomplete.

Notification

Enter the notification values that corresponds to the notification type. Notifications are defined on the [Define Notifications Page](#). Only those notifications associated with this category will be available for selection.

Note: Default notifications can be overridden at the template level on the [Activity Guide Composer - Notifications Page](#).

Notification Priority

Specify whether the Initial or Overdue notification should takes the highest priority.

When a user initiates and activity guide instance, the system checks to see if there are open steps in that activity guide instance. When there are open steps, the system will perform these actions when the follow option is selected as the priority notification:

Initial

Sends the initial notification to the assignees, even if a step is overdue.

Note: Initial notifications are not sent to the user who initiated the step.

Overdue

When the step is overdue, the system sends the overdue notification to the assignees, even if the initial notification has not been sent. If the step is not overdue, the initial notification will be sent.

Note: Notification priority is set at the category level. You cannot override these options at the template level.

For more information on using notifications for activity guides, see [Understanding Notifications for Activity Guide Instance Steps](#).

Preview Notification Page

Use the Preview Notification page (AGC_CAT_NOTIF_SEC) to view the notification text or message that will be sent to an assignee.

Navigation

Select the Preview link for a notification type.

Image: Preview Notification Page

This example illustrates the fields and controls on the Preview Notification page.

Preview Notification

Notification Details

Notification HR_OFFBOARD_INIT_NOTIFICATION
Description OffBoarding Process Start

Push Notification

Text OffBoarding tasks are available for your review and update.

Email Notification

Priority 2-Med
Subject OffBoarding tasks require your attention
Message

Dear %AG_USER%,
OffBoarding tasks associated to the following position are available for your review and updates:
%PERSONAL_DATA-NAME_DISPLAY%
%JOBCODE_TBL-DESCR%
Please ensure completion of your assigned tasks prior to %HR_OFB_CTX_VW-LAST_DATE_WORKED%. Select the %AG_URL% to begin the OffBoarding process.
Thank you.
This is a system generated message. Do not reply to this message.

Available Text Placeholders

Value	Description
%AG_DETAILS%	Activity Guide Step Details
%AG_URL%	Activity Guide URL
%AG_USER%	Activity Guide User Description
%JOBCODE_TBL-DESCR%	Job Code Description
%PERSONAL_DATA-NAME_DISPLAY%	Display Name
%HR_OFB_CTX_VW-LAST_DATE_WORKED%	Last Date Worked

Displays the push or email message text that will be sent via a notifications. Changes to the message text must be done on the [Define Notifications Page](#).

Cloning Activity Guide Categories

Use the Clone Category (AGC_CAT_CLONE_FL) component to clone a category for an activity guide.

Pages Used to Clone Activity Guide Categories

Page Name	Definition Name	Usage
Clone Category Page	AGC_CAT_CLONE_FL	Clone an activity guide category.

Clone Category Page

Use the Clone Category page (AGC_CAT_CLONE_FL) to clone an activity guide category.

Navigation

Enterprise Components >Activity Guide Composer >Activity Guide Utilities >Clone Category >Clone Category

Image: Clone Category Page

This example illustrates the fields and controls on the Clone Category page.

The screenshot shows the 'Clone Category' page. At the top, there's a breadcrumb trail: < Activity Guide Templates > Clone Category. A 'Clone Category' button is in the top right. The main section is titled 'New Category Details' and contains the following fields:

- *Category: FINADMIN
- *Effective Date: 01/01/2020
- *Description: Finance Administrator
- *Long Description: This activity guide category will support activity guide templates that are created for a Finance Administrator who manages and maintains budgets data.

Below the form is a table titled 'Available Categories' with 8 rows. The table has three columns: Category, Description, and Effective Date. The 'HRADMIN' row is selected.

Category	Description	Effective Date
☐ HGA_EA_REQ	Extended Absence Request	01/01/1900
☒ HRADMIN	Human Resources Administrator	01/01/2000
☐ LIFE EVENT	Life Event	01/01/1900
☐ MANAGEPOSITION	Manage Positions	01/01/1900
☐ OFFBOARDING	OffBoarding	01/01/1900
☐ ONBOARDING	OnBoarding	01/01/1900
☐ OPENENROLLMENT	Open Enrollment	01/01/1900
☐ QST0000001	Create Questionnaire	01/01/1900

Enter the category ID, effective date, short and long description.

The page sorts the Available Categories list by category and then by effective date within that category. Select the up and down arrows in the column heading to change the sort order.

Select the effective dated row you want to copy and click Clone Category. You will remain on this page but the Available Categories list will now include your newly cloned category.

To make any changes or updates to this newly cloned category, navigate to the Activity Guide Composer - Categories component (Enterprise Components >Activity Guide Composer >Categories).



Filters icon or
icon with filters applied



Filter

Click to open the Filters page and select criteria to narrow the list of activity guide categories. You can use that page to filter the list by category, short description, or effective date,

When filters are in place, the icon displays as green. Click the filter icon and click the Clear button to reset the filters.

Related Links

[Setting Up Activity Guide Categories](#)

Managing Activity Guide Templates

The Activity Guide Composer (AGC) feature enables you to use fluid to create activity guide templates that identify the steps a user should take to perform a transaction or process. You can use AGC templates for a variety of purposes, such as identifying the steps that a new employee would complete through the OnBoarding feature, or the items that should be updated in the system using the fluid pages when a person encounters a life event change.

You can even define an activity guide with multiple steps that supports a single component. The required pages are added to an activity guide template so that the PeopleSoft component can be saved. There are additional instructions and validations for the functional analyst who defines the activity guide template. These validations ensure a Submit action for the activity guide category and template.

The following videos provide demonstrations of features and how to use the Activity Guide Composer:



[Image Highlights, PeopleSoft HCM Update Image 23: Activity Guide Composer](#)



[PeopleSoft Activity Guide Composer](#)



[Image Highlights, PeopleSoft HCM Update Image 29: Activity Guide Composer - Single Component](#)

The activity guide template administrator determines the following aspects of each transaction template:

- The type, or layout format of the template, where you determine if the steps should be presenting in a vertical or horizontal layout.
- The activity guide category of the template, which determines available steps, assignees, images, and actions for the user.
- Administrator and end user security roles.
- Actions that should be available to the user from the Actions Menu list in the banner (pre PeopleTools 8.57) and the sub-banner (PeopleTools 8.57 and higher).

- Content that should appear in the fluid sub banner of the activity guide.
- The steps, the order in which they appear in the activity guide, and configuration options and rules for each step.
- Identify notification settings, if enabled.
- If a template should be available in the My Processes pages.

Note: When you create an activity guide template, the system also creates a PeopleTools activity guide template using the PeopleTools Activity Guide application process integration (API). This combines the technical data from the activity guide category and the functional data from the activity guide template to save a PeopleTools activity guide template.

To add, update, clone, or delete activity guide templates, use the Templates component (AGC_TMPL_SRCH_FL).

These topics discuss managing activity guide templates.

Pages Used to Manage Activity Guide Templates

Page Name	Definition Name	Usage
Activity Guide Templates Page	AGC_TMPL_SRCH_FL	View a list of existing activity guide templates or initiate the action to add, update, delete, or clone a template.
Add Activity Guide Template Page	AGC_TMPL_ADD_SCF	Identify the template ID and effective date for a new template.
Update Template Page	AGC_TMPL_UPDT_FL	Manage effective dated rows for an activity guide template.
Clone Template Page	AGC_TMPL_CLONE_SCF	Clone an activity guide template
The Activity Guide Composer Guided Template Process	N/A	The Activity Guide Composer guided template process is itself an activity guide process. It shows a list of application steps in the left panel that take you to pages displayed in the content area to define and configure your activity guide template. The Activity Guide Composer also provides navigation buttons in the page sub banner for navigating through the steps.
Activity Guide Composer - Introduction Page	AGC_TMPL_INTRO_FL	Review an introduction to the Activity Guide Composer.
Activity Guide Composer - General Information Page	AGC_TMPL_GNRL_FL	Enter or view the template description and category.

Page Name	Definition Name	Usage
Activity Guide Composer - Activity Guide Type Page	AGC_TMPL_TYPE_FL	Select or view the activity guide type—either horizontal sequential, vertical non sequential, or vertical sequential. Depending on the type, you can also determine auto save, side panel display, translation, and hide step options.
View Example (Activity Guide Types) Page	AGC_TMPL_TYPE1_SCF	View examples of the horizontal, vertical non sequential, and vertical sequential activity guide types.
Activity Guide Composer - Security Page	AGC_TMPL_SCRTY_FL	Identify the security roles for administrator and end user.
Activity Guide Composer - Additional Actions Page	AGC_TMPL_BTNS_FL	Select which actions will be available in the activity guide for a template
Activity Guide Composer - Sub Banner Page	AGC_TMPL_SBNR_FL	Identify the type of sub banner you wish to display at the top of the activity guide, if any.
Configure Sub Banner Page	AGC_TMPL_SBNR1_SCF	Identify the image and fields that should appear in the sub banner
View Example (Sub Banner) Page	AGC_TMPL_SBNR2_SCF	View examples of sub banners.
Activity Guide Composer - Select Steps Page	AGC_TMPL_STEP1_FL	Select the steps that should be part of this activity guide.
Activity Guide Composer - Organize and Configure Steps Page	AGC_TMPL_STEP2_FL	Organize, configure, or delete a step from the activity guide template.
Add Group Step Page	AGC_TMPL_STPAG_SCF	Define the label for the group of steps.
Configure Group Step Page	AGC_TMPL_STPEG_SCF	Select which steps should be a sub step within this group.
Configure Attributes Page	AGC_TMPL_STPEA_SCF	Configure the rules for a step.
Configure Dependencies Page	AGC_TMPL_STPDP_SCF	Identify steps that must be completed prior to completing this step.
Configure Page Text Page	AGC_TMPL_PGTEXT	Enter page text when a step is page text enabled.
Step Details Page	AGC_TMPL_STPED_SCF	View configuration details for a step.
Activity Guide Composer - Display and Processing Page	AGC_TMPL_PRCS_FL	Configure an activity guide template for use in My Processes.
Activity Guide Composer - Notifications Page	AGC_TMPL_NOTF_FL	Configure notifications for a template

Page Name	Definition Name	Usage
Preview <Notification Type> Notifications Page	AGC_TMPL_NTPV_SCF	View the notification text or message that will be sent to the users assigned to the steps.
Activity Guide Composer - Review and Activate Page	AGC_TMPL_ACTIVE_FL	Activate or deactivate an activity guide template.

Activity Guide Templates Page

Use the Activity Guide Templates page (AGC_TMPL_SRCH_FL) to view a list of existing activity guide templates or initiate the action to add, update, delete, or clone a template.

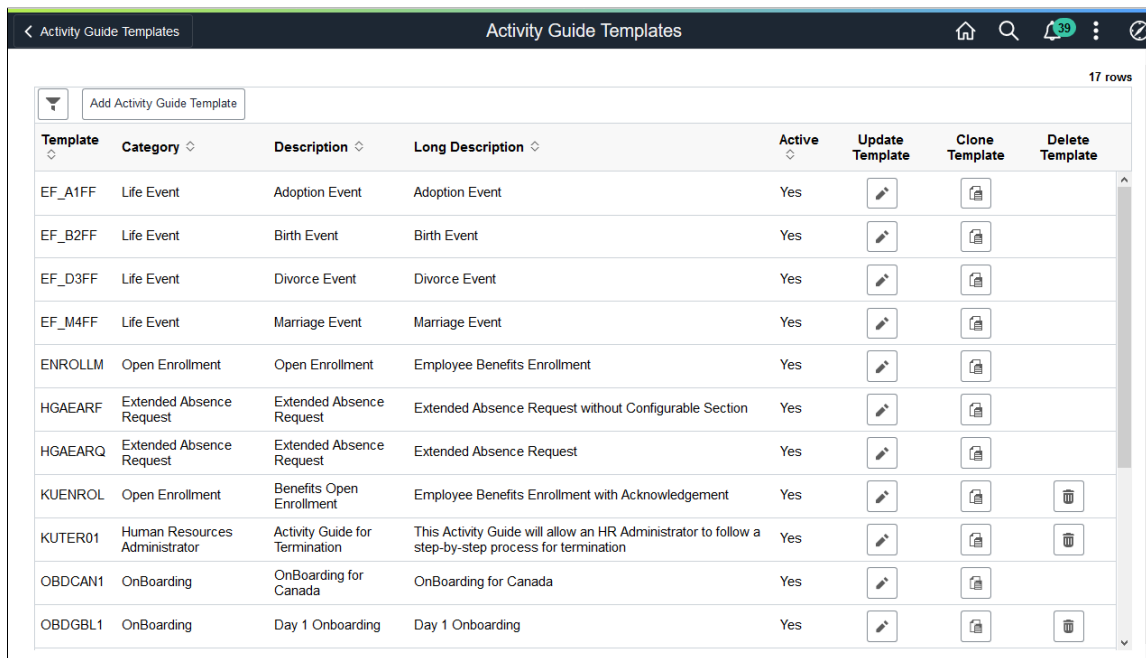
Note: You will only see templates you have administrator access to or where no security has been defined for the template.

Navigation

Enterprise Components >Activity Guide Composer >Templates >Activity Guide Templates

Image: Activity Guide Templates Page

This example illustrates the fields and controls on the Activity Guide Templates page.



Activity Guide Templates							
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			
ENROLLM	Open Enrollment	Open Enrollment	Employee Benefits Enrollment	Yes			
HGAEARF	Extended Absence Request	Extended Absence Request	Extended Absence Request without Configurable Section	Yes			
HGAEARQ	Extended Absence Request	Extended Absence Request	Extended Absence Request	Yes			
KUENROL	Open Enrollment	Benefits Open Enrollment	Employee Benefits Enrollment with Acknowledgement	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			
OBDGAN1	OnBoarding	OnBoarding for Canada	OnBoarding for Canada	Yes			
OBDGBL1	OnBoarding	Day 1 Onboarding	Day 1 Onboarding	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.

Note: Depending on the PeopleSoft application, you may already have several activity guides templates available. For example, HCM delivers templates such as OnBoarding, Life Events, Open Enrollment, managing positions, and so forth. The administrator of these templates should be someone who is very familiar with your organization's application transaction processes and can configure and maintain additional activity guides and rules needed for users to complete personal and business transactions.



Filter button

Click to open the Filter page and select criteria to narrow the list of activity guide templates.

Add Activity Guide Template button

Click this button to access the [Add Activity Guide Template Page](#) and identify the name and effective date of a new activity guide template.

Note: In order to add a template, the user needs to have role access to add a template for at least one category.

Active

Indicates if the template is active (*Yes*) or inactive (*No*).



Update Template button

Click the button for a template row to access the [Update Template Page](#) for the template you have chosen.



Clone Template button

Click this button for a template row to access the [Clone Template Page](#) where you can initiate the process to clone this template.



Delete Template button

Click this button to delete all effective dated versions of this template. This button is not available for delivered templates. However, if an effective dated row has been inserted for a delivered template, the user can access Update Template Page to delete the specific effective dated row added for the template.

Note: If more than one effective dated row exists for this template, the system will delete all rows. Use the Update Template button to access the [Update Template Page](#) to see all effective dated rows and delete individual rows, if necessary.

Add Activity Guide Template Page

Use the Add Activity Guide Template page (AGC_TMPL_ADD_SCF) to identify the template ID and effective date for a new template.

Navigation

Click the Add Activity Guide Template button from the [Activity Guide Templates Page](#).

Image: Add Activity Guide Template Page

This example illustrates the fields and controls on the Add Activity Guide Template page.

Cancel

Add Activity Guide Template

Continue

*Template

*Effective Date

03/25/2020

Enter the ID for the new template and an effective date. Template IDs must be seven characters in length.

- Cancel button

Click this button to exit the page and return the [Activity Guide Templates Page](#) without saving the new template.
- Continue button

After entering a template ID and effective date, click this button to access the [Activity Guide Composer - Introduction Page](#) and start the template creation process.
- Template

Enter a seven (7) character template code.

Important! Some applications may require a unique naming convention. For example, the first four characters of a Life Events template *must* use a unique convention to ensure that Life Event activity guides are processed correctly.

Update Template Page

Use the Update Template page (AGC_TMPL_UPDT_FL) to manage effective dated rows for an activity guide template.

Navigation

Click the Update Template button from the [Activity Guide Templates Page](#).

Image: Update Template Page

This example illustrates the fields and controls on the Update Activity Guide Template page.

Cancel

Update Template

Apply

Done

Effective Dated Templates

2 rows

Effective Date	Description	Update Template
01/01/2020	Standard OnBoarding	+
01/01/1900	Standard OnBoarding	+

Use this page to view, select to update, insert a new row, or delete an effective dated rows for a template.

Cancel button

Click this button to return to the [Activity Guide Templates Page](#). If you have not clicked the Apply button, the data you entered on the page will not be saved.

Apply or Done buttons

Click either of these buttons to apply and save your changes.

Click the Apply button to save you data and remain on this page. If you added a new row, the Update Template button becomes active for that row and you can now update the template as necessary.

Click the Done button to save your changes and return to the Activity Guide Composer - [Activity Guide Templates Page](#).



Update Template button

Click this button to access the Activity Guide Template pages to make updates to the template. The system will display the last activity guide step page you accessed in this component.

When you click this button for a delivered template, the system will issues a warning that it is delivered data and cannot be deleted or modified. However, you can click OK to view the template setup.



Add button

Click the Add a Row button to insert a new effective dated row for this template.

When you select the most current row, the system will insert a new row with today's date. When you insert a row from an historical row, the template will copy over the same data from that row, including the effective date. Overwrite this date as needed so the rows do not share the same effective date.

In order to proceed with updating a new row, click the Apply button to save the row and activate the Update Template button, where you can access and update the setup parameters for the new template row.



Delete button

Click this button to delete the row.

Important! You must click the Apply or Done button to save this deletion. If you cancel out of the [Update Template Page](#) without saving, the delete action will not take place and the row will remain.

Clone Template Page

Use the Clone Template page (AGC_TMPL_CLONE_SCF) to clone an activity guide template.

Navigation

Click the Clone Template button on the [Activity Guide Templates Page](#).

Image: Clone Template Page

This example illustrates the fields and controls on the Clone Template page.

Clone Template

Template EF_B2FF
Description Birth Event

New Template Details

*Template EF_B3FF
*Description Birth Event
*Effective Date 01/01/2020

Select the effective date of the template to clone.

Available Templates 2 rows

Effective Date	Description
☐ 01/01/1900	Birth Event
☒ 01/01/2020	Birth Event

Enter the seven character template ID, description, and effective date for the new template.

Note: Some delivered activity guide templates have specific naming conventions. For example, Life Event templates must begin with either *EF_A* (for Adoption) , *EF_B* (for Birth), *EF_D* (for Divorce), or *EF_M* (for Marriage) , to ensure correct processing of the Life Event transactions.

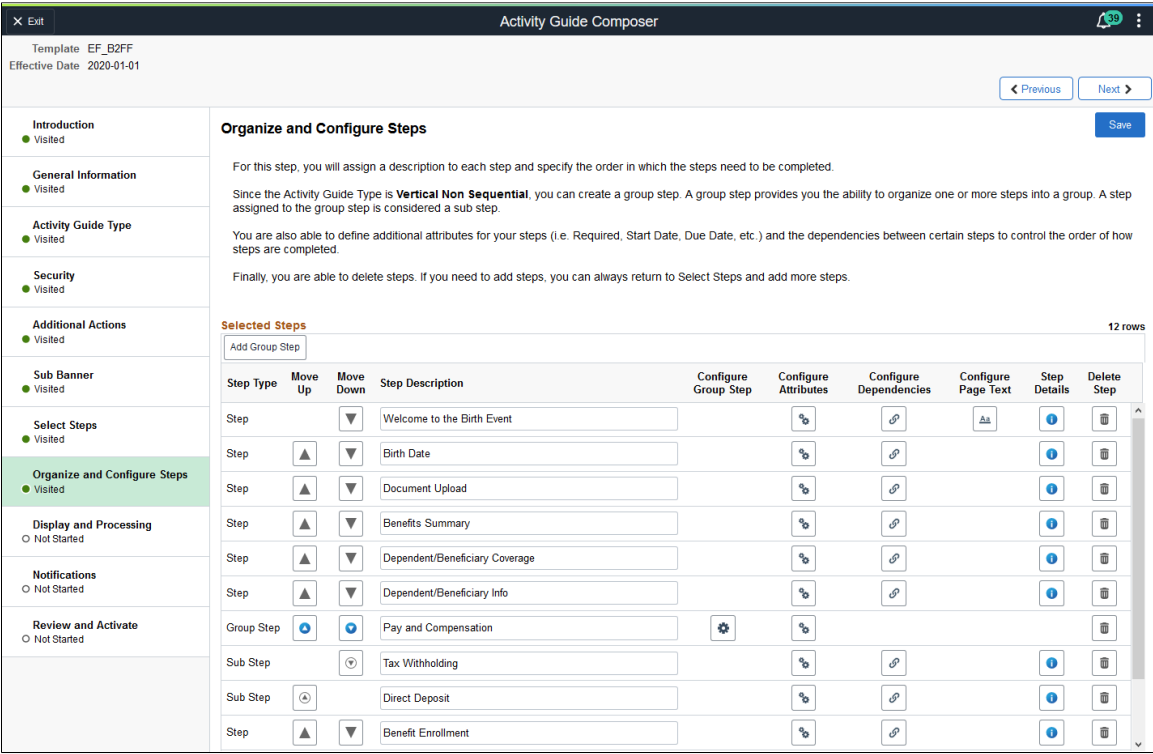
The page displays all effective dated rows for the template you are cloning, oldest to newest. Select the effective dated row you want to copy and click Continue. The system will return you to the [Activity Guide Templates Page](#) where you can click the Update Template button to make any changes to this newly cloned template.

The Activity Guide Composer Guided Template Process

The Activity Guide Composer guided template process is itself an activity guide process. It shows a list of application steps in the left panel that take you to pages displayed in the content area to define and configure your activity guide template. The Activity Guide Composer also provides navigation buttons in the page sub banner for navigating through the steps.

Image: Activity Guide Composer Layout

This example illustrates the layout for the Activity Guide Composer pages showing an example of the Activity Guide Composer - Organize and Configure Steps page.



Fluid Activity Guide Banner

The top of PeopleSoft pages is called the page banner.

On most pages, users see the standard set of banner icon buttons.



or **Exit button**

Click this button to exit the Activity Guide Composer guided template process. You can return at a later time to modify and update your activity guide template.

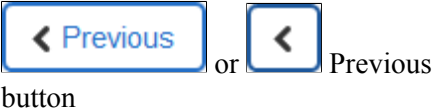


Actions list icon

Select the Actions List icon to exit the Activity Guide Composer pages and navigate back to your home page. If you have not saved the page, the system prompt you to save your changes.

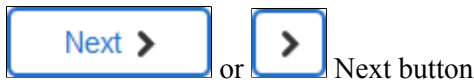
Activity Guide Sub Banner

The section under the banner of the PeopleSoft pages is called the page sub banner. The sub banner will display the name of the template ID and effective date for the template in which you are working. The sub banner also displays several standard activity guide icon buttons.



or **Previous button**

Click this button to navigate to the previous step or substep. If you have not saved the page, the system prompt you to save your changes. The button is not visible on the first step in the activity guide.



Click this button to navigate to the next step. If you have not saved the page, the system prompts you to save your changes.

On the last step of the activity guide (the Review and Activate step), the Next button does not appear. The page displays an [Activate Activity Guide](#) or [Deactivate Activity Guide](#) button on the page to activate or deactivate this template.



