PeopleSoft CRM 9.2: Enterprise Components

August 2023

Documentation Accessibility

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

Access to Oracle Support

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

Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

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

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft Enterprise Components Related Links

PeopleSoft Information Portal

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PeopleSoft Training from Oracle University

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Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you’re using.

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

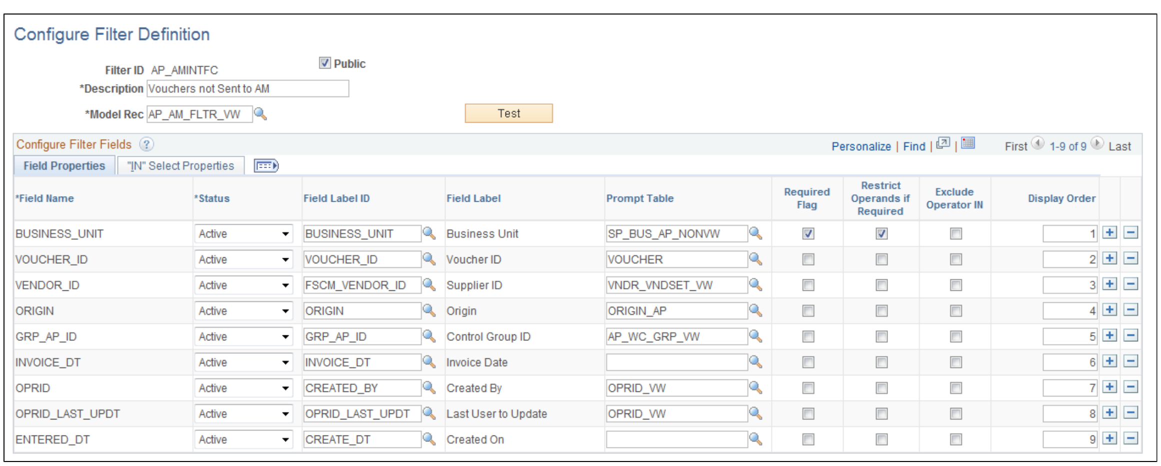
Configure Filter Definition Page

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

Navigation:

Enterprise Components > **WorkCenter/Dashboards** > **Configure Filter Definitions**

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



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

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

Field or Control	***Description***
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.

Field or Control	***Description***
Status	Select a status for the field. Options are Active and Inactive. Active fields are available for editing on the Configure Filter Values page and are available to end users when filtering data.
Field Label ID	Select an option that corresponds the field label.
Prompt Table	Displays the prompt table that controls the valid values that can be entered on the Configure Filter Values page. For translate and yes or no *fields*, this value defaults from the prompt table that is defined on the record. You can choose to keep the default value or change it. For translate *tables*, this field is not available and can’t be changes.
Required Flag	Select to indicate that this field must have a value on the Configure Filter Values page.

Field or Control	*Description*
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.

Field or Control	*Description*
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.

Field or Control	*Description*
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.

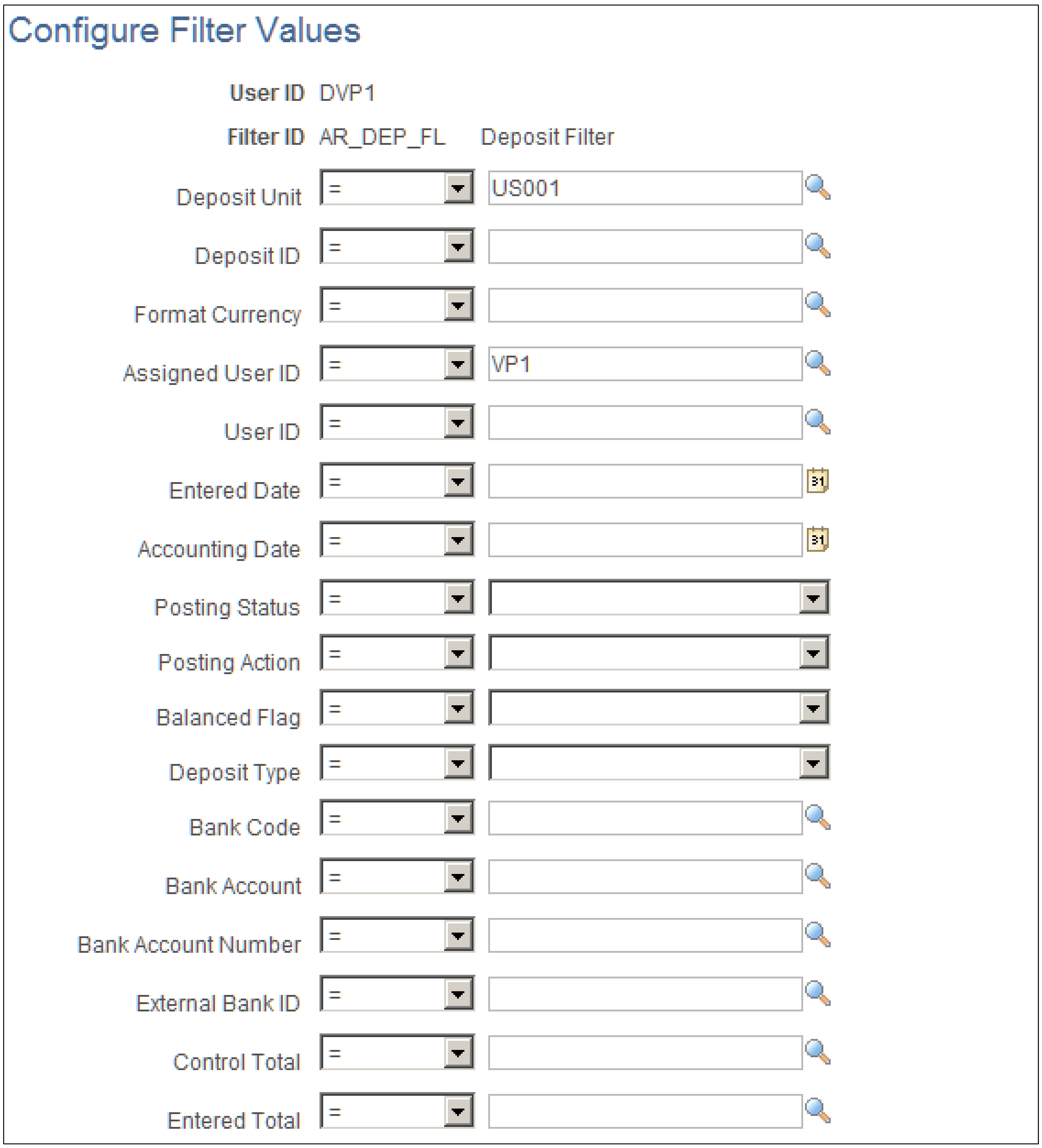
Configure Filter Values Page

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**

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



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

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

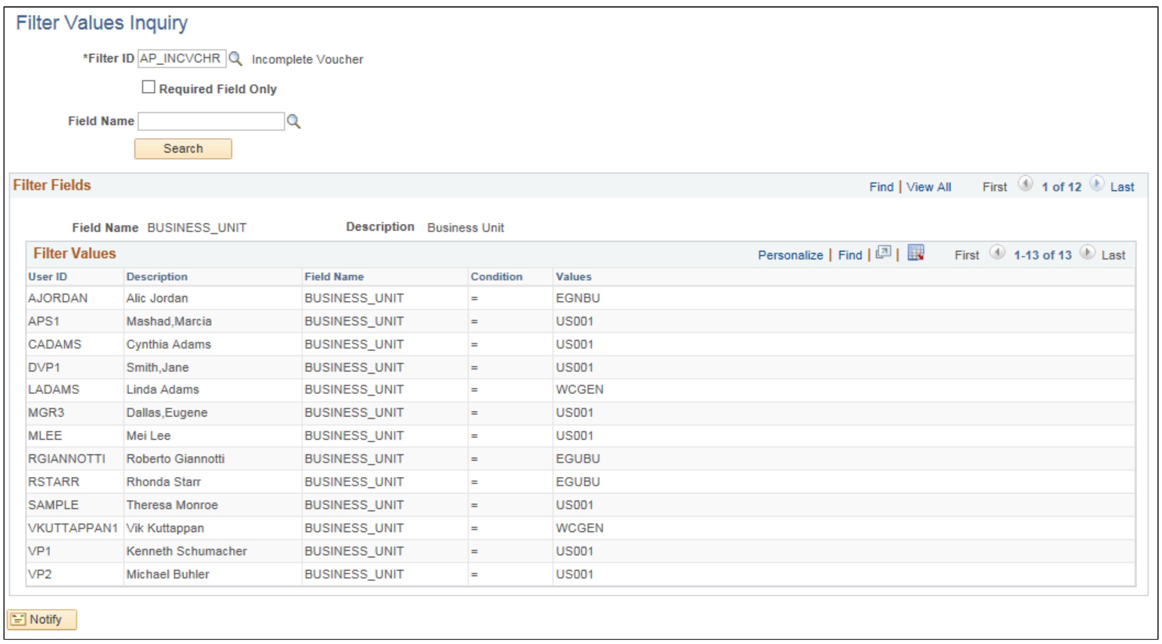
WC Filter Value Inquiry Page

Use the WC Filter Value 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** > **WC Filter Value Inquiry**

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



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

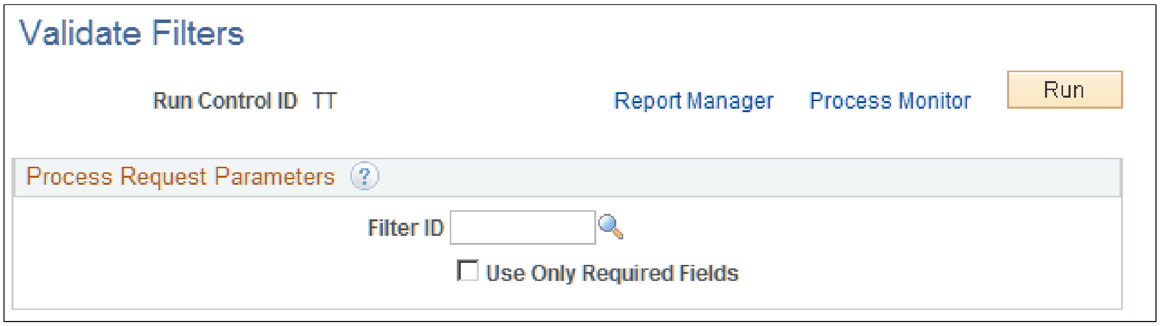
Validate Filters Page

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

Navigation:

Enterprise Components > **WorkCenter/Dashboards** > **Validate Filters**

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.

Field or Control	***Description***
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.

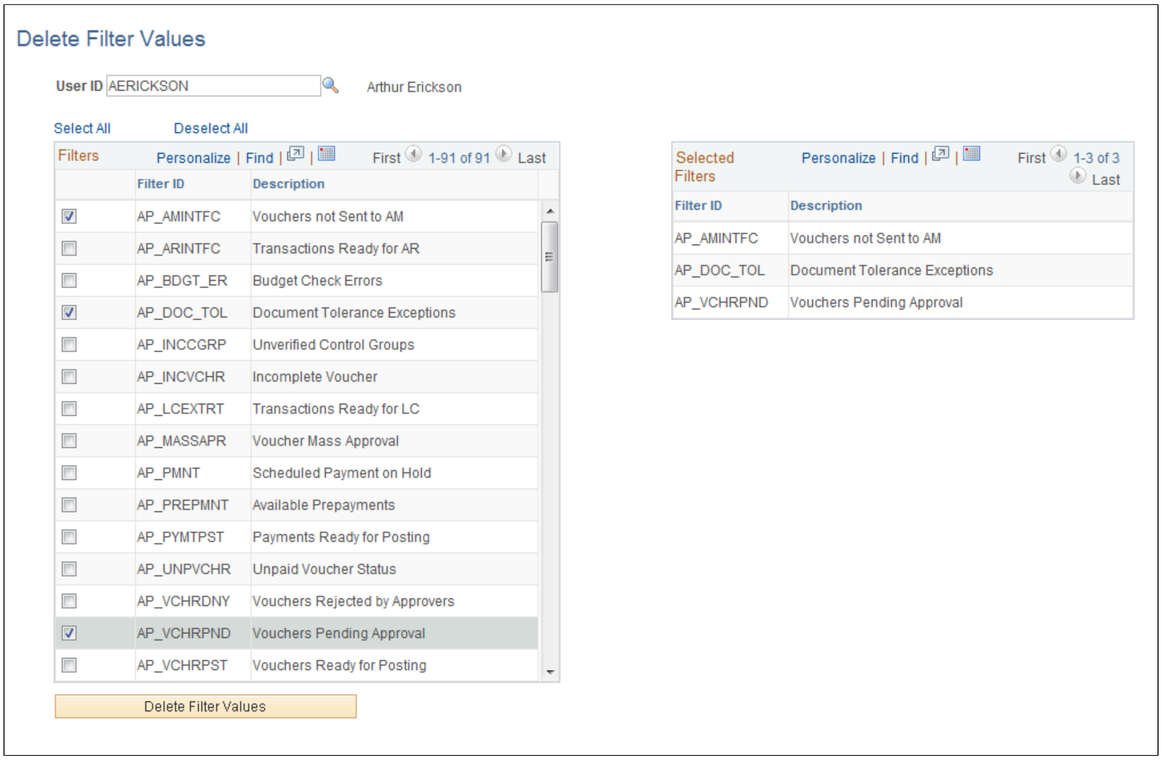
Delete Filter Values Page

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**.

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



Field or Control	***Description***
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

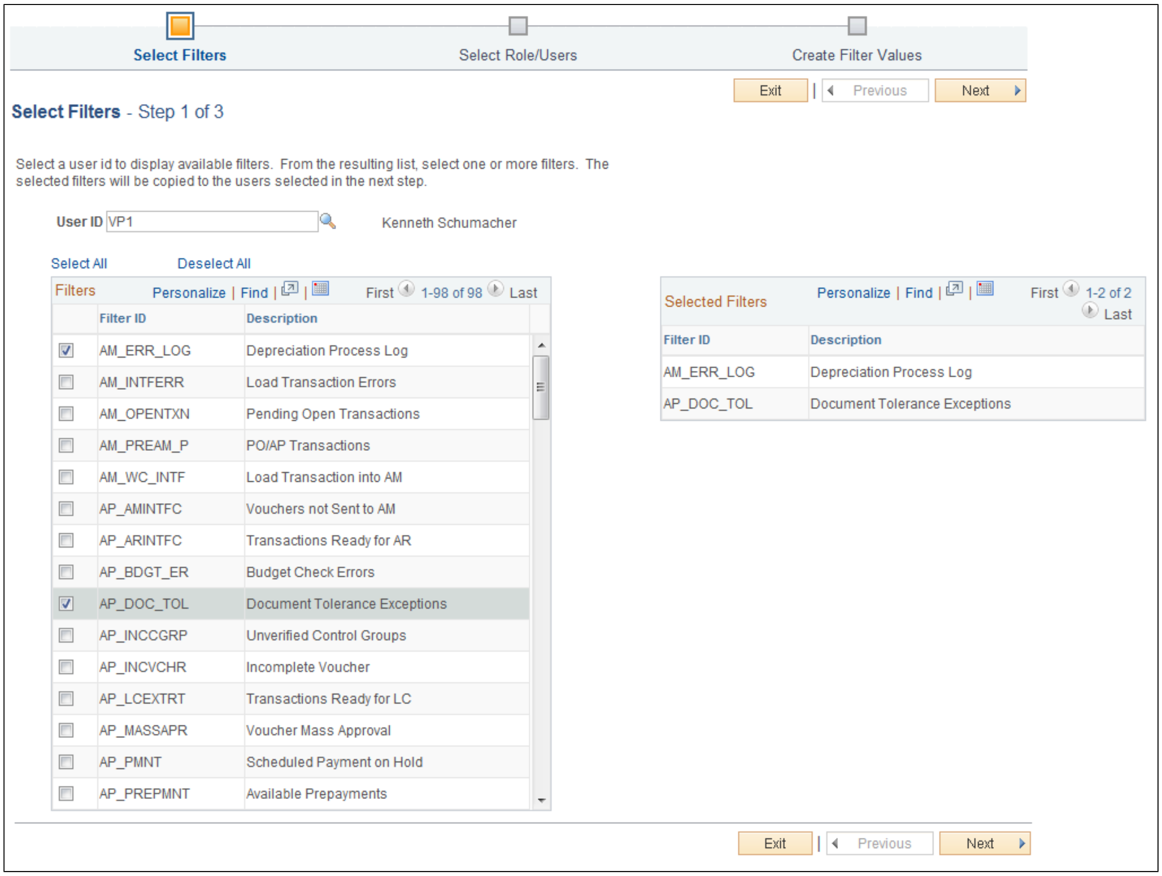
Select Filters Page

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**

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



Field or Control	*Description*
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.

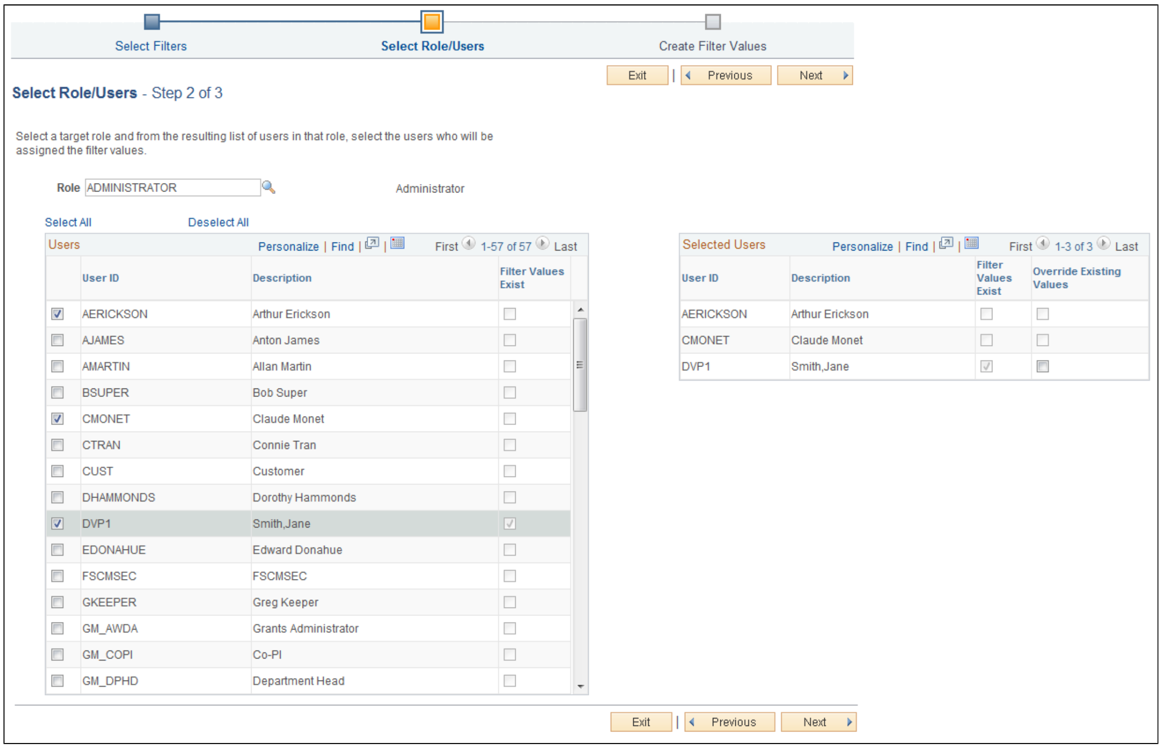
Select Roles/Users Page

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.

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



Field or Control	*Description*
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.

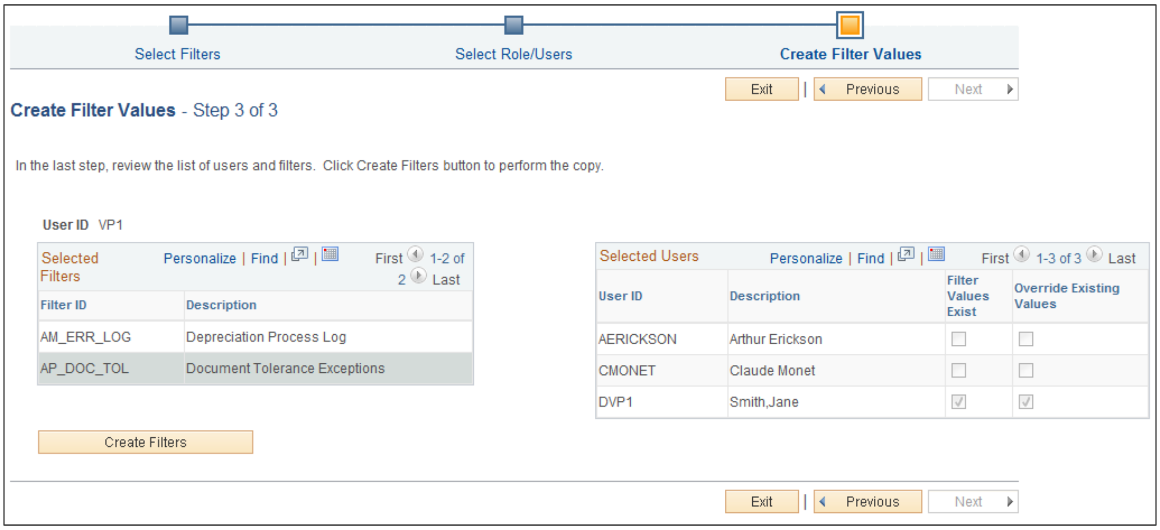
Create Filter Values Page

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.

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



Field or Control	***Description***
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.

Page Name	***Definition Name***	***Usage***
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.
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.