Though this button does not appear in the sub banner, it does appear on the page of each step, with the exception of the first and last pages.

Click this button to save the changes to a specific step configuration prior to navigating to another page.

Pages and Step List Format

This Activity Guide Composer will display vertical steps. The steps will also display a status indicating if you have or have not visited the page.

<Step Status>

Each page step has a status. These statuses include:

- *Not Started:* These are unvisited steps to completing your template.
- *Visited:* When you first access a step the status changes to this.

You can return to steps by clicking the step or using the navigation buttons in the banner.

The transaction content area displays the page for the current step you have selected for this template configuration.

Activity Guide Composer - Introduction Page

Use the Activity Guide Composer - Introduction page (AGC_TMPL_INTRO_FL) to review an introduction to the Activity Guide Composer.

Navigation

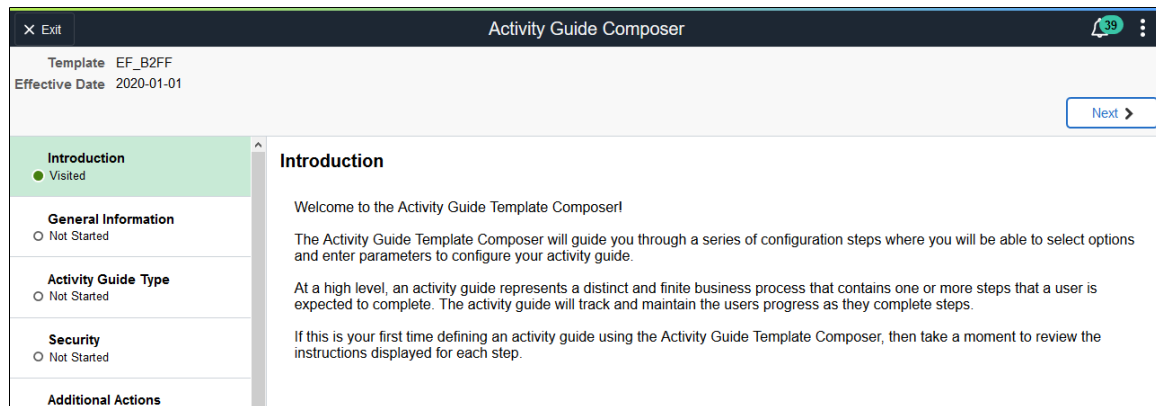
Enterprise Components >Activity Guide Composer >Templates >Activity Guide Template

- 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 Introduction tab from the left panel list or click the Previous button to navigate to the page.

Image: Activity Guide Composer - Introduction Page

This example illustrates the fields and controls on the Activity Guide Composer - Introduction page.



Activity Guide Composer - General Information Page

Use the Activity Guide Composer - General Information page (AGC_TMPL_GNRL_FL>) to enter or view the template description and category.

Navigation

Enterprise Components >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.

Image: Activity Guide Composer - General Information Page for a New Template

This example illustrates the fields and controls on the Activity Guide Composer - General Information page when creating a new template.

Exit

Activity Guide Composer

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Template AG_TERM

Effective Date 2020-01-01

Previous

Next

Save

Introduction

General Information

Activity Guide Type

Security

Additional Actions

Sub Banner

Select Steps

Organize and Configure Steps

Display and Processing

Notifications

General Information

For this step, you need to provide some general information for the activity guide template you are defining.

The Description entered here is displayed to the user in the Fluid Activity Guide Banner.

The Category selected will control the available options you can specify for the template. For example, the Category will control the steps you can add to the template.

*Description

Termination

*Long Description

Termination

Available Categories

Category	Description
Create Questionnaire	Activity guide for creating questionnaire.
Life Event	Life Event
Human Resources Administrator	This activity guide category will support activity guide templates that are created for an HR Administrator who manages and maintains employee data via the standard HCM administrator pages.
Open Enrollment	Open Enrollment
Manage Positions	Manage Positions

Image: Activity Guide Composer - General Information Page for an Existing Template

This example illustrates the fields and controls on the Activity Guide Composer - General Information page when updating or viewing an existing template.

Exit

Activity Guide Composer

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Template EF_B2FF

Effective Date 2020-01-01

Previous

Next

Save

Introduction

General Information

Activity Guide Type

Security

Additional Actions

Sub Banner

Select Steps

General Information

For this step, you need to provide some general information for the activity guide template you are defining.

The Description entered here is displayed to the user in the Fluid Activity Guide Banner.

The Category selected will control the available options you can specify for the template. For example, the Category will control the steps you can add to the template.

*Description

Birth Event

*Long Description

Birth Event

Selected Category

Category	Description
Life Event	Life Event

Description

Enter the description that should appear on the fluid activity guide banner.

The description is displayed in Activity Guide Templates. If the activity guide template is configured for My Processes Page,

then the template description is displayed in the left panel of the My Processes page.

Long Description

Enter a longer description that explains the purpose of the template, if needed.

Available Categories or Selected Category

Select the category that contains the actions, images, assignees, and steps that apply to this template. Depending upon your PeopleSoft application, you may have delivered options. For example, in HCM you will have *Life Events* and *OnBoarding*. Or, you can create new categories using the Activity Guide Composer - Categories component (see [Setting Up Activity Guide Categories](#)).

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 - Activity Guide Type Page

Use the Activity Guide Composer - Activity Guide Type page (AGC_TMPL_TYPE_FL) to select or view the activity guide type—either horizontal sequential, vertical non sequential, or vertical sequential. Depending on the type, you can also determine auto save, side panel display, translation, and hide step options.

Navigation

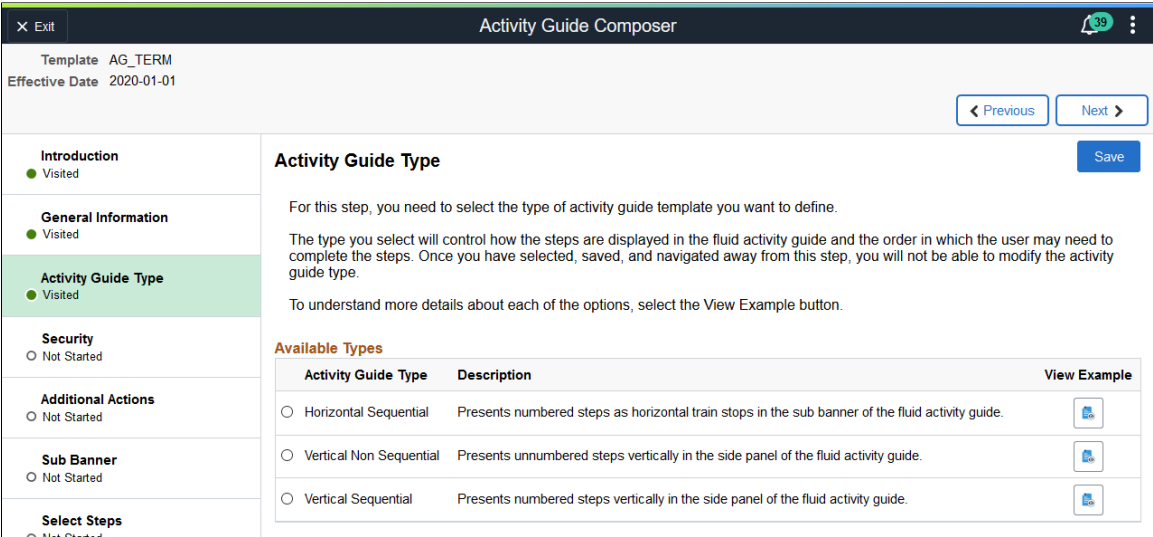
Enterprise Components >Activity Guide Composer >Templates >Activity Guide Template

- 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 Activity Guide Type tab from the left panel list, or click the Next or Previous buttons to navigate to the page.

Image: Activity Guide Composer - Activity Guide Type Page for a New Template

This example illustrates the fields and controls on the Activity Guide Composer - Activity Guide Type page for a new template.



Use this page to select an activity guide type or view the type that is selected for this template. You can view static examples of the different types by clicking the View Example button.

The delivered activity guide composer templates use the Vertical Non Sequential type with the left panel that lists the steps in the process. For this configuration, the panel appears on the left of larger devices. On a small form factor such as phone, the panel is initially hidden. Users would click the left panel tab to manually expand and view the steps.

Note: When you clone an existing template, the system copies the same activity guide type over and you cannot select a different activity guide type for the newly cloned template.

Activity Guide Type

Select from one of the following activity guide types:

- Horizontal Sequential:* Select this option to have the activity guide display the steps horizontally across the top of the page.
- Vertical Non Sequential:* Select this option to have the activity guide display unnumbered steps vertically in the left panel of the page.
- Vertical Sequential:* Select this option to have the activity guide display numbered steps vertically in the left panel of the page.

Note: You cannot change the activity guide type for this template after you have saved this page. Or If you have cloned or inserted a new row for an existing template, you cannot change the activity guide type.

View Example

Click this button to access the [View Example \(Activity Guide Types\) Page](#) and see examples of this type of activity guide.

Note: These are examples only and do not reflect the template you are creating.

Image: Activity Guide Composer - Activity Guide Type Page for an Existing Template

This example illustrates the fields and controls on the Activity Guide Composer - Activity Guide Type page after you have saved the type.

✕ Exit

Activity Guide Composer

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Template EF_B2FF

Effective Date 2020-01-01

< Previous

Next >

Save

Introduction

Visited

General Information

Visited

Activity Guide Type

Visited

Security

Not Started

Additional Actions

Not Started

Sub Banner

Not Started

Select Steps

Not Started

Organize and Configure Steps

Not Started

Display and Processing

Not Started

Notifications

Not Started

Review and Activate

Not Started

Activity Guide Type

The activity guide type for the template has been selected and cannot be modified.

To understand more details about the activity guide type selected, select the View Example button.

Selected Type

Activity Guide Type	Description	View Example
Vertical Non Sequential	Presents unnumbered steps vertically in the side panel of the fluid activity guide.	

For the activity guide, you have the option to enable auto save for each step. Auto save will identify if any data has changed on a step and save those changes when the user navigates away from the step.

Auto Save ☐

For Vertical Sequential or Non Sequential, you have the option to always display the activity guide steps shown in the side panel.

Display Side Panel ☒

If the activity guide template is going to be translated into one or more languages, then you have the option to control how language translation is managed when a user starts an activity guide.

When a user starts an activity guide, the system can either translate the activity guide for the preferred language of the user (i.e. Partial Translation) or translate the activity guide for all language translations defined for the template. (i.e. Full Translation)

Translation Option

Partial Translation

For example, Full Translation is useful for multi user activity guides where different users of the activity guide may have different language preferences.

For Vertical Non Sequential, you have the option to hide steps that are not assigned to the current user accessing the activity guide. This option is useful for multi user activity guides where you don't want the user to view steps they are not assigned to.

Hide Steps ☐

When you save the page, the activity guide type option you selected is now read-only. The page may also display other fields, which are based on the activity guide type you selected.

Auto Save

This option is available for *Vertical Non-Sequential* types.

Click this check box to enable the auto save feature. When enabled, the system will automatically save the page when a user moves from one step to another. Deselect to have the system warn the user that unsaved data exist have allows the user to determine whether to save the changes to the activity guide.

The system does not display this option for the sequential activity guide types because PeopleTools auto save is automatically turned on for these types and cannot be overridden.

Display Side Panel

This option is available for *Vertical Non-Sequential* and *Vertical Sequential* types.

Select this option to have the left panel expanded when the user accesses a vertical activity guide on a large form factor device. The panel will always be hidden on small form factor devices and the user will need to manually expand the panel to view the vertical activity steps.

Translation Option

Select how you want the system to translate the language when a user accesses the activity guide process:

- *Full Translation*: Translates the activity guide for all language translations defined for the template. This option is beneficial when an activity guide has multiple users that need to access the process and have different language preferences.
- *Partial Translation*: Translates the activity guide to the user's preferred language. This is the default value.

Hide Steps

This option is available for the *Vertical Non Sequential* type and organizations on PeopleTools 8.58 or higher.

Select to hide steps for a user when not assigned to him or her. With this option selected, users will only see the steps for which they need to take action.

Deselect this option to display all step to users in the left panel. Although the step will appear in the left panel navigation, it will not be available for selection. This is the default value.

View Example (Activity Guide Types) Page

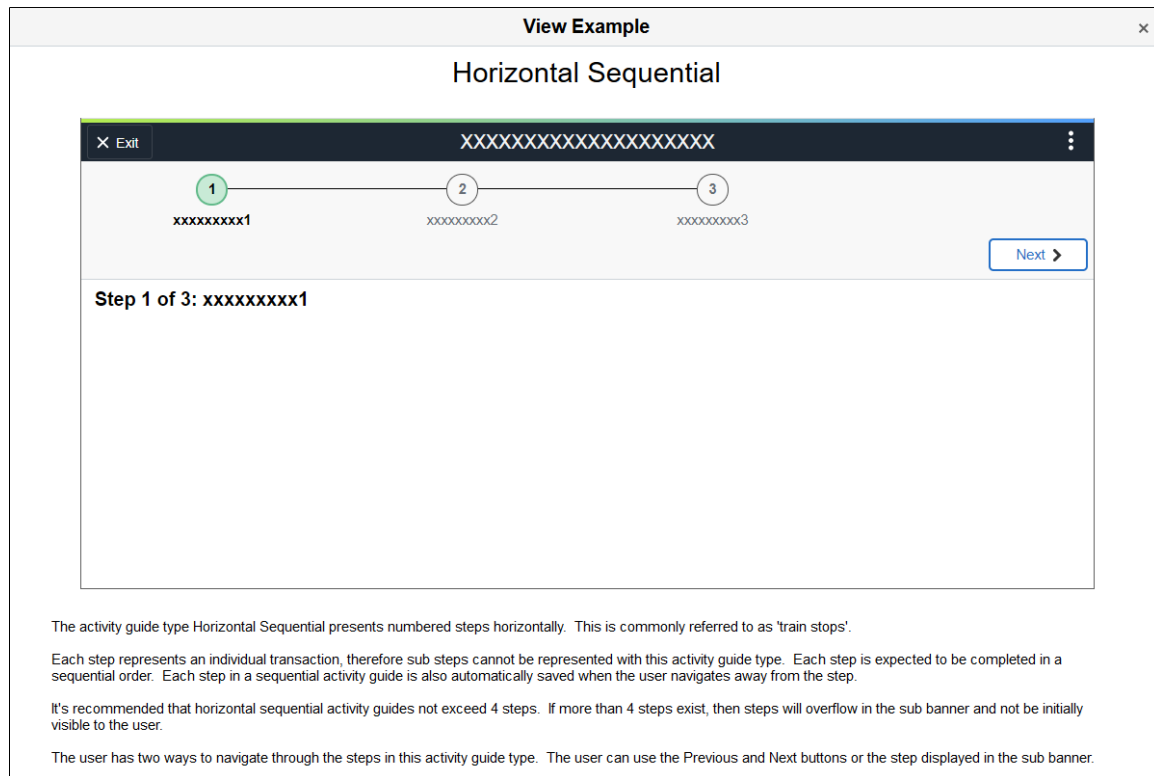
Use the View Example (Activity Guide Types) page (AGC_TMPL_TYPE1_SCF) to view examples of the horizontal, vertical non sequential, and vertical sequential activity guide types.

Navigation

Click a View Example button on the [Activity Guide Composer - Activity Guide Type Page](#).

Image: View Example Page: Showing an Example of the Horizontal Sequential Type

This example illustrates the View Example page showing a horizontal sequential example.



Note: These are static examples only and do not reflect the current template you are creating.

Activity Guide Composer - Security Page

Use the Activity Guide Composer - Security page (AGC_TMPL_SCRTY_FL) to identify the security roles for administrator and end user.

Navigation

Enterprise Components >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 Security tab from the left panel category list, or click the Next or Previous buttons to navigate to the page.

Image: Activity Guide Composer - Security Page

This example illustrates the fields and controls on the Activity Guide Composer - Security page.

Exit

Activity Guide Composer

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Template EF_B2FF

Effective Date 2020-01-01

Previous

Next

Save

Introduction

Visited

General Information

Visited

Activity Guide Type

Visited

Security

Visited

Additional Actions

Not Started

Sub Banner

Not Started

Select Steps

Security

For this step, you need to specify the security roles that will have access to the activity guide template.

Security is defined by specifying the following security types and associating them to a security role:

Administrator - Responsible for maintaining and managing updates to the activity guide template configuration.

End User - Responsible for utilizing the activity guide process.

Security Roles

+

*Security Type	*Role Name	Description
Administrator	Benefits Administrator	[WF] Benefits Administrator
End User	Employee	[WF] Employee

Note: You must first enter an activity guide type and category in order to define the security for an activity guide template. This step is also required before you can complete many of the other steps, or pages, for this template.



Add button

Click this button to insert an additional security row.

Security Type

Select a security user type. Valid values are:

- *Administrator* for maintaining updates to the template configuration.
- *End User* for user accessing the template to enter transactional data.

Note: You must enter at least one *Administrator* and one *End User* role.

Role Name

Select the role that will either maintaining the template configuration (*Administrator*) or that will be the user for the template (*End User*).

Important! The role name that is assigned to the user profile must match the role name that is specified for the security types defined here.



Delete button

Click to remove a security row from this template.

Activity Guide Composer - Additional Actions Page

Use the Activity Guide Composer - Additional Actions page (AGC_TMPL_BTNS_FL) to select which actions will be available in the activity guide for a template.

Navigation

Enterprise Components >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 Additional Actions tab from the left panel list, or click the Next or Previous buttons to navigate to the page.

Note: If the activity guide category specified for the template has a Step Definition Rule of Steps from single component saved as single transaction, then the user should select an Action that allows the user to submit or complete the activity guide.

Image: Activity Guide Composer - Additional Actions Page

This example illustrates the fields and controls on the Activity Guide Composer - Additional Actions page.

Activity Guide Composer

Template EF_B2FF
Effective Date 2020-01-01

Previous Next

Save

Additional Actions

For this step, you can specify additional actions for your Activity Guide Template.

For the Activity Guide Type, **Vertical Non Sequential**, the user will have the following visible actions by default:

- Previous
- Next
- Exit

The Category specified for this Activity Guide is **Life Event** and the additional actions you can select for your activity guide template are displayed.

Available Actions

Description	Long Description	Action Label
☒ Cancel Button	Cancel Life Event template	Cancel
☒ Exit Button	Exit Life Event Template	Exit

Note: You must first identify the security roles for this template before you can configure actions.

Use this page to identify the actions a user can take when using this template. Actions are those list items or buttons that are available to the user from the Actions List menu (pre PeopleTools 8.57) or sub banner button (PeopleTools 8.57 or higher) of the activity guide.

Image: Example of Actions in the Activity Guide Actions List Menu pre PeopleTools 8.75

This example illustrates the action items available from the activity guide Actions List menu prior to PeopleTools 8.75.

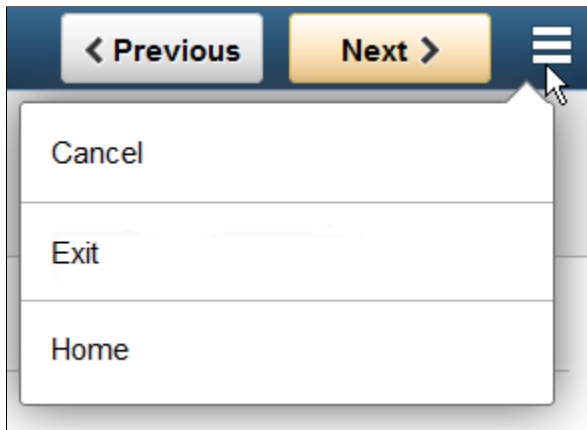
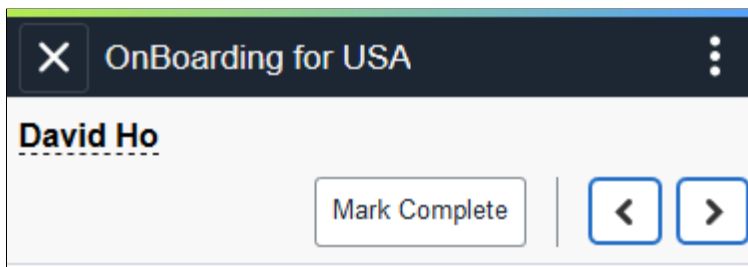


Image: Example of Actions item button using PeopleTools 8.57 or higher

This example illustrates the Mark Complete action item button available from the activity guide sub banner with PeopleTools 8.57 and higher.



(Check Box)

Select those items you want to include in the Actions List menu (prior to PeopleTools 8.57) or as a sub banner button (PeopleTools 8.57 or higher).

To select all actions, select the check box next to the Description column in the header, or select action buttons individually.

Action Label

Enter the text that should appear in the Actions List menu or button. If you save the page before entering a label, the page will automatically populate the fields you have selected with the Description label. You can overwrite this value and save your changes. If you deselect an action type and save, the page will remove the label you have entered.

The activity guide category defines which actions are available on this page. To manage actions for a category, use the [Categories - Actions Page](#).

Activity Guide Composer - Sub Banner Page

Use the Activity Guide Composer - Sub Banner page (AGC_TMPL_SBNR_FL) to identify the type of sub banner you wish to display at the top of the activity guide, if any.

Navigation

Enterprise Components > 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 Sub Banner tab from the left panel category list, or click the Next or Previous buttons to navigate to the page.

Image: Activity Guide Composer - Sub Banner Page

This example illustrates the fields and controls on the Activity Guide Composer - Sub Banner page.

Activity Guide Composer

Template EF_B2FF
Effective Date 2020-01-01

< Previous Next >

Save

Sub Banner

For this step, you are able to configure the fluid activity guide sub banner.

The sub banner displays below the fluid activity guide banner, which displays the title of the activity guide. The sub banner can be configured to display an image and up to three fields. The image and fields available for you to select are determined by the Activity Guide Category for this template, which is **Life Event**.

This configuration is optional, but the information that can be displayed in the sub banner may provide context for who or what the activity guide steps are pertaining to.

Use the View Example to review the layout and format of each sub banner type. Select the Sub Banner type you would like to use and use the Configure Sub Banner button to select the image and/or fields you want to display.

Available Types

Configure Sub Banner

Sub Banner Type	Description	Popup Display Option	View Example
☒ No Sub Banner	No sub banner will be displayed for the activity guide.		
☐ Image with 1 Primary Field	The sub banner will display an image with a maximum of three fields with no labels. One field can be marked as primary and will be displayed in bold.	☐ No	
☐ Image, No Primary Field	The sub banner will display an image with a maximum of three fields with an optional label for each field.	☐ No	
☐ No Image with 1 Primary Field	The sub banner will display a maximum of three fields with no labels. One field can be marked as primary and will be displayed in bold.	☐ No	
☐ No Image, No Primary Field	The sub banner will display a maximum of three fields with an optional label.	☐ No	
☐ Display Page	The sub banner will display a primary field as a link that will open a window to a display page.		

Note: You must first identify the security roles for this template before you can select a sub banner.

Configure Sub Banner

Click this button to access the [Configure Sub Banner Page](#) and identify which image and fields should display in the sub banner.

When No Sub Banner is selected, the system will not allow you to access the Configure Sub Banner page when you click this button.

Sub Banner Type

Select from one of the following sub banner types:

- No Sub Banner:* This activity guide will display the banner and the page directly below the banner.