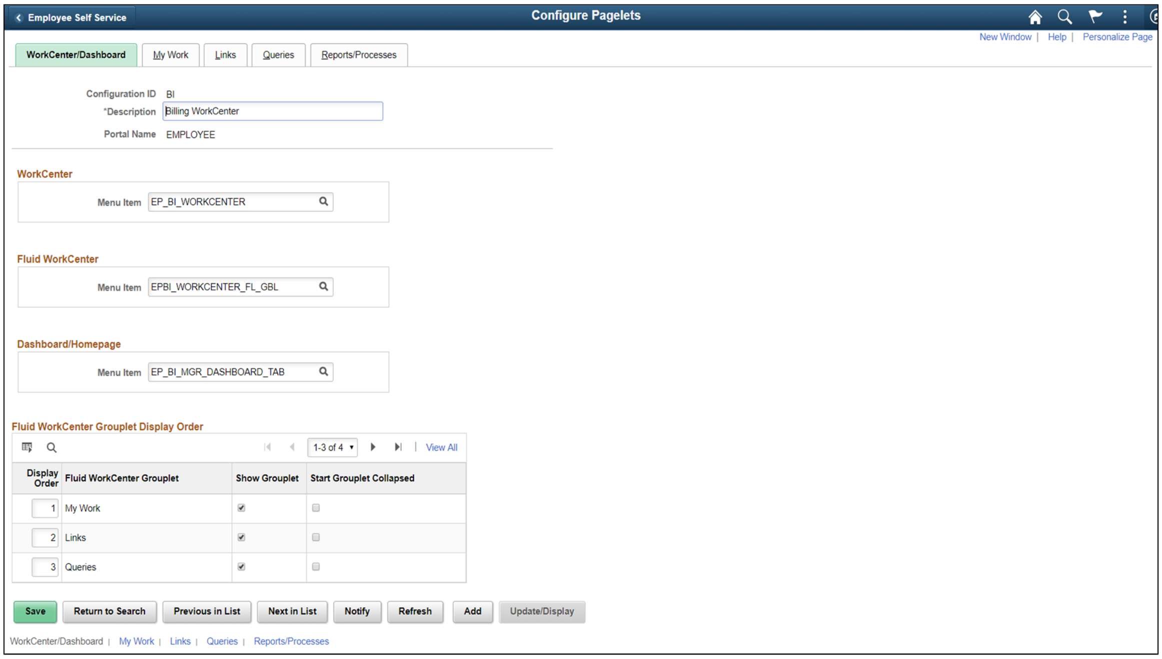
Configure Pagelets – WorkCenter/Dashboard Page

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**

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



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

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

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

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

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

Fluid WorkCenter Grouplet Display Order

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

Field or Control	*Description*
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

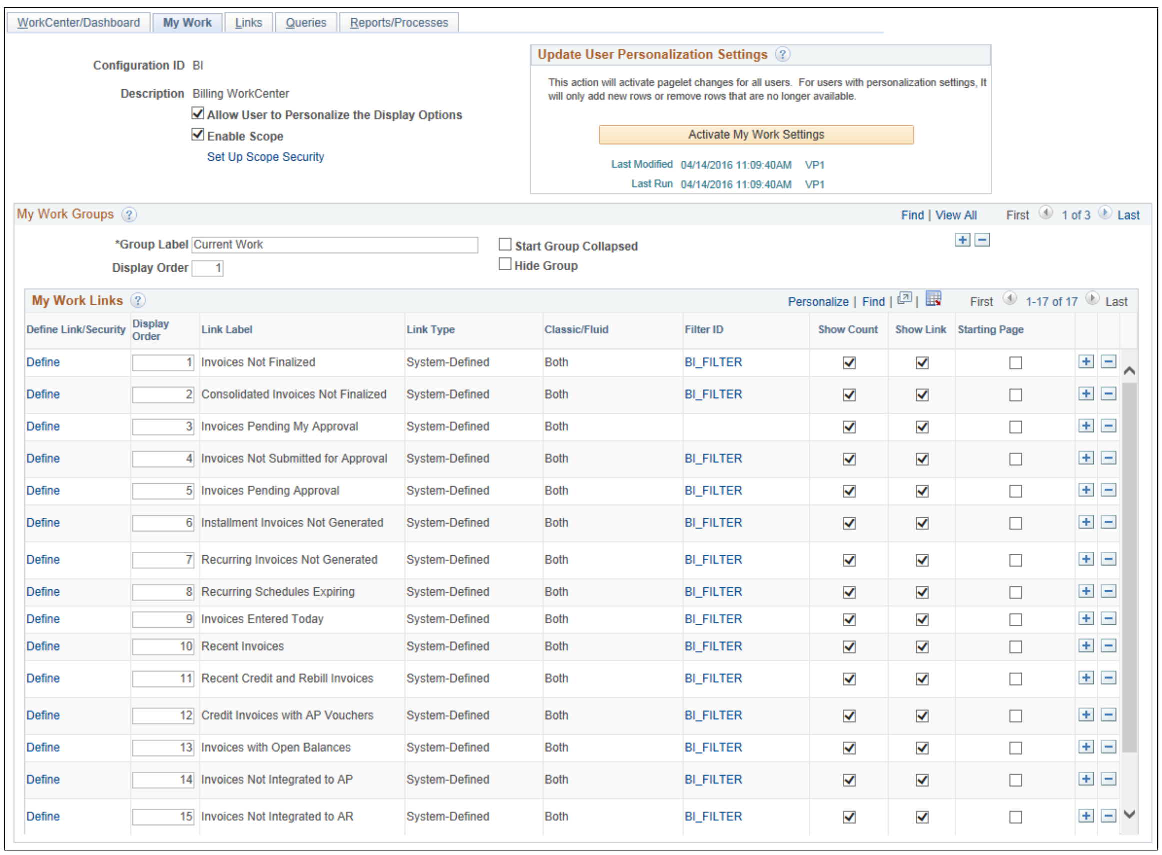
Use the Configure Pagelets – My Work page (FSPC_ADMIN_MYWORK) to set up My Work links for end users.

Navigation:

Enterprise Components > **WorkCenter/Dashboards** > **Configure Pagelets**

Click the My Work tab.

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



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

Field or Control	Description
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

Field or Control	Description
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

Field or Control	Description
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.

Field or Control	***Description***
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

Field or Control	***Description***
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.

Field or Control	Description
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.

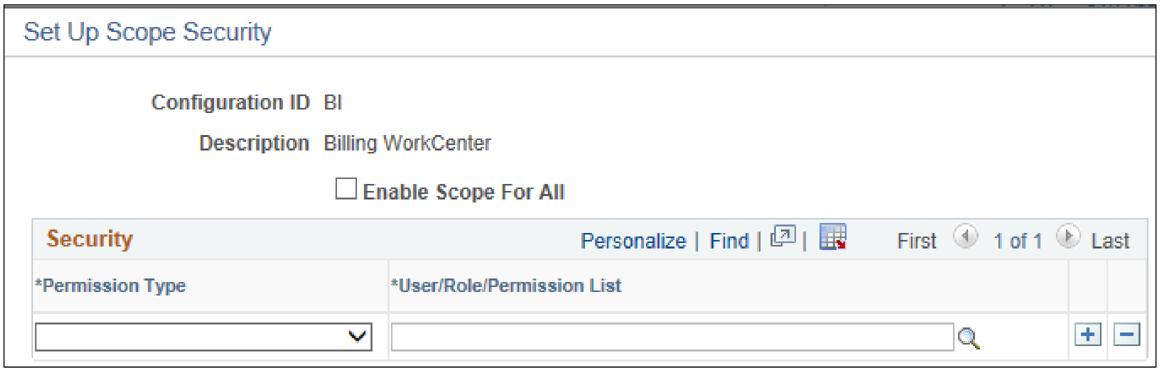
Set Up Scope Security Page

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.

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



Field or Control	***Description***
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.

Field or Control	***Description***
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

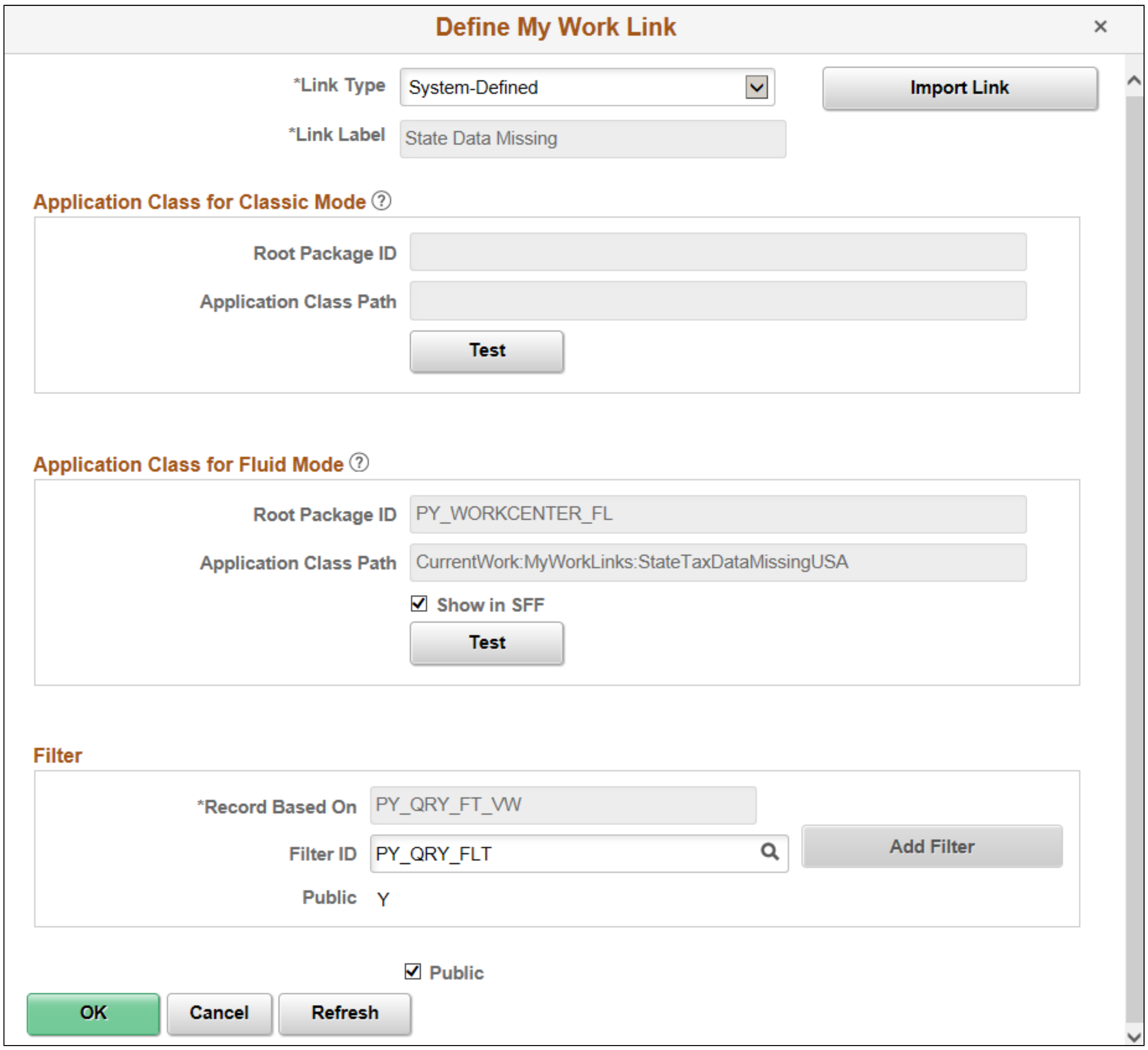
Use the Define My Work Link page (FSPC_ADM_WRK_SEC) to define link types and security for My Work Pagelets as a system administrator.

Navigation:

Enterprise Components > **WorkCenter/Dashboards** > **Configure Pagelets**

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

This example illustrates the Define My Work Link Page.



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

Field or Control	*Description*
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

Field or Control	***Description***
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

Field or Control	***Description***
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

Field or Control	***Description***
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.

Field or Control	Description
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

Field or Control	Description
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

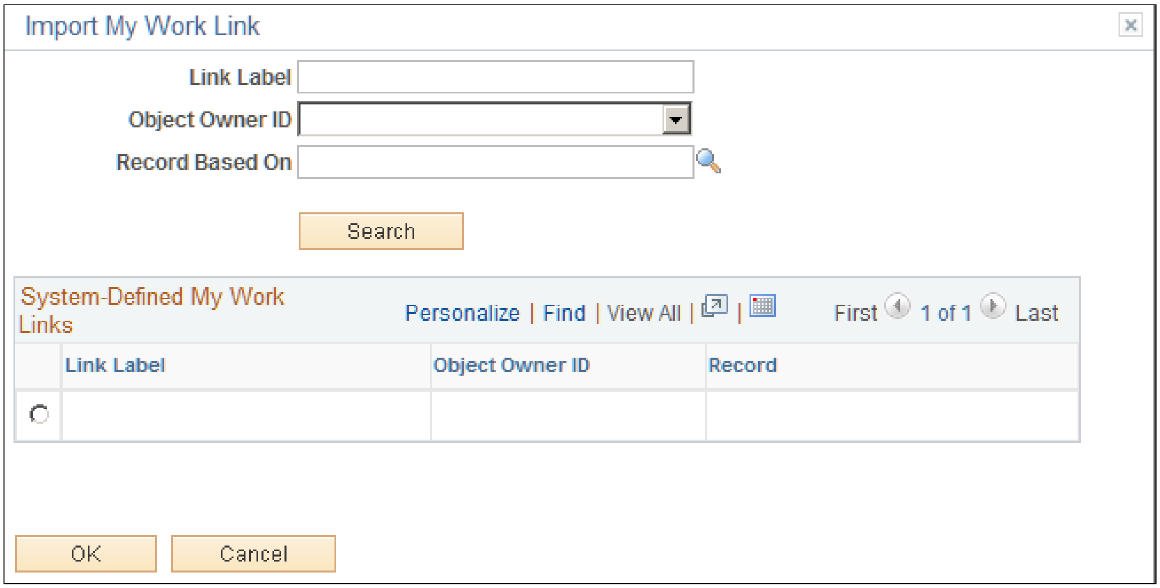
Use the Import My Work Link page (FSPC_MYWORK_PROMPT) to import system defined My Work links as a system administrator.

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.

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



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

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

Field or Control	***Description***
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

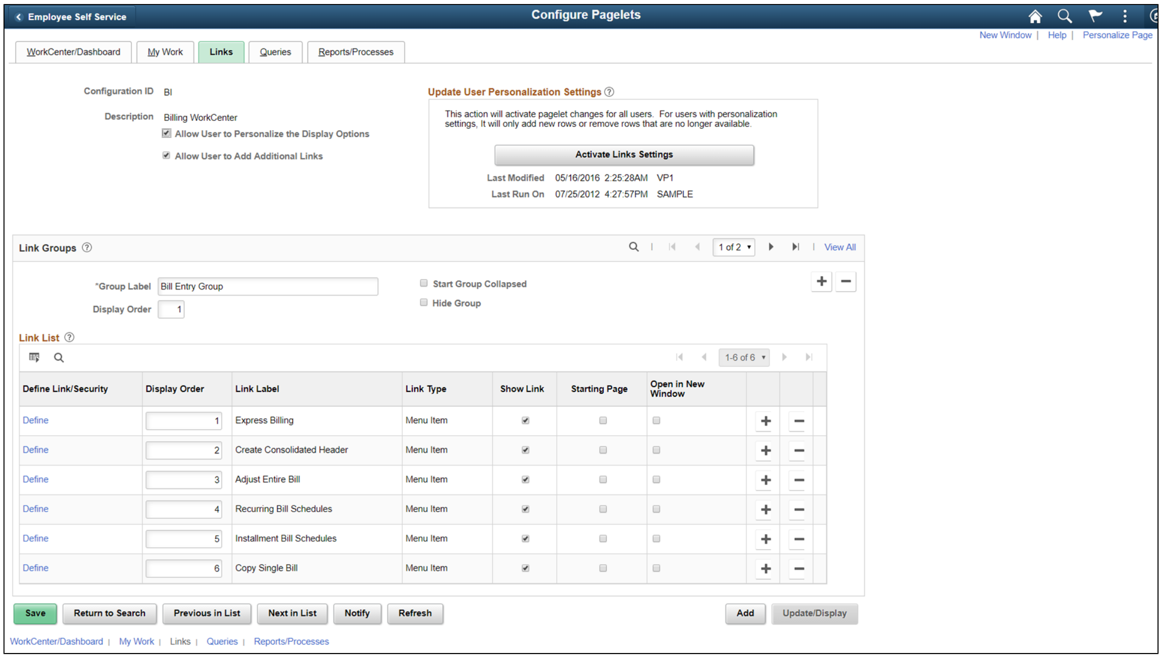
Use the Configure Pagelets – Links page (FSPC_ADMIN_LINK) to determine how links appear on the Links Pagelets as a system administrator.

Navigation:

Enterprise Components > **WorkCenter/Dashboards** > **Configure Pagelets**

Click the Links tab.

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



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

Field or Control	***Description***
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

Field or Control	***Description***
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

Field or Control	***Description***
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

Field or Control	***Description***
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

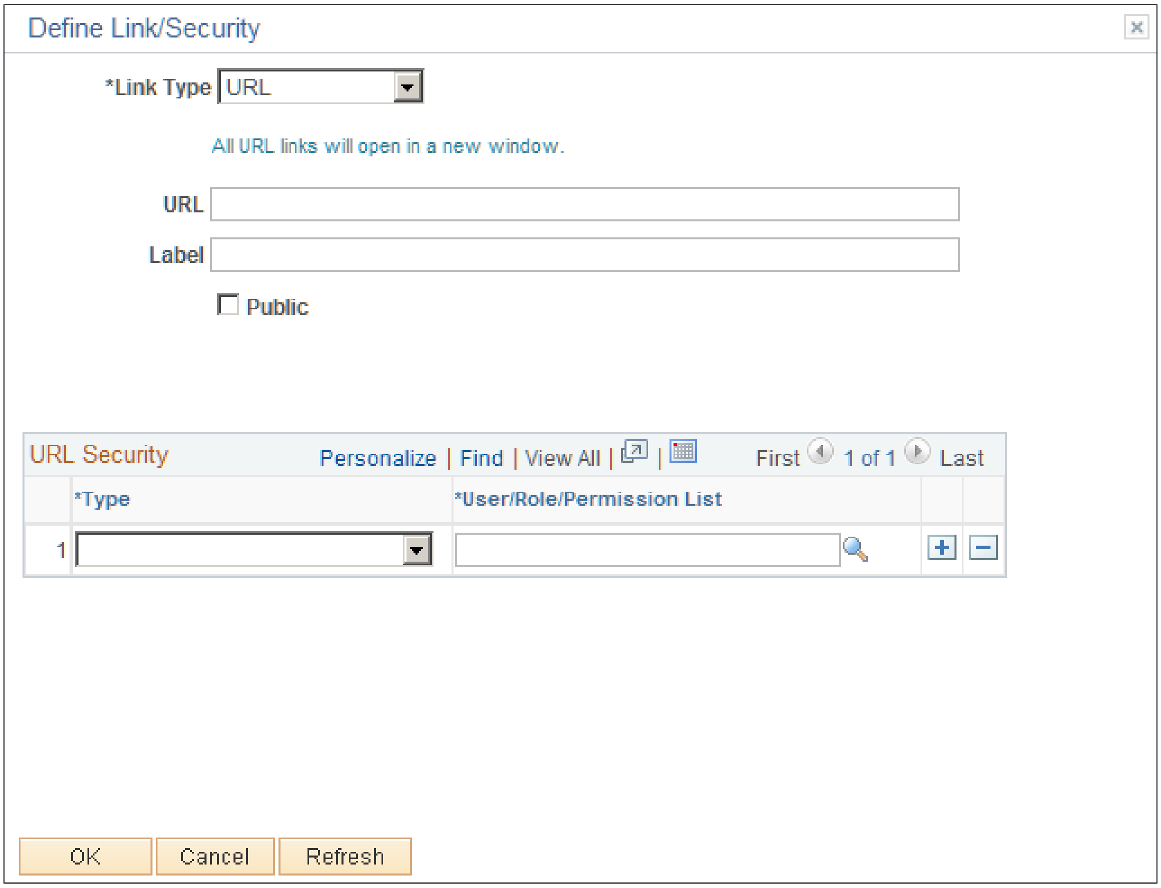
Use the Define Link/Security page (FSPC_ADMIN_LINK_SEC) to define links and external link security as a system administrator.

Navigation:

Enterprise Components > **WorkCenter/Dashboards** > **Configure Pagelets**

Click the Links tab. Click the Define link.

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.

Field or Control	***Description***
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.

Field or Control	Description
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

Field or Control	Description
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

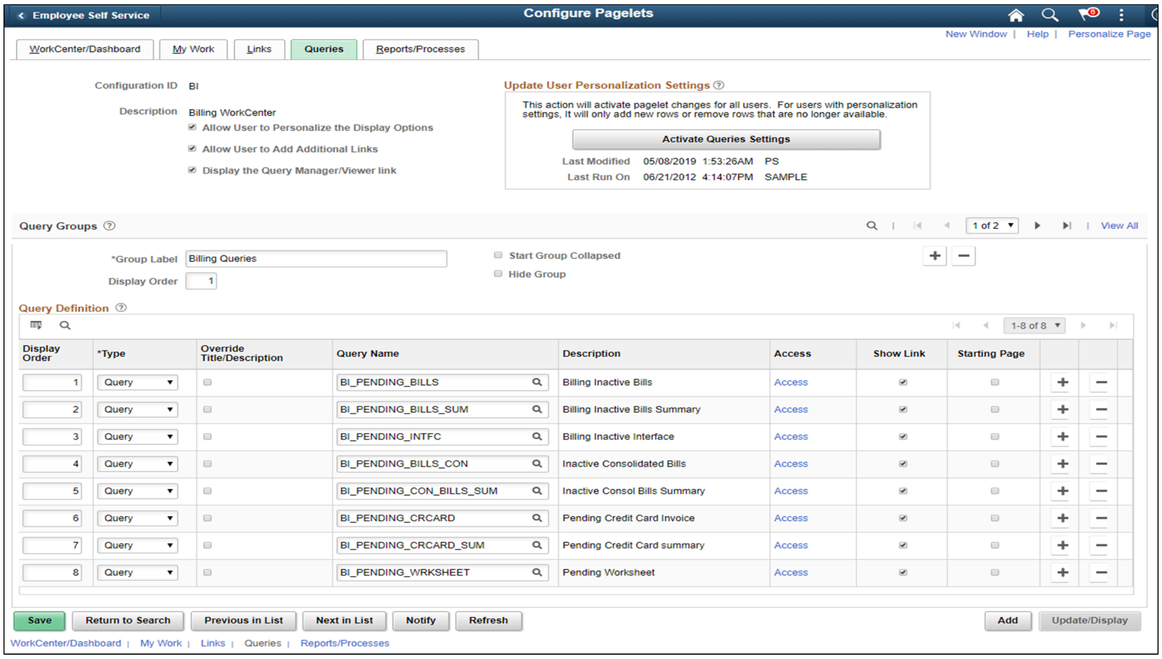
Use the Configure Pagelets – Queries page (FSPC_ADMIN_QUERY) to determine how queries appear on pagelets.

Navigation:

Enterprise Components > **WorkCenter/Dashboards** > **Configure Pagelets**

Click the Queries tab.