- *Image with 1 Primary Field:* This activity guide will display a sub banner where you can display one image, such as an employee photo or company logo, and up to three fields, with one serving as the primary field in bold, such as the employee's name or the job title.
- *Image, No Primary Field:* This activity guide will display a sub banner where you can display one image, such as an employee photo or company logo, and up to three fields, although none serve as a primary field.
- *No Image with 1 Primary Field:* This activity guide will display a sub banner where you can display up to three fields, with one serving as the primary field in bold, such as the employee's name or the job title.
- *No Image, No Primary Field:* This activity guide will display a sub banner where you can display up to three fields, although none serve as a primary field.
- *Display Page:* This activity guide will display a sub banner with a link that will open a popup display page of non-editable data and informational text.

Popup Display Option

Swipe this option to *Yes* to have a link appear in the sub banner that will open a popup display page. When you have this option set to *Yes*, the View Example page will change dynamically to show an example of the data in a popup page. Swipe this option to *No* to keep the information viewable in the sub banner.

Popup pages can display non-editable data and informational text but cannot have links, buttons, and other controls that will take the user out of the fluid activity guide. The primary field value will be displayed as a link to the display page.

View Example

Click this button to access the [View Example \(Sub Banner\) Page](#) and view an example of the different sub banner types.

Note: These are examples only and do not reflect the current template you are creating.

Configure Sub Banner Page

Use the Configure Sub Banner page (AGC_TMPL_SBNR1_SCF) to identify the image and fields that should appear in the sub banner.

Navigation

Click the Configure Sub Banner button from the [Activity Guide Composer - Sub Banner Page](#).

Image: Configure Sub Banner Page

This example illustrates the fields and controls on the Configure Sub Banner page.

Sub Banner Type Image with 1 Primary Field	
*Image	Employee Photo
Available Fields 5 rows	
☐ Description	Primary ☐
☐ Employee ID	☐
☐ Empl Record	☐
☐ User ID	☐
☒ Job Code Description	☐
☒ Display Name	☒

Sub Banner Type

Display the sub banner type you selected on the [Activity Guide Composer - Sub Banner Page](#).

Image

This option is available only when you have selected one of the sub banner types that includes an image.

Enter which image should display in the sub banner. Valid images are defined on the [Categories - Images Page](#).

Description

Select up to three available fields. These fields come from the category associated with this template and are defined on the [Categories - Context Page](#). Available fields for selection are those defined as Context Record and Fields values and derived Contextual Data fields where you have selected the Use in Sub Banner option.

Display Label

This option is available when you have selected one of the sub banner types that has no primary Field.

Indicate whether a label should be displayed for the field.

Primary

This option is available only when you have selected one of the sub banner types that include a primary field.

Select which field should serve as the primary field. This item will appear at the top of the list in bold.

Done

Click to save your options and return to the [Activity Guide Composer - Sub Banner Page](#).

Cancel

Click this button to return to the [Activity Guide Composer - Sub Banner Page](#) without saving your changes.

Popup Display Pages

Popup display pages can show non-editable data and informational text but cannot have links, buttons, and other controls that will take the user out of the fluid activity guide. Selected one field as primary, which will be used as the link to the popup display page.

The popup page configuration options are set up in the Content Display Page section of the [Categories - Context Page](#).

View Example (Sub Banner) Page

Use the View Example (Sub Banner page (AGC_TMPL_SBNR2_SCF) to view examples of sub banners.

Navigation

Click a View Example button on the [Activity Guide Composer - Sub Banner Page](#).

Image: View Example (Sub Banner) Page

This example illustrates the View Example page showing a sub banner example.

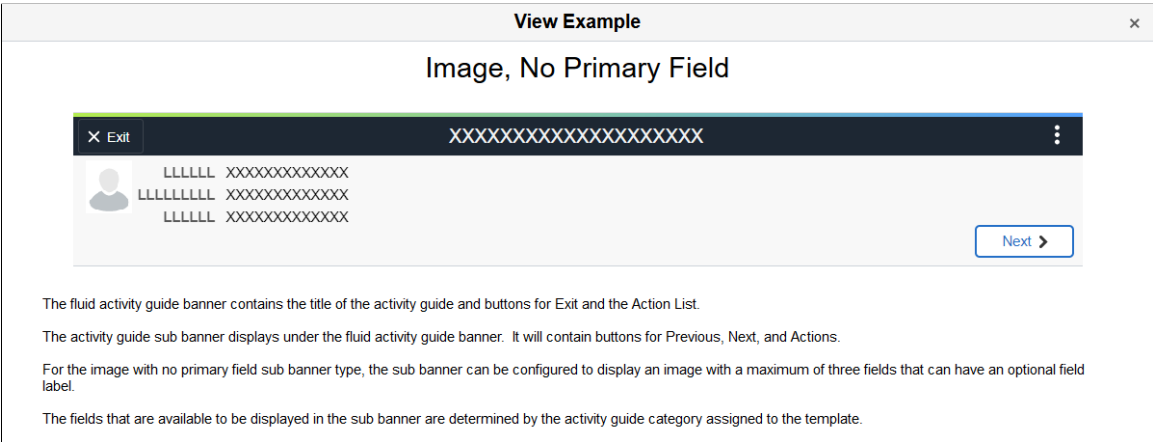
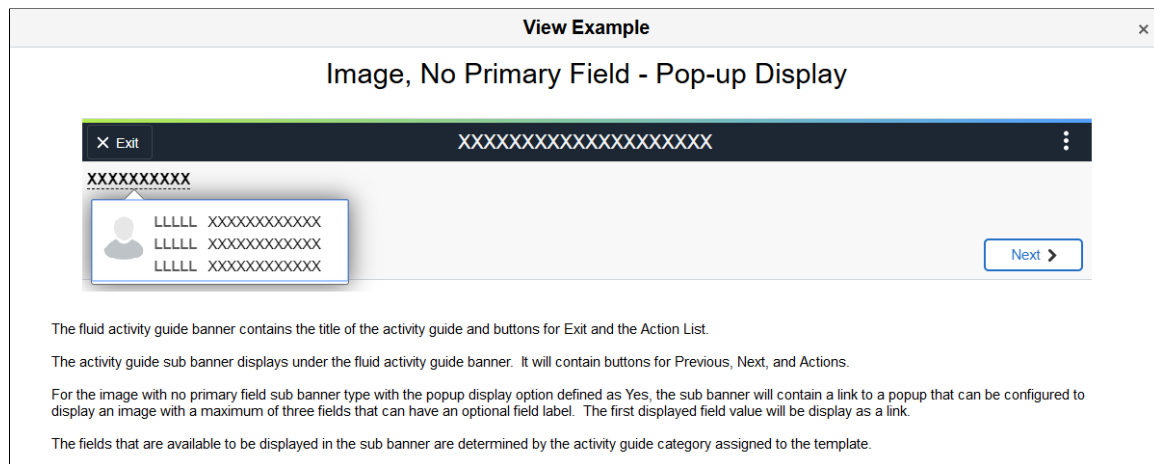


Image: View Example (Sub Banner) Page with the Popup Display Option Selected

This example illustrates the View Example page showing a sub banner example when you have swiped the Popup Display Option to *Yes*.



Note: These are static examples only and do not reflect the template you are creating.

Activity Guide Composer - Select Steps Page

Use the Activity Guide Composer - Select Steps page (AGC_TMPL_STEP1_FL) to select the steps that should be part of this activity guide.

Navigation

Enterprise Components >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.

Image: Activity Guide Composer - Select Steps Page

This example illustrates the fields and controls on the Activity Guide Composer - Select Steps page.

Activity Guide Composer

Template EF_B2FF
Effective Date 2020-01-01

Navigation: < Previous, Next >, Save

Select Steps

For this step, you need to select the steps you want to include in your Activity Guide Template.

The Category specified for this Activity Guide is **Life Event** and the different steps that can be included for this template are displayed.

Total Steps for Template 11

Available Steps 21 rows

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	0	Home and Mailing Address	Enter home and mailing address changes
Add Step	0	Benefit Enrollment	Start benefits enrollment and enroll for available benefits.
Add Step	0	Benefit Summary	Review your current benefits
Add Step	1	Benefits Statements	View Benefits Statements
Add Step	1	Birth/adoption Date	Enter the date of child birth or date of adoption and submit.
Add Step	0	Contact Information	Enter valid contact information.

Image: Activity Guide Composer - Select Steps Page for a Single Component

This example illustrates the fields and controls on the Activity Guide Composer - Select Steps page for a single component. Steps defined for this type of activity guide represent individual pages from a single PeopleSoft component that will be saved as a single transaction. Single component functionality is set up on the category assigned to the template. See the [Categories - Steps Page](#) documentation for more information on single component categories and templates.

Important! At minimum, the required steps need to be included in the activity guide template to ensure the PeopleSoft component can be saved.

Activity Guide Composer

Template POS_DAT
Effective Date 2020-01-01

Navigation: < Previous, Next >, Save

Select Steps

For this step, you need to select the steps you want to include in your Activity Guide Template.

The Category specified for this Activity Guide is **Manage Positions** and the different steps that can be included for this template are displayed.

Total Steps for Template 5

Available Steps 5 rows

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	1	Budget Incumbents	Budget Incumbents
Add Step	1	Position Data	Position Information
Add Step	1	Review and Submit	Review and Submit
Add Step	1	Position Attachments	Position Attachments
Add Step	1	Specific Information1	Specific Information

The following video provides an overview of Activity Guide Composer - Single Component.



[Image Highlights, PeopleSoft HCM Update Image 29: Activity Guide Composer - Single Component](#)

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](#).

Total Steps for Template

Displays the number of steps that have been added to this template.

Add Step

Click this button to add the step to a template. 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.

To organize, configure, or delete a step, use the [Activity Guide Composer - Organize and Configure Steps Page](#).

Note: If Step Definition Rule on the category is defined as Steps from a single component saves as single transaction, then the user is only able to add the step once to the activity guide template and Add Step will be disabled after the step is added.

Added Step Count

Identifies how many times you have added this step to your template. If you have added a step by accident, you can delete it from the [Activity Guide Composer - Organize and Configure Steps Page](#).

Required

This column is available when the Step Definition Rule on the category (see the [Categories - Steps Page](#)) is defined as *Steps from a single component saves as single transaction*, and at least one of the steps is selected as required. The field will display a *Yes* or *No* value depending on what is defined on the category.

Note: This will generate an error if required steps are not added and allow a step to be added once.

Activity Guide Composer - Organize and Configure Steps Page

Use the Activity Guide Composer - Organize and Configure Steps page (AGC_TMPL_STEP2_FL) to organize, configure, or delete a step from the activity guide template.

Navigation

Enterprise Components >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.

Image: Activity Guide Composer - Organize and Configure Steps Page

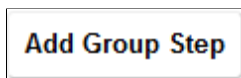
This example illustrates the fields and controls on the Activity Guide Composer - Organize and Configure Steps page.

Step Type	Move Up	Move Down	Step Description	Configure Group Step	Configure Attributes	Configure Dependencies	Configure Page Text	Step Details	Delete Step
Step			Before You Start						
Step	▲	▼	Welcome						
Step	▲	▼	Acknowledgement						
Step	▲	▼	I-9						
Step	▲	▼	Disability						
Step	▲	▼	Veteran Status						
Step	▲	▼	Ethnic Groups						

Note: You must first identify the security roles and select step for this template before you can configure steps.

This page displays the steps you added on the [Activity Guide Composer - Select Steps Page](#). Determine the step order by moving them up and down in the list. If the activity guide type is vertical, you can group steps into like categories by adding group steps and selecting which steps should be a sub step within the group. For example, you can create a group called Payroll and select all those steps related to payroll as sub steps to this group. This page also enables you to configure step attributes.

The following columns will display to manage your steps. If none of the steps are associated with that type of configuration, that column will not display. For example, if none of your steps are page text enabled, that column and button will not be available.



button

Add Group Step

Click this button to access the [Add Group Step Page](#) and enter a group step description.

Note: This button is not available for templates made using the Horizontal activity guide types.

Step Type

Displays if this is an individual *Step*, the *Group Step* label, or a *Sub Step* that is part of a group step.

**Move Step Up and Move Step Down** icon buttons

Click the solid up arrow to move the step up one position in the list or click the solid down arrow to move the step down one position in the list of steps. If the next step consists of a group step, then this step will be moved above or below the group step with all its sub steps.

**Move Group Step Up** and**Move Group Step Down** icon buttons

Click the solid circled up arrow to move the group step with all its sub steps up one position in the list or click the solid circled down arrow to move the step and all its sub steps down one position in the list of steps.

**Move Sub Step Up** and**Move Sub Step Down** icon buttons

Click the open circled up arrow to move the sub step up one position within the group of steps or click the open circled down arrow to move the sub step down one position within the group of steps. When you reach the top (or bottom) of the group step, you will no longer be given the option to move the sub step up (or down) in that group step.

Step Description

The step description defaults from the Description field on the [Categories - Steps Page](#). You can modify this description as needed. This description will be the name of the step in the left panel, or horizontal step across the top for a horizontal activity guide type. It will also appear as the page name.

**Configure Group Step** button

This button is available for group steps. Click this button to access the [Configure Group Step Page](#) and select which steps should be a sub step within this group.

**Configure Attributes** button

Click this button to access the [Configure Attributes Page](#) to define step attributes, such as whether the step is required or if it must be completed by a specific due date.

**Configure Dependencies** icon button

Click this button to access the [Configure Dependencies Page](#) to identify steps that must be completed prior to completing this step.

**Configure Page Text** icon button

This button is available when a step is page text enabled, such as the Welcome or Summary page.

Click this button to access the [Configure Page Text Page](#) to enter any text that you want the page to display for this step.

**Step Details** icon button

Click this button to access the [Step Details Page](#) to view the configuration for this step. Step configuration is defined on the [Categories - Steps Page](#), with the exception of the Step Description value, which comes from the Step Description value you entered on this page.

**Delete Step** icon button

Click this button to remove this step from the template. You can return to the [Activity Guide Composer - Select Steps Page](#) to add the step back into this template.

Note: If the Step Definition Rule on the category is defined as Steps from a single component saves as single transaction, then that user will not be able to delete the step if it has been defined as a Required step in the activity guide category.

Add Group Step Page

Use the Add Group Step page (AGC_TMPL_STPAG_SCF) to define the label for the group of steps.

Navigation

Click the Add Group Step button from the [Activity Guide Composer - Organize and Configure Steps Page](#).

Image: Add Group Step Page

This example illustrates the fields and controls on the Add Group Step page.

A group step does not display a transactional page to the end user. Rather, it serves as a header for a group of steps. For example, you can create a group step called Personal Data and then associate it to other steps that prompt the user to enter contact information, addresses, dependent data, and emergency contacts. When a user selects a group step from the left panel of the page, the panel will expand to show the sub steps within that group.

Use the [Configure Group Step Page](#) to associate sub steps to a group.

Note: Group steps are not allowed for horizontal activity guides.

Configure Group Step Page

Use the Configure Group Step page (AGC_TMPL_STPEG_SCF) to select which steps should be a sub step within this group.

Navigation

Click the Configure Group Step button from the [Activity Guide Composer - Organize and Configure Steps Page](#).

Image: Configure Group Step Page

This example illustrates the fields and controls on the Configure Group Step page.

Step Description	Step Definition Description
☐ Welcome to the Birth Event	Welcome
☐ Birth Date	Birth/adoption Date
☐ Document Upload	Document Upload
☐ Benefits Summary	Fluid Benefits Summary
☐ Dependent/Beneficiary Coverage	Dependent/Beneficiary Coverage
☐ Dependent/Beneficiary Info	Dependent/Beneficiary Info
☒ Tax Withholding	Tax Withholding
☒ Direct Deposit	Fluid Direct Deposit
☐ Benefit Enrollment	Fluid Benefit Enrollment

The page displays those steps that have been added to this template that have not already been associated with another group step. To add the same step to different groups, you will need to add the step multiple times from the [Activity Guide Composer - Select Steps Page](#).

Select those steps that should be part of this group. To remove a step from a group, deselect the check box for that step row.

Configure Attributes Page

Use the Configure Attributes page (AGC_TMPL_STPEA_SCF) to configure the rules for a step.

Navigation

Click the Configure Attributes button from the [Activity Guide Composer - Organize and Configure Steps Page](#).

Image: Configure Attributes Page (1 of 2)

This example illustrates the fields and controls on the Configure Attributes page (1 of 2).

Cancel

Configure Attributes

Done

Step Description Complete/Re-verify I-9 Form

Step Controls

Required

Yes

Disable AWE Status Update

No

Lock Step After Complete

Yes

Step Assignments

1 row

*Assignee	Description		
Manager	For this assignee, the app package method will return the user ID of the manager of the employee who create the process instance.	+	⌵

Start Date

Start Date Option

Current Date

Start Date Field

Image: Configure Attributes Page (2 of 2)

This example illustrates the fields and controls on the Configure Attributes page (2 of 2).

Due Date

Due Date Option

Date Field

*Due Date Field

EE Job Data : Hire Date

Add Days to Due Date

1

Inactivate Step After Due Date

No

Step Question

Question

150 characters remaining

Step Controls

- Required

Swipe to *Yes* to make this a required step for the end user. When required, the step tab in the left panel will display an asterisk to the left to the step label.
- Disable AWE Status Update

This field is enabled when the AWE integration configuration is set up on the [Categories - Steps Page](#) for this step.

Swipe to *Yes* to override and turn off the AWE Integration that updates the status of this template step.
- Lock Step After Complete

Swipe to *Yes* to disable end user updates to this step after the step has been completed. When step reaches a Complete status,

the step is locked. Therefore, further updates or changes cannot be made to this step once complete.

Step Assignments

This section is available when you have configured assignees on the [Categories - Assignees Page](#).

Assignee

Select one or more assignees that should be associated to this step. Assignees will still see all the steps listed in the activity guide process but they can access only those steps assigned to them. To hide steps that are not assigned to a user, select the Hide Steps option on the [Activity Guide Composer - Activity Guide Type Page](#). This option is available for the non sequential vertical activity guide type only.

If you have set up default assignees in the Default Step Assignments section of the [Categories - Steps Page](#), those values will appear here, but you can override these values.

Leave this field blank to have the system automatically assign this step to the user that created the activity guide instance.

Consider the following when you insert a new effective dated row for a template after you have added or modified default assignee information on the category:

- The system will attempt to carry forward all configuration to the new effective dated row.
- If you previously did *not* added assignee information for this template, the page will take the new default assignees, if any.
- If you previously added assignee information for this template, the page will copy the previous assignee information from the template and not take the default information from the category.
- When an assignee defined for a step no longer exists on the category, it will remove the assignee from the step.
- If you added a new step to the template, then the new step will have default assignees based on the maximum effective dated category to the effective date of the template.

Note: When you click Done on this page or Save on the Organize and Configure Steps page, the system will issue a warning if you left the Assignee field blank. Although you can leave this field blank, we recommend that you review all steps, especially those that should not be assigned to the user that created the instance, to ensure the proper assignment.

When a person initiates an activity guide and assignees are associated with the template, only those steps a user is assigned appear as available in the left navigation. The steps assigned to another person are grayed out and unavailable. If notifications are enabled for the template, the assignees will be notified when their assigned steps become open. Therefore, if a dependency is set for a step, the assignee will be notified after the prerequisite step is marked complete.

The following video provides an overview of Activity Guide Composer - multi user guides:



[Image Highlights, PeopleSoft HCM Update Image 31: Activity Guide Composer-Multi User Guides](#)

Start Date

Use this section to identify the start date of a step.

Start Date Option

Indicate the start date for this step, if any. Options include: *Current Date*, *Date Field*, and *None*.

Start Date Field

This field becomes available when you select *Date Field* in the Start Date Option field.

Valid options for this field are defined on the [Categories - Context Page](#) when you select the Use in Start/Due Date Option check box for a derived contextual date field.

Due Date

Use this section to identify when a step must be completed.

Due Date Option

Indicate a due date for this step, if any. Options include: *Date Field*, *None*, and *Start Date*.

Due Date Field

This field becomes available when you select *Date Field* in the Due Date Option field.

Valid options for this field are defined on the [Categories - Context Page](#) when you select the Use in Start/Due Date Option check box for a contextual date field.

Add Days to Due Date

Enter the number of days after the date you have entered (start date or the date field) the user must be complete the step. For example, if proof of identification is due within three (3) days of the worker's hire date, you would select *Date Field* in the Due Date Option field, *EE Job Data : Hire Date* in the Due Date Field, and enter 3 in the Add Days to Due Date field.

Inactivate Step After Due Date

Swipe to *Yes* if you want to inactivate and lock this step for the end user after the due date has passed.

Step Question

Enter a simple yes or no question if you want the user to decide if the step should be included or excluded from the activity guide.

If the user answers *Yes* to the question, then the step will appear in the activity guide.

If the user answers *No* to the question, then the step will be cancelled and not displayed to the user.

Configure Dependencies Page

Use the Configure Dependencies page (AGC_TMPL_STPDP_SCF) to identify steps that must be completed prior to completing this step.

Navigation

Click the Configure Dependencies button from the [Activity Guide Composer - Organize and Configure Steps Page](#).

Image: Configure Dependencies Page

This example illustrates the fields and controls on the Configure Dependencies page.

The screenshot shows the 'Configure Dependencies' page. At the top, there are 'Cancel' and 'Done' buttons. Below them are tabs for 'Step Description' and 'Benefit Enrollment'. The main section is titled 'Step Dependencies' and indicates '1 row'. A table with the header '*Dependent Step' contains one row with the value 'Birth Date'. To the right of the table are '+' and trash icons.

Dependent Step

Select a step or steps that must be completed before an end user can perform this step. Valid values are all the steps that have been added to this template. Group steps are not part of the step selection options: you would need to select each sub step within a group step if the entire group step should be completed prior to completing this step.

Note: You cannot make a step dependent upon itself.

Configure Page Text Page

Use the Configure Page Text page (AGC_TMPL_PGTEXT) to enter page text when a step is page text enabled, such as the Welcome, Video, and Summary page steps.

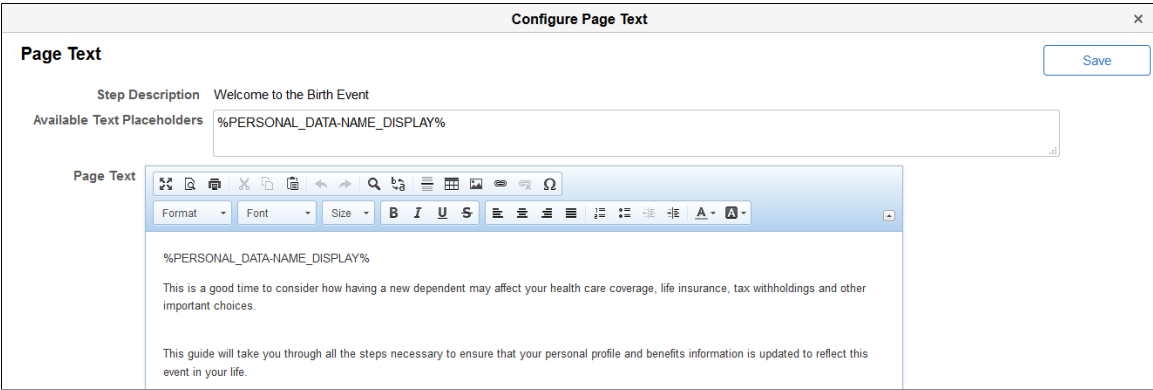
As delivered, page text is only enabled for the following related content services: HC_AGC_INFO_FL, HC_AGC_VIDEO_FL, and HC_AGC_SUMMARY_FL.

Navigation

Click the Configure Page Text button from the [Activity Guide Composer - Organize and Configure Steps Page](#).

Image: Configure Page Text Page

This example illustrates the fields and controls on the Configure Page Text page.



Use the Rich Text editor to enter additional information for the step. For example, you can enter a personalized welcome message for your workers or remind them of other things they may need to consider.

Step Description	Displays the Step Description field value for the step from the Activity Guide Composer - Organize and Configure Steps Page . This will appear as the navigation and page name in the activity guide for this step.
Available Text Placeholders	Contextual data fields will be available as text placeholders when the Use in Page Text option is selected for the derived contextual data field on the Categories - Context Page .

Step Details Page

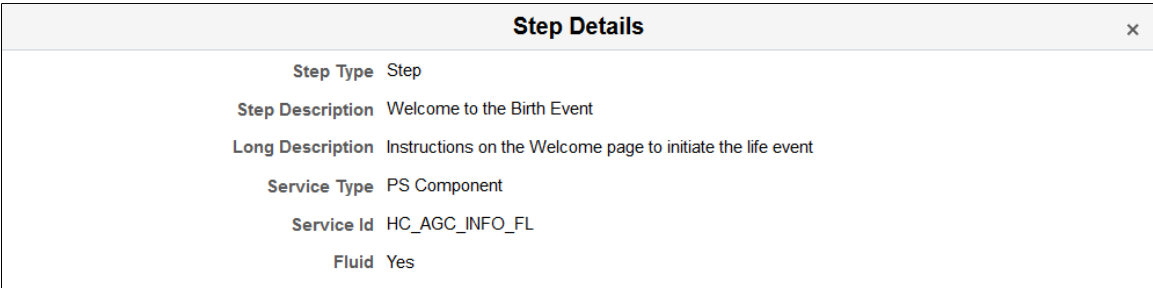
Use the Step Details page (AGC_TMPL_STPED_SCF) to view configuration details for a step.

Navigation

Click the Step Details button from the [Activity Guide Composer - Organize and Configure Steps Page](#).

Image: Step Details Page

This example illustrates the fields and controls on the Step Details page.



Step Type	Displays whether this is a step or substep of a group of steps. This information is defined on the Activity Guide Composer - Organize and Configure Steps Page .

Step Description

Displays the step description that will appear for the user as a navigation step and as the page name. This comes from the Step Description field on the [Activity Guide Composer - Organize and Configure Steps Page](#).

Long Description, Service Type, Service Id, and Fluid

These values come from the configuration defined on the [Categories - Steps Page](#) for this step.

The service type and ID indicate the related content service that is associated with the step.

The Fluid field will display a *Yes* value if this step is performed using a fluid page.

Activity Guide Composer - Display and Processing Page

Use the Activity Guide Composer - Display and Processing page (AGC_TMPL_PRCS_FL) to configure a template for use in My Processes.

Navigation

Enterprise Components >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 Display and Processing tab from the left panel category list, or click the Next or Previous buttons to navigate to the page.

Image: Activity Guide Composer - Display and Processing Page

This example illustrates the fields and controls on the Activity Guide Composer - Display and Processing page.

✕ Exit

Activity Guide Composer

39

Template KUTER01

Effective Date 2017-01-01

< Previous

Next >

Save

Introduction

General Information

Activity Guide Type

Security

Additional Actions

Sub Banner

Select Steps

Organize and Configure Steps

Display and Processing

Notifications

Review and Activate

Display and Processing

For this step, you will configure if this Activity Guide template is displayed in the My Processes page.

The My Processes page is a centralized page where a user can access all their activity guides processes.

This page will display the activity guide templates the user has Contributor Role access to. It can also be used to start the activity guide, review activity guide instances that are already in progress, and/or delete an instance of an activity guide if it is no longer needed.

If you decide to display your activity guide in My Processes, you can define a detailed description that will be displayed to the user and explain what the activity guide does. You can also associate an icon that will be displayed.

For processing controls, you can control whether the user can start and/or delete an instance of the activity guide, and the number of instances of the activity guide they are allowed to have.

*Display in My Processes

Yes

My Processes Description

This Activity Guide will allow an HR Administrator to follow a step-by-step process for termination

Template Icon

PS_APPR_TERMINATED_GRAY_S_FL

*Start in My Processes

Yes

*Delete in My Processes

Yes

Maximum Instances

10

Use this page to identify which template activity guides should be available from the My Processes page and the rules that apply for each activity guide.

Note: For users to access an activity guide from My Processes Page page, they must have a security role equal to one of the end user security roles specified for the activity guide template.

Display in My Processes

Select *Yes* to include this activity guide template in the My Processes pages. This will also open up the remaining fields on this page.

Note: The template must also be active to be available from the My Processes page.

My Processes Description

Enter a long description that introduces the user to the activity guide template. This long description displays on the content area of My Processes after the user has selected an activity guide template from the left panel.

This will be defaulted to the long description of the activity guide, but it can be modified.

Template Icon

(Optional) Select the icon, if any, that should appear next to the template name in the left panel of the My Processes page. The image will display below the field after it is selected.

Start in My Processes	Select <i>Yes</i> to enable the user to initiate an activity guide instance from the My Processes page.
Delete in My Processes	Select <i>Yes</i> to enable the user to delete an instance of an activity guide that is no longer needed.
Maximum Instances	Indicate the maximum number of activity guide instances a user can have in progress for this activity guide template. The page provides 0 as the default value, which is used to indicate that there is no limit on the number of instances the user can have in progress for this activity guide.

Activity Guide Composer - Notifications Page

Use the Activity Guide Composer - Notifications page (AGC_TMPL_NOTF_FL) to configure notifications for a template.

Navigation

Enterprise Components >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 Notifications tab from the left panel category list, or click the Next or Previous buttons to navigate to the page.

Image: Activity Guide Composer - Notifications Page

This example illustrates the fields and controls on the Activity Guide Composer - Notifications page.

Exit

Activity Guide Composer

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Template: OBDUSA1

Effective Date: 2020-01-01

Previous

Next

Save

Introduction

Visited

General Information

Visited

Activity Guide Type

Visited

Security

Visited

Additional Actions

Visited

Sub Banner

Visited

Select Steps

Visited

Organize and Configure Steps

Visited

Display and Processing

Visited

Notifications

Visited

Review and Activate

Not Started

Notifications

For this step, you have the ability to optionally use notifications.

The Category specified for this Activity Guide is **OnBoarding**. The notification options and settings are provided by default from the category. You have the ability to override the Notification Settings, enter the number days between reminder notifications and select a notification value for each notification type.

Enable Notifications

Yes

Notification Options

Email Notification: Yes

Push Notification: Yes

Notification Settings

Enable	Notification Type	Description	Notification	Preview Notification	Days Between Reminders
Yes	Initial	Notification that is sent when the step(s) first become available.	OnBoarding Initial Notification		
No	Overdue	Notification that is sent when the step(s) is incomplete and overdue.			
Yes	Reminder	Notification that is sent as a reminder when the step remains incomplete.	OnBoarding Reminder Notification		3

Use this page to manage notification settings for a template. Default values are provided from the category but can be overridden here.

Enable Notifications Swipe this option to *Yes* to enable notifications for this template.

Notifications must be enabled on the [Categories - Notifications Page](#) in order to enable notifications for this template.

Enable Swipe to *Yes* for those notification types you want to send to the assignees of this template. Options include *Initial*, *Overdue*, and *Reminder*.

Initial notifications will not be sent to the user that created the instance of the activity guide process. For more information on notifications, see [Understanding Notifications for Activity Guide Instance Steps](#).

Notification Select the notification that should be sent to the assignee. Notifications are configured on the [Define Notifications Page](#).



Preview Notifications button Click this button to access the [Preview <Notification Type> Notifications Page](#) and view the notification text or message that will be sent to an assignee.

Days Between Reminders Enter a positive number of days indicating when a reminder notification will be sent to an assignee.

Preview <Notification Type> Notifications Page

Use the Preview <Notification Type> Notification page (AGC_TMPL_NTPV_SCF) to view the notification text or message that will be sent to the users assigned to the steps.

Note: The name of the page will vary based on which notification type preview you select.

Navigation

Select the Preview link for a notification type.

Image: Preview <Notification Type> Notification Page

This example illustrates the fields and controls on the Preview Initial Notification page.

Preview Initial Notification

Description

OnBoarding Initial Notification

Push Notification

Text

Adtion Required. Initial Notification for OnBoarding Process

Email Notification

Priority

2-Medium

Subject

Adtion Required. Initial Notification for OnBoarding Process

Message

Hi %PERSONAL_DATA-NAME_DISPLAY%,

The OnBoarding process has steps that equire your attention. Please select the following link to complete the transaction.

%AG_URL%

Step(s) assigned to you:

%AG_DETAILS%

Contact your HR Administrator if there are any issues accessing the link or completing the steps.

Available Text Placeholders

6 rows

Value	Description
%AG_DETAILS%	Activity Guide Step Details
%AG_URL%	Activity Guide URL
%AG_USER%	Activity Guide User Description
%JOBCODE_TBL-DESCR%	Job Code Description

Displays the push or email message text that will be sent via a notifications. Changes to the message text must be done on the [Define Notifications Page](#).

Activity Guide Composer - Review and Activate Page

Use the Activity Guide Composer - Review and Activate page (AGC_TMPL_ACTIVE_FL) to activate or deactivate an activity guide template.

Navigation

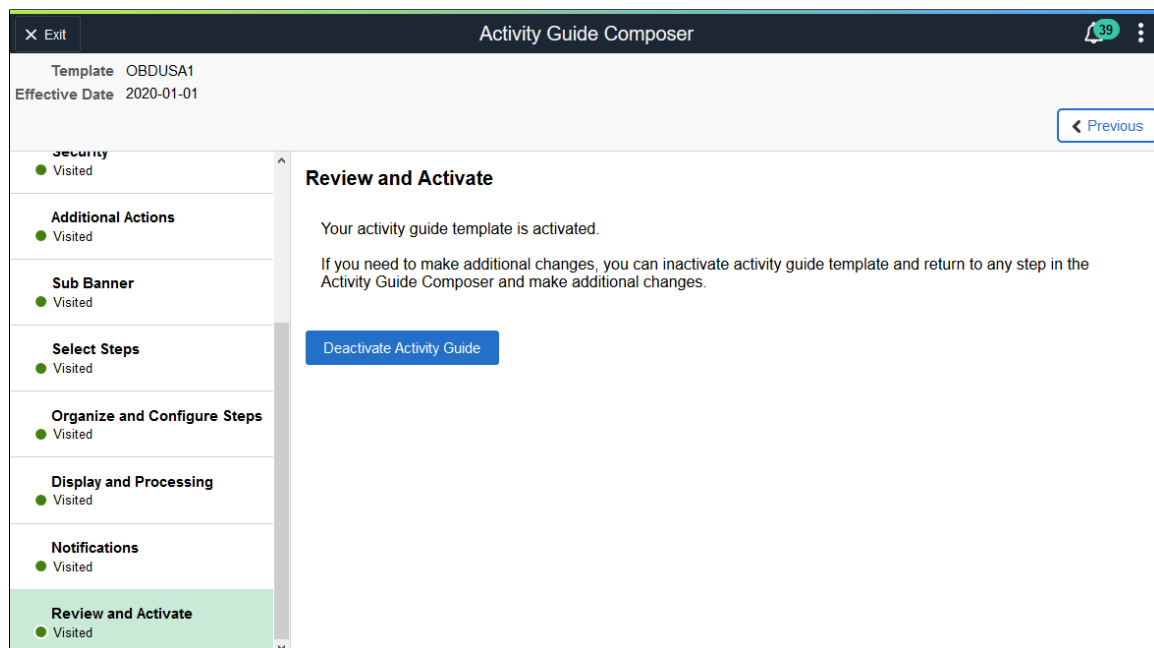
Enterprise Components >Activity Guide Composer >Templates >Activity Guide Template

- 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 Review and Activate tab from the left panel category list, or click the Next button to navigate to the page.

Image: Activity Guide Composer - Review and Activate Page

This example illustrates the fields and controls on the Activity Guide Composer - Review and Activate page.



Activate Activity Guide or Deactivate Activity Guide buttons These buttons are not active for the initial row of delivered templates.

When an activity guide is *Active*, the text at the top of the page informs you that your activity guide is active and will display the Deactivate Activity Guide button.

If an activity guide is *Inactive*, the text at the top of the page reminds you to activate your activity guide after you have completed all changes. It will also display the Activate Activity Guide button for you to change the status.

When you create a new activity guide template, the default value is inactive and the page will present you with the Activate Activity Guide button.

If you insert a new effective dated row or clone an existing activity guide template, the system will copy the same active status of that template. For example, if you insert a new effective dated row or clone an activity guide template with a status of *Inactive* (deactivated), the new row or cloned activity guide template will also be *Inactive*. However, if you insert a row or clone an activity guide template that has a status of *Active*, the new row or cloned activity guide template will be *Active*.

Note: If Step Definition Rule on the category is defined as Steps from a single component saves as single transaction, then the user will not be able to activate the template until an Action has been defined for the template that enables the end user to submit or complete the activity guide process.

Working with Activity Guide Notifications

Activity guide processes enable you to create and send notifications to the assignees associated with your activity guide templates. The PeopleSoft application delivers several notifications, or you can create your own.

To create message text for activity guides, use the Define Notifications (AGC_CAT_NOTIF_TBL) component.

To generate and review your notification processes, use the Process Notifications (AGC_PRC_NOTIF_RC) component.

These topics provide an overview of activity guide notifications for activity guide instance steps and discusses working with activity guide notifications.

Pages Used to Work with Activity Guide Notifications

Page Name	Definition Name	Usage
<u>Define Notifications Page</u>	AGC_CAT_NOTIF_DEF	Create activity guide notifications.
<u>Process Notifications Page</u>	AGC_PRC_NOTIF_RC	Process a batch or individual template notifications.

Understanding Notifications for Activity Guide Instance Steps

You can configure your activity guides to send notifications to those who are required to complete steps within a process. This is particularly beneficial when you are using a template that requires multiple users to complete different steps within an instance. While a primary user will trigger and own the activity

guide instance, there may be other users, such as a manager or administrator, that may need to react to one or more steps in an activity guide instance. These assignees are associated to steps and you can configure the system to send a push or email notification to the appropriate users at the appropriate time to complete their steps.

Notification Options and Types

You will enable and set notification defaults when you configure your categories. Although notifications can be overridden at the template level, notifications must be first enabled on the category. Templates that are assigned to categories that do not have notifications enabled will not be able to use this feature.

The system provides three notification types:

- Initial
- Overdue
- Reminder

You will create your own notification messages and link these to the notification types you select on either the [Categories - Notifications Page](#) or template [Activity Guide Composer - Notifications Page](#). You can choose one or all of these notification types, as well as select the options of whether you want to notify the assignees through push notification, email, or both. When notifications are enabled, you must select at least one notification type and option. Since notification types are provided by default from the category, you can override which types of notifications you want to use at the template level. A type does not need to be selected at the category level to be used in the template. However, options to use push or email notifications are determined at the category level.

When setting up notifications for your categories, you are required to select a notification priority or either *Initial* or *Overdue*.

The system will send notifications based on the priority you select for the category and in this order.

Initial Notification Priority and Considerations

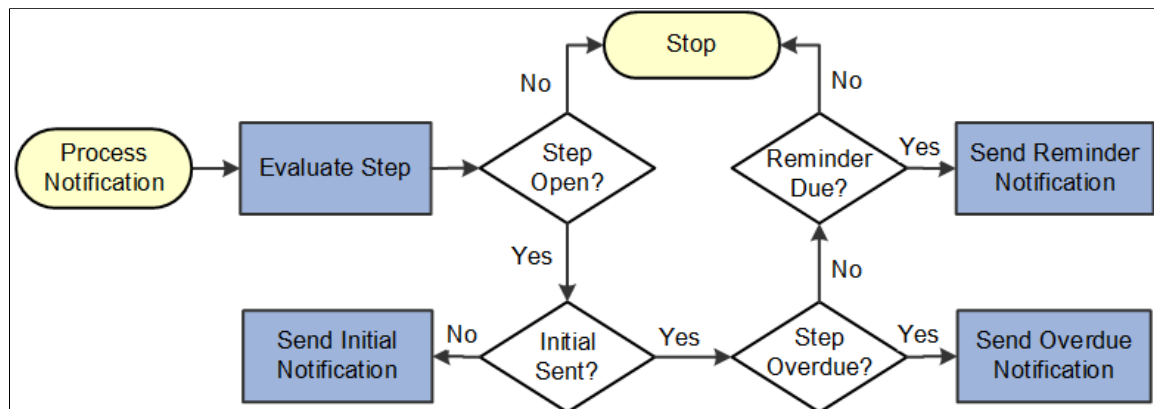
When you set the category to use *Initial* as the priority notification, the system will process notifications in this order:

1. Initial
2. Overdue
3. Reminder

Image: Process flow when Initial notifications are set as the priority

When an activity guide is initiated or a batch process for notification is run, the system will first evaluate the steps to see which are open.

- When an activity guide is first initiated, the system checks to see if steps are open and, if so, sends the initial notification.
- When a process notification is run, the system first checks for open steps and then checks to see if an *initial* notification has been sent. If it has not been sent, the initial notification is sent to the assignee. If an initial notification has already been sent, then the system checks to see if there are *overdue* steps. If the step is overdue, the overdue notification is sent. If it is not overdue, then the system checks to see if it is time to send a *reminder* notification, as specified on the template [Activity Guide Composer - Notifications Page](#).



Keep the following in mind when setting up notifications when you select *Initial* as the first priority:

- The system will *not* send an initial notification to the initiator of the instance. Initial notifications are sent only to assignees who are not the initiators of the instance and sent when their step is open and ready for them to complete.
- Initial notification is sent only once for each assignee.
- If the steps are overdue and the initial notification was not sent, the system will first send the initial notification.
- If initial notification has been sent and the step is not overdue but is due for a reminder, the system will send a reminder notification.
- If the steps are overdue and initial notification was sent, then the system will send an overdue notification.
- The system will not send duplicate notifications to an assignee on the same day for the same instance of an activity guide template.

Overdue Notification Priority and Considerations

When you set the category to use *Overdue* as the priority notification, the system will process notifications in this order:

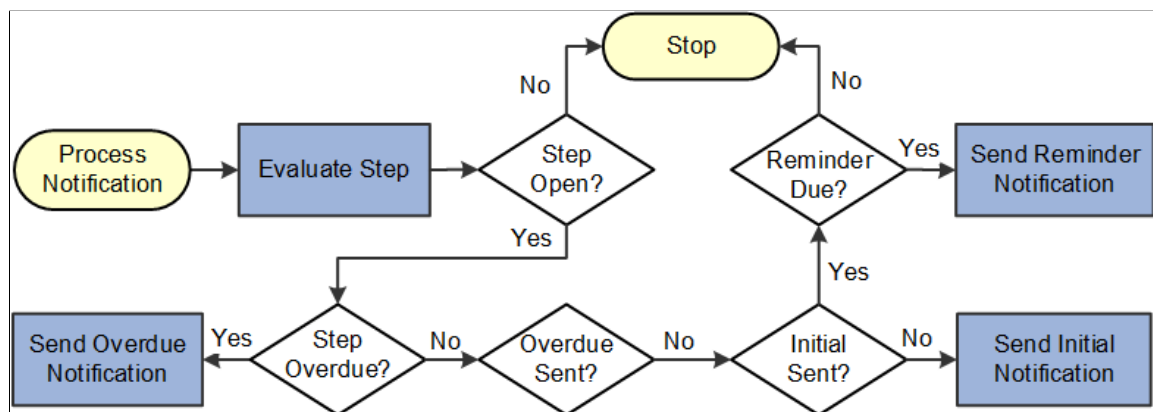
1. Overdue
2. Initial

3. Reminder

Image: Process flow when Overdue notifications are set as the priority

When an activity guide is initiated or a batch process for notification is run, the system will first evaluate the steps to see which are open.

- When an activity guide is first initiated, the system checks to see if steps are open and, if so, then check to see if a step is overdue. If it's not overdue, it sends the initial notification.
- When a notification process is run, the system first checks for open steps and then checks to see if any are *overdue*. If the step is overdue, and the notification hasn't been sent, the overdue notification is sent at this time. If it is not overdue, the system will then check to see if the *initial* notification was sent to the assignee and sends it if it hasn't already. If an initial notification has already been sent, then the system checks to see if it is time to send a *reminder* notification, as specified on the template [Activity Guide Composer - Notifications Page](#).



Keep the following in mind when setting up notifications when you select *Overdue* as the first priority:

- The system will *not* send an initial notification to the initiator of the instance. Initial notifications are sent only to assignees who are not the initiators of the instance and send when their step is ready for them to complete.
- If no overdue steps are found the first time for an assignee, then the initial notification is sent. Initial notification is sent only once for each assignee.
- If the steps are overdue when they become open, the system will send the overdue notification. Initial notification only be sent if the step is not overdue.
- Once the overdue notification is sent, the system will check if the step is due for reminder.
- The system will not send duplicate notifications to an assignee on the same day for the same instance of an activity guide template.

Define Notifications Page

Use the Define Notifications page (AGC_CAT_NOTIF_DEF) to create activity guide notifications.

Navigation

Enterprise Components >Activity Guide Composer >Define Notifications

Image: Define Notifications Page

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

Define Notifications

Activity Guide Category: ONBOARDING OnBoarding

Notification: OB_INITIAL

Notification Details ⓘ

*Description: OnBoarding Initial Notifications

Data Type Code: Customer Data

Push Notification

Text: Action Required: Initial Notification for OnBoarding Process

Email Notification

Priority: 2-Med

Subject: Action Required: Action Required for OnBoarding Process

Message:

Hi %PERSONAL_DATA-NAME_DISPLAY%,

The OnBoarding process has step(s) that require(s) your attention. Please select the following link to complete the transaction.

%AG_URL%

Step(s) assigned to you:

%AG_DETAILS%

Contact your HR Administrator if there are any issues accessing the link or completing the steps.

Available Text Placeholders

Value	Description
%AG_DETAILS%	Activity Guide Step Details
%AG_URL%	Activity Guide URL
%AG_USER%	Activity Guide User Description

Push Notification

Enter the text that should appear in the push notification alert.

Alert messages are sent to the assignees via the Notifications functionality and will appear on the banner once they have been processed (see [Process Notifications Page](#)).

Email Notification

Enter the priority, subject, and message of the email that will be sent to assignees.

The page displays the Available Text Placeholders section, which you can use to configure and derive your email text. These values come from the context fields defined in the Derived Contextual Data section on the [Categories - Context Page](#).

Use these reserved text placeholders for the following:

- **%AG_DETAILS%:** Display the steps in the activity guide that are assigned to the user receiving the email. Details will also identify if the step is overdue.
- **%AG_URL%:** Display a URL to access the fluid activity guide. The URL will appear as a hyperlink with the description of *link*.

%AG_USER%: Display the description of the operator id receiving the email. Typically, the operator description is the users name.

Related Links

[Categories - Notifications Page](#)

[Activity Guide Composer - Notifications Page](#)

Process Notifications Page

Use the Process Notifications page (AGC_PRCN_NOTIF_RC) to process a batch or individual template notifications.