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



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

Field or Control	***Description***
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

Field or Control	*Description*
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

Field or Control	*Description*
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

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

Define Link Page

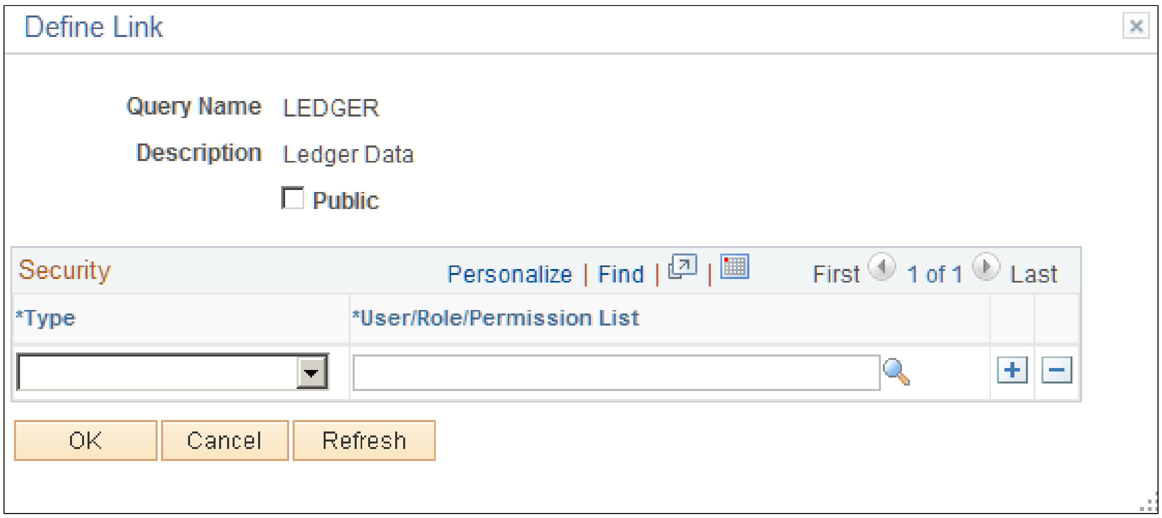
Use the Define Link page (FSPC_ADM_QRY_SEC) to define query access as a system administrator.

Navigation:

Enterprise Components > **WorkCenter/Dashboards** > **Configure Pagelets**

Click the Queries tab. Click the Access link.

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.

Field or Control	***Description***
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

Field or Control	***Description***
Type	Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the link.

Field or Control	***Description***
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

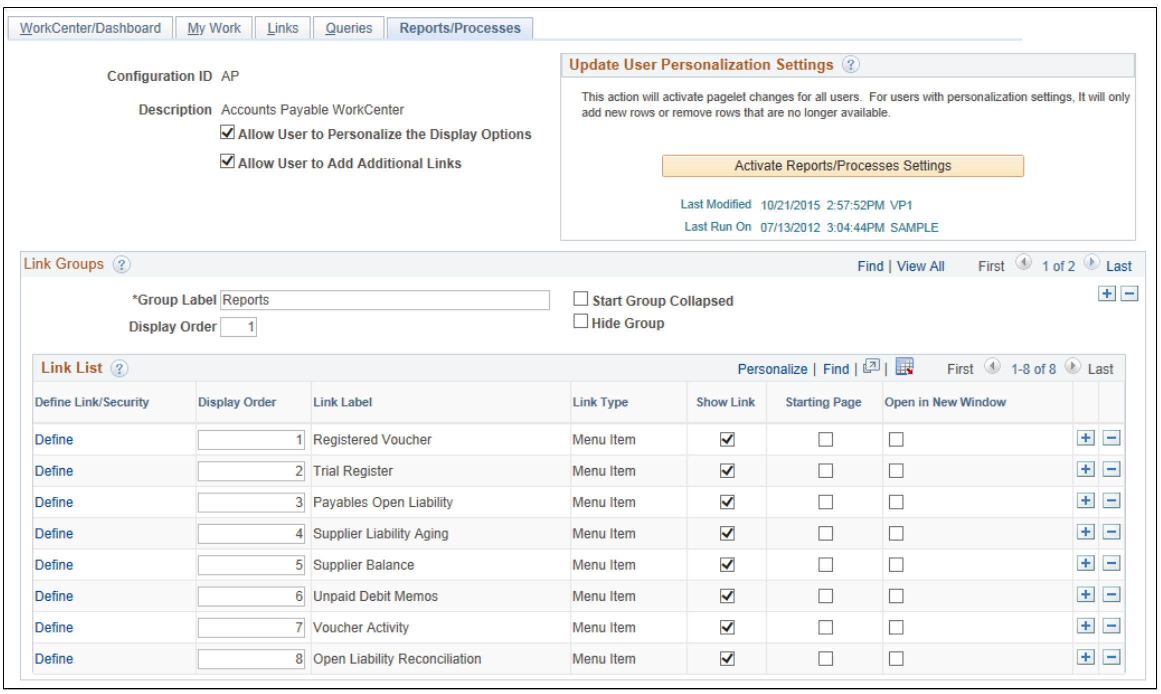
Use the Configure Pagelets – Reports/Processes page (FSPC_ADMIN_REPORT) to determine how reports and process links appear on pagelets as a system administrator.

Navigation:

Enterprise Components > **WorkCenter/Dashboards** > **Configure Pagelets**

Select the Reports/Processes tab.

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



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

Field or Control	Description
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

Field or Control	Description
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

Field or Control	Description
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.

Field or Control	Description
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

Field or Control	Description
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

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

Understanding Dataset Rules

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

To use dataset rules and roles:

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

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

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

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

- %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"

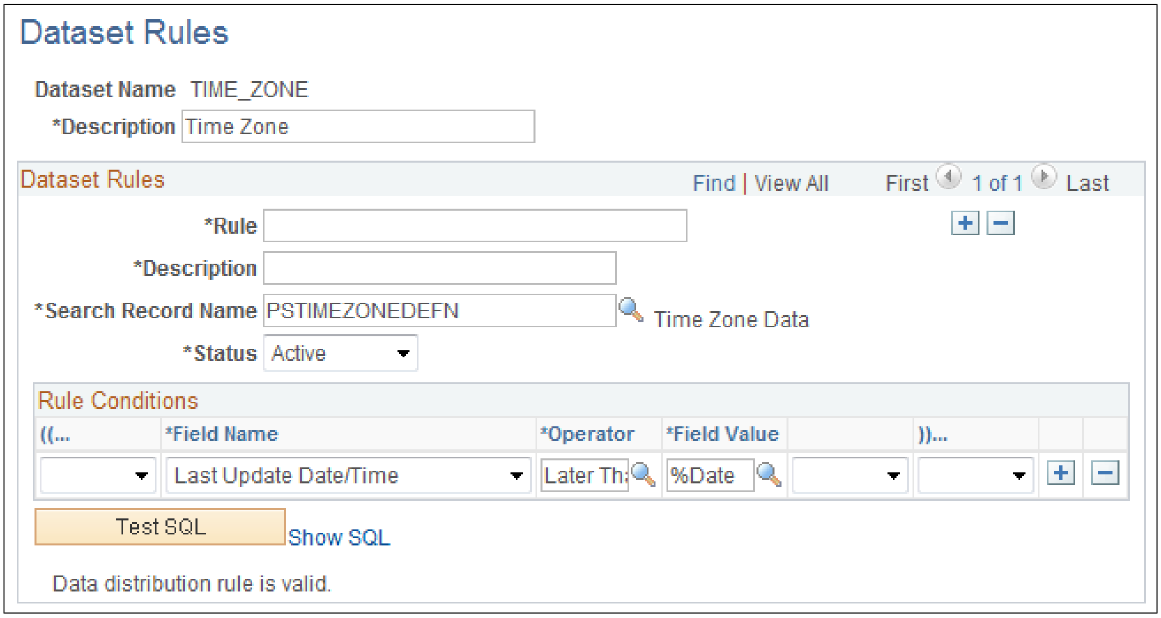
Dataset Rules Page

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

Navigation:

Enterprise Components > **Component Configurations** > **Datasets** > **Dataset Rules**

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



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

Dataset Rules

Field or Control	***Description***
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

Field or Control	***Description***
...((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 or Control	*Description*
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.

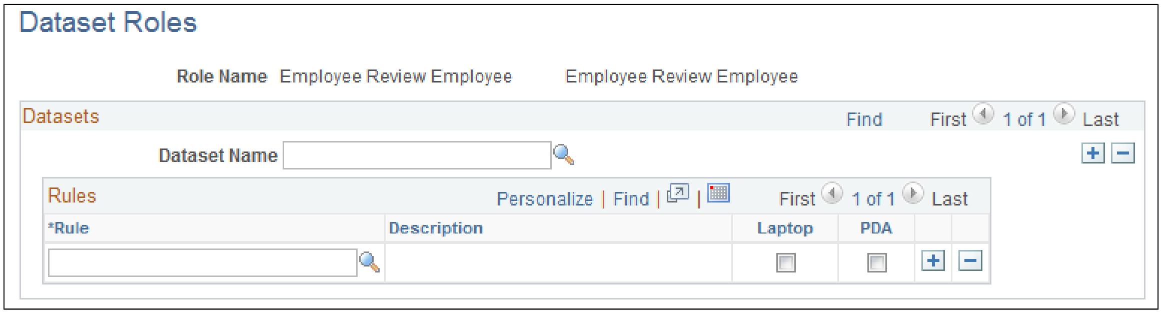
Dataset Roles Page

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**

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”

Field or Control	***Description***
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

Page Name	***Definition Name***	***Usage***
Mobile Data Distribution Page	EOEC_MP_RULE	Define data distribution rules for mobile devices based on datasets.

Page Name	***Definition Name***	***Usage***
Mobile User Rules Page	EOEC_MP_USRRULE	Preview the effect of mobile data distribution.

Understanding Mobile Data Distribution

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

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

Implementing Mobile Data Distribution

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

For example:

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

See Also

Enterprise PeopleTools 8.49 PeopleBook: Mobile Agent

PeopleTools: PeopleCode Language Reference

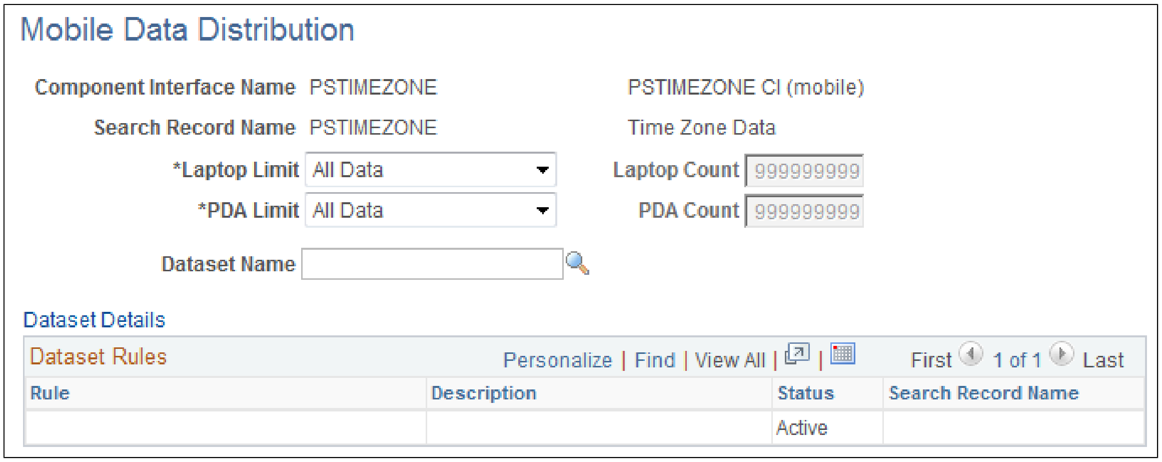
Mobile Data Distribution Page

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**

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



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

Field or Control	***Description***
Laptop Limit	Select the limiting factor for data instances to be downloaded to a laptop computer during synchronization. Select from: *All Data:* Select to download all data matching the rule's conditions. *Limit By Count:* Select to download only data matching the rule's conditions up to the specified count. The count is based on the number of rows returned. Referenced data is also included. *Referenced Data Only:* Select to download only data only if it is referenced by another component. You would be more likely to select this option for setup data than for transaction data. For example, if you have 50,000 products, but the leads you download are related to only 2,000 of the products, select *Referenced Data Only* so that you only download the 2,000 products, instead of the entire set. If *Reference Data Only* is selected for products, downloads do not include products unless other objects such as leads and opportunities that reference products are downloaded.

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

The **Dataset Rules** grid lists rules for the specified dataset.

Mobile User Rules Page

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

Navigation:

Enterprise Components > **Component Configurations** > **Mobile** > **Mobile User Rules**

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

Field or Control	Description
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.

Field or Control	*Description*
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

Page Name	***Definition Name***	***Usage***
Country Description Page	COUNTRY_DEFN	Define countries to be used throughout the system. This is used mainly for currencies and addresses.
Address Format Page	ADDR_FORMAT_TABLE	Customize fields and field descriptions, so addresses conform to the customary address format of the specified country. Once set, the format appears everywhere the system uses the address subrecord.
Valid Address Page	EO_ADDR_VALIDAT	Add valid combinations of address fields.

Page Name	*Definition Name*	*Usage*
State/Province Page	STATE_DEFN	Add or review a state, province, county, or other geopolitical region within a country.

Country Description Page

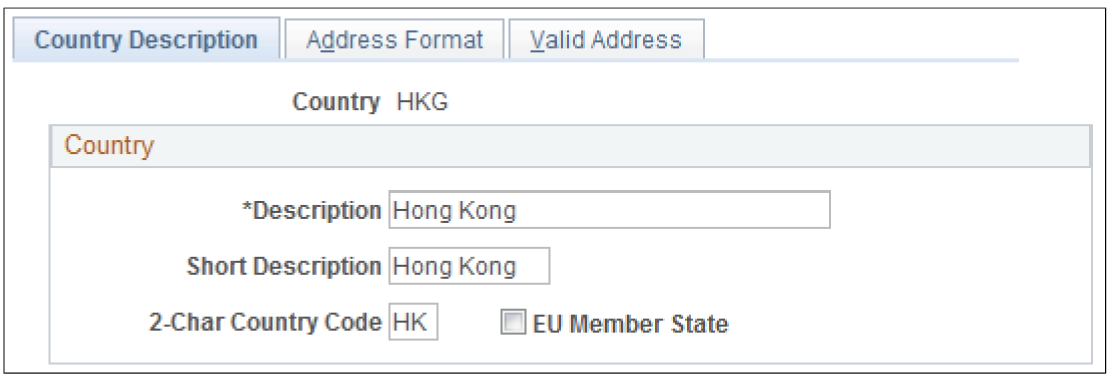
Use the Country Description page (COUNTRY_DEFN) to define countries to be used throughout the system.

This is used mainly for currencies and addresses.

Navigation:

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

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



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

Field or Control	*Description*
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.

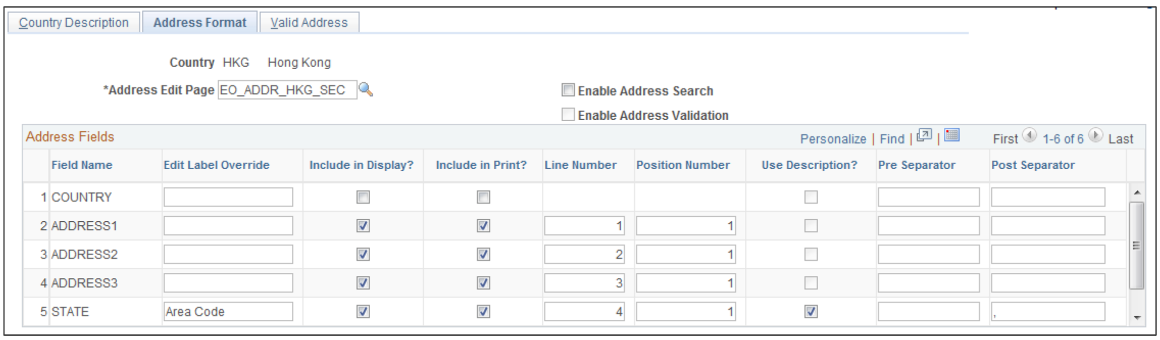
Once set, the format appears everywhere the system uses the address subrecord.

Note: The navigation, page shot, and field definitions are from a HCM database. See the FSCM Application Fundamentals documentation for navigation and field definitions from a FSCM database.

Navigation:

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

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.

Field or Control	***Description***
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.

Field or Control	*Description*
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.

Field or Control	***Description***
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)*.

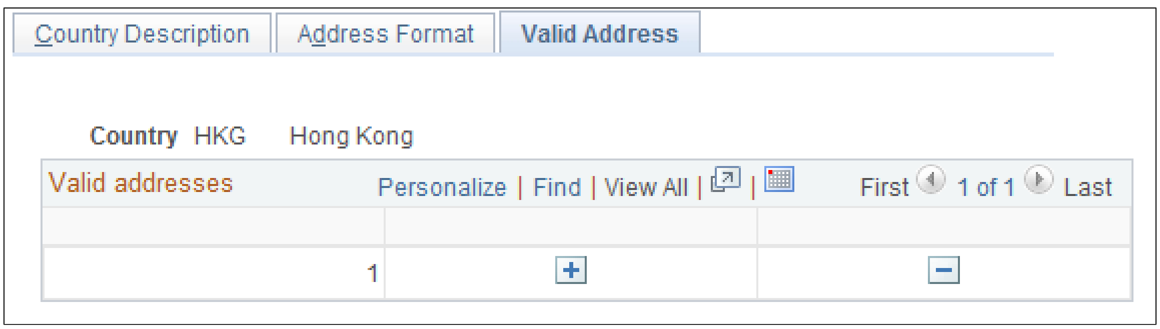
Valid Address Page

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**

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



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

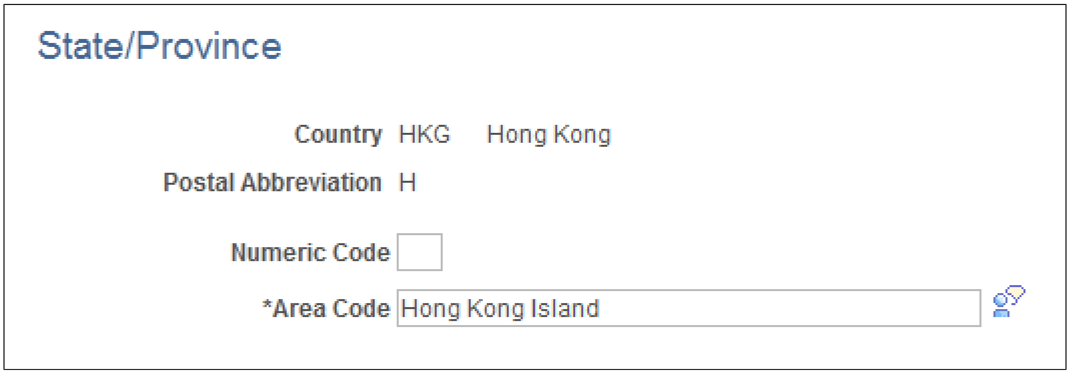
State/Province Page

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

Navigation:

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

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



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

Field or Control	***Description***
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

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

Understanding Navigation Path Search Criteria

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

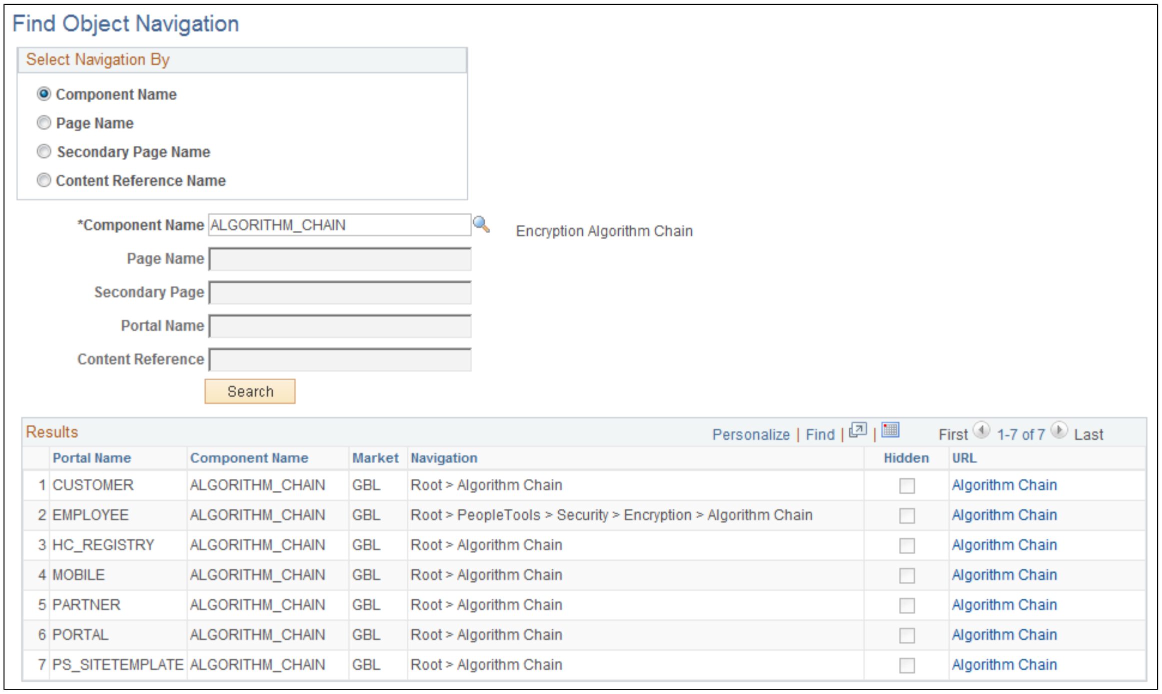
Find Object Navigation Page

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

Navigation:

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

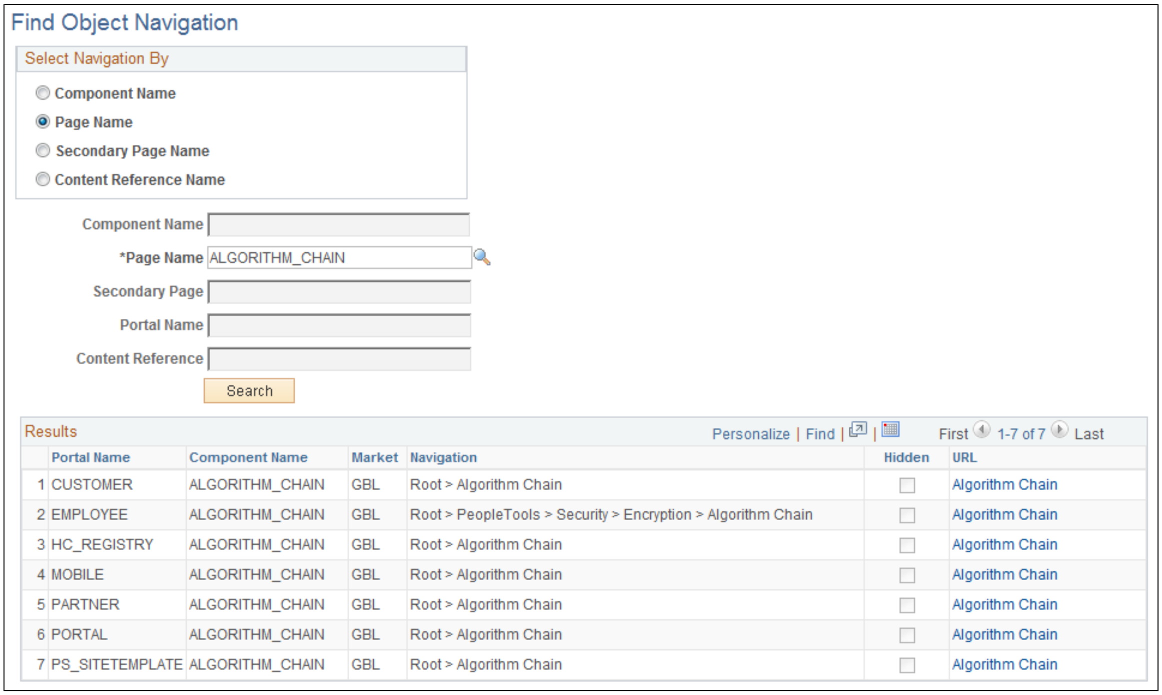
This example illustrates the fields and controls on the Find Object Navigation page with the navigation grid displaying the path and URL for search parameters of component name. You can find definitions for the fields and controls later on this page.