Navigation

Enterprise Components >Activity Guide Composer >Process Notifications

Image: Process Notifications Page

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

Process Notifications

Run Control ID: PS Report Manager Process Monitor Run

Input Parameters

☐ All Activity Guide Categories

Specific Categories and Templates

Activity Guide Category	Template	Description		
ONBOARDING	OBDBL1	Day 1 Onboarding	+	-
ONBOARDING	OBDDSA1	OnBoarding for USA	+	-

Processes should be run on a regular basis to capture any new or upcoming notifications that need to be sent.

All Activity Guide Categories

Select to indicate that the system should run and process notifications for all templates. By selecting this check box, the remaining fields on the page become unavailable.

Activity Guide Category

Select the categories for templates for which you want to run and process notifications.

Template

Enter the templates for which you want to run and process notifications. If you do not enter a template, notifications will be generated for all templates within the category specified.

Setting Up Activity Guide Utilities for Template Assignment

The Activity Guide Composer enables organizations to assign an activity guide template to a person based on a set of rules you define using the Template Assignment feature.

For example, the OnBoarding feature enables the administrator to assign templates using a default template or by using the Template Assignment feature, where the system will automatically assign the OnBoarding activity guide. The OnBoarding administrator determines which type of template assignment feature on the OnBoarding Installation page.

To set up Activity Guide Utilities for auto Template Assignment, use the Search Key Source Tables (AGC_SRCHREC_TBL), Search Keys (AGC_SRCHKEY_TBL), Template Assignment (AGC_TMA_TBL), and Test Template Assignment (AGC_TMA_TEST) components.

These topics discuss setting up Activity Guide Utilities for auto Template Assignment.

Pages Used to Set Up Activity Guide Utilities for Auto Template Assignment

Page Name	Definition Name	Usage
Search Key Source Tables Page	AGC_SRCHREC_TBL	Identify source criteria fields that are derived from the key structure of a source table.
Search Keys Page	AGC_SRCHKEY_TBL	Identify search key source configurations.
Template Assignment - General Page	AGC_TMA_TBL1	Enter search keys for the template assignment definition
Template Assignment - Template Assignment Page	AGC_TMA_TBL2	Enter template assignment definitions.
Edit Search Key Values Page	AGC_TMA_TBL2_SEC	Enter search key values for a template.
Test Template Assignment Page	AGC_TMA_TEST	Test and validate the template assignment process.

Search Key Source Tables Page

Use the Search Key Source Tables page (AGC_SRCHREC_TBL) to identify source criteria fields that are derived from the key structure of a source table.

Navigation

Enterprise Components >Activity Guide Composer >Activity Guide Utilities > Search Key Source Tables >Search Key Source Tables

Image: Search Key Source Tables Page

This example illustrates the fields and controls on the Search Key Source Tables page.

Criteria Field	Field Long Name	Criteria Type
EMPLID	Empl ID	Required
EMPL_RCD	Empl Record	Required
EFFDT	Effective Date	Derived
EFFSEQ	Effective Sequence	Derived

Identify source tables that you will use when creating auto template assignment search keys on the [Search Keys Page](#). When you add the source table to this page, the page displays the criteria fields associated with this source table.

Criteria Type

The system uses the criteria fields to retrieve data from the source table.

Criteria fields with the type of *Required* need to have values specified in order to retrieve data.

Criteria fields with the type of *Derived* indicate that the system will derive the value based on common criteria utilized in the system. For example, *EFFDT* will be derived by retrieving the maximum effective dated row as of the date specified or *EFFSEQ* will be derived by retrieving the maximum effective sequence row as of the date specified.

Search Keys Page

Use the Search Keys page (AGC_SRCHKEY_TBL) to identify search key source configurations.

Navigation

Enterprise Components >Activity Guide Composer >Activity Guide Utilities > Search Keys >Search Keys

Image: Search Keys Page

This example illustrates the fields and controls on the Search Keys page.

The screenshot shows the 'Search Keys' page with the following configuration:

- Search Key:** JOBCODE
- *Description:** Job Code
- Search Key Source:**
 - *Source Table: JOB (EE Job History)
 - *Source Field: JOBCODE (Job Code)
 - Field Edit Type: Prompt Table
- Search Key Prompt:**
 - *Prompt Table: JOBCODE_TBL (Job Codes)
 - *Prompt Key 1: SETID (Set ID)
 - Prompt Key 2: JOBCODE (Job Code)
 - Prompt Key 3: (empty)
 - Source Table: JOB (EE Job History)
 - *Source Foreign Key 1: SETID_JOBCODE (Job Code Set ID)
 - Source Foreign Key 2: JOBCODE (Job Code)
 - Source Foreign Key 3: (empty)

The system uses the search keys prompt configuration when you define a Template Assignment definition (see [Template Assignment - General Page](#)). This ensures that the user enters valid search key values.

Search Key Source

Source Table and Source Field

Identify the search key source by entering a source table and field that will be used to retrieve the search key value.

Valid source tables are defined using the [Search Key Source Tables Page](#). They are defined with an edit table that controls the valid values that can be selected for a field.

Field Edit Type

Displays the field edit type after you enter the Source Field value. Values are *Prompt Table*, *Translate Table Edit* and *Yes/No*. When the source field is a *Prompt Table*, the page displays the Search Key Prompt section of the page.

Search Key Prompt

This section becomes available when the Source Field value you entered on this page is a *Prompt Table* field edit type.

The search key prompt configuration is provided by default based on the source field you selected from the source table. The field edit type on the source table determines the values populated in the prompt and source foreign key fields, if any.

The Prompt Table field edit type supports prompt tables that have no more than three keys defined, excluding the EFFDT field. If a prompt table has more than three keys, then you can specify a different record view to retrieve valid values for the search key.

Template Assignment - General Page

Use the Template Assignment - General page (AGC_TMA_TBL1) to enter search keys for the template assignment definition.

Navigation

Enterprise Components >Activity Guide Composer >Activity Guide Utilities > Template Assignment >General

Image: Template Assignment - General Page

This example illustrates the fields and controls on the Template Assignment - General page.

General | Template Assignment

Template Assignment KUTEMPLATE01

*Description Template Assignment for Onboarding Events

*Activity Guide Category ONBOARDING OnBoarding

Last Update User ID RCHANNING

Last Update Date/Time 06/26/2017 6:49:23PM

Search Keys ?

*Search Key	Description	Source Foreign Key 1	Source Foreign Key 2	Source Foreign Key 3		
REG_REGION	Regulatory Region	REG_REGION			+	-
COMPANY	Company	COMPANY			+	-

Activity Guide Category

Select the activity guide category for which you will be performing auto template assignment. Valid values are defined using the [Categories - Category Page](#).

Search Keys

Enter up to 15 search keys for your template assignment definition. Valid values are defined on the [Search Keys Page](#).

Each search key will display as columns in the order you indicate here on the [Template Assignment - Template Assignment Page](#), which is where you will specify the criteria that should be met to assign an activity guide template to an individual.

Template Assignment - Template Assignment Page

Use the Template Assignment - Template Assignment page (AGC_TMA_TBL2) to enter template assignment definitions.

Navigation

Enterprise Components >Activity Guide Composer >Activity Guide Utilities > Template Assignment >Template Assignment

Image: Template Assignment - Template Assignment Page

This example illustrates the fields and controls on the Template Assignment - Template Assignment page.

The screenshot shows the 'Template Assignment' tab selected. Below the tabs, the 'Template Assignment' is 'KUTEMPLATE01' and the 'Description' is 'Template Assignment for Onboarding Events'. Below this is the 'Template Assignment Table' with a search icon and a pagination control showing '1-3 of 3'. The table has the following columns: Priority, Template, Description, Edit, Regulatory Region, Company, and two empty columns with '+' and '-' icons. The data rows are:

Priority	Template	Description	Edit	Regulatory Region	Company		
1	OBDUSA1	OnBoarding for USA		USA	GBI	+	-
2	OBDKAN1	OnBoarding for Canada		CAN		+	-
3	OBDSTND	Standard OnBoarding				+	-

The template assignment definition is a look up table that associates activity guide templates to specific search key values. For example, a template assignment definition for employee OnBoarding will have search keys based on the job data related to the employee being hired. The system will retrieve the search key values for that employee and then find the highest priority (lowest number) template where all search key values match the employee's values to find the activity guide template that should be assigned to the employee.

Important! It is recommended that a low order priority template be entered as a default template to get assigned in the event that no higher priority criteria matches. This default template should have no values assigned to the search keys.

Priority

Organize and control the priority of certain search key value combinations that should take precedence over others. The system will compare the search key values with those of the employee's in priority order and assign the template upon the first match. The lowest number represents the highest priority.

Edit icon

Click this icon button to access the [Edit Search Key Values Page](#) to enter the values for the search keys. These values will appear in the search key columns after you have added them on the secondary page.

Edit Search Key Values Page

Use the Edit Search Key Values page (AGC_TMA_TBL2_SEC) to enter search key values for a template.

Navigation

Click the Edit icon button on the [Template Assignment - Template Assignment Page](#).

Image: Edit Search Key Values Page

This example illustrates the fields and controls on the Edit Search Key Values page.

For the template specified, enter the search key values that need to be satisfied to assign the template.

This page displays the search keys that you entered on the Template Assignment - General Page.

Test Template Assignment Page

Use the Test Template Assignment page (AGC_TMA_TEST) to test and validate the template assignment process.

Navigation

Enterprise Components > Activity Guide Composer > Activity Guide Utilities > Test Template Assignment > Test Template Assignment

Image: Test Template Assignment Page

This example illustrates the fields and controls on the Test Template Assignment page.

Source Table	Criteria Field	Field Long Name	Criteria Field Value
JOB	EMPLID	Empl ID	KU0005
JOB	EMPL_RCD	Empl Record	0

The template administrator can test a template by performing a mock transaction, like a hire, without actually applying the transaction to the system.

When you perform a look up against the Template Assignment definition table, the system retrieves the values of each search key based on the required criteria fields that you defined for the source table specified for the search key. The process then uses the values of the search keys to find a match in the Template Assignment definition table to assign the activity guide template.

Test Template Assignment

Template Assignment Enter a definition value to test a template assignment. Valid value are created using the [Template Assignment - General Page](#).

Required Fields to Retrieve Search

After entering a template assignment value, the page will display the search keys and required fields for this template assignment in this section. The system will use these to retrieve information for this template assignment. The required fields are derived from the search key source table specified on the [Search Keys Page](#).

Criteria Field Value Enter the values for the required fields to retrieve the search keys to test a template assignment.

Assign Template and Template Select the Assign Template button to see the template that is assigned based on your values.

Related Links

[Template Assignment - Template Assignment Page](#)

Setting Up Activity Guide Utilities for Contextual Data

The system uses contextual data and fields to retrieve and display data in an activity guide from a specified source table. The PeopleSoft application delivers some contextual data but you can also add your own.

To set up activity guide contextual data, use the Contextual Data (AGC_CTXDTA_TBL) component.

These topics discuss setting up activity guide context data.

Pages Used to Set Up Activity Guide Utilities for Contextual Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Contextual Data - Definition Page	AGC_CTXDTA_TBL1	Define definitions that will derive data based on the context fields defined for an activity guide category. The derived contextual data can be displayed in the fluid sub banner, page text, or, if its a date field, to configure the start and due date of a step.

Page Name	Definition Name	Usage
Contextual Data - Test Page	AGC_CTXDTA_TBL2	Test and validate contextual data.

Contextual Data - Definition Page

Use the Contextual Data - Definition page (AGC_CTXDTA_TBL1) to define definitions that will derived data based on the context fields defined for an activity guide category. The derived contextual data can be displayed in the fluid sub banner, page text, or, if its a date field, to configure the start and due date of a step.

Navigation

Enterprise Components >Activity Guide Composer >Activity Guide Utilities > Contextual Data >Definition

Image: Contextual Data - Definition Page

This example illustrates the fields and controls on the Contextual Data - Definition page.

DefinitionTest

Contextual Data

EE_JOB_DATA

*DescriptionEmployee Job Data

Short DescriptionEE Job Data

Long DescriptionThis contextual data definition will retrieve employee job data for activity guide that have EMPLID and EMPL_RCD as context keys.

*Source TableJOB

Data Type CodeSystem Data

Required Context Fields

Required Context Field	Field Long Name		
EMPLID	Empl ID	+	-
EMPL_RCD	Empl Record	+	-

Contextual Data Fields

Field Id	Source Field	Description	Short Description	Related Data Type	Related Data Table	Related Data Field		
001	JOBCODE	Job Code	Job Code	None			+	-
002	JOBCODE	Job Code Description	Job Code Descr	Table	JOBCODE_TBL	DESCR	+	-
003	HIRE_DT	Hire Date	Hire Date	None			+	-
004	POSITION_NBR	Position Number	Position Number	None			+	-

The system uses the required context fields to retrieve data from the specified source table. Therefore, the required context fields are typically the keys of the table that enable you to retrieve a row of data from the source table.

Description

Enter a description for the contextual data. This is the value that will appear in the Contextual Data field on the Categories - Context Page.

Source Table

Identify the record source for the context fields.

Data Type Code

Displays if it is *System Data* or *Customer Data*.

The PeopleSoft application delivers the following system contextual data values:

- *EE_JOB_DATA*: Retrieves employee job data that have EMPLID and EMPL_RCD as context keys.
- *EE_PERSON_DATA*: Retrieves employee person data.

Required Context Fields

Use this section to define the required context fields that need to exist in the activity guide category in order to utilize the contextual data fields. This ensures that the contextual data fields can be retrieved based on the values assigned to the context data fields.

Contextual Data Fields

Contextual data fields are fields that can be retrieved from the source table based on the values of the required context fields. They are defined by a field id, source field description, short description, and related data type.

Field Id and Source Field

Enter a field and its position within the record.

Related Data Type, Related Data Table, and Related Data Field

Select either *None* or *Table*.

The related data type value of *Table* displays the fields Related Data Table and Related Data Field, which enable you to retrieve related data (e.g. Description) from another table based on the value of the source field. For example, a contextual data field could have the source field of *JOB_CODE* and related data type specified as *Table* where the table is *JOB_CODE_TBL* and the related data field is *DESCR*.

To retrieve the related data for the value of the source field, all the keys of the related data table need to exist on the source table.

Contextual Data - Test Page

Use the Contextual Data - Test page (AGC_CTXDTA_TBL2) to test and validate contextual data.

Navigation

Enterprise Components >Activity Guide Composer >Activity Guide Utilities > Contextual Data >Test

Image: Contextual Data - Test Page

This example illustrates the fields and controls on the Contextual Data - Test page.

Definition

Test

Contextual Data

EE_JOB_DATA

Description

Employee Job Data

Required Context Fields to Test ?

Required Context Field

Field Long Name

Value

EMPLID

Empl ID

KU0046

EMPL_RCD

Empl Record

0

*As Of Date

01/01/2020

*Contextual Data Field Id

Job Code Description

Test Contextual Data

Test Result

Senior Accounting Manager

- Required Context Field

Specify the required context fields to test and validate contextual data. These fields will default from the required context fields you specified on the [Categories - Category Page](#).
- Value

Enter the value the system should use to retrieve data for the contextual data field you are testing.
- As of Date

Enter the date for when you want to view the data test results.
- Contextual Data Field Id

Select which field you want to search. Valid values come from the contextual data fields you defined on the [Categories - Category Page](#).
- Test Contextual Data and Test Results

Click the Text Contextual Data button to have the system test the retrieval of the contextual data you entered. Results are shown in the Test Results field.

Deploying and Managing Activity Guide Processes

The Activity Guide Composer provides your organization various means on how you can deploy and access activity guide processes. Many business processes deliver pages that workers access to complete a transactional process. The Activity Guide Composer provides the My Processes page as a centralized location where organizations can deploy their activity guide templates to their users without having to create a custom page. The Activity Guide Tiles page enables you to create custom tiles to grant assignees easy access to an activity guide. With these features, users can access activity guides to which they have been granted access to start new instances of activity guides, review and access activity guide instances already in progress, take action on individual steps to which they have been assigned, and, if given access, start or delete instances of a process.

These topics discuss using the My Processes and Activity Guide Tile pages.

The following video provides an overview of Activity Guide Composer multi user guides and creating tiles for the users:



[Image Highlights, PeopleSoft HCM Update Image 31: Activity Guide Composer-Multi User Guides](#)

Pages Used to Deploy and Manage Activity Guides

Page Name	Definition Name	Usage
My Processes Page	AGC_MYAG_DETAIL_FL	View and manage activity guide processes.
Start Process Page	AGC_START_AG_FL	Deploy an activity guide process instance.
Start Process - Questionnaire Page	AGC_START_AG_FL	Answer questions that determine if certain steps will appear in the activity guide transaction process.
Activity Guide Tiles Page	AGC_TILE_TBL1	Create and publish activity guide tiles for assignees
<Activity Guide Tile Review> Page	AGC_REVIEW_AG_FL	Access activity guide instances through a custom tile.

My Processes Page

Use the My Processes page (AGC_MYAG_DETAIL_FL) to view and manage activity guide processes.

Navigation

Enterprise Components >Activity Guide Composer >My Processes

Image: My Processes Page

This example illustrates the fields and controls on the My Processes page.

Empl ID/Description	Empl Record/Description	Status	Delete	Continue
00012 Malay Sia	0 Accountant	Completed 0 of 8 Steps		
KU0099 Tommy Ellis	0 Receiving Manager	Completed 0 of 8 Steps		

The My Processes fluid pages allow the user to start or access an in progress activity guide. When starting the activity guide, the user will enter information and be transferred into a fluid activity guide.

My Processes Page Layout

The My Processes page layout shows a list of activity guide process templates in the left pane to which you have been granted access and that meet the following requirements set up by the template administrator:

1. You have been granted the security access role as defined for the *End User* security type for this template on the [Activity Guide Composer - Security Page](#).
2. The template is active and has been configured to display on the My Processes pages on the [Activity Guide Composer - Display and Processing Page](#).

Activity guide templates are listed in alphabetical order. Each time you return to the My Processes page, the system will select, by default, the first activity guide template in the list. Select an activity guide template from the left pane and the main content page will be updated with details about the selected template. The left pane will also display the number of activity guide processes currently in progress for a template. The number of instances you can initiate per activity guide is set by the template administrator.

My Processes Page Elements

The activity guide description, start, and delete options will vary by activity guide template and are set on the [Activity Guide Composer - Display and Processing Page](#) of the template.

Start Process button

Click this button to access the [Start Process Page](#) to initiate a new instance of the activity guide for a person.

The capability to initiate an activity guide from the My Processes page is determined on the [Activity Guide Composer - Display and Processing Page](#). If the Start in My Processes is not set to *Yes* for an activity guide template, then this button will not be available for this activity guide type.

Note: If you have met the maximum number of instances you can have in progress for an activity guide, this button will still display. However, when you click the button, the system will inform you that you cannot start another instance for this activity guide because the maximum number has been met.

Administrators can set a different maximum instance number of for each activity guide template. Hence, although you may have reached your maximum instances for one activity guide, you may not have met it for others.

In Progress

This section displays a list of activity guide process instances you have started but not completed. The fields displayed are the context key fields specified for the category of the template (see [Categories - Context Page](#)).



Delete icon button

Click this button to delete this activity guide process instance.

This button displays for activity guide templates where the template administrator has granted the user deleting capabilities on the My Processes page (see [Activity Guide Composer - Display and Processing Page](#)).

**Continue** icon button

Click this button to access this activity guide process instance and view or complete the activity guide.

Start Process Page

Use the Start Process page (AGC_START_AG_FL) to deploy an activity guide process instance.

Navigation

Click the Start Process button from the [My Processes Page](#).

Image: Start Process Page

This example illustrates the fields and controls on the Start Activity Guide page.

Note: Fields on this page vary based on the setup of the activity guide category associated with this activity guide template and are defined on the [Categories - Context Page](#).

Click the Next button to either access the Questionnaire page or start the activity guide.

Start Process - Questionnaire Page

Use the Start Process – Questionnaire page (AGC_START_AG_FL) to answer questions that determine if certain page steps will appear in the activity guide transaction process.

Navigation

Click the Next button on the [Start Process Page](#).

Note: Not all activity guide templates are set up to display the questionnaire. Some will take you directly to the activity guide transaction process pages and steps.

Image: Start Process - Questionnaire Page

This example illustrates the fields and controls on the Start Process - Questionnaire page.

Questions on this page vary based on the setup of the template step configuration, which is defined on the [Configure Attributes Page](#).

Switch to *Yes* to have steps related to that question appear in the activity guide process. Select *No* to hide the step within the activity guide process, since it is not needed.

Click Previous to return to the [Start Process Page](#) to update any parameters.

Click Next to access the activity guide transaction process pages. The My Processes fluid pages allow the user to start or access an in progress activity guide. When starting the activity guide, the user will enter information and be transferred into a fluid activity guide. When a user accesses an activity guide that is in progress, the user will be transferred into a fluid activity guide.

Related Links

[Managing Activity Guide Templates](#)

Activity Guide Tiles Page

Use the Activity Guide Tiles page (AGC_TILE_TBL1) to create and publish activity guide tiles for assignees.

Navigation

Enterprise Components >Activity Guide Composer >Activity Guide Utilities >Activity Guide Tiles

Image: Activity Guide Tiles Page (1 of 2)

This example illustrates the fields and controls on the Activity Guide Tiles page (1 of 2).

Activity Guide Tiles

Tile MGR_OFFBOARDING

Tile Information

*Title

*Category

Define Activity Guide Page Controls

View Activity Guides Yes

Start Activity Guide

Root Package Id

Path

Start Class Id

Start Method

Max Activity Guides

Delete Activity Guides

Image: Activity Guide Tiles Page (2 of 2)

This example illustrates the fields and controls on the Activity Guide Tiles page (2 of 2).

Identify Activity Guide Templates

Template Assignment

Selected Templates

1-2 of 2

Template	Description		
OFBINVO	Involuntary OffBoarding	+	-
OFBVOL1	Voluntary OffBoarding	+	-

Define Tile Attributes

Image Name

PS_OFFBOARD_MSS_L_FL



Tile Security Roles

1-1 of 1

Role Name	Description		
OffBoarding Manager	OffBoarding Manager User	+	-

Publish to Fluid Homepages

1-1 of 1

Homepage	Published	Publish Tile		
Manager Self Service	No	Publish Tile	+	-

Use this page to configure a tile for easy access to activity guide instances. This is particularly useful when there is not a delivered business process page from which to access an activity guide process, or you are using a template that allows multiple users to complete different steps within a process. For example, an employee may initiate a process from a delivered transactional page, such as the OnBoarding pages. However, if a manager or administrator is assigned to complete one of these steps, this tile provides a means for them to take action on this activity guide process that he or she did not initiate.

Important! A user creating tiles needs to have access to create a new content reference for the tile and update the fluid homepage. Therefore, you must assign the *Portal Administrator* role to those users creating tiles through this page.

Tile Information

Tile

Displays the unique code you entered to identify the tile.

Title

Enter the title that should appear on the tile. Enter up to 30 characters.

Category

Select the category that should be associated with this tile. This will determine which template you can select later on this page. Categories are defined using the Activity Guide

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Composer - Categories component (see [Setting Up Activity Guide Categories](#))

Define Activity Guide Page Controls

View Activity Guides	Displays <i>Yes</i> to indicate that the a tile will always allow a user to view activity guides associated it. This is the default value.
Start Activity Guide	Select <i>Yes</i> to enable the user to initiate an activity guide instance from the new tile. By selecting <i>Yes</i> , the package, path, class, method, and maximum fields become available.
Root Package Id	Select the ID of the application package that contains the method to be invoked at instance creation.
Path	Select the names of each subpackage in the application class hierarchy that defines the location of the application class.
Start Class Id	Enter the name of the application class that contains the method to be invoked at instance creation.
Start Method	Enter the method name in the application class ID to be invoked to initialize the activity guide instance.