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

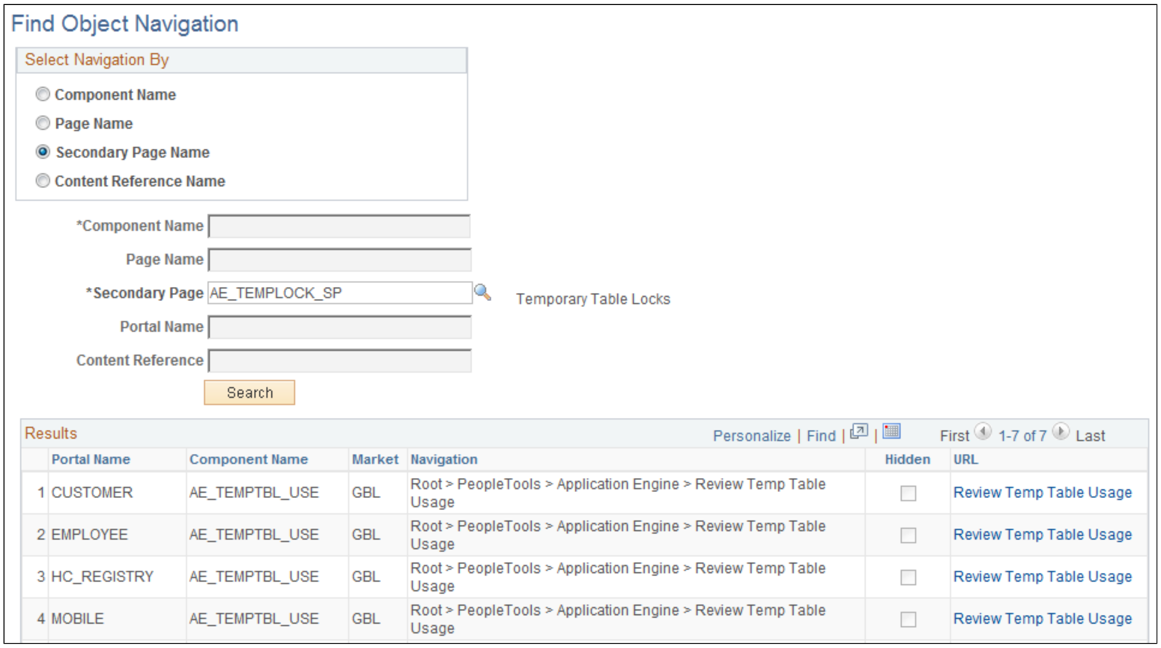
Field or Control	***Description***
Component Name	Select to search by component name. The system default is *Component Name.*
***Component Name**	This is a required field. Enter the name of the component for the search, or click the prompt to display available component names.
Search	Click to display 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.

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.



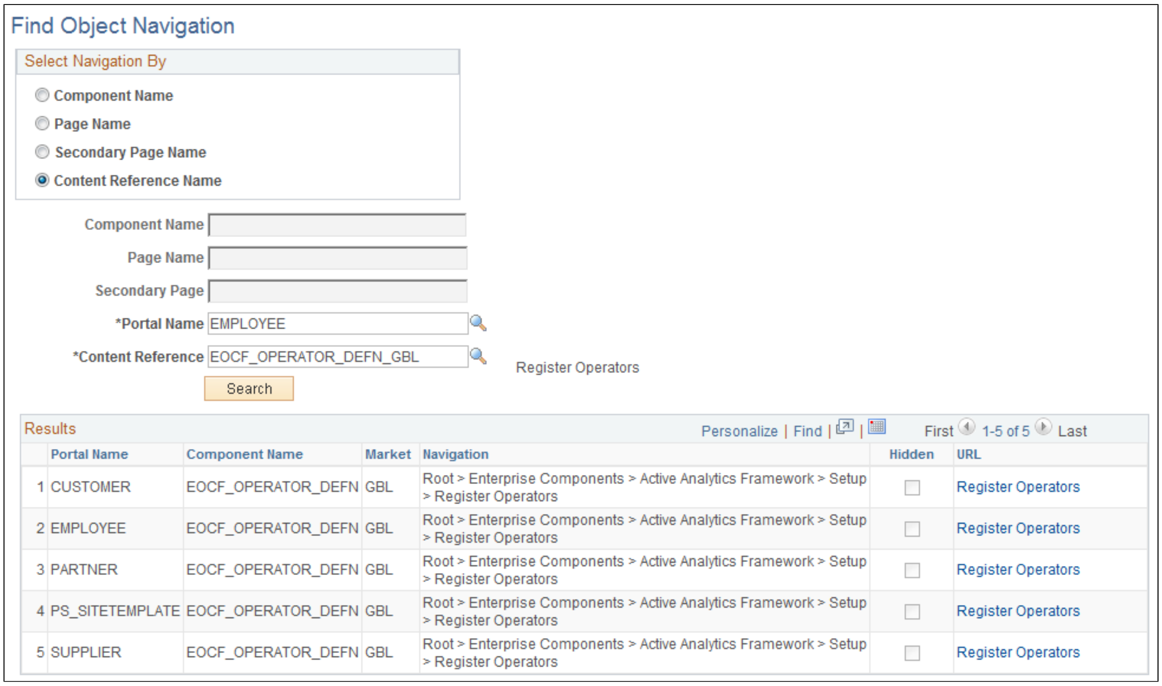
Field or Control	***Description***
Page Name	Select to search by page name.
***Page Name**	This is a required field. Enter the name of the page for the search, or click the prompt to display available page names.
Search	Click to display a grid that is populated with all of the corresponding navigation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

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.



Field or Control	***Description***
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.

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



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

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

Chapter 5

Using the Review Navigation Search Updates Utility

Reviewing and Managing Content Reference Label Updates

PeopleTools 8.59 enhanced the PTPORTALREGISTRY search definition to allow users to perform navigation searches using the Global Search field. To complement this feature, PeopleSoft updated content reference labels, descriptions, and keywords. The Review Navigation Search Updates utility enables you to review the updated content references applied to your target environment. The utility also enables you to manage which updates are applied to your production environment.

Note: This feature is currently only used by the HCM and FSCM products.

Page Used to Review Content Reference Label Updates

Page Name	*Definition Name*	*Usage*
Review Navigation Search Updates Page	EOPR_REVIEW	Review updated content reference labels and manage which labels you wish to apply to your production environment.

Understanding the Review Navigation Search Updates Utility

The Review Navigation Search Updates utility enables you to review content references applied to your target environment and compare the new label, description, and keywords with the original. You can also manage which labels you wish to apply to your production environment.

Content reference information displayed in the utility originates from the staging table *PS_EOPR_PRSMCR,* which exists in the target environment. You can filter the information you want displayed in the utility based on content reference object name, content reference parent folder, object owner, and bug number.

The Review Navigation Search Updates utility also provides a Process Flag to help manage which labels are applied to your production environment. If you do not want to apply the new labels to your production environment, you can set the flag to *No.* Please note that updating the Process Flag alone does not change the content references in your target environment. To implement the changes, you must re-run the Data Mover script that exports the *PS_EOPR_PRSMCR,* staging table data in PeopleSoft Change Assistant. The path to this step in Change Assistant is: Execute File References > Execute DMS > Running DataMover UPD*_ECRF.DMS.

When you re-export the staging table data, it creates a data (DAT) file that becomes the source when you apply the update in a subsequent pass using Change Assistant.

Follow these steps to implement content reference changes in your production environment:

1. Access PeopleSoft Change Assistant > Change Package Settings.

   Use the **Apply Type** section to indicate which pass you are processing (*Initial Pass, Subsequent Pass,* or *Move to Production).*

2. Use *Initial Pass* to apply the update to your development environment.

   The final step in the initial pass process creates a modified change package that includes all your customizations.

3. Use *Subsequent Pass* to apply the modified change package updates to additional target databases at the same maintenance level. Re-run the Data Mover script that exports the *PS_EOPR_PRSMCR,* staging table data in PeopleSoft Change Assistant. The path to this step in Change Assistant is: Execute File References > Execute DMS > Running DataMover UPD*_ECRF.DMS.

4. Use *Move to Production* to apply your updates to the Production database.

For more information about Change Assistant, see the topic 'Applying Change Package' in the *PeopleTools Change Assistant and Update Manager* documentation.

Note: To access the Review Navigation Search Updates utility, users must be assigned to the security role *"Ent Utilities Administrator."*

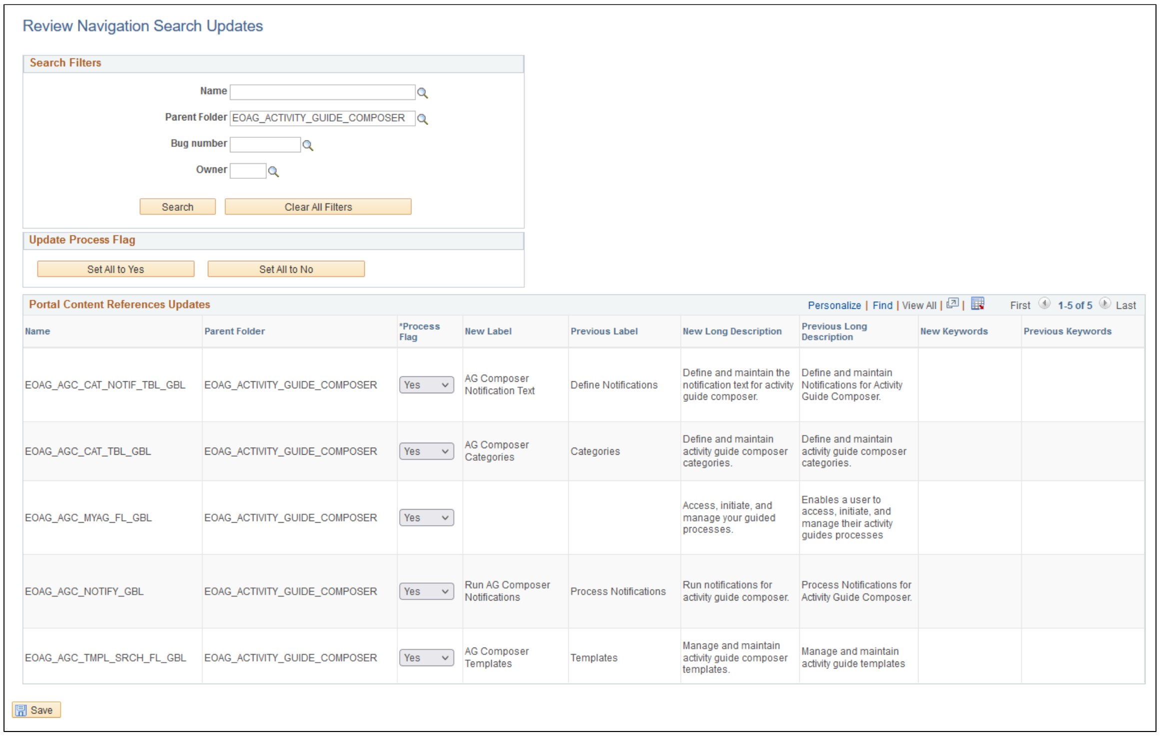
Review Navigation Search Updates Page

Use the Review Navigation Search Updates page (EOPR_REVIEW) to review updated content reference labels, and manage which labels you wish to apply to your production environment.

Navigation:

Enterprise Components > **Common Utilities** > **Review Nav Search Updates** > **Review Navigation Search Updates**

This example illustrates the fields and controls on the Review Navigation Search Updates page.



Search Filters

Field or Control	***Description***
Name	Filter content reference information in the grid by content reference object name.
Parent Folder	Filter content reference information in the grid by content reference parent folder.
Bug Number	Filter content reference information in the grid by bug number. Each content reference label update is associated with a bug number
Owner	Filter content reference information in the grid by owner.
Search	Select to filter the content reference information in the grid based on the filter values in the Search Filters section.
Clear All Filters	Select to clear all filters of values.

Update Process Flag

Use this section to set all Process Flags in the results grid to *Yes* or *No*.

Portal Content References Updates

Field or Control	***Description***
Name	Displays the object name for the content reference.
Parent Folder	Displays the parent folder for the content reference.
Process Flag	Indicate whether you want to apply the updated label to your production environment. Select *No,* if you do not want to apply the new label to your production environment. You must also use Change Assistant to re-run the Data Mover script that exports the staging table data. For more information on re-running the Data Mover script in Change Assistant , see Understanding the Review Navigation Search Updates Utility
New Label	Displays the new label for the content reference.
Previous Label	Displays the previous label for the content reference.
New Long Description	Displays the new long description for the content reference.
Previous Long Description	Displays the previous long description for the content reference.
New Keywords	Displays the new keywords for the content reference.
Previous Keywords	Displays the previous keywords for the content reference.
Save	Select to save changes to the Process Flag.

Chapter 6

Working With Currencies and Market Rates

Understanding Currencies and Market Rates

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

This section provides overviews of:

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

Understanding Currency and Market Rate Tables

The following tables store currency and market rate data:

- CURRENCY_CD_TBL

  Stores currency code data.

- CURR_QUOTE_PNL

  Stores currency quotation method data.

- RT_INDEX_TBL

  Stores market rate index data.

- RT_TYPE_TBL

  Stores rate type data.

- RT_RATE_TBL

  Stores market rate data.

Understanding Triangulation

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

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

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

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

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

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

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

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

Related Links

Calculating Cross, Triangulated, and Reciprocal Rates

Understanding Conversion Factor Fields and the Visual Rate

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

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

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

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

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

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

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

100 USD to GBP (indirect) = (100 USD / 1.6) × 1 = 62.50 GBP
1000 CHF to DEM (direct with units) = (1000 CHF / 100) × 119.335 = 1193.35 DEM
100 USD to FRF (triangulate) = (100 USD / 1.25) × 6.8 = 544 FRF

Related Links

Defining Currency Quotation Methods

Understanding Application-Specific Requirements for Currency Conversion

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

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

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

See Also

PeopleTools: Global Technology

PeopleTools: PeopleCode Developer's Guide

Defining Currencies

This section discusses how to define currency codes.

Page Used to Define Currency Codes

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

Currency Code Page

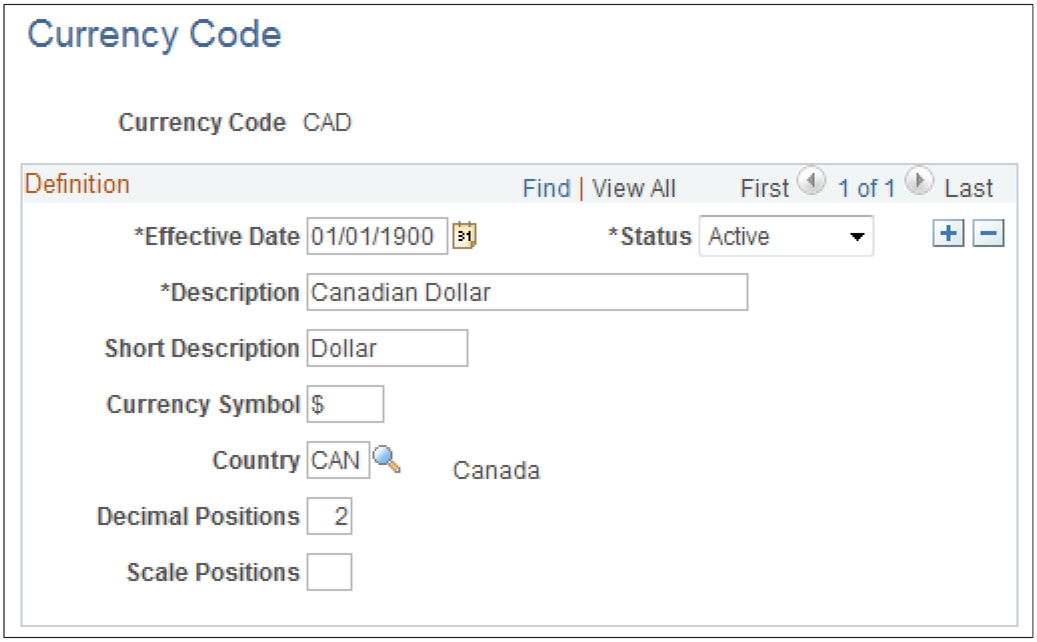
Use the Currency Code page (CURRENCY_CD_TABLE) to define currency codes.

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**

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.

Field or Control	***Description***
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.

Field or Control	*Description*
Country	Select the code for the country from which the currency originates. **Note:** PeopleSoft applications deliver fully populated country, state, and province code tables and update these tables as national boundaries and designations change.
Decimal Positions	Enter the number of decimal positions that should appear in the notation for the currency. For example, there are two decimal positions for Australian dollars (500.00 AUD), but no decimal positions for Japanese yen (500 JPY).
Scale Positions	Enter the scale positions you want to round for this currency. This controls how many numbers appear to the left of the decimal when displayed. The data is actually stored with full precision in the database itself. For example, if you want all million-dollar amounts displayed as the number of millions without the zeros, enter 6 as your scale position. In this case, 24,000,000 is displayed as 24, but is stored in the database as 24,000,000.

Defining Currency Quotation Methods

This section discusses how to define currency quotation methods.

Page Used to Define Currency Quotation Methods

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

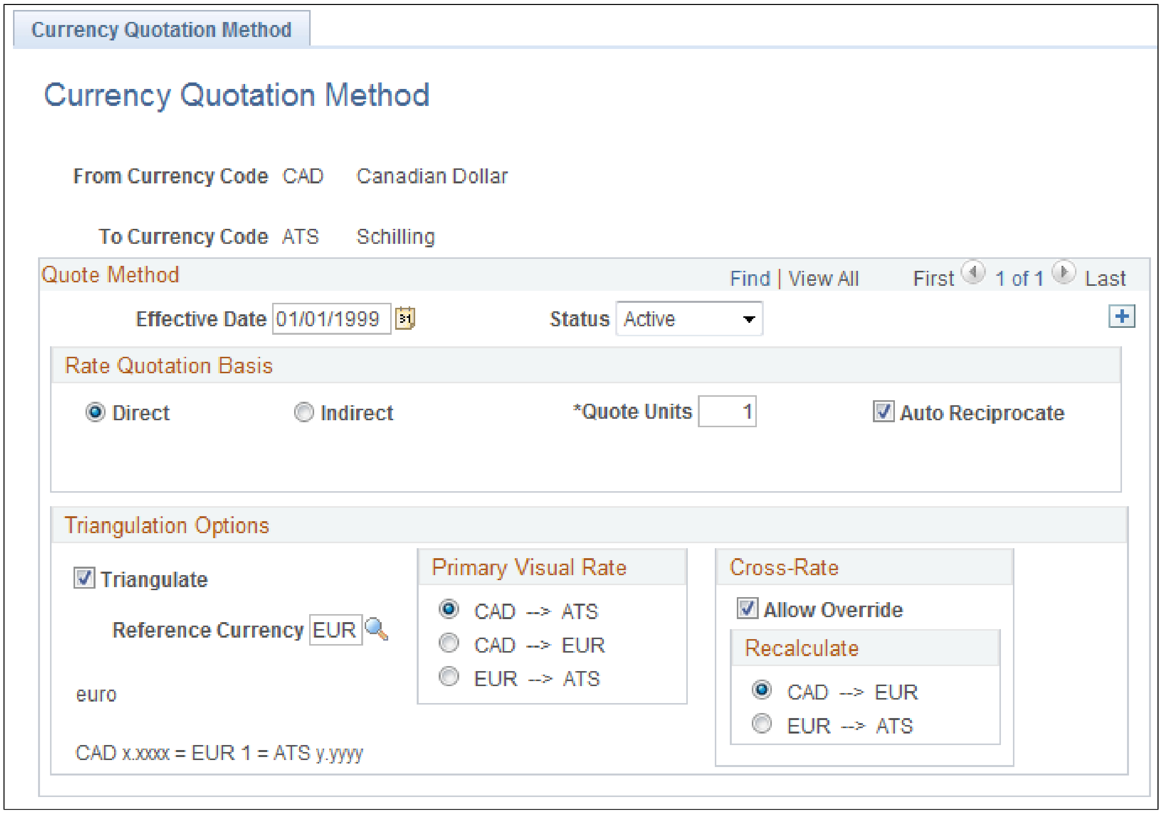
Currency Quotation Method Page

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

Navigation:

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

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.

Field or Control	***Description***
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.

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

Defining Market Rates

This section discusses how to define market rates.

Pages Used to Define Market Rates

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

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

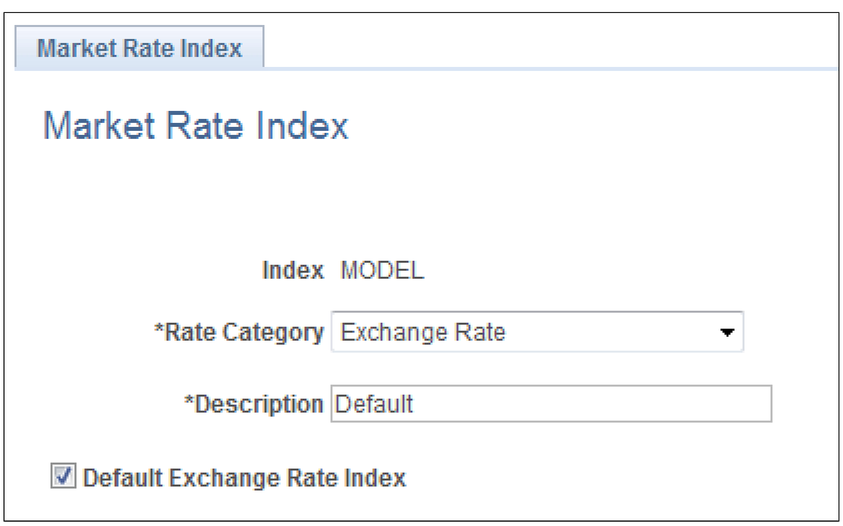
Market Rate Index Page

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

Navigation:

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

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



Market rate indexes are stored in the RT_INDEX_TBL table.

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

Market Rate Type Page

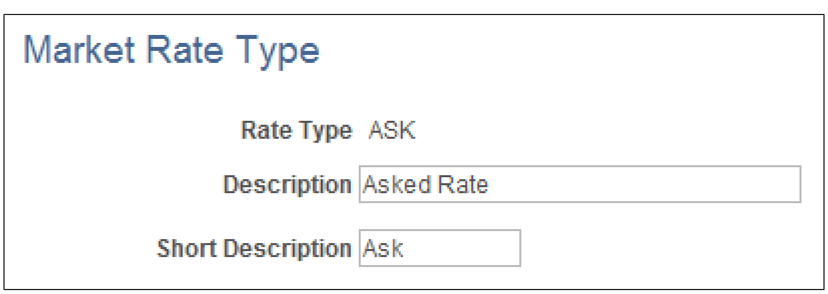
Use the Market Rate Type page (RT_TYPE_TBL) to define rate types that further categorize market rates.

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

Navigation:

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

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



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

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

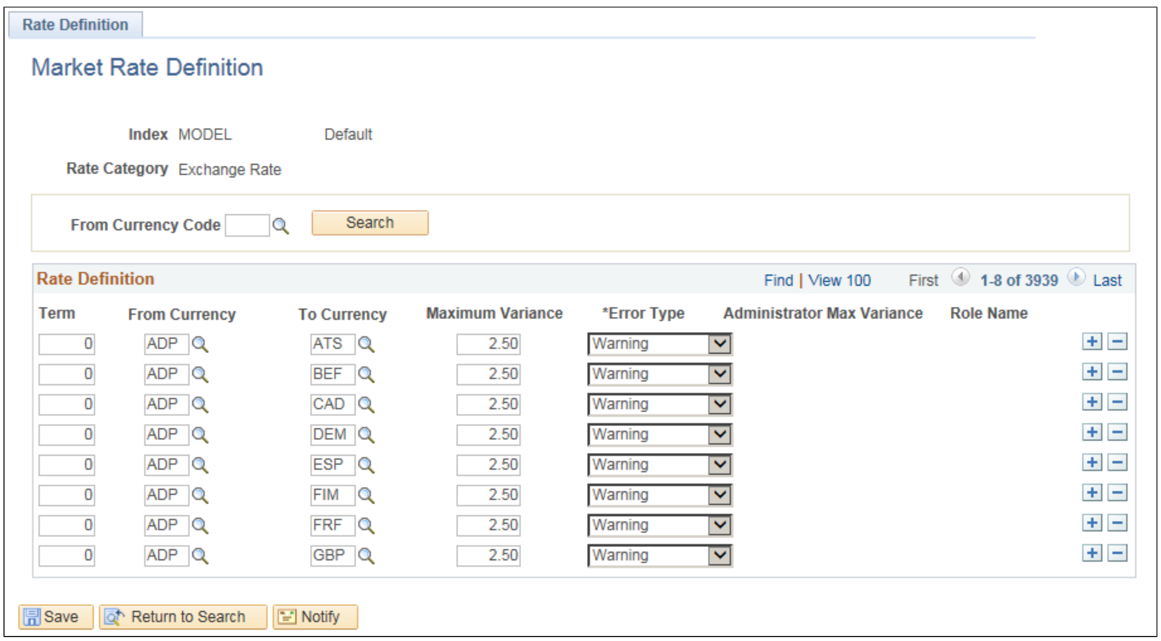
Market Rate Definition Page

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**

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



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

Market rate definitions specify the valid term, currency, and other appropriate field combinations for market rates. For example, if you have a market rate definition for 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.

Field or Control	***Description***
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

Field or Control	***Description***
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%).

Field or Control	*Description*
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

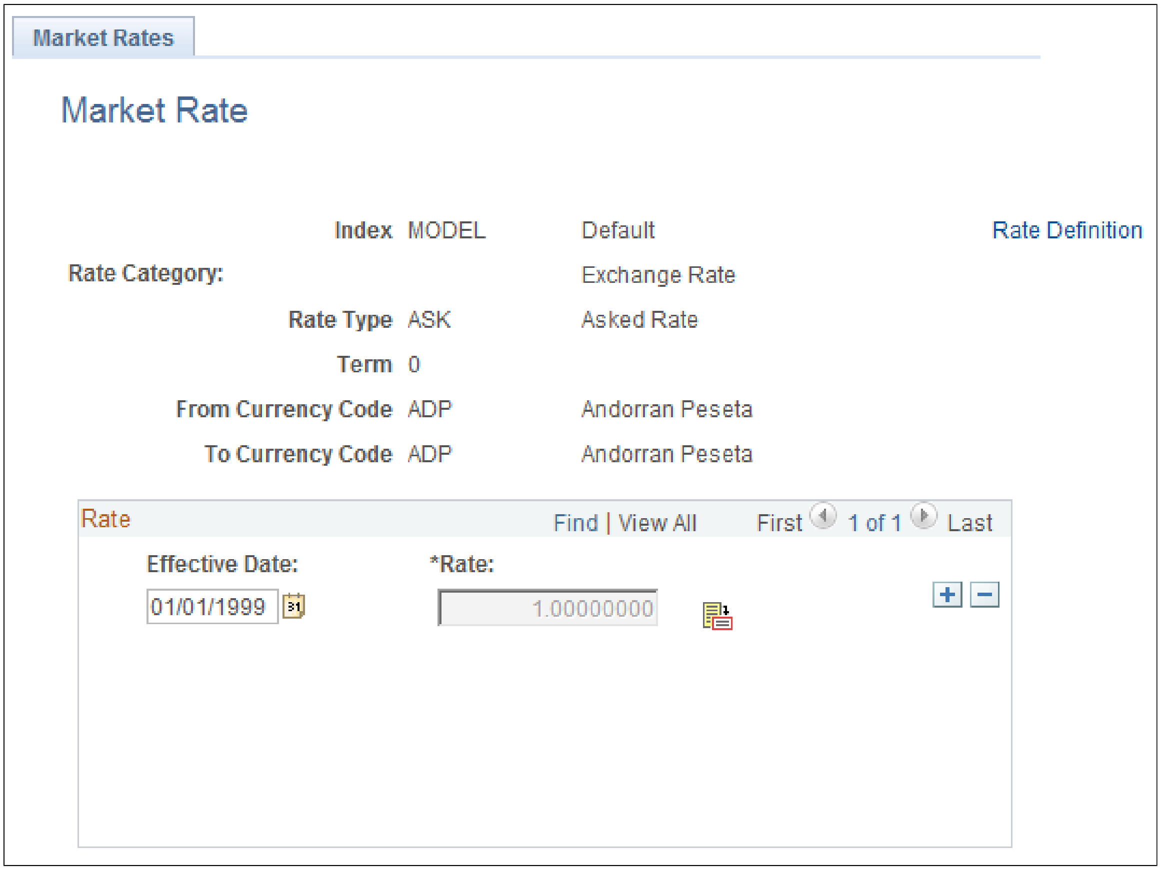
Use the Market Rate page (RT_RATE_PNL) to maintain and view market rates.

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**

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



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

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

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

- 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.

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

Rate

Field or Control	Description
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.

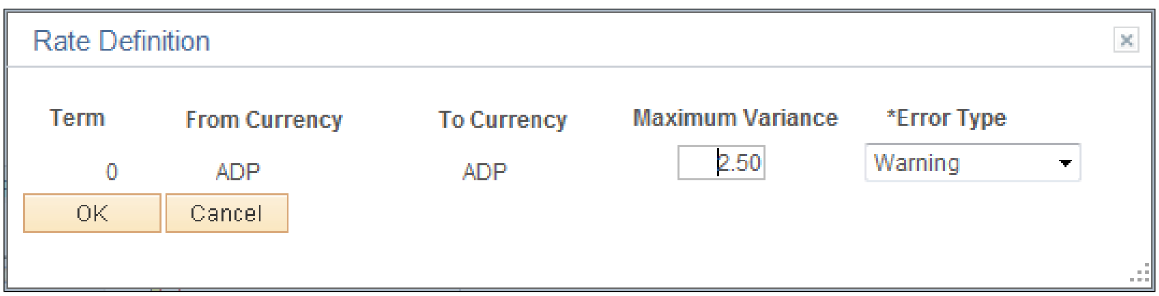
Rate Definition Page

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.

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



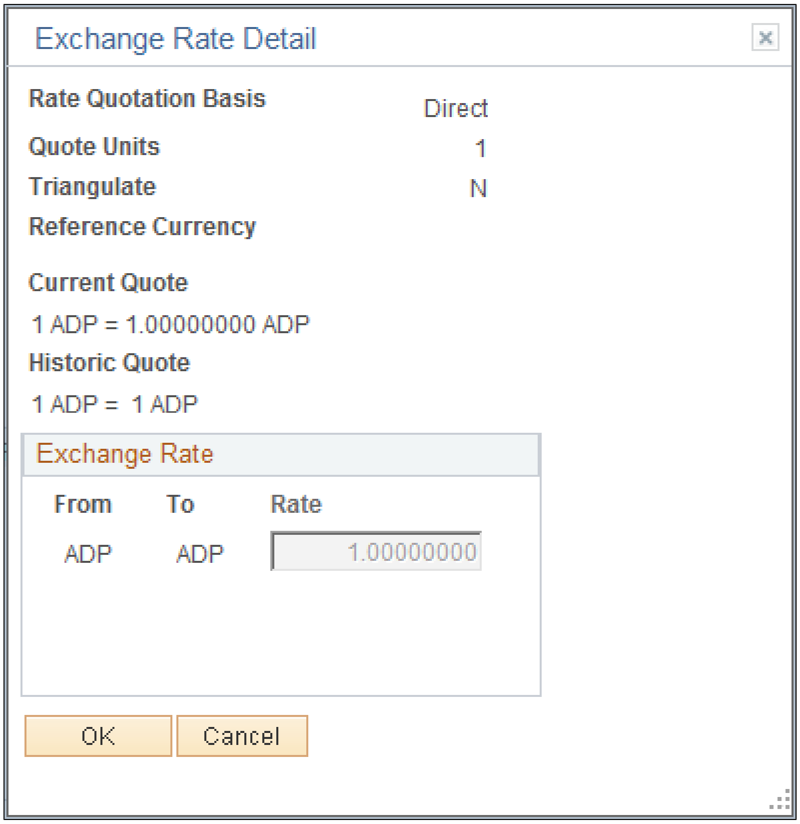
Exchange Rate Detail Page

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

Navigation:

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

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



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

Field or Control	***Description***
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.

Field or Control	***Description***
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.*

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

Calculating Cross, Triangulated, and Reciprocal Rates

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

Page Used to Run the EOP_RATECALC Process

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

Understanding the EOP_RATECALC Process

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

The process performs three functions:

- Generates cross rates for non-triangulated currency pairs.

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

- Generates triangulated rates for triangulated currency pairs.

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

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

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

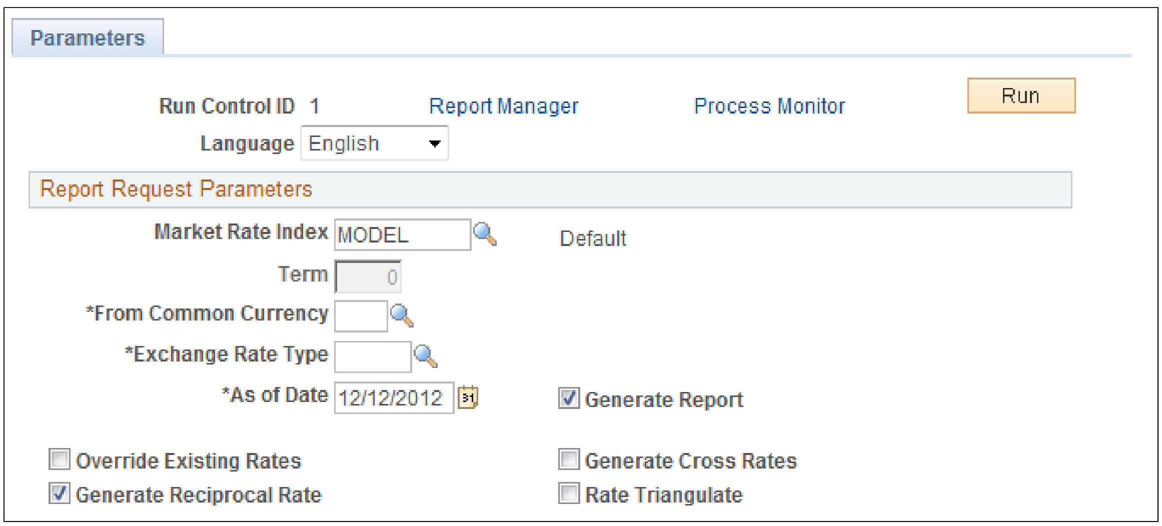
Calculate Cross/Reciprocal Rate - Parameters Page

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

Navigation:

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

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.

Field or Control	*Description*
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.

Field or Control	*Description*
Generate Reciprocal Rate	Select to calculates reciprocal rates for currency pairs that do not have the **Auto Reciprocate** option select on the Currency Quotation Method page. You can select this option alone, or in combination with the **Generate Cross Rates** and **Rate Triangulate** options. This process does not directly manipulate the exchange rates. The system uses numerator and denominator values instead, such that the following is true: (from-currency / RATE_DIV) × RATE_MULT = to-currency Fro example, suppose you want a reciprocal rate between USD and CHF and assume a two-to-one ratio. If the exchange rate for USD to CHF is quoted directly (either using a direct quote method that you selected or using the system default), this rate is stored as RATE_MULT = 2 and RATE_DIV = 1. The rate is represented as 1 USD = 2 CHF, with a visual rate of 2. In turn, the CHF to USD rate must be indirect. The reciprocal is a simple exchange, storing the rate as RATE_MULT = 1 and RATE_DIV = 2. The visual rate remains 2. If quote methods are not being used, the CHF to USD rate must be quoted directly (the default), so the reciprocal rate is actually a calculated inverse. This rate is stored as RATE_MULT = 0.5 and RATE_DIV = 1, with a visual rate of 0.5. In this example between USD and CHF, using a quote method and using a calculated inverse produced the same end result, 1/2 equals 0.5. But in actual practice, the manipulation of exchange rates is a major task and is one of the reasons for establishing the currency quote method.
Generate Cross Rates	Select to automatically generate cross rates. For example, to generate cross currency rates for USD, CAD, and MXP, you enter USD to CAD = 1.473 and USD to MXP = 9.8793. The system automatically generates CAD to MXP = 9.8793/1.473 = 6.7069246. If you choose to generate cross rates, the **From Cur** (from-currency) and **To Cur** (to-currency) fields display and you must select a from-currency and a to-currency. You can enter a wild card of % in either or both fields to indicate from all or to all currencies.
Rate Triangulate	Select to convert two currencies through a third currency. Select to convert two currencies through a third currency. If you select **Rate Triangulate**, the **From Cur** (from-currency) and **To Cur** (to-currency) fields display and you must select a from-currency and a to-currency. You can enter a wild card of % in either or both fields to indicate from all or to all currencies.

Field or Control	Description
Quote Method Required	Select to indicate that you want the process to perform selected calculations only if the currency pairs have an existing currency quotation method definition.

Using the Currency Exchange Calculator

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

Page Used to Convert Amounts Using the Currency Exchange Calculator

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

Currency Exchange Calculator Page

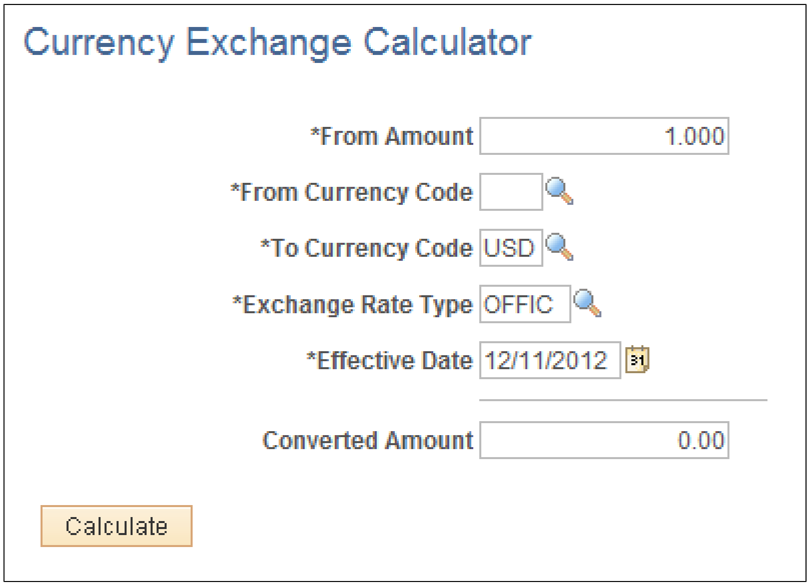
Use the Currency Exchange Calculator page (CURRENCY_EXCHNG_PN) to calculate currency exchange between currencies.

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

Navigation:

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

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.



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

Chapter 7

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:

Field or Control	***Description***
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:

Field or Control	***Description***
Initial	When a form user accesses an activated form and begins to complete it, the status of the form instance is set to *Initial.*
Pending	When the form user finalizes the form instance and submits it for approval, the status changes to *Pending.*
On Hold	When an approver or reviewer requests more information about a submitted form, the status changes to *On Hold.*
Approved, Denied, or *Cancelled*	As the form instance flows through the required approval chain, the status subsequently updates to approved, denied, or cancelled.

Security and Delivered Roles

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

Role Name	***Description***	***Permission Lists***	***Access Rights***
FORM_USER	Form user: Can complete and submit forms.	EOFM1000	The form user has add/update/display access to forms that have been created with the Form Design Wizard (form instances).
FORM_DESIGNER	Form designer: Can complete and submit forms, design forms, and manage forms that they are assigned to as the owner.	EOFM1000 EOFM2000	The form designer has add/update/display access to forms that have been created with the Form Design Wizard, *and* has add/update/display access to the Form Design Wizard component. Form designers have update/display access to only *their* forms when using the Manage Forms (FORM_RPT) component.
FORM_ADMIN	Form administrator: Can complete and submit forms, design forms, and manage *all* forms.	EOFM1000 EOFM2000 EOFM3000 EOSD2000	The form administrator has the same access as the form designer, and additionally, has update/display access to *all* forms when using the Manage Forms (FORM_RPT) component.

Role Name	Description	Permission Lists	Access Rights
FORM_CI_ DEVELOPERS	Form to component interface (CI) developer: Can complete and submit forms, design forms, manage *all* forms, and map forms to component interfaces (integrate forms).	EOFM1000 EOFM2000 EOFM3000 EOFM4000 EOSD2000	The form to CI developer has the same access as the form administrator, and in addition can set up form integration by mapping forms to component interfaces using the Forms to CI Mapping page.

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

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

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

Requirements

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

Related Links

“Understanding Approval Features” (Approval Framework)

Designing Forms

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

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

Pages Used to Design Forms

Page Name	Definition Name	Usage
Design Form Wizard - Step 1: Basic Information Page	FORM_DSN_WZR_MAIN	Define a form's basic information.
Design Form Wizard - Step 2: Instructions Page	FORM_DSN_WZR_INST	Provide instructions for users that describe how to complete and submit a form.

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

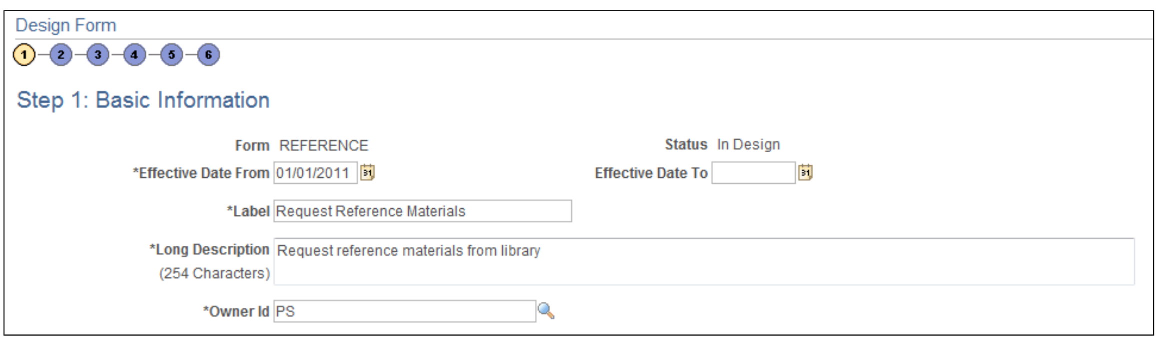
Design Form Wizard - Step 1: Basic Information Page

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

Navigation:

Enterprise Components > **Forms** > **Design Form Wizard**

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



Field or Control	Description
Form	The unique identifier for the form. You specify this ID when you add a new form.

Field or Control	*Description*
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.

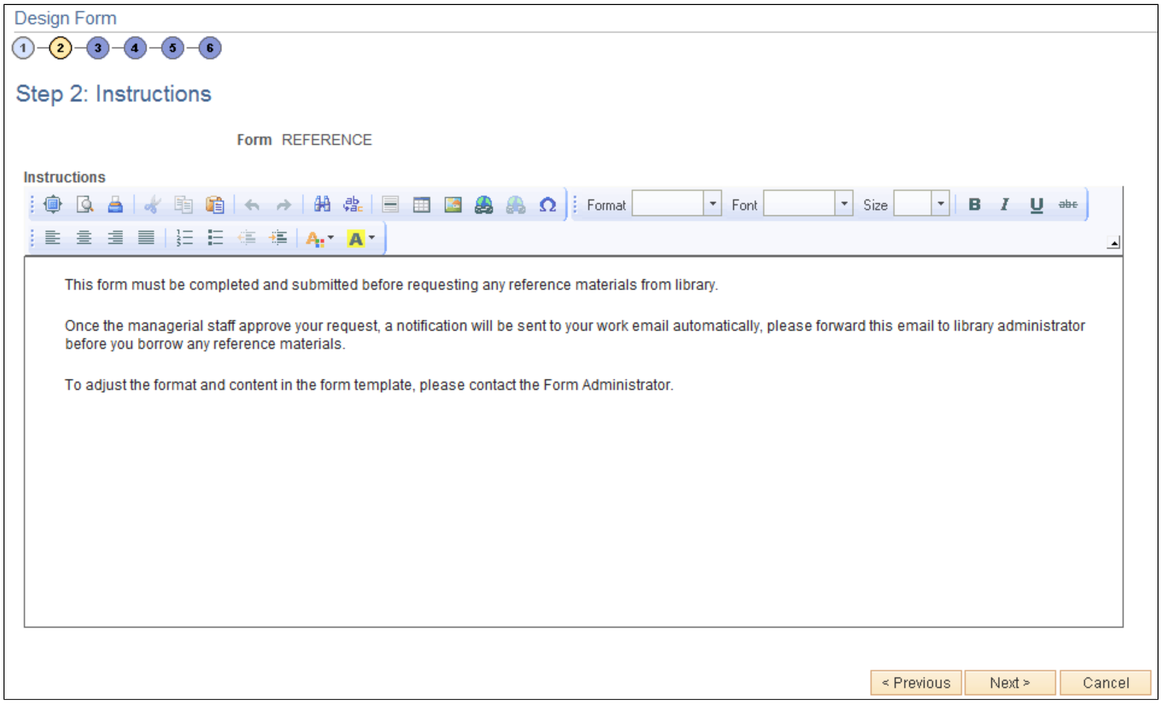
Design Form Wizard - Step 2: Instructions Page

Use the Design Form Wizard - 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 Wizard - Step 1: Basic Information page of the Forms Design Wizard.