Note: The logic in the start method can be designed to derive all the necessary information to start an activity guide or generate a URL to a page that enables the user to enter the necessary information to start an activity guide.

If the tile is defined with template assignment, then this method needs to have the appropriate logic to call the Template Assignment API to identify the activity guide template that will be use to start the activity guide.

Max Activity Guides (maximum activity guides)

This option is available when Start Activity Guide is set to *Yes*.

Indicate the maximum number of activity guide instances a user can have in progress for this activity guide template. For example, if you enter 3 in this field and the user has three in progress activity guides, then the user will not be able to start a fourth. However, if the user has access to delete an activity guide or if one of the activity guides reaches a completed status, then he or she will be able to start another activity guide instances.

Delete Activity Guides

Select *Yes* to enable the user to delete an instance of an activity guide that is no longer needed.

Identify Activity Guide Templates

Use this section to select either the template assignment or templates to be used for this tile. Valid values are those that are associated with the Category value entered at the top of this page.

Template Assignment

Select an ID, which defines the rules for automatically assigning templates to workers. For more information on the Template Assignment process, see [Setting Up Activity Guide Utilities for Template Assignment](#).

Template

Select one of more template processes that are available through this tile.

Define Tile Attributes**Image Name**

(Optional) Select the icon, if any, that should appear in the tile. The image will display below the field after it is selected.

If nothing is selected, then the default black and white Oracle PeopleSoft image is displayed in the tile.

Tile Security Roles

Enter the security roles that should have access to this tile. The role should be assigned to the user's profile. If you are using multiple assignees for a template and want to use the Activity Guide Tile feature, you will need to ensure that those who are identified as assignees also have the security role entered here.

For information on where to identify assignees, see [Categories - Assignees Page](#).

Publish to Fluid Homepages

Select the homepages to which you want to add your tile.

Published and Publish Tile button

The Published field displays whether you have published the tile to the homepage.

Click the Publish Tile button to add the tile to the homepage you indicated. If you do not publish a tile, it will not appear on the homepage.

<Activity Guide Tile Review> Page

Use the <Activity Guide Tile Review> page (AGC_REVIEW_AG_FL) to access activity guide instances through a custom tile.

Note: The title of the tile and review page is based on the Title value you entered on the [Activity Guide Tiles Page](#).

Navigation

Access the homepage to which you published your custom activity guide tile, then click the tile.

Image: Example of a Custom Activity Guide Tile

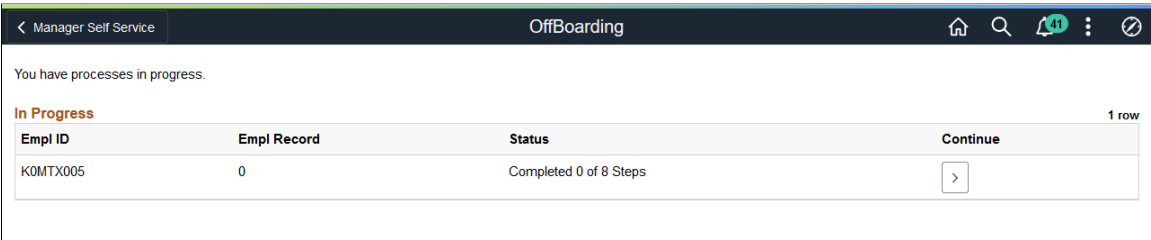
This example illustrates an example of a custom tile created using the Activity Guide Tiles page.



The tile will display the number of activity guide processes in progress.

Image: <Activity Guide Tile Review> Page

This example illustrates the activity guide tile review page.



This page displays when the user has one or more activity guides in progress.

If the activity guide tile displays 0 and the user has access to start the activity guide, they will not see this page. The Start method will be called. The start method may transfer the user to a page to enter information to start the activity guide or the method may have logic to transfer the user directly into the fluid activity guide.

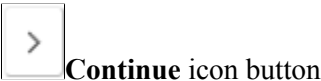
Status

Displays the progress status of the activity guide. If all the steps are completed, the in progress activity guide instance will no longer display on this page. However, the page will display a completed activity guide instance if the tile is defined to allow the user to delete the activity guide on the [Activity Guide Tiles Page](#).



Click this button to delete this activity guide process instance.

This button displays for activity guide templates where the template administrator has granted the user deleting capabilities on the [Activity Guide Tiles Page](#).



Click this button to access this activity guide process instance and view or complete the activity guide.

Chatbot Integration Framework

Understanding Chatbots

A chatbot is a program, which simulates interaction with users like a real person via a chat interface. This is powered by certain rules which allows it to understand the requirement or data requested by the requester and then the program fetches the data or carries out a transaction. Chatbots are most useful for mundane and repetitive business transactions that involves a predictable conversation path. For example, ordering a pizza or checking your leave balance.

It brings in efficiency and cost savings to the business as it can service multiple requests at the same time on a large scale.

For more information on chatbots, see

<https://www.oracle.com/solutions/chatbots/what-is-a-chatbot/>

PeopleSoft delivers setup pages which can be used to develop and deploy chatbots on PeopleSoft systems. Oracle Digital Assistant (ODA) is leveraged to enable chatbots on PeopleSoft systems. For more details on Oracle Digital Assistant please refer to:

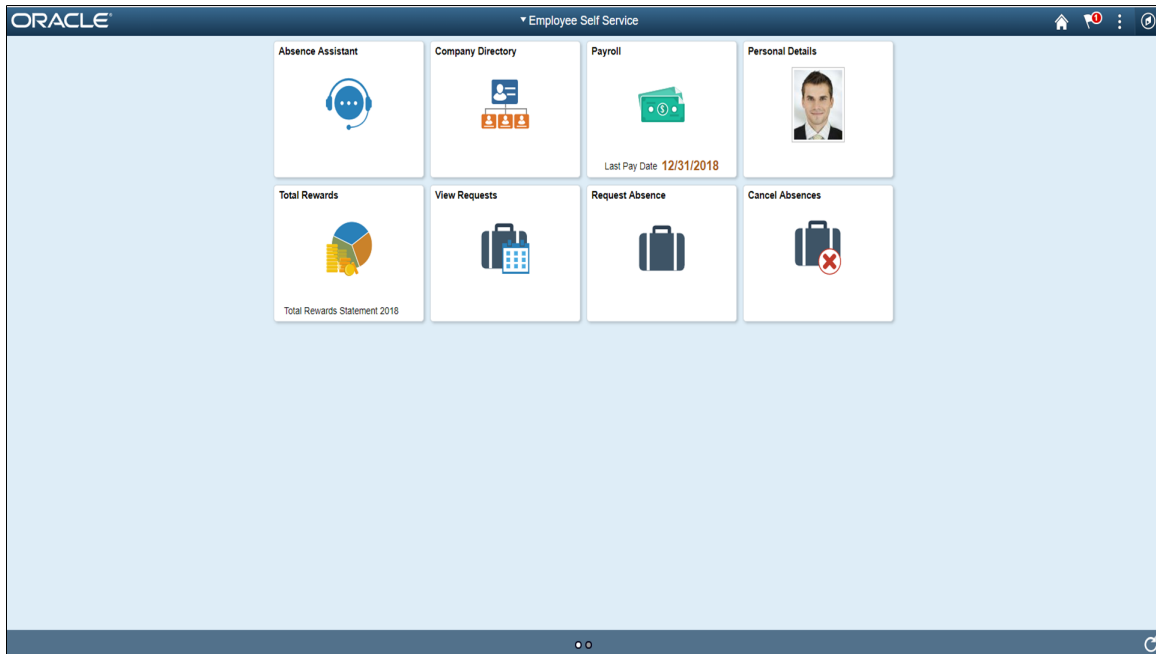
<https://cloud.oracle.com/digital-assistant>

However, if your ODA instance version is below 19.10, then refer the documentation for [PeopleSoft Chatbot Integration Framework for ODA instance below 19.10 version](#).

Chatbots can be configured as Tiles or as a Widget to PeopleSoft Application pages.

Image: Chatbot delivered as a Tile on a Desktop

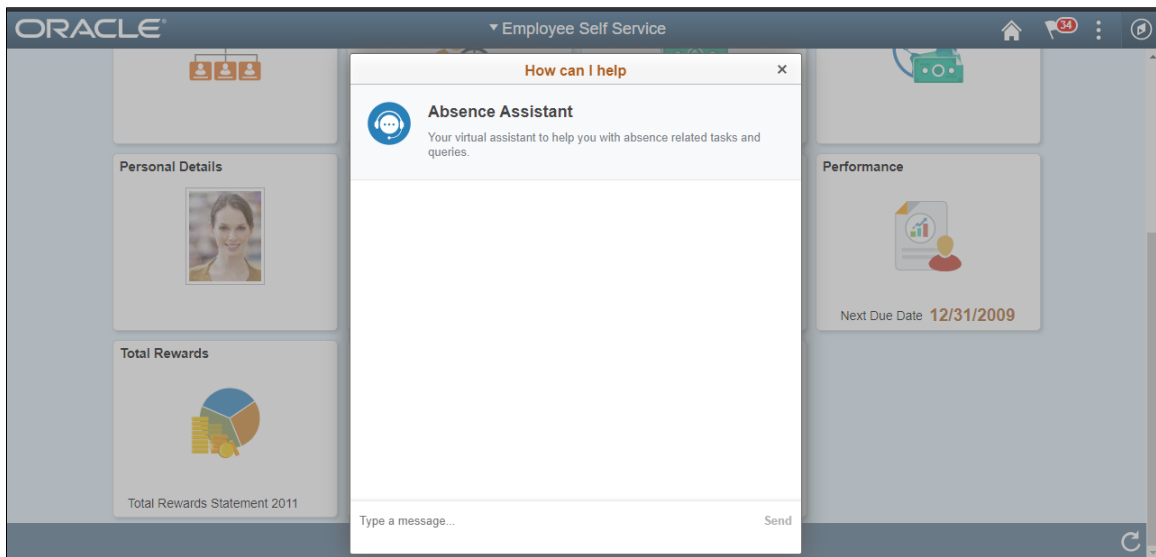
This image illustrates the chatbot tile (Absence Assistant) on a desktop



Click the tile to launch the chatbot. You can start a conversation with the chatbot though the chat window.

Image: Chat Window

This image illustrates the chat window of a chatbot.



The chat client window on a desktop device is launched as a modal from the tile which the user can use to chat with the chatbot. However on a mobile device, the chat window is displayed as a standard page.

Image: Chatbot tile on a mobile device

Chatbot tile on a mobile device

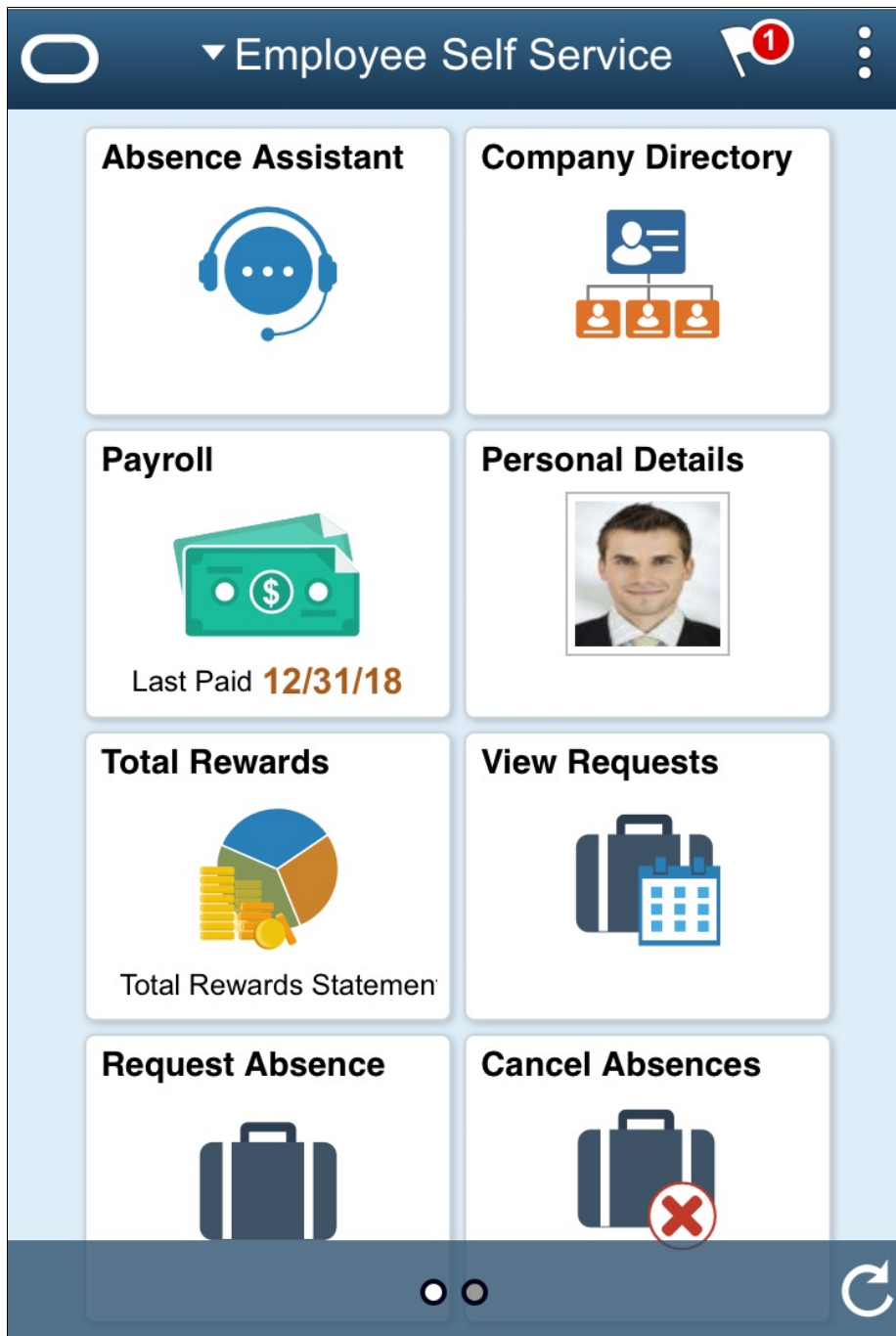
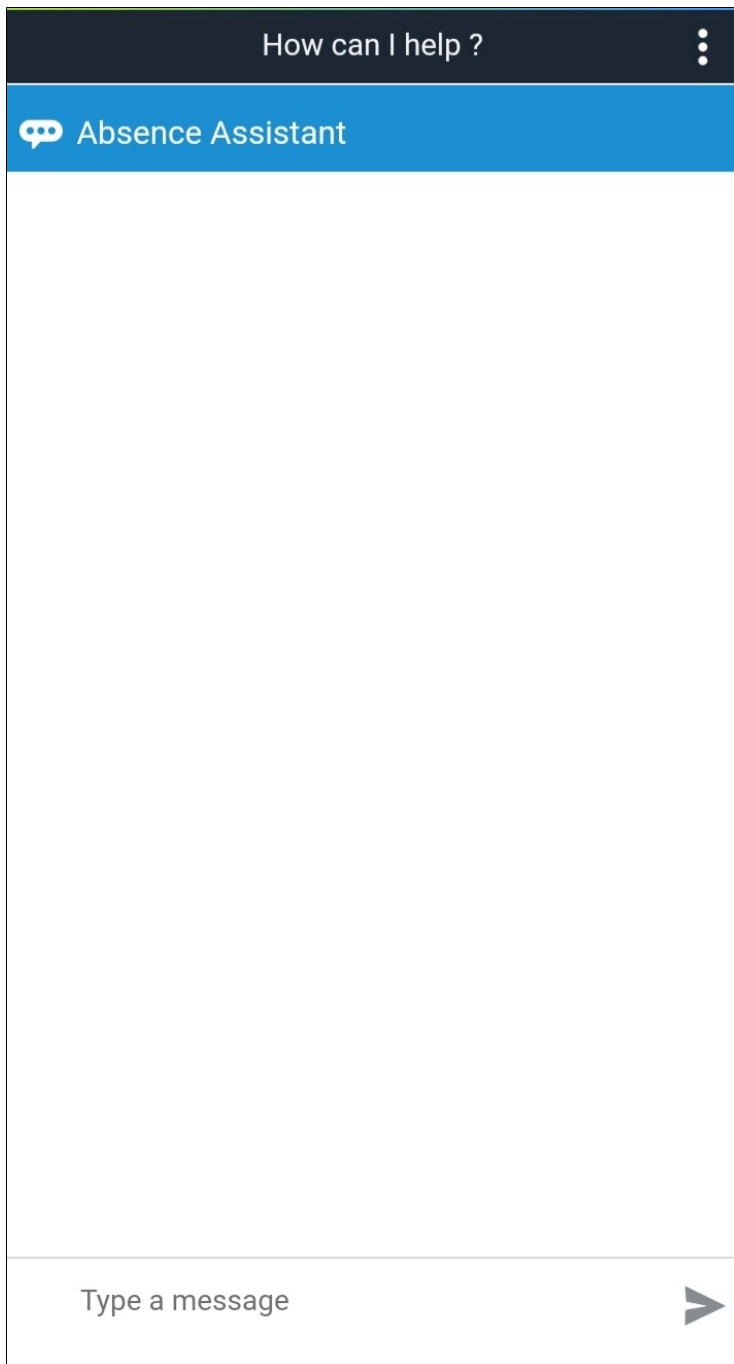


Image: Chatbot client on a mobile device

Chatbot client on a mobile device.



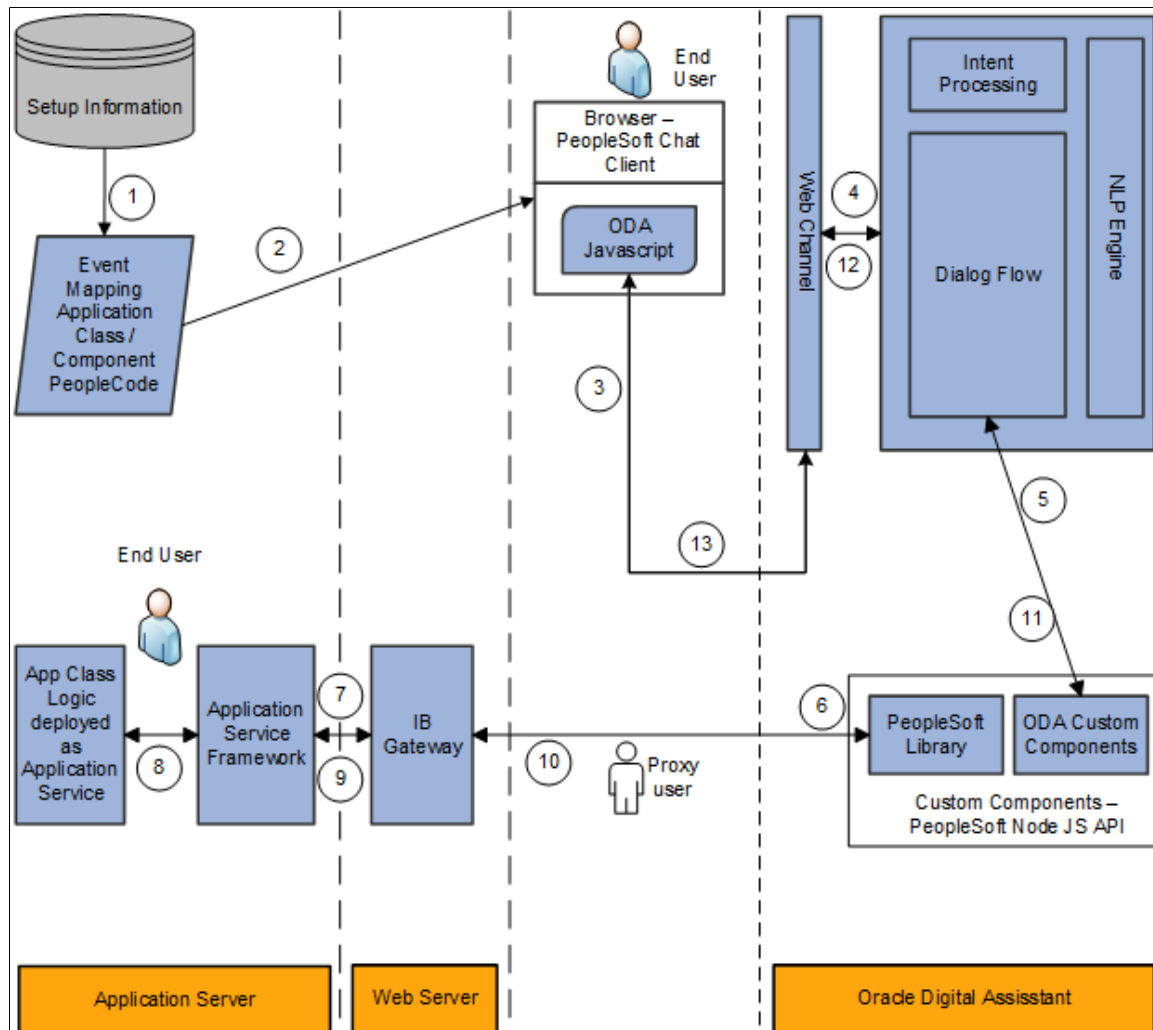
Understanding the Chatbot Architecture

The Chatbot Integration Framework consists of components in PeopleSoft and in ODA. Refer the diagram to see how the different components are connected to each other.

The sequence of flow of data or information is represented by the sequential numbers.

Image: Chatbot Architecture Diagram

Chatbot Architecture Diagram



The different parts or components involved in the Chatbot Integration Framework are summarized below:

Component	Description
Chat Client	The chat client in PeopleSoft is a web based client that users use as the interface to converse with the chatbot. The chat client is rendered with the help of the Web SDK which contains the JavaScript to embed the client to any web page and to handle the communication with the chat server. Chat client can be rendered as a stand alone page or as an embedded widget within a component.
Web Channel	The Web Channel (in ODA) works as the communication end point between the Digital Assistant and the chat client.
Skill/Bot	The skill governs the actual interaction between the user and ODA. The skill has the natural language processing (NLP) capability that enables it to recognize the intent of a request and route it accordingly to the appropriate dialogue flow.

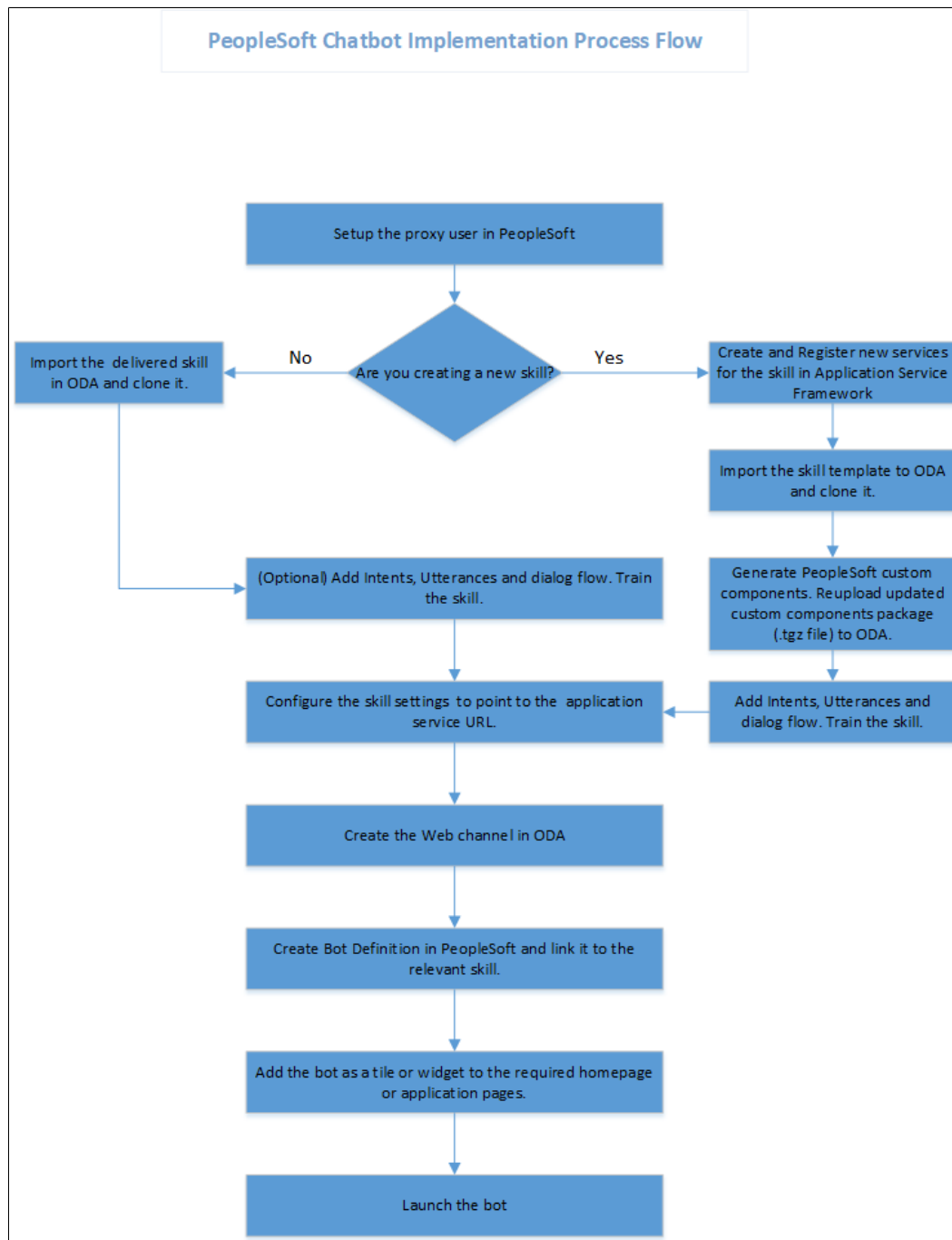
Component	Description
NodeJS API	The NodeJS API contains custom components for the ODA. They are hosted as a service in an embedded container in ODA and can be called from the different dialog flows. It can be used to generate custom components by providing the Application Service metadata. The NodeJS API also contains the PeopleSoft Library which is a set of JavaScript for efficient connection and methods to the PeopleSoft Application Service.
PeopleSoft Application Service	The PeopleSoft Application Service allows users to expose the application logic in Application classes. They are exposed as REST services which have a structure very common to the ODA custom component services. New service is created and registered using the PeopleSoft Application Service Framework
Setup Information	This is a set of PeopleSoft setup pages that control the chatbot definition in PeopleSoft.
Event Mapping Application Class/ Component PeopleCode	The chat client can be delivered as a stand-alone page or as a floating window (widget) in PeopleSoft Application pages. The Event Mapping configuration controls the application pages and the users that have access to the chat client and renders the floating window (Widget).

Understanding the Chatbot Integration Framework Implementation Process flow.

The Chatbot Integration Framework is used to deploy a delivered skill or users can decide to create a new skill. The process flow for the Chatbot Framework Implementation is illustrated below.

Image: PeopleSoft Chatbot Implementation Process Flow

PeopleSoft Chatbot Implementation Process Flow.



Understanding Security for the Chatbot Integration Framework

The access to the chatbot and the setup pages for chatbot is controlled by specific roles and permissions. Administrator can define and control the users who can have access to the chatbots and determine the application pages where it can be deployed.

The below table describes the users associated with the Chatbot Integration Framework.

User	Description	Roles associated with the User
<Proxy User>	A proxy user has to be created which is used for the integration of the chatbot with the application services. It is recommended not to give PIA access to the proxy user.	PTCB_USER EOCB Service User
Application Service Administrator	This user manages the Application Service Framework.	PTCB_ADMINISTRATOR
Chatbot Configuration Administrator	This user manages the chatbot configuration pages.	EOCB Admin User
Chatbot Client users	All users who use the chatbot client.	EOCB Client User Note: Any additional role defined in the Bot Definition page for a chatbot also needs to be assigned to the client users of that particular chatbot.

The below table describes the Roles associated with Chatbot Integration Framework.

Role	Description
PTCB_ADMINISTRATOR	This role is given to the user who manages the Application Service Framework.
PTCB_USER	This role is to be given to the proxy user to access the Application Services Framework.
EOCB Admin User	Users who need to use the Application Services Framework to develop and register new application services should have the EOCB Admin User role.
EOCB Service User	This role is used for access to the Chatbot Integration Framework.
EOCB Client User	This permission is used for providing chat client access to the tile created for the chat client.

Understanding Application Service for Chatbot Integration Framework

The Application Services are application logic that are exposed as a service. These services can be used to call relevant application functionality as part of a transaction or query. Chatbot Integration Framework delivers some services that can be used to help the chatbot carry out various tasks that these services allow to perform. To integrate the chatbot with the application services, you need to create a proxy user. This proxy user is used for the chatbot to communicate with the application services.

1. Create a proxy user on the PeopleSoft system. It is recommended not to give PIA access to this user.
2. Assign the following roles to the proxy user:
 - a. PTCB_USER
 - b. EOCB_SERVICE_USER

Note: The PeopleSoft application service should be exposed to the open Web for the ODA to access the PeopleSoft REST services. PeopleSoft should have a certificate issued from a valid certifying authority.

The Chatbot Integration Framework delivers a set of application services. They are:

App ID	ID for Service URL	Description
EOCB_GETMSGCATLOG	ps.GetMessageCatalogs	Message Catalogs without parameter substitution.
EOCB_GETSYSTEMVARIABLES	ps.GetSystemVariables	Get System Variables.
EOCB_GUID_TO_PSTOKEN	ps.AuthenticateGUID	Authenticate a user's chatbot GUID.
EOCB_VERIFY_SERVICE_ACCESS	ps.VerifyServiceAccess	Verify current user's access to a service

Note: It is recommended to use the EOCB_VERIFY_SERVICE_ACCESS (ps.VerifyServiceAccess) with Application Service ID or its corresponding ID to handle authorization rejections early in the dialog flow of ODA.

If users need to create new service, then they can use the Application Service Framework to create custom services.

For more information please refer the documentation on Application Service Framework <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2557046.1>

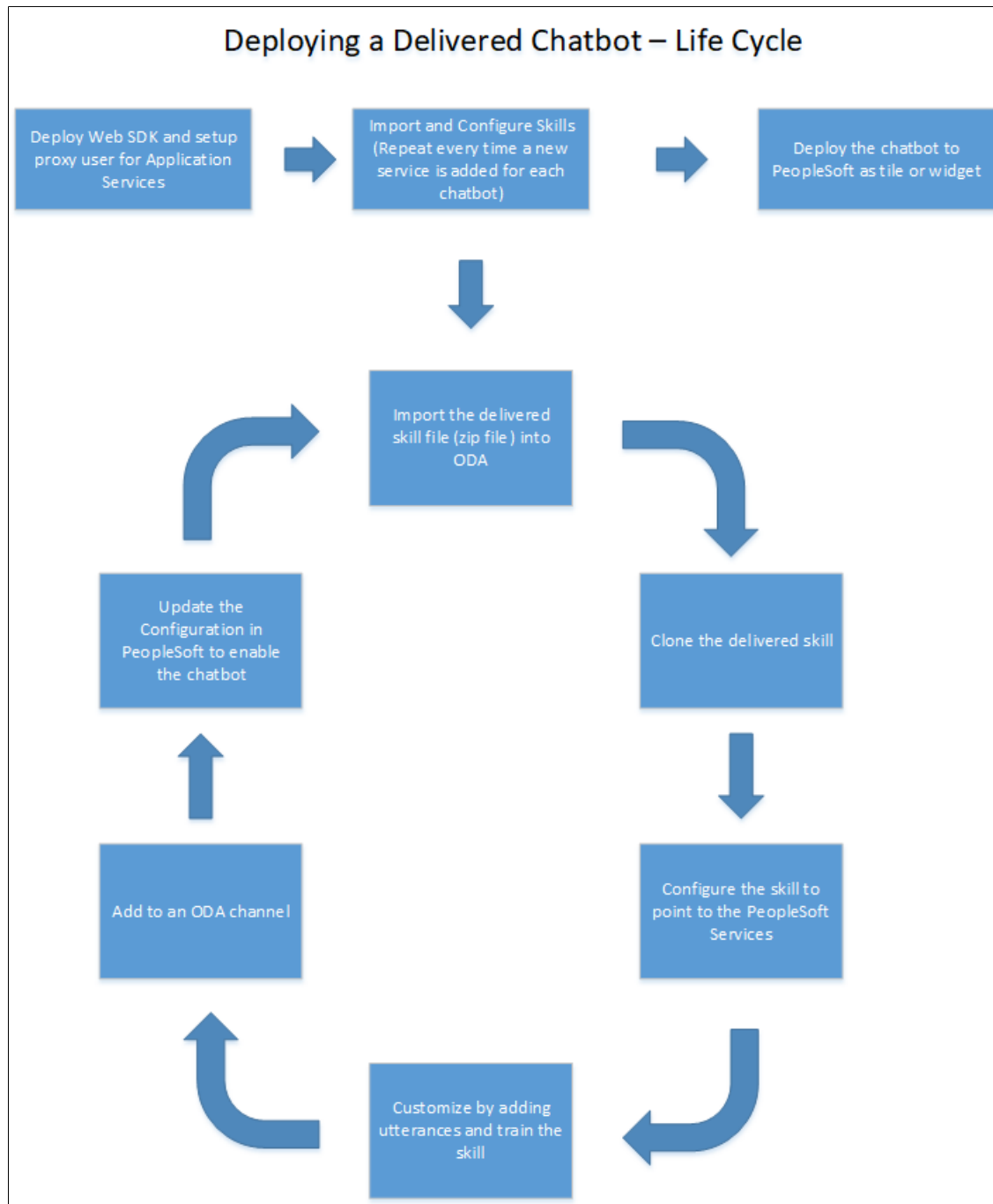
For more details on how to generate custom components for new services for your chatbot, please refer the red paper on Chatbot Integration Framework. <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2558379.1>

Importing and Setting Up a Delivered Skill

Once the site is setup and proxy user is available for communicating with the chatbot application services, import and configure the skills that are delivered by PeopleSoft (through Update Images). Whenever new skills are delivered or new services are introduced the process of importing and configuring needs to be repeated. Here is the high level illustration of the life cycle of a delivered skill.

Image: Life Cycle management of a Delivered Skill

Life Cycle management of a Delivered Skill



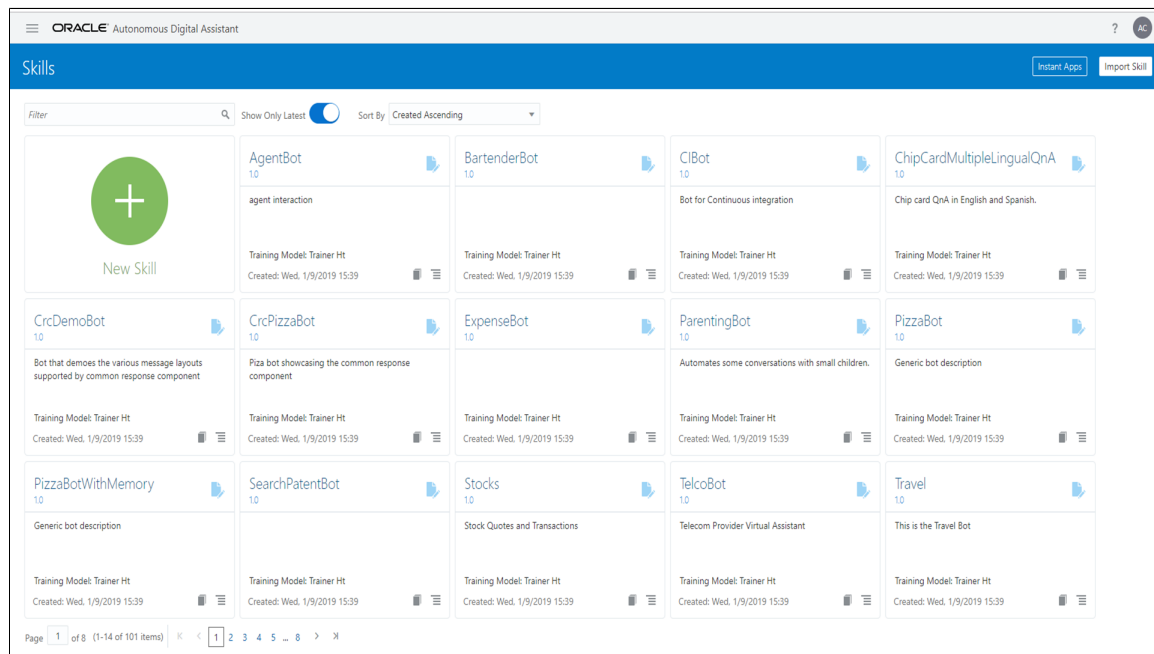
Importing the Delivered Skill File into ODA

To uptake new services added to a delivered skill or to uptake a new skill, it needs to be imported to your ODA instance. The delivered zip file is a container that has all the necessary instructions to the ODA to recognize and respond to the queries and transactions for that skill.

Login to your ODA instance and access the page where all the skills are listed.

Image: ODA Skills Page

A typical Skills page in ODA



Use the Import option to import the skill. The skill file is listed at the location `<PS_APP_HOME>/setup/chatbot`

Clone the Delivered Skill

Use the clone functionality of ODA to clone the imported skill. For more information on cloning a skill, please refer the ODA documentation [ODA documentation](#) on cloning a skill.

Configure to Point To PeopleSoft Service

The delivered skill now needs to be connected to the relevant service in PeopleSoft.

Access the configuration settings option of the cloned skill

Under Custom Parameters add the following parameters

Name	Display Name	Type	Value
Add the Base URL name in the format <i>PS <pillar> baseurl</i> For example the base URL name for the HCM area can be PSHCMbaseurl.	Create a display name in accordance with the PeopleSoft application . For example, the display name for HCM area can be <i>HCM Base URL</i>	Add type as <i>String</i>	Enter the URL of the application service. It is in the format <i>https://<server>:<port>/PSIGW/RESTListeningConnector/<node>/PTCB_APPL_SVC.v1</i>

<i>Name</i>	<i>Display Name</i>	<i>Type</i>	<i>Value</i>
Add the proxy user name in the format PS <pillar> userid	Add the display name for the proxy user	Add type as <i>String</i>	Enter the proxy user name.
Add the proxy password name in the format PS <pillar> password	Add the display name for the proxy user password	Add type as <i>String</i>	Enter the password of the proxy user.

Note: Delivered skills have the names already configured. Users need to update the Value field for them. It is recommended to also add the custom parameter *DebugLevel* with Type as *Integer* and value as 3.

Image: Configure skill to point to PeopleSoft service

Configure skill to point to PeopleSoft service.

[illegible]

Customize and Train the Skill

Though the skill is ready to be deployed as is, it needs to be trained with the delivered list of utterances. Additional changes can be done to build it into an effective skill for the required business needs. For more details on adding Intents and training the skill, please refer the Intends section in the ODA documentation.

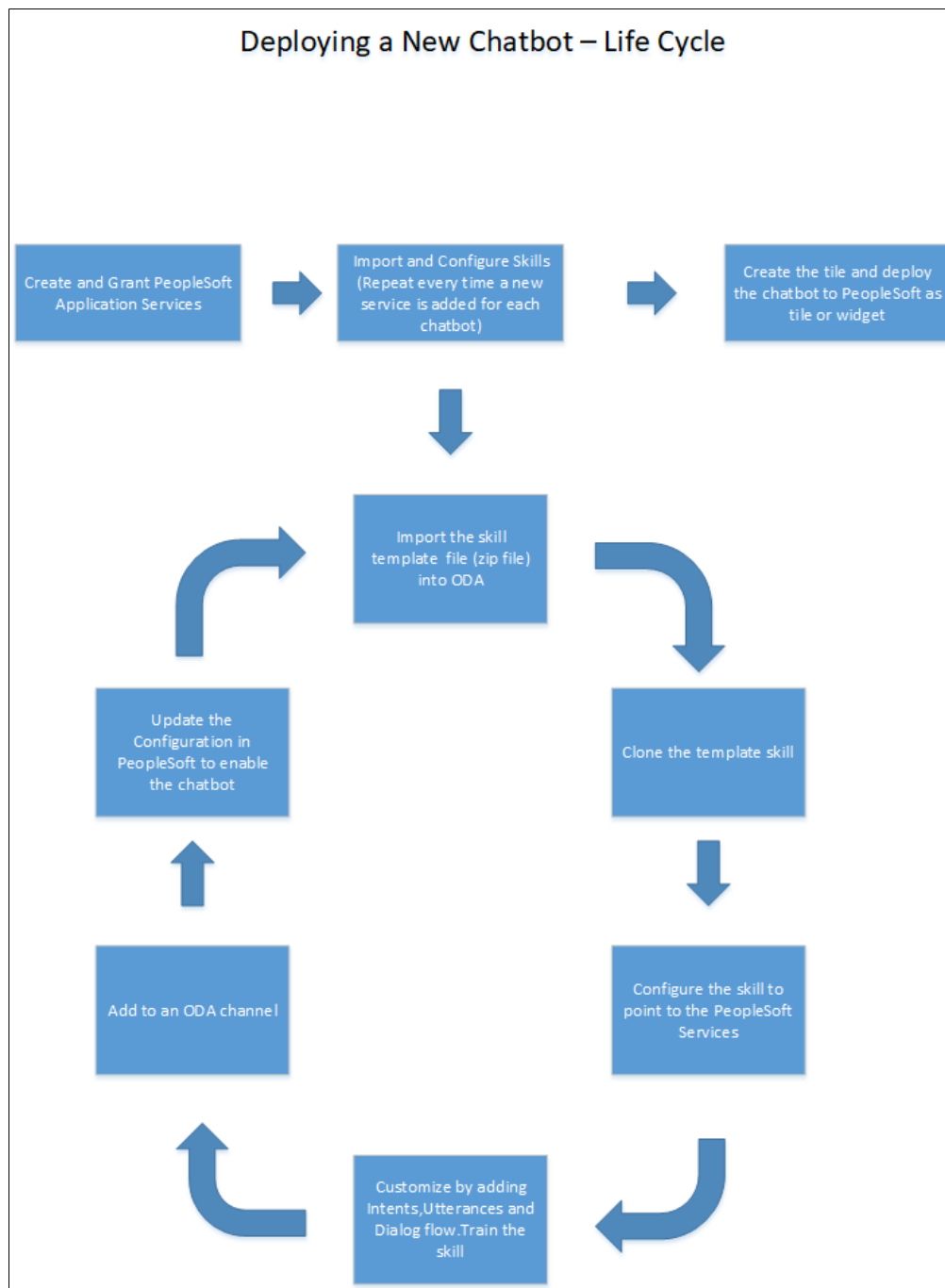
Importing and Setting Up the Skill Template

The Chatbot Integration Framework allows users to create a skill from scratch. If users want to develop a new skill, they need to perform some additional steps.

This diagram illustrates the life cycle of a skill that is developed from scratch.

Image: Deploying a new skill or chatbot

Deploying a new skill or chatbot



Create and Grant Application Services

The Chatbot Integration Framework allows users to create new skills. However this will also require setting up of relevant application services in PeopleSoft which can be referenced by the skill to execute the requests.

For information on using the Application Service Framework to create and register services, see the documentation on Application Service Framework <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2557046.1>

Import the skill template

The Chatbot Integration Framework delivers a template file that contains the settings and configuration for building a new skill in ODA. To import the skill template zip file,

Login to your ODA instance and access the page where all the skills are listed.

Use the import option to import the skill template file. It can be found in *<PS_APP_HOME>/setup/chatbot*

Clone the Skill Template

Clone the skill template similar to how the delivered skill is cloned.

Configure to Point to PeopleSoft Service

Configure the skill to point to PeopleSoft Service in the same way as configuring a delivered skill.

Customize and Train the Skill

The Skill cloned from the skill template needs to be developed in order to create the conversation flow for the new skill and to include the relevant Intents and utterances. Oracle Digital Assistant delivers an API for users to develop test and implement skills. For more information on developing a new skill, refer the red paper on Chatbot Integration Framework <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2558379.1>.

Additional, refer the Oracle tutorial on developing an ODA skill <https://fnimphiu.github.io/OracleTechExchange/>.

Creating the Web Channel

Once a delivered skill or a new skill is ready, the next step is to create a channel for it.

Channels are used as communication end points for ODA skills or Digital Assistants.

Each channel can be routed to a particular skill and it can be updated.

To create a new Web Channel for your skill, refer the ODA documentation on creating Web channels. You need to select the Channel Type as Oracle Web.

Configure the Oracle Web Channel

Note: While creating the Oracle Web Channel, note down the Channel Id value generated by the system. This value is added to the corresponding PeopleSoft Bot Definition of the chatbot in the Maintain Bot Definition Page. The Client Authentication Enabled option should be disabled.

Creating Bot Definitions

Create Bot Definitions in PeopleSoft to create chatbot clients in PeopleSoft for the Skills created in ODA.

Pages Used to Create Bot Definition

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Bot Definition Page</u>	EOCB_BOTSRCH_FL	Search or view the list of available bot definitions.
<u>Add Bot Definition Page</u>	EOCB_ADDBOTDEFN_FL	Add a Bot ID.
<u>Maintain Bot Definition Page</u>	EOCB_BOTDEFN_FL	Configure the Bot ID.
<u>Maintain Branding Template Page</u>	EOCB_BRNDTMPL_FL	Configure the branding for the Bot ID.