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



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

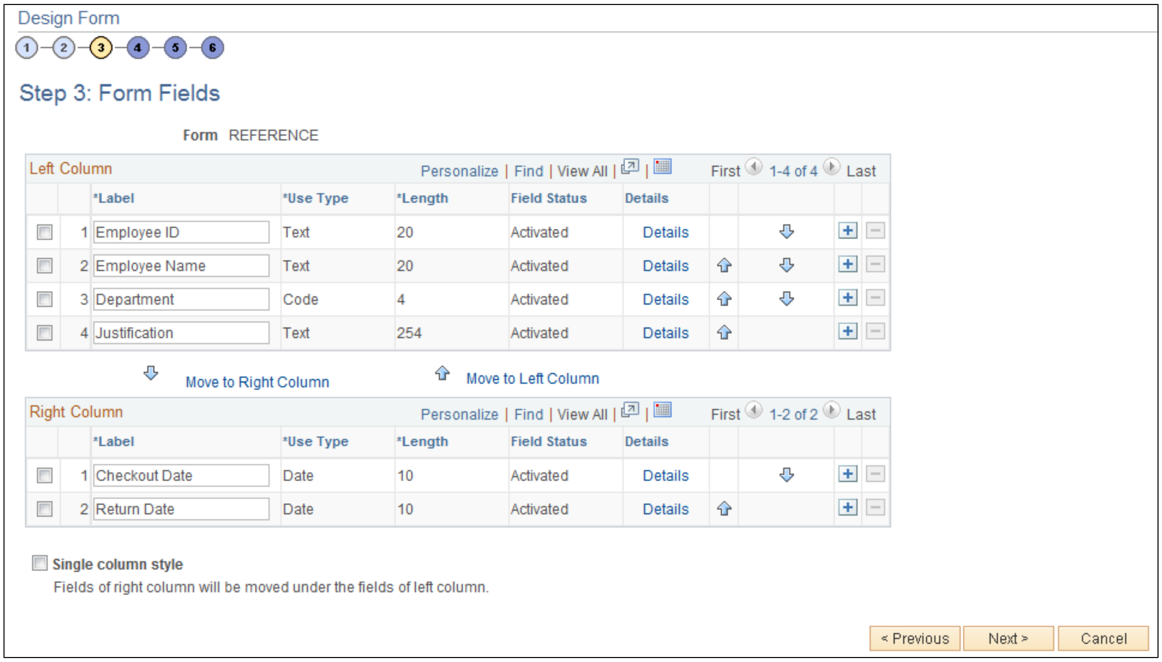
Design Form Wizard - Step 3: Form Fields Page

Use the Design Form Wizard - 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 Wizard - Step 2: Instructions page of the Forms Design Wizard.

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



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

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

Field or Control	***Description***
Label	Enter the label to use for this field.

Field or Control	*Description*
Use Type	Select the field type, and field length, if required (depends on the Use Type). Values are: *Code:* Use to define a code field that allows the form user to select a response from a list of codes. *Date:* Use for dates. *Number:* Use for numeric entries (only positive values are allowed). *Prompt:* Defines a prompt field that allows the user to select data from existing PeopleSoft database tables. *Section:* Use to separate a form into sections. The section can include a header with instructive text, and an HTML editor is provided for you to define the section. *Signed:* Use for signed numeric entries (values can be positive or negative). *Text:* Use for text entries. *Time:* Use for time entries. *Y/N:* Use for yes/no responses.
Length	Select the field length. You can modify this field only for Number, Prompt, Signed, and Text fields; the remaining field types use a preset length. The syntax for numeric fields is *X.Y*, where the value before the decimal *(X)* is the number of integer digits allowed, the value after the decimal *(Y)* is the number of decimal places allowed.
Field Status	Indicates the status of the field, either *Activated* or *In Design.*
Details	Click to access the Form Fields Details page, where you define additional requirements for the field, including whether the field is required, and edits for the field when a user completes the form. See Form Field Edits Page.
 and 	Click the arrow icons to reposition a field.
Move to Right Column	Click to move selected fields to the right column.
Move to Left Column	Click to move selected fields to the left column.

Field or Control	***Description***
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.

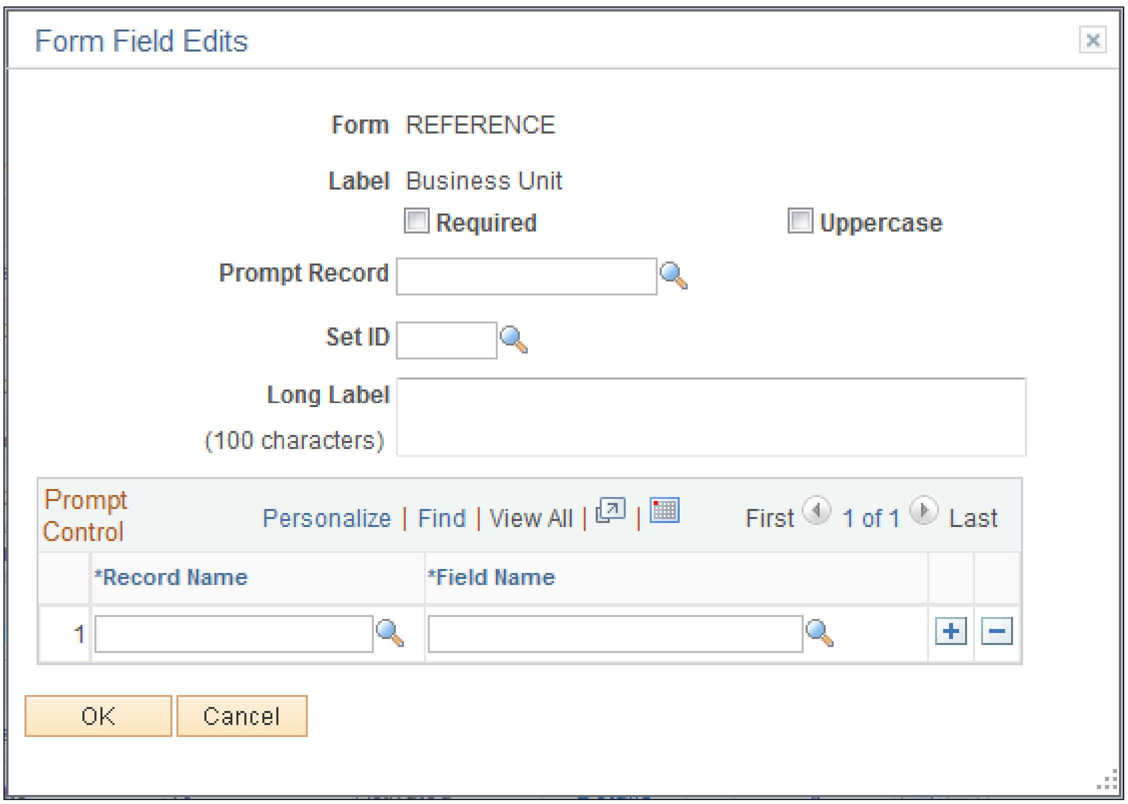
Form Field Edits Page

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

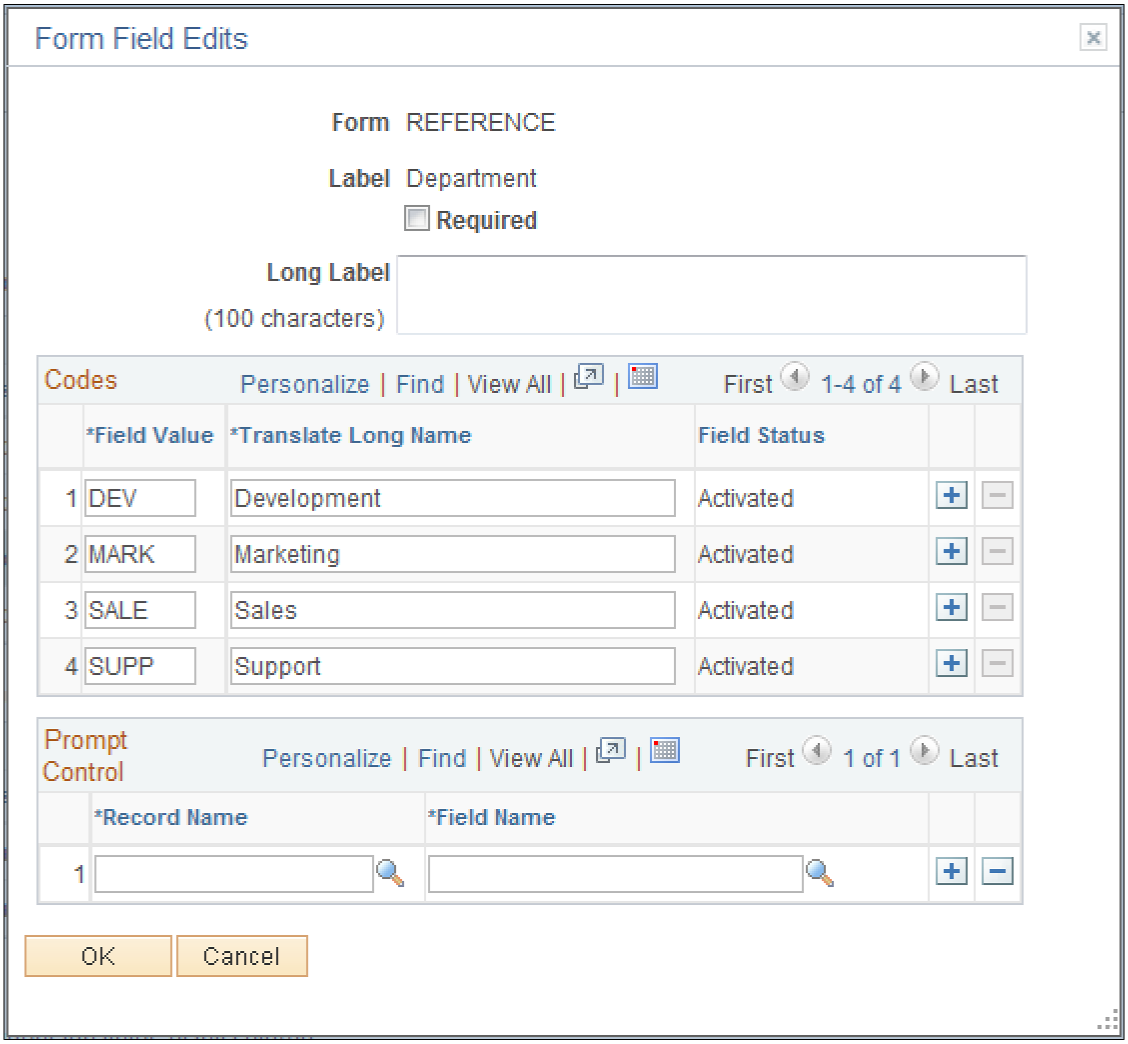
Navigation:

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

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.



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



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

Field or Control	***Description***
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.

Field or Control	*Description*
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.

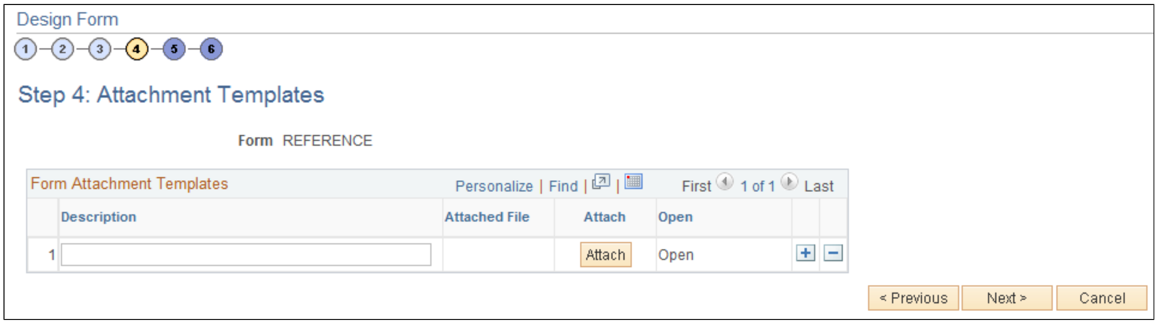
Design Form Wizard - Step 4: Attachment Templates Page

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

Navigation:

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

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



Field or Control	***Description***
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.

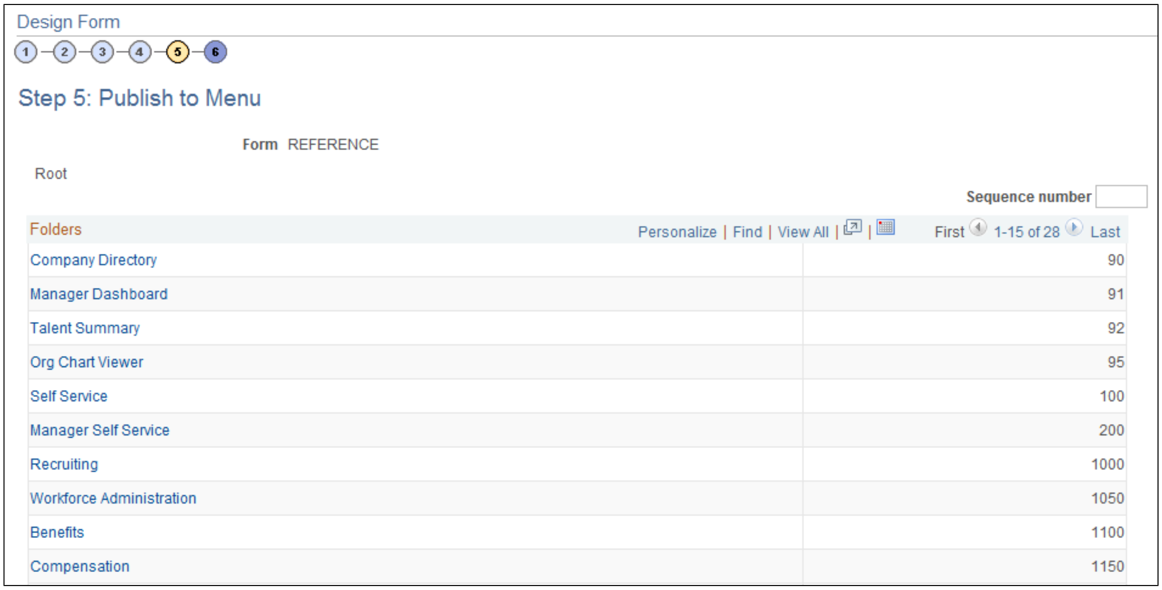
Design Form Wizard - Step 5: Publish to Menu Page

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

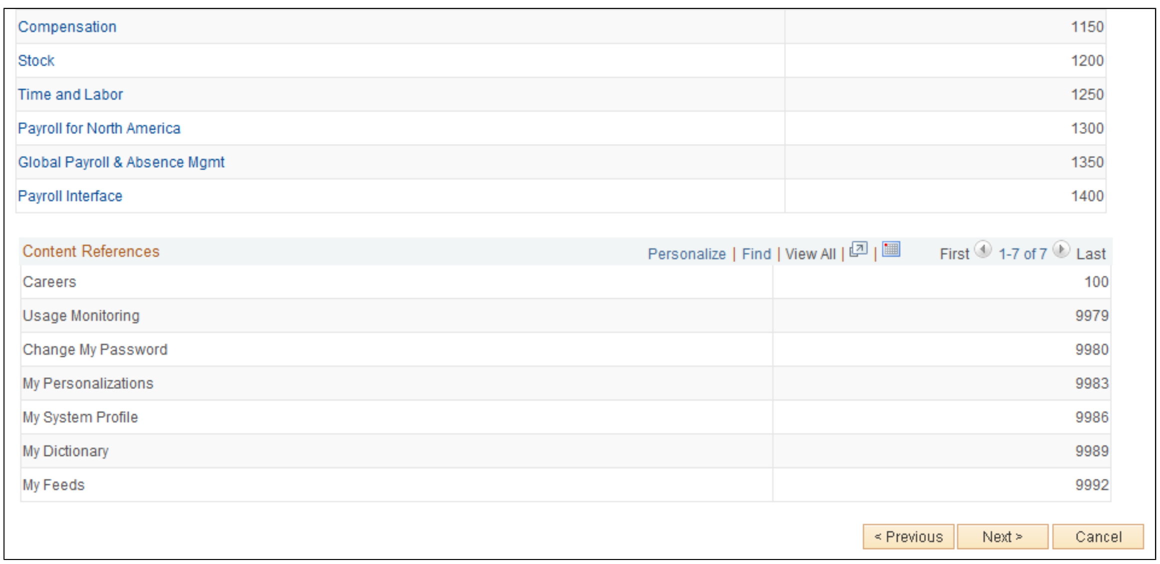
Navigation:

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

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



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



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

Field or Control	***Description***
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.

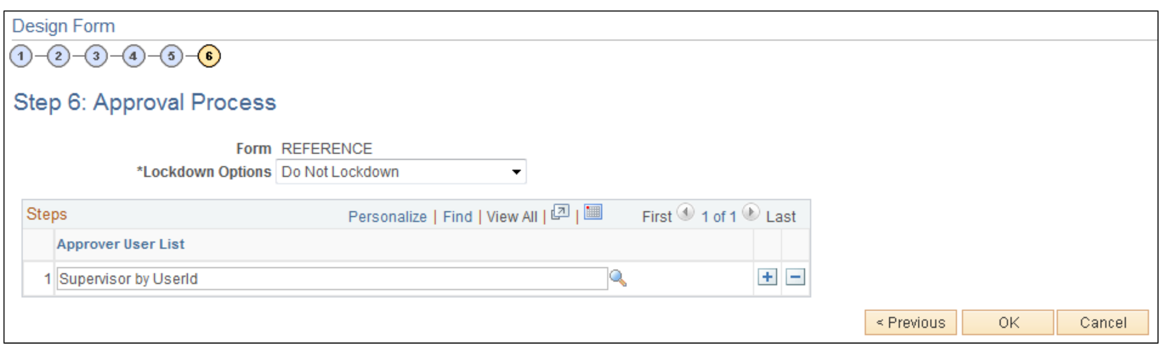
Design Form Wizard - Step 6: Approval Process Page

Use the Design Form Wizard - 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 Wizard - Step 5: Publish to Menu page of the Forms Design Wizard.

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



Field or Control	*Description*
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” (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.*

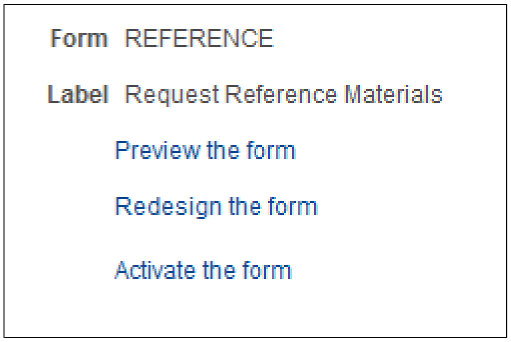
Design Form Wizard: Complete Page

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

Navigation:

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

This example illustrates the fields and controls on the Design Form Wizard: 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:

Field or Control	***Description***
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

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

Define Prompt Records Page

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

Navigation:

Enterprise Components > **Forms** > **Prompt Records for Forms**

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.

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

Managing Forms

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

Page Used to Manage Forms

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

Understanding Form Management

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

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

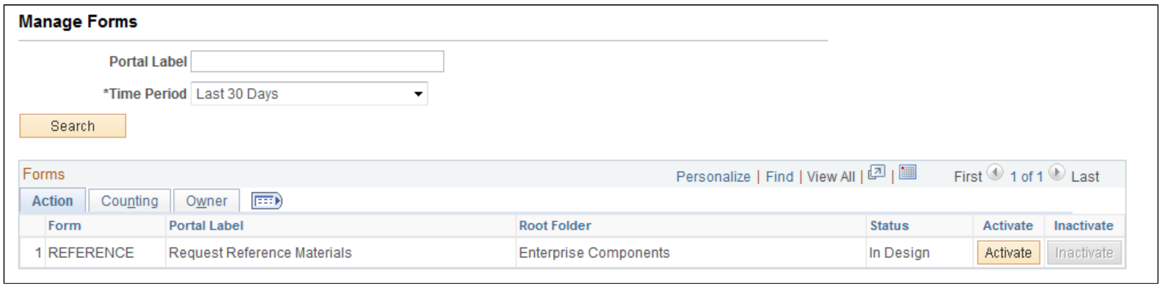
Manage Forms Page

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

Navigation:

Enterprise Components > Forms > Manage Forms

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:

Field or Control	***Description***
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:

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

Activating/Inactivating Forms

Select the **Action** tab to activate or inactivate forms.

Note: The SQL view generation of form data is currently only used by FSCM products.

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

Reviewing Form Counts

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

Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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***
Maintain Forms Page	FORM_ADD	Search for an existing form instance to update, or complete a new form instance.
Form Page	FORM FORM2	Complete a form instance and submit it for approval.
<Portal label (approval preview)> Page	FORM_APPR_MAP	Preview the approval path for a form.

Page Name	***Definition Name***	***Usage***
Instructions Page	FORM_INSTR	Review form instructions if needed.
Attachments Page	FORM_ATCH	Download and upload attachments to the form if needed.
Form Approval Page	FORM_APPR_ACTION	Approve or deny a form.