Bot Definition Page

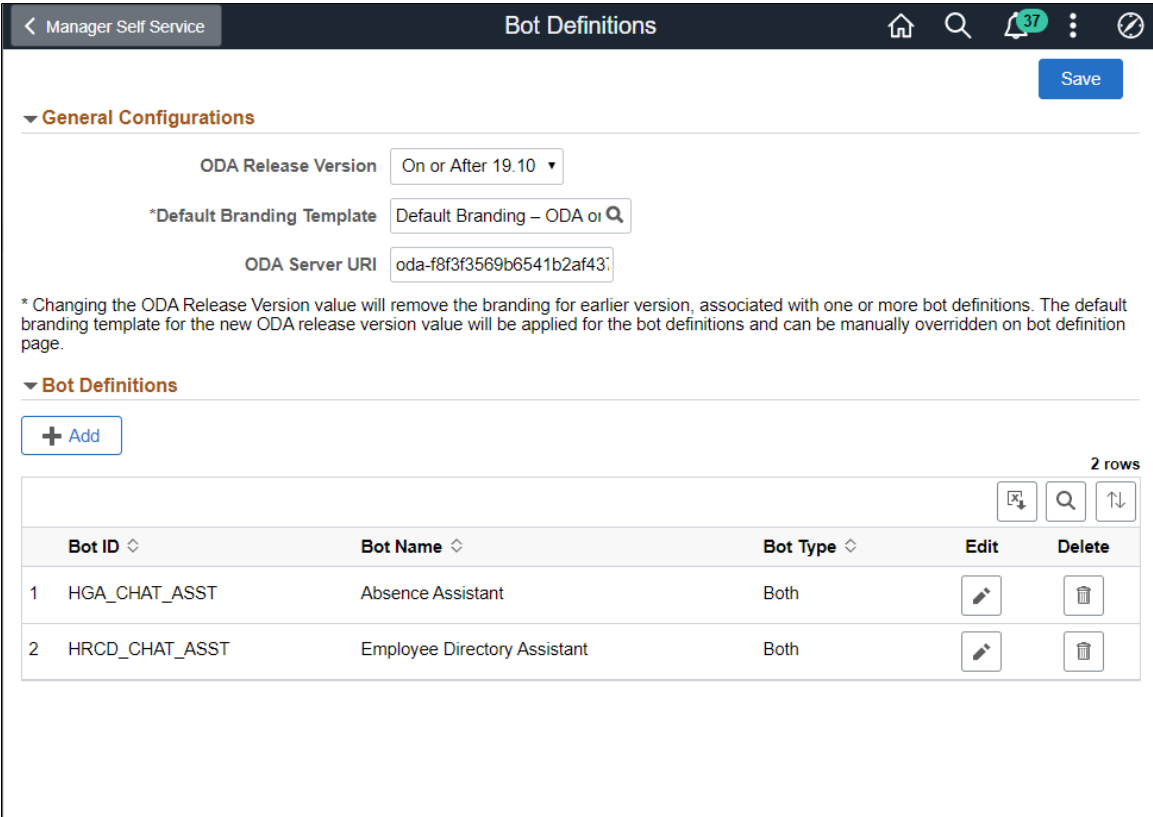
Use the Bot Definition page (EOCB_BOTSRCH_FL) to view, edit or add a new bot definition.

Navigation

Enterprise Components > Chatbot Configurations > Bot Definitions

Image: Bot Definitions Page

Bot Definitions Page



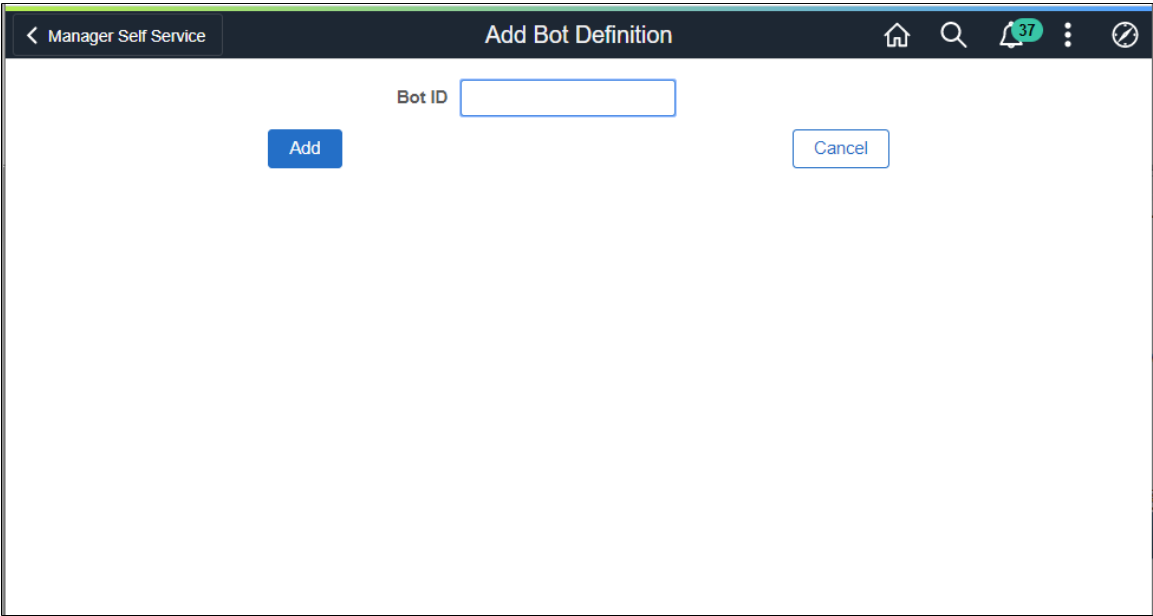
Field	Description
ODA Release Version	Choose whether your ODA version is 19.10 and above or if it is below 19.10
Default Branding Template	Choose the default branding template for the chatbots.
ODA Server URI	Enter the Uniform Resource Identifier of your ODA instance.
The Bot Definitions page lists all the chatbots.	
Use the Add button to add a new bot definition.	
Use the Edit button corresponding to a bot to edit the bot definition.	
Use the Delete button corresponding to a bot to delete the bot definition.	

Add Bot Definition Page

Use the Add Bot Definition page (EOCB_ADDBOTDEFN_FL) to add a new Bot Definition. To access this page, click the Add button on the Bot Definition page.

Image: Add Bot Definition page

Add Bot Definition page

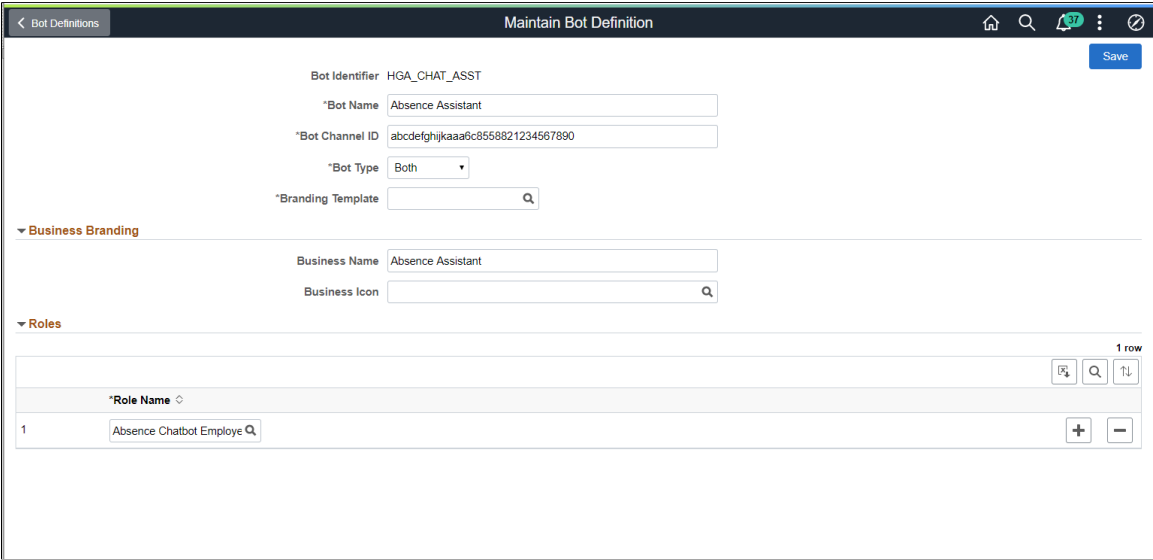


Maintain Bot Definition Page

Once the Bot Definition name is added, use the maintain Bot Definition page (EOCB_BOTDEFN_FL) to configure the bot definition.

Image: Maintain Bot Definition page

Maintain Bot Definition page



Field	Description
Bot name	Name of the Bot

Bot Channel ID	Enter the Channel Id generated by the corresponding channel in ODA. For more details, see Creating the Web Channel
Bot Type	Chose how the bot client needs to be rendered. Available types are: - Web Based; This will render the chat client as a modal window - Widget; This will render the chat client as a widget at the bottom of the screen - Both; This enables the chat client to be rendered in both Web and Widget formats.
Branding Template	Choose the Branding template for the bot.
Business Name	Name of the Bot as it appears to users.
Business Icon	Choose the icon for the bot
Role Name	Add the user roles that should have access to the bot.

Maintain Branding Template Page

Use the Maintain Branding Template page (EOCB_BRNDTMPL_FL) to control the branding aspects of the bot definition.

Image: Maintain Branding Template page

Maintain Branding Template page.

Add Branding Template
Maintain Branding Template

Save

ODA Release Version On or After 19.10

Template ID TEMPLATE_2

*Template Name Template 2

Custom Properties

Name	Type	Value
1 colors	JSON	("branding": "##0000")
2 logoicon	Image	EOCB_BOTICON1_FL
3 enableSpeech	Boolean	true

Custom Text

Custom Text	Message Set Number	Message Number	Message Text
1 inputPlaceholder	1000	9991	I would like to know about

Field	Description
Template Name	Name of the template.

Custom Properties

Choose the custom properties for the bot available from ODA to customize the bot layout, color and icons. In the Name field, enter the appropriate name reference listed in the [ODA documentation](#) to set the custom property.

Custom Text

PeopleSoft provisions custom text to overwrite the custom texts provided by default by ODA. The overriding text is created as a message catalog entry. The message catalog entry is assigned to the custom text key value.

Choose the appropriate Custom Text references available in the [ODA documentation](#) to configure the default text that is displayed in the chat client.

Adding Chatbot to Application pages

Adding the Chatbot for a delivered skill to a PeopleSoft Page as a Tile

After Configuring the Bot ID, it can be rendered in the relevant application pages. based on the Chatbot Type selected in the Bot Definition page, the chat client can be rendered as a tile or as a widget. PeopleSoft delivers the tile for the delivered skills. To enable the delivered skill as a tile in a page:

1. From the relevant Homepage, choose the Personalize Homepage option.
2. Choose the Add Tile button.
3. Add the delivered Chatbot Tile to the homepage.

Adding the Chatbot for a new skill to a PeopleSoft Page as a Tile

To create and enable the tile for the chatbot for a new skill:

1. Create a new Content Reference to create the tile for the chatbot. See Administering Content References section under Portal Technology in the PeopleTools Online Help.
2. In the General tab, Under URL Information section, choose URL Type as PeopleSoft Generic URL
3. At the end of the URL, enter the text BOTID=<BotID> where <BotID> is the ID of the Bot definition.
4. In the Security tab, ensure that the permission list EOCB_CLIENT_USER is added. Also add the roles that were added to the Bot ID in the [Maintain Bot Definition Page](#)
5. In the Fluid Attributes tab, select the Display In field value as *Modal*.

Image: Content Reference General tab

Content Reference General tab

Content Ref Administration

General | Security | Fluid Attributes

Root > Self Service > HR Fluid Components >

Content Ref Administration

Name

HC_HGA_CHAT_ASST_FLU

CreatedBy

PS

*Label

Absence Assistant

Parent Folder

HR Fluid Components

Copy object

Select New Parent Folder

Long Description

(254 Characters)

Absence Assistant

Product

HC

Sequence number

90

*Valid from date

01/01/1900

to

Valid to date

to

Owner ID

HGA

Absence Management

Usage Type

Target

Storage Type

Remote by URL

Creation Date

05/31/2019

☐ WSRP Productible

☒ No Template

☒ Fluid Mode

☒ Display on Small Form Factor

Create Content Reference Link

Add Content Reference

Test Content Reference

URL Information

Node Name

HRMS

URL Type

PeopleSoft Generic URL

*Portal URL

/EOCB_MENU.EOCB_CLIENT_FL.GBL?BOTID=HGA_CHAT_ASST

☐ Hide from portal navigation

☐ Hide from MSF navigation

IWC Message Events

Content Reference Attributes

Name

DASHBOARD_TILE

Label

Translate

Attribute value

false

Image: Content Reference Security tab

Content Reference Security tab

Content Reference Security

General | Security | Fluid Attributes

Root >

Content Reference Security

Label:

PS Absence Bot

☐ Public

☒ Author Access

The permissions for the component or script this content reference points to, control its permissions. To change these component or script permissions, click on the "View Definition" link for the appropriate permission list.

Security Authorizations

Personalize | Find | 1 of 1 | First | Last

Type	Name	Description	View Definition	
1	Permission List	EOCB_CLIENT_USER	EOCB Client User	View Definition

Inherited Security Authorizations

Personalize | Find | 1 of 1 | First | Last

Type	Name	Description	View Definition

Save

Notify

General | Security | Fluid Attributes

540

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Image: Content Reference Fluid Attributes tab

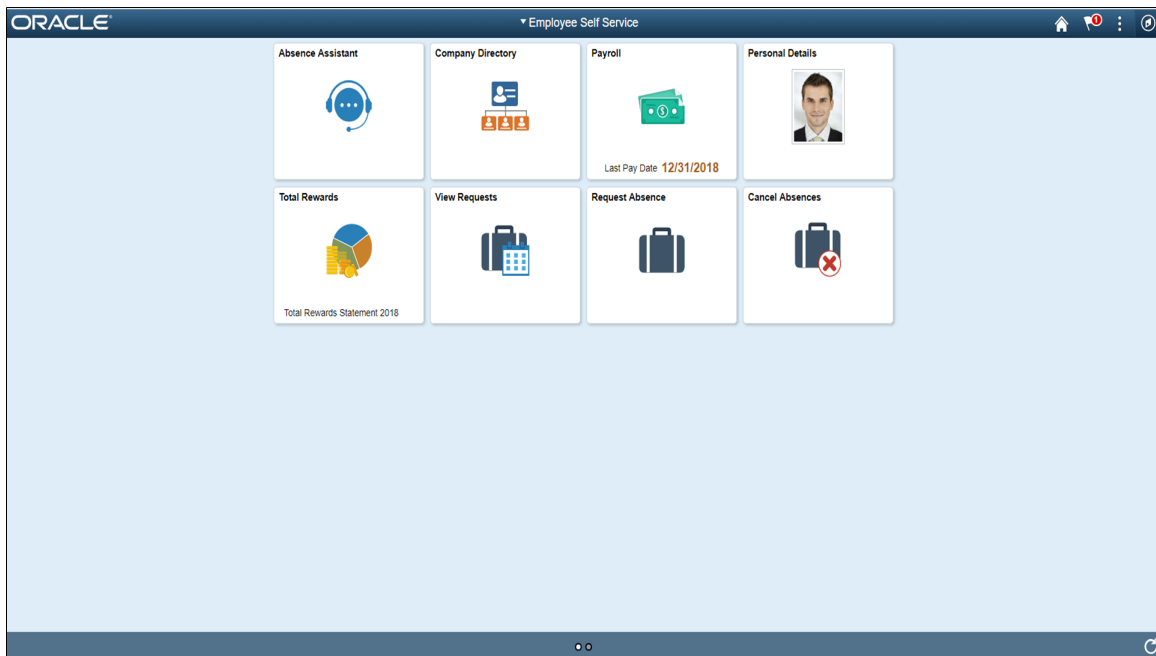
Content Reference Fluid Attributes tab.

The screenshot shows the 'Structure and Content' page with the 'Fluid Attributes' tab selected. The page has a breadcrumb trail: [Root](#) > [Self Service](#) > [HR Fluid Components](#) >. The 'Fluid Attributes' tab is active, and the 'Tile Information' section is expanded. The 'Image Name' field is set to 'PS_CHAT_CLIENT_M_FL'. The 'Display In' dropdown is set to 'Modal'. The 'Modal Parameters' field contains 'sStyle@frame-pt_chatclientpage;bAutoClose@0'. The 'Height' and 'Width' fields are both set to '1'. The 'Refresh Timer' field is set to '0'. The 'Event Name' field is empty. The 'Dynamic Tile Content' section shows 'URL Type' set to 'None'. The 'Tile Repository' section shows 'Folder' set to 'HC_SELF_SERVICE_FL_GBL' and 'Folder Label' set to 'Employee Self Service'. The 'Include In Repository' section has three checkboxes: 'Homepage', 'Dashboard', and 'NavBar', all of which are unchecked. At the bottom, there are 'Save' and 'Notify' buttons. The page footer shows 'General | Security | Fluid Attributes'.

Once this is done, Add the tile to the relevant homepages.

Image: Chatbot tile on a Homepage

Chatbot tile on a homepage



Adding the Chatbot to a PeopleSoft Page as a Widget

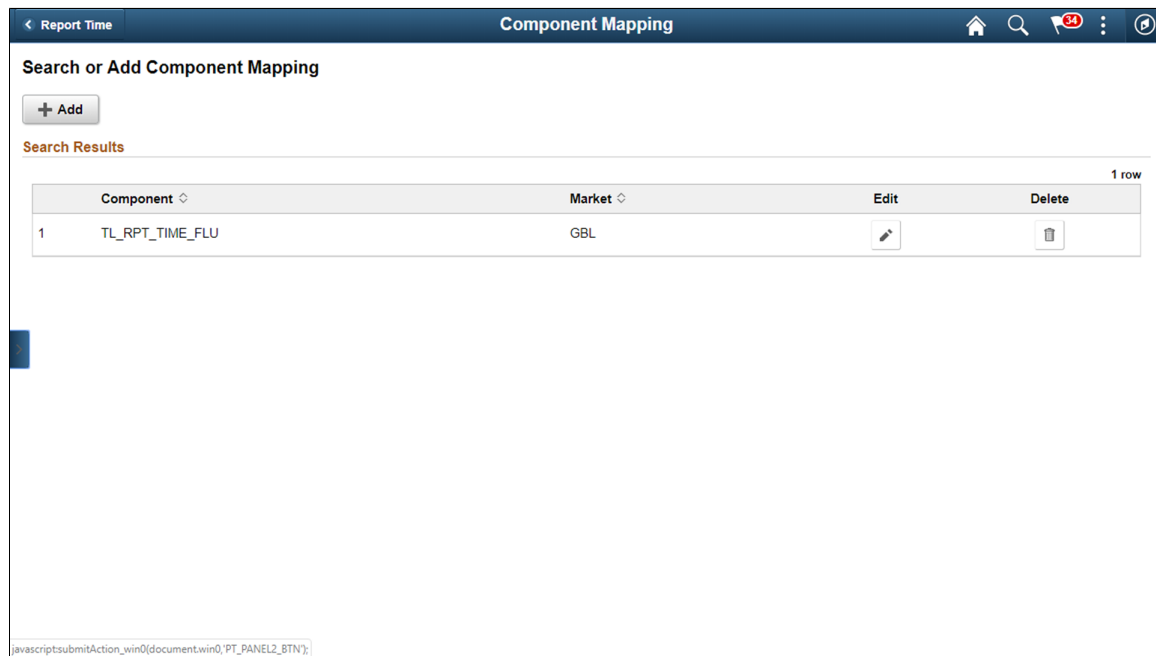
Adding the chatbot as a widget in a page requires mapping it to the required component and then creating the related content service.

Component Mapping Page

Use the Component mapping Page (EOCB_COMPSRCH_FL) to map a bot to a component. This can then be configured to appear as a widget on the component page.

Image: Component Mapping page

Component Mapping page



Component Mapping

Search or Add Component Mapping

+ Add

Search Results

Component	Market	Edit	Delete
1 TL_RPT_TIME_FLU	GBL		

1 row

javascript:submitAction_win0(document.win0,'PT_PANEL2_BTN');

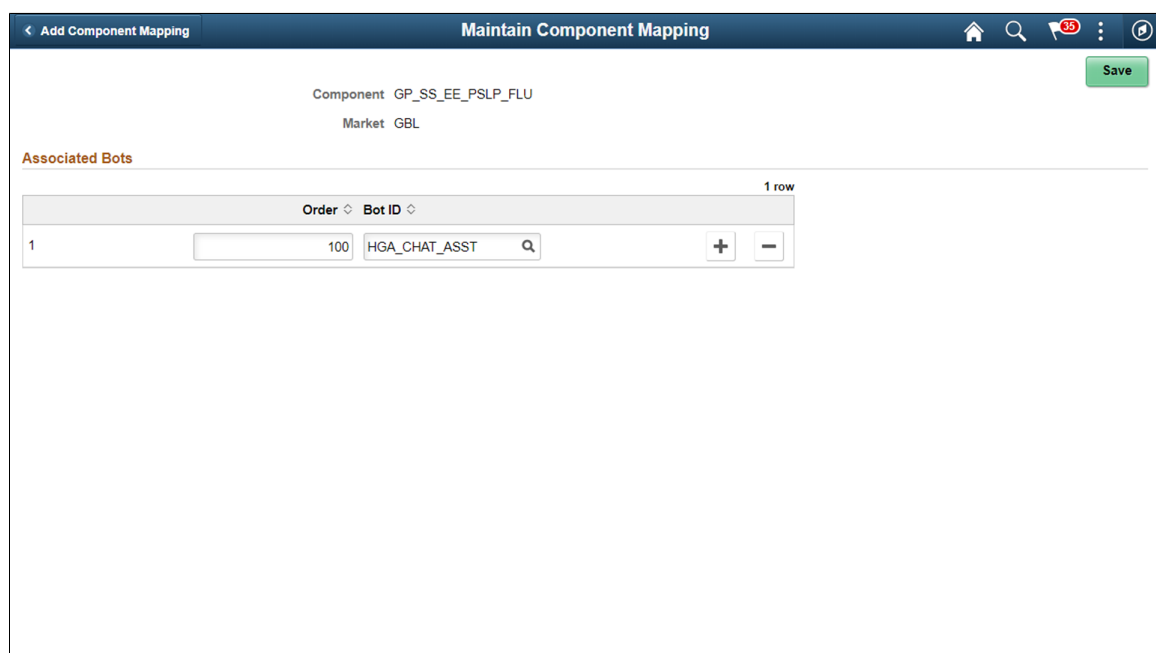
To add a new component, click the Add button

Maintain Component Mapping Page

Use the maintain Component Mapping page(EOCB_COMP_ASSOC_FL) to associate Bot Ids to a component.

Image: Maintain Component Mapping page

Maintain Component Mapping page



Maintain Component Mapping

Component GP_SS_EE_PSLP_FLU

Market GBL

Save

Associated Bots

Order	Bot ID	Bot Name
1	100	HGA_CHAT_ASST

1 row

Component	Choose the component in which the bot needs to be enabled.
Market	Choose the market
Order	Chatbot preference order for the user If multiple bots are associated with a component..
Bot ID	choose the Bot Id of the bot to be associated for the component.

Map Related Content Service

Map the Related Content Service for chatbot to the widget in the required component page.

1. Refer the *Mapping Application Class PeopleCode to Component Events* section in the PeopleTools Online Help to select the application page in which the widget has to be rendered.
2. In the Event Mapping tab of the application page, choose add the following parameters

Field name	Variable
Event Name	PostBuild
Service ID	EOCB_CHATCLIENT
Processing Sequence	PostProcess

Image: Configure event mapping for the application page.

Configure event mapping for the application page.

Configure Event Mapping

Event Mapping

Configure Event Mapping

Configure the custom application class with the selected event. Custom PeopleCode can be configured to be executed before (pre process) or after (post process) defined for the same event from the component definition.

[Content Reference](#) [Payslips](#)

Component Level Event Mapping

Map the custom application class to the Component level event.

Personalize | Find | View All | 1 of 1 | First | Last

Enable	Event Name	Select	Service ID	Sequence Number	Processing Sequence
☒	PostBuild		EOCB_CHATCLIENT		Post Process

Page Level Event Mapping

Map the custom application class to the Page level event.

Personalize | Find | View All | 1 of 1 | First | Last

Enable	Unrestricted Prompt	Page	Event Name	Select	Service ID	Sequence Number	Processing Sequence
☒	☐		Activate				

Component Record Level Event Mapping

Map the custom application class to the Component Record level event.

The chatbot widget becomes available at the bottom right corner of the application page.

Image: Chatbot widget on the application page.

Chatbot widget on the application page.