Maintain Forms Page

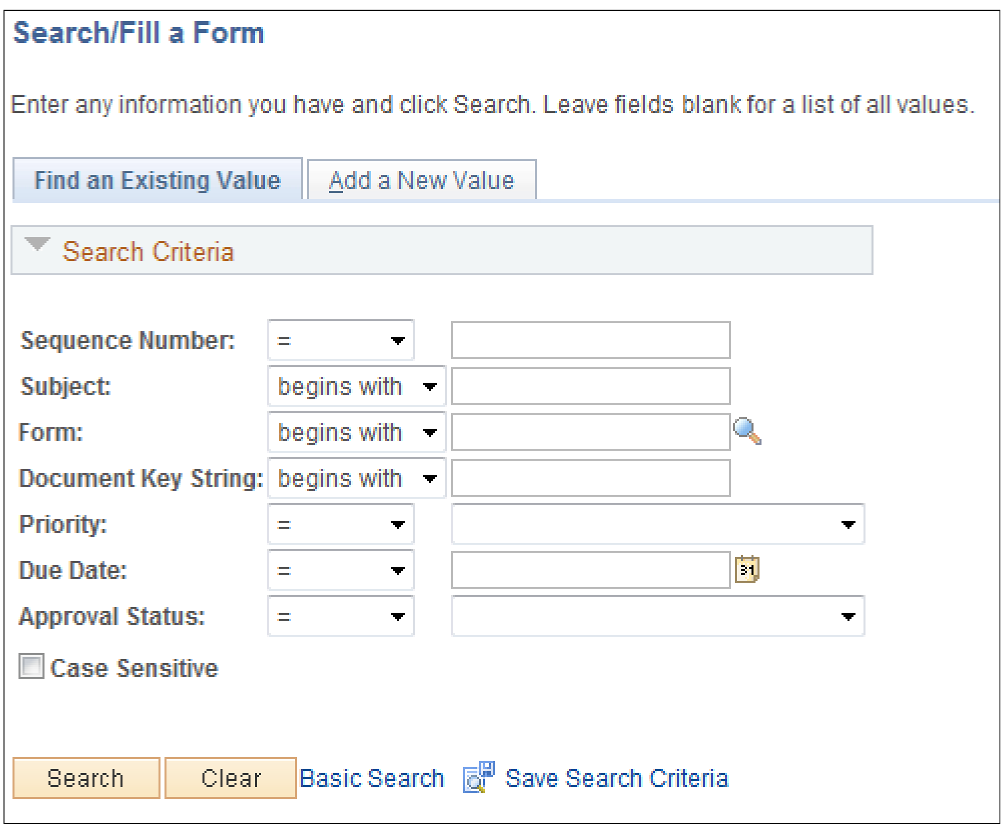
Use the Maintain Forms page (FORM_ADD) to search for an existing form instance to update, or complete a new form instance.

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** > **Maintain Forms**
- **<Menu Path>** > **<Form Label>**

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.

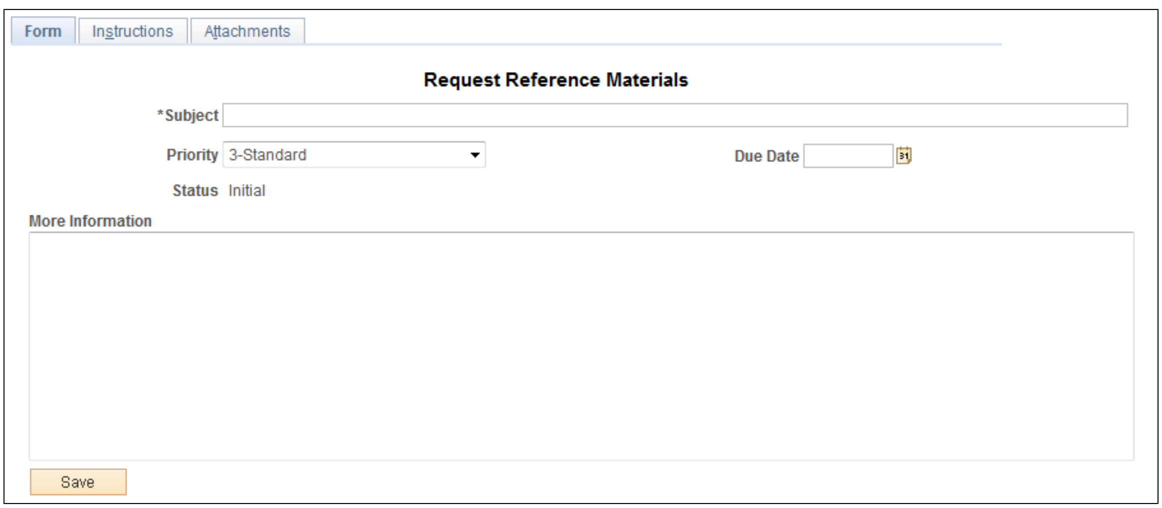
Form Page

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

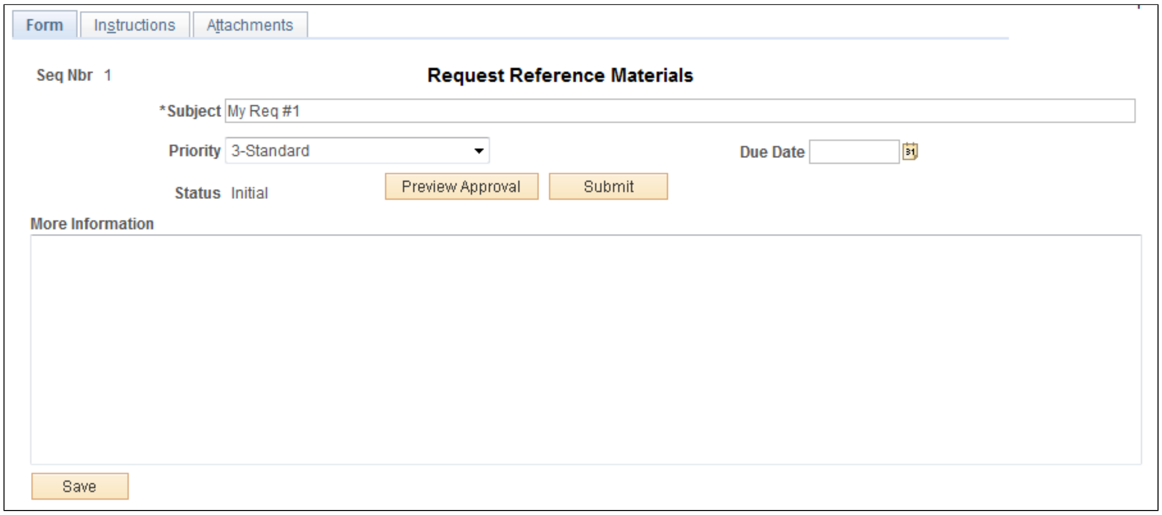
Navigation:

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

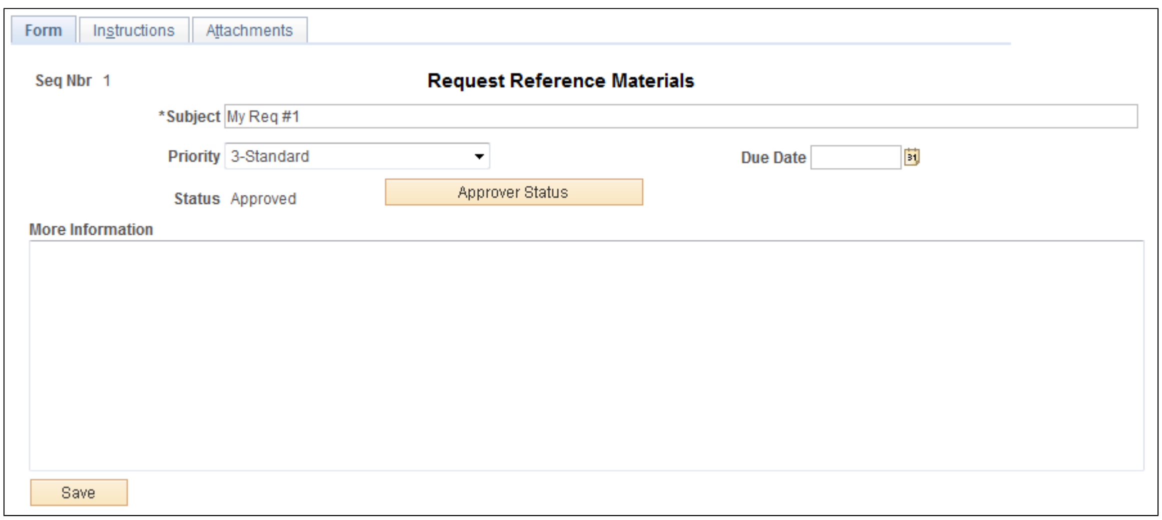
This example illustrates the Form page when a new form instance is added, but has not been completed. You can find definitions for the fields and controls later on this page.



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



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.

Field or Control	***Description***
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.

Field or Control	*Description*
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.

Field or Control	*Description*
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.

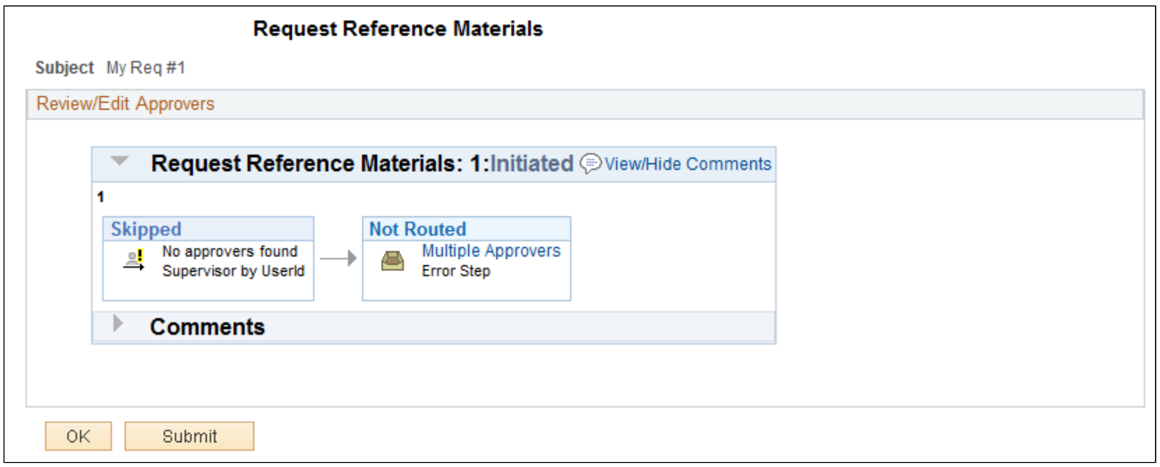
<Portal label (approval preview)> Page

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.

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.



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

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

Related Links

"Understanding Approval Features" (Approval Framework)

Form Approval Page

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

Navigation:

Enterprise Components > Forms > Review Forms

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" (Approval Framework)

Integrating Forms with PeopleSoft Applications

This section provides an overview of form integration.

Pages Used to Integrate Forms with PeopleSoft Applications

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

Understanding Form Integration

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

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:

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

Form Integration Implementation Steps

Integrating forms involves the following steps:

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

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

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

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

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

   See Form to CI Collection Mapping Page.

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

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

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

Component Interface Guidelines

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

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

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

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

Form Design Guidelines

Keep the following considerations in mind when designing integrated forms:

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

  Note: If the required field length is not available in the form designer, then choose either a shorter or longer field length. If you choose a longer field length, the value will be truncated before it is posted to its associated transaction table.
- For prompt fields, the prompt values must match those in the prompt list of the CI property they map to; this may require you to create a new prompt.
- For code fields, you must ensure that the codes are the same as those of the CI Property being mapped to.

- Set all the required fields according to the base component associated with the CI, otherwise an error message that a required field has not been completed will appear when a form user attempts to save and post the form data.

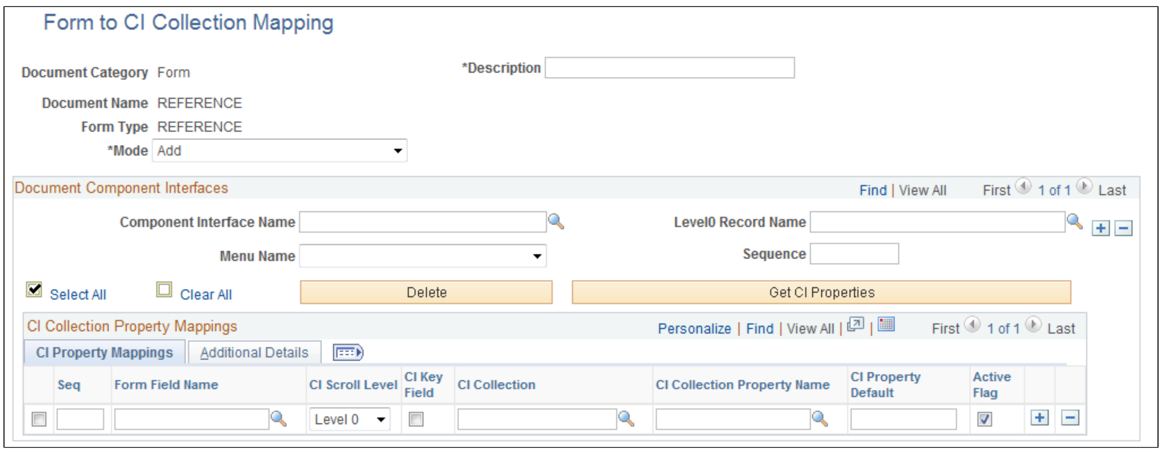
Form to CI Collection Mapping Page

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

Navigation:

Enterprise Components > Forms > Map Form to Component Intfrc

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.



Field or Control	*Description*
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:

Field or Control	***Description***
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.

Field or Control	***Description***
Seq (sequence)	Enter a number to specify the order in which to process the field mapping. Processing order is important because any data in a form that depends on other data must be processed after the data on which it depends is entered.
Form Field Name	Select the name of the form field to map. Only form fields with *Active* status appear in the selection list.

Field or Control	***Description***
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.

Field or Control	*Description*
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:

Field or Control	*Description*
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.

Field or Control	*Description*
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.

Designing Forms in PeopleSoft Fluid User Interface

Use Fluid 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.

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

Video: PeopleSoft Fluid Forms and Approval Builder

Pages Used to Create and Manage Fluid Forms

Page Name	*Definition Name*	*Usage*
Design Forms - Design a New Form Page	EOFM_DSN_SRCH_FL	Review existing forms or add a new form.
Form Designer - Form Page	EOFM_DSN_FORM_FL	Create a form and enter basic form information.
Form Designer - Layout Page	EOFM_DSN_FLDS_FL	Define the fields that appear on the form and configure form layout.
Form Designer - Instructions Page	EOFM_DSN_INST_FL	Provide instructions for users that describe how to complete and submit a form.
Form Designer - Approval Page	EOFM_DSN_APPR_FL	Assign the approval workflow required for a form.
Form Designer - Security Page	EOFM_DSN_ROLE_FL	Define security and reporting authorizations for the form.
My Forms Page	EOFM_CONTAINER_FL	Access forms available to you, based on security authorizations role.

Page Name	Definition Name	Usage
Pending Approvals - Forms Page	EOAWMA_MAIN_FL	View a list of all Fluid forms that are pending your approval. From here you can access individual forms and approve or deny the form.

Understanding Fluid Forms

The Fluid 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.

Accessing Fluid Forms and Approval Builder

The Fluid Form and Approval Builder can be accessed using the **Design Form in FAB** tile on the Employee Self Service home page.

Design Form in FAB Tile

Form Design

Fluid Form Designer guides you through the following steps:

1. Defining the basic information for a form, including the label, and status.
2. Specifying the fields that appear on the form and configure form layout.
3. Providing instructions that describe how to use the form.
4. Assigning the approval workflow for a form.
5. Defining security and reporting authorizations for the form.

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. You can specify the following field types on a form:

- Text
- Date
- Number

- Signed Number
- Divider
- Time
- Yes/No
- Prompt
- Code
- Section

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 form that designers create using the Fluid Form Designer. 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:

Field or Control	***Description***
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. **Note:** Only the owner of a form can activate or inactivate a fluid form.
Inactive	Indicates a form that has been inactivated. When a form is inactive, form users are not permitted to complete the form.

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

Field or Control	***Description***
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.*

Field or Control	Description
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.

Form Reporting

Oracle-PeopleSoft enables you to report on Fluid form data. When you activate a Fluid form, Fluid Form Builder generates a runtime SQL view for Query Manager that is based on the form data. Views are automatically added to the Query Security tree under the EO_FORM_REPORT node.

Generated runtime SQL views follow this naming convention: FAB_*NNNNNNNN*_VW and FAB_*NNNNNNNN*_SC, where '*NNNNNNNN*' represents the eight digit sequence number.

You can authorize access to form data in Query Manager by adding a reporting role for the form using the Form Designer - Security Page. Only users associated with the role can access the form data in Query Manager.

Oracle-PeopleSoft delivers the role "FORM_REPORT_USER." If you create your own role, ensure that it has access to the "EO_FORM_REPORT" node in the "QUERY_TREE_EO" Query Security Tree.

When a form is inactivated, the associated Runtime SQL view remains available for PS Query. To restrict users from querying against the view, you must remove all Reporting Authorizations roles associated with the form.

If you need to regenerate runtime SQL views for your forms - for example, when you migrate forms from one environment to another - run the "EO_FORM_RPTV " Application Engine process. Because runtime SQL view names are unique, it is possible the name may change during the regeneration process, depending on availability of names at the time of regeneration.

Note: Form reporting is available with PeopleTools 8.59 or higher.

Note: The Form Reporting feature is currently used by FSCM and HCM products.

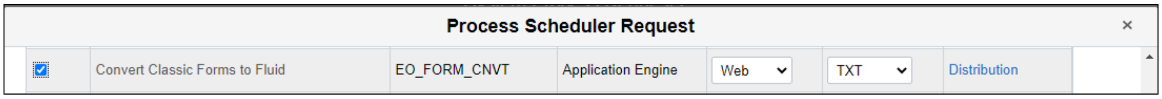
Converting Classic Forms to Fluid

Forms designed in Fluid Forms and Approval Builder are not accessible in the classic version, and vice versa. However, you can convert existing classic forms to fluid forms. Once you convert classic forms to Fluid, classic forms can no longer be opened in classic. Before converting forms in your production environment, Oracle recommends you first run he conversion in a non-production environment and validate the results.

Use the System Process Requests run control page to run the *Convert Classic Forms to Fluid (EO_FORM_CNVT)* conversion process on your classic forms.

When you click Run, the Process Scheduler Request page appears, showing the job and process that you have the security to run.

Process Scheduler Request



For more information on submitting and scheduling process requests, refer to the *PeopleTools Process Scheduler* documentation.

Note: All open pending transactions for Classic Forms should be completed (Approved or Denied) before running the forms conversion process EO_FORM_CNVT. Configure the Approval Monitor for Process ID “FormApproval” and User Role “FORM_ADMIN” and use the Monitor Approvals page to review pending approvals and take appropriate action. For more information on configuring and reviewing using Approval Monitor, see *PeopleBooks, Approval Framework, Using the Approval Monitor*.

Note: If your classic forms have attachment templates attached, post conversion same cannot be removed in fluid forms. Take appropriate action before running conversion process. Once converted, the attachments are read-only. You may need to realign the form based on their requirements.

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 Fluid Form Designer.
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 Fluid Form Designer. Form designers have update/display access to only *their* forms when using the Manage Forms (FORM_RPT) component.
FORM_ADMIN	Form administrator: Can complete and submit forms, design forms, and manage *all* forms.	EOFM1000 EOFM2000 EOFM3000 EOSD2000	The form administrator has the same access as the form designer, and additionally, has update/display access to *all* forms when using the Manage Forms (FORM_RPT) component.

Role Name	***Description***	***Permission Lists***	***Access Rights***
FORM_CI_ DEVELOPERS	Form to component interface (CI) developer: Can complete and submit forms, design forms, manage *all* forms, and map forms to component interfaces (integrate forms).	EOFM1000 EOFM2000 EOFM3000 EOFM4000 EOSD2000	The form to CI developer has the same access as the form administrator, and in addition can set up form integration by mapping forms to component interfaces using the Forms to CI Mapping page.
FORM_REPORT_ USER	Form report user: Can create and run PS Query on form Runtime Reporting View to fetch form instance data.	EOFM5000	The form report user can access the reporting view in PS Query Manager. The user can also create and run PS Query on form Runtime Reporting View to fetch form instance data.

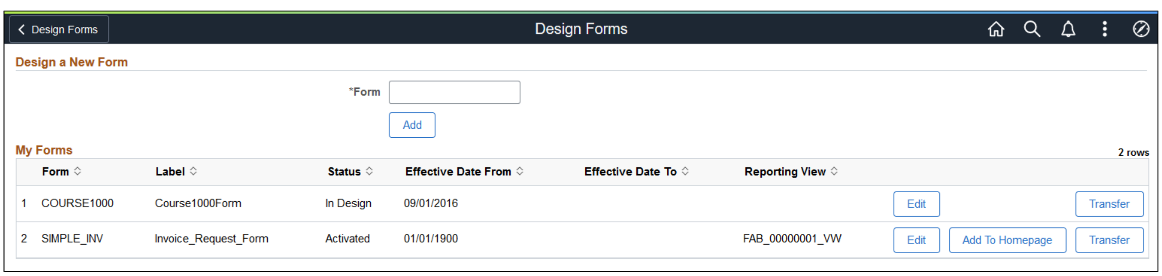
Design Forms - Design a New Form Page

Use the Design a New Form page (EOFM_DSN_SRCH_FL) to add a new form or review existing forms. You can only view existing forms with a status of Activated or In Design.

Navigation:

Employee Self Service > **Design Form in FAB Tile** > **Design a New Form**

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



Field or Control	***Description***
Form	Enter a unique value. The form name can contain letters, digits or underscore. A validation is performed to ensure the value is not used by an existing form or any other supplemental data record.
Add and **Edit**	Select to access the Fluid Form Designer component.

Field or Control	***Description***
Add To Homepage	Select 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. For additional information about adding a tile to a PeopleSoft Fluid Home page, see the topic 'Working with Fluid Homepages and Dashboards' in the *PeopleTools Application User's Guide* documentation.
Transfer	Click to transfer the ownership of the form to another user.
Actions List	Select Show Inactive Forms to view inactive forms in the table.

Note: You can only view existing forms if you have the FORM_DESIGNER role assigned to you.

Form Designer - Form Page

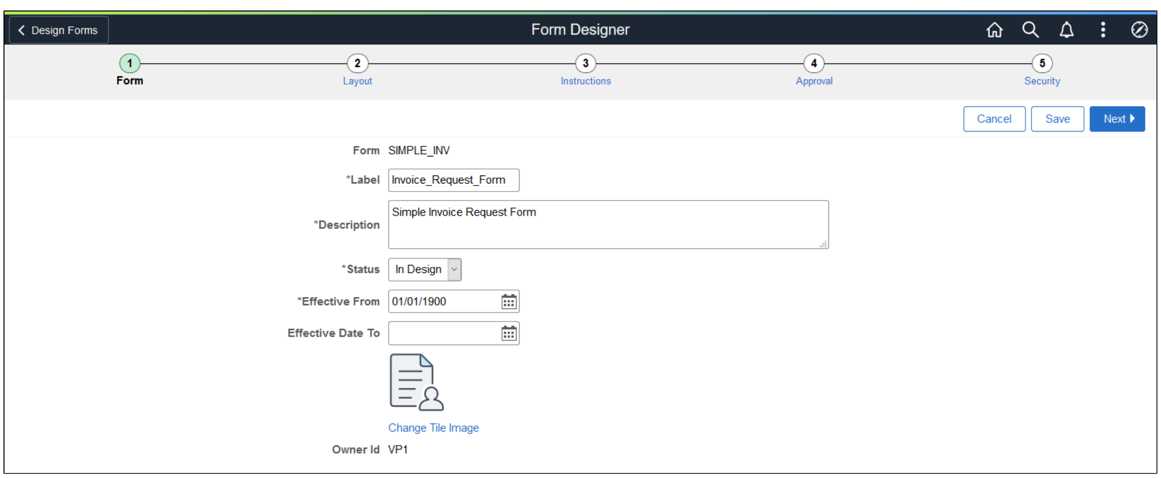
Use the Form Designer - Form page (EOFM_DSN_FORM_FL) to create a form and enter basic form information.

Navigation:

Employee Self Service > **Design Form in FAB Tile** > **Design a New Form** > **Click the Add button**

Employee Self Service > **Design Form in FAB Tile** > **Design a New Form** > **Click the Edit button**

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.



Field or Control	***Description***
Label	Enter a name for the design.

Field or Control	***Description***
Status	The available status options are • In Design • Inactivated

Form Designer - Layout Page

Use the Form Designer - Layout page (EOFM_DSN_FLDS_FL) to define the fields that appear on the form and configure form layout.

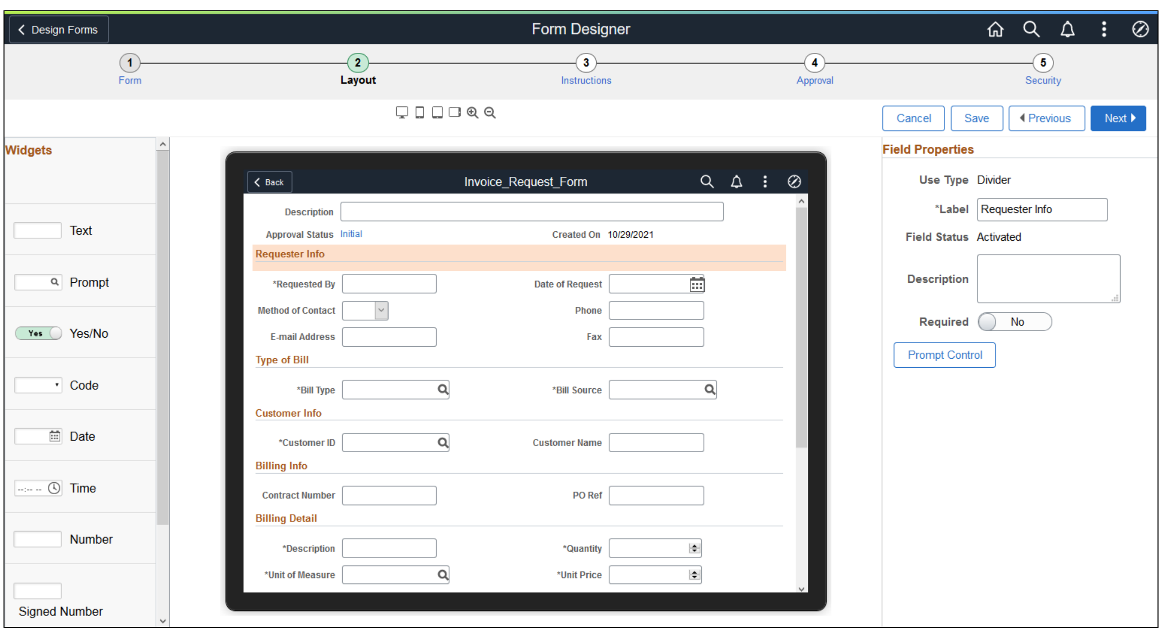
Navigation:

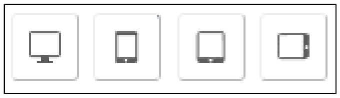
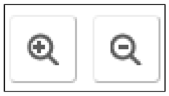
Navigation:

Employee Self Service > Design Form in FAB Tile > Design a New Form > Click the Add button > Layout

Employee Self Service > Design Form in FAB Tile > Design a New Form > Click the Edit button > Layout

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.



Field or Control	***Description***
	Use the form factor icons to preview the form appearance on a specific device. Available options are *Laptop/ Desktop, Phone, Tablet Portrait, and Tablet Landscape.* **Note:** Form factor is for preview purposes only.
	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. For more information about prompt records, see Defining Prompt Records. • *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* • *Time* • *Number* • *Signed Number* • *Divider*: Allows user s to organize the form into multiple sections using horizontal rule. • *Section*: Allows user to organize the form into multiple sections using HTML formatted text. Once you drag and drop the ‘Section widget’, Field Properties appear on the right hand side. Edit the label and enter the HTML formatted text in the Section field.

Note: Rich Text Editor is not available for fluid form designer. You can perform rich text editing using the Supplemental Data Record - Record Page

See also Defining Prompt Records.

Form Designer - Instructions Page

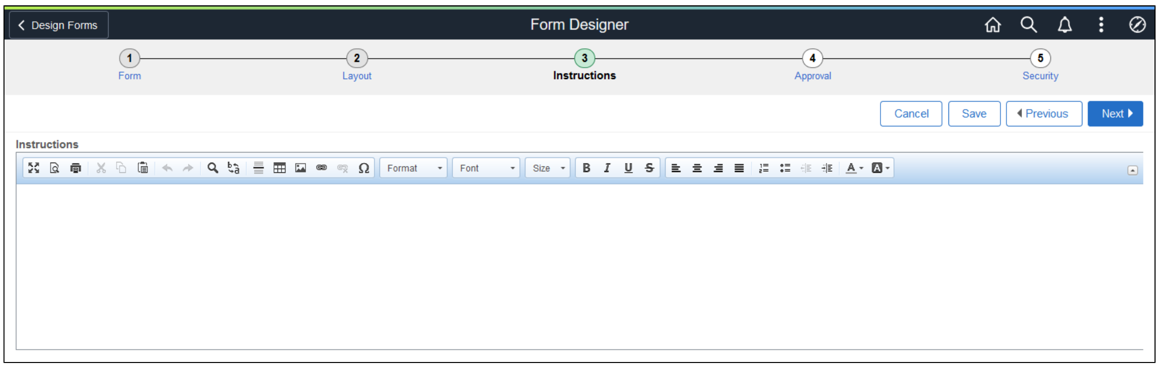
Use the Form Designer - Instructions page (EOFM_DSN_INST_FL) to provide instructions for users that describe how to complete and submit a form.

Navigation:

Employee Self Service > Design Form in FAB Tile > Design a New Form > Click the Add button > Instructions

Employee Self Service > Design Form in FAB Tile > Design a New Form > Click the Edit button > Instructions

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



Form Designer - Approval Page

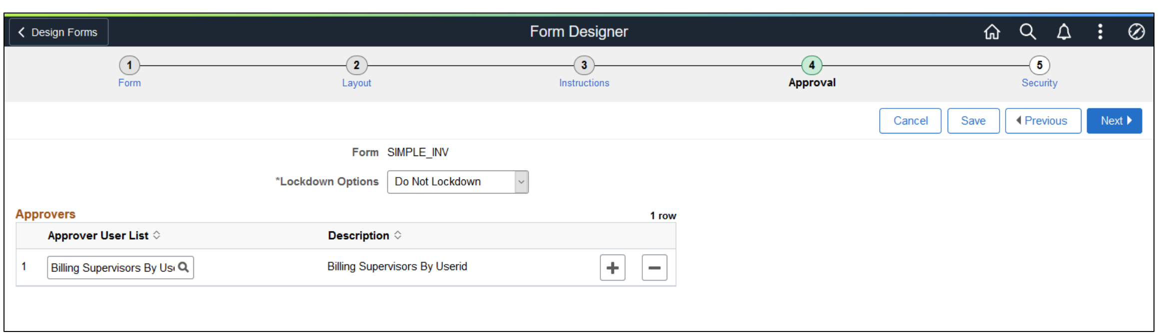
Use the Form Designer - Approval page (EOFM_DSN_APPR_FL) to assign the approval workflow required for a form.

Navigation:

Employee Self Service > Design Form in FAB Tile > Design a New Form > Click the Add button > Approval

Employee Self Service > Design Form in FAB Tile > Design a New Form > Click the Edit button > Approval

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.



Field or Control	*Description*
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 is synchronized with the Approval Workflow Engine (AWE) setup. For more information about defining user lists, see the "User List Definition Page" (Approval Framework).

Form Designer - Security Page

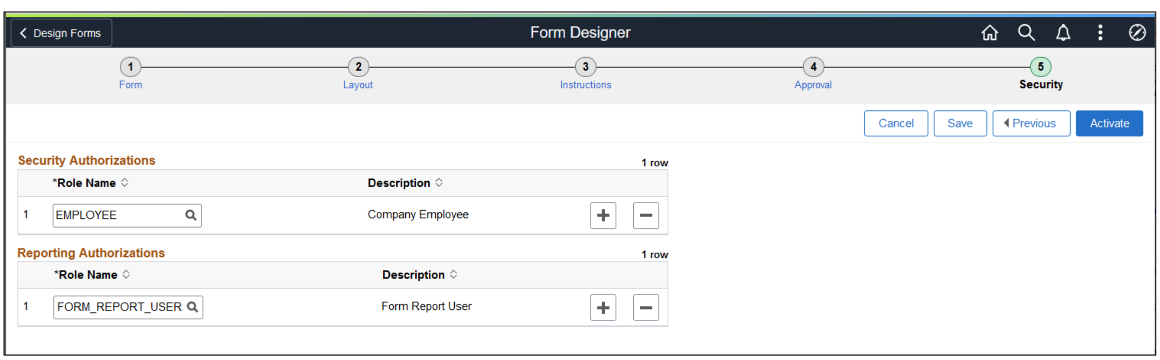
Use the Form Designer - Security page (EOFM_DSN_ROLE_FL) to define security and reporting authorizations for the form.

Navigation:

Employee Self Service > **Design Form in FAB Tile** > **Design a New Form** > **Click the Add button** > **Security**

Employee Self Service > **Design Form in FAB Tile** > **Design a New Form** > **Click the Edit button** > **Security**

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.



Note: The Form Reporting feature is currently used by FSCM and HCM products.

Field or Control	*Description*
Role Name (Security Authorizations)	Authorize access to the form by adding a security role. Only users associated with the role can access the form.

Field or Control	***Description***
Role Name (Reporting Authorizations)	Authorize access to form data in Query Manager by adding a reporting role. Only users associated with the role can access the form data in Query Manager. For more information about Query Manager, see the PeopleTools Query documentation.
Activate	Click to activate the form. When you activate a form, Fluid Form Builder generates a runtime SQL view for Query Manager that is based on the form data. Views are automatically added to the Query Security tree under the EO_FORM_REPORT node. For more information about Query Manager, see the PeopleTools Query documentation.

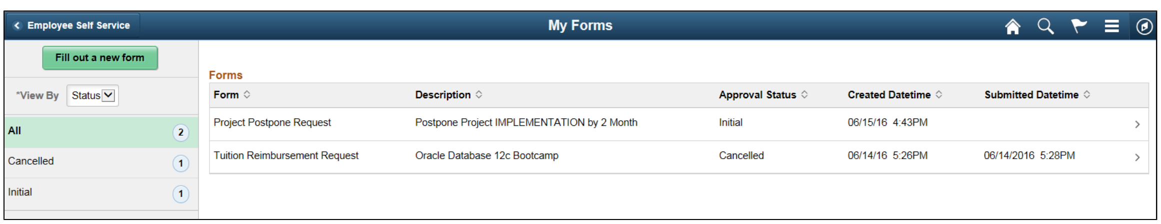
My Forms Page

Use the My Forms page (EOFM_CONTAINER_FL) to access forms available to you, based on security authorizations role.

Navigation:

Employee Self Service > **My Forms Tile**

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.



Field or Control	***Description***
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	Select to view available forms and fill out a form.

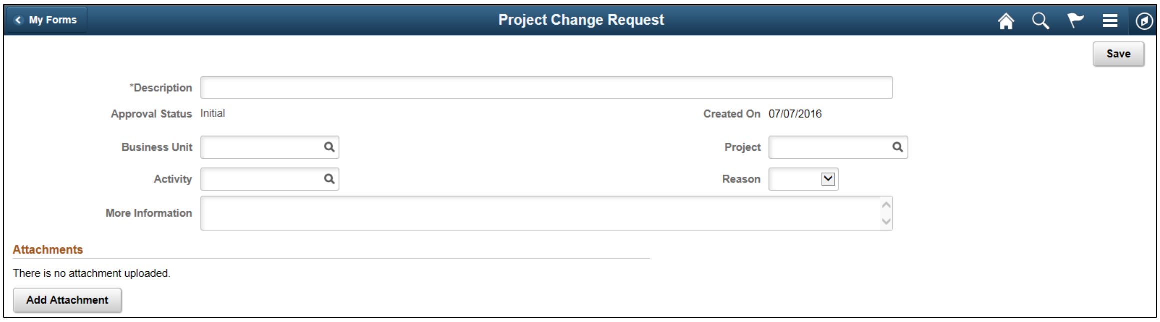
Filling Out a New Form

Fill out a form that is available to you.

Navigation:

On the My Forms page, select a form (row), then the **Fill out a new form** button.

This is an example of a form (EOFM_FORM_FL) when accessed from the My Forms page, Fill out a new form



Field or Control	***Description***
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.

Pending Approvals - Forms Page

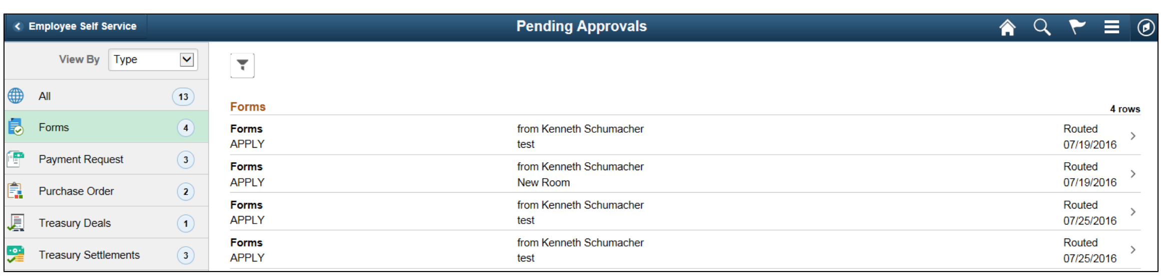
Use the Pending Approvals - Form page (EOAWMA_MAIN_FL) to view a list of all Fluid forms that are pending your approval. From here you can access individual forms and approve or deny the form.

Navigation:

Employee Self Service > **Approvals Tile**

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.

This example illustrates the fields and controls on the Pending Approvals - Form page.



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

Note: Only Fluid forms are supported for fluid approvals.

For more information about approvals, see Using the PeopleSoft Fluid User Interface to Work with Approvals

Chapter 8

Configuring Toolbars

Understanding Toolbars

This section discusses:

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

Toolbar Elements

A toolbar contains these parts:

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

Title Area

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

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

See Toolbar Definition - Description Page.

Button Bar

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

- PeopleTools actions

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

- Custom actions

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

- The Personalize action

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

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

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

See Toolbar Definition - Button Page.

Component-Specific Data

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

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

See Toolbar Definition - Content Page

Toolbar Footer

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

Delivered Toolbars

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

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

Delivered Toolbar Buttons

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

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

Defining Toolbar Buttons

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

Page Used to Define Toolbar Buttons

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

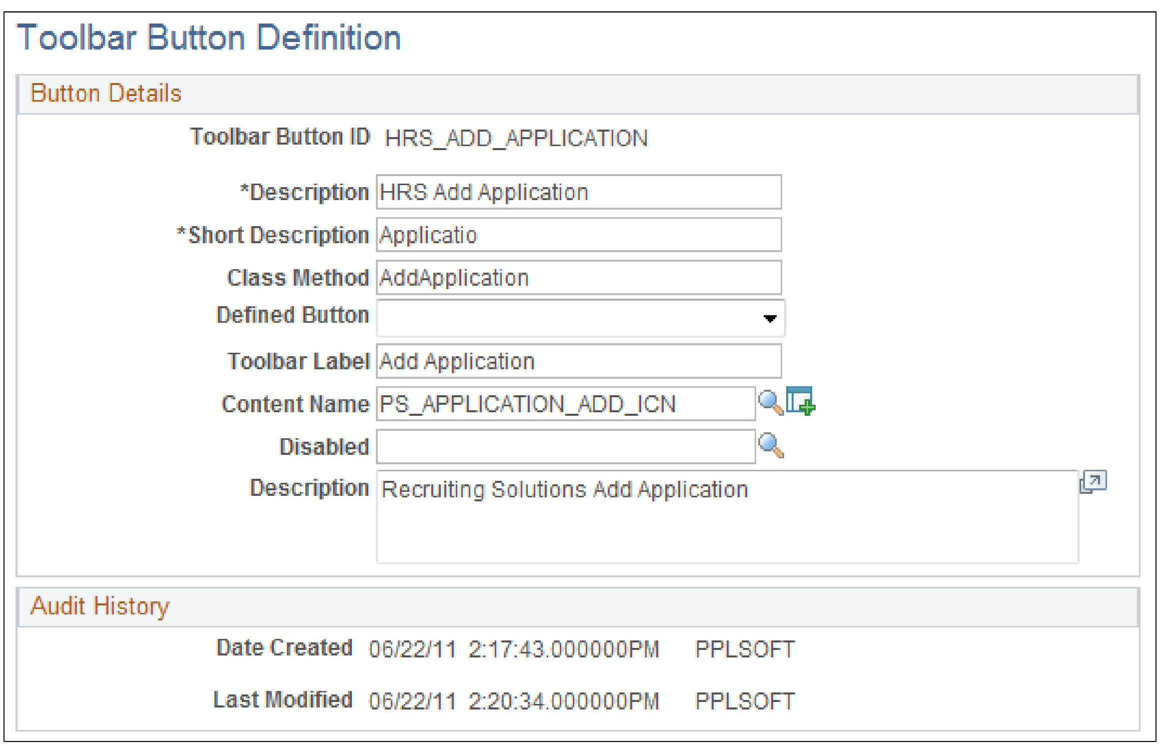
Toolbar Button Definition Page

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

Navigation:

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

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.



Field or Control	*Description*
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

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

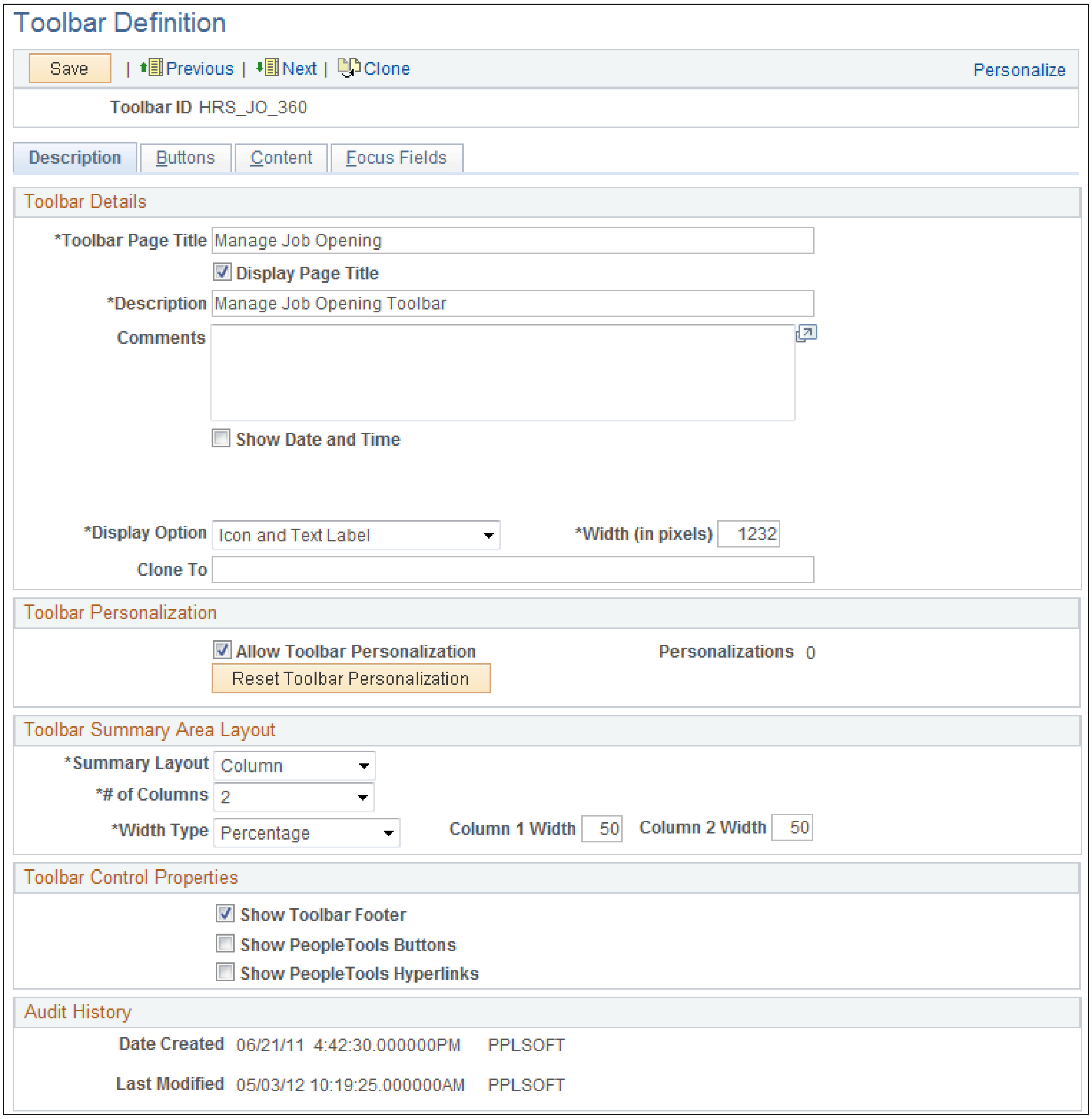
Toolbar Definition - Description Page

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

Navigation:

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

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.



Field or Control	***Description***
Toolbar ID	Displays the toolbar's unique identifier. This ID is referenced in PeopleCode to manipulate toolbar properties.

Toolbar Details

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

Toolbar Personalizations

Field or Control	***Description***
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

Field or Control	***Description***
Summary Layout	Select *Column* or *Row.* The summary information area will be displayed under the button bar only after a customer or contact has been selected. Depending on the application, the summary area may contain other information besides customer information. The information in the content area is displayed in a two-column format, with the number of fields being configurable.
# of Columns (number of columns)	You can select a one or two column display if you select columns for the summary layout. The recommended number of columns is *2*.
Width Type	Define the width of the columns using either a pixel or percentage amount.

Field or Control	*Description*
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

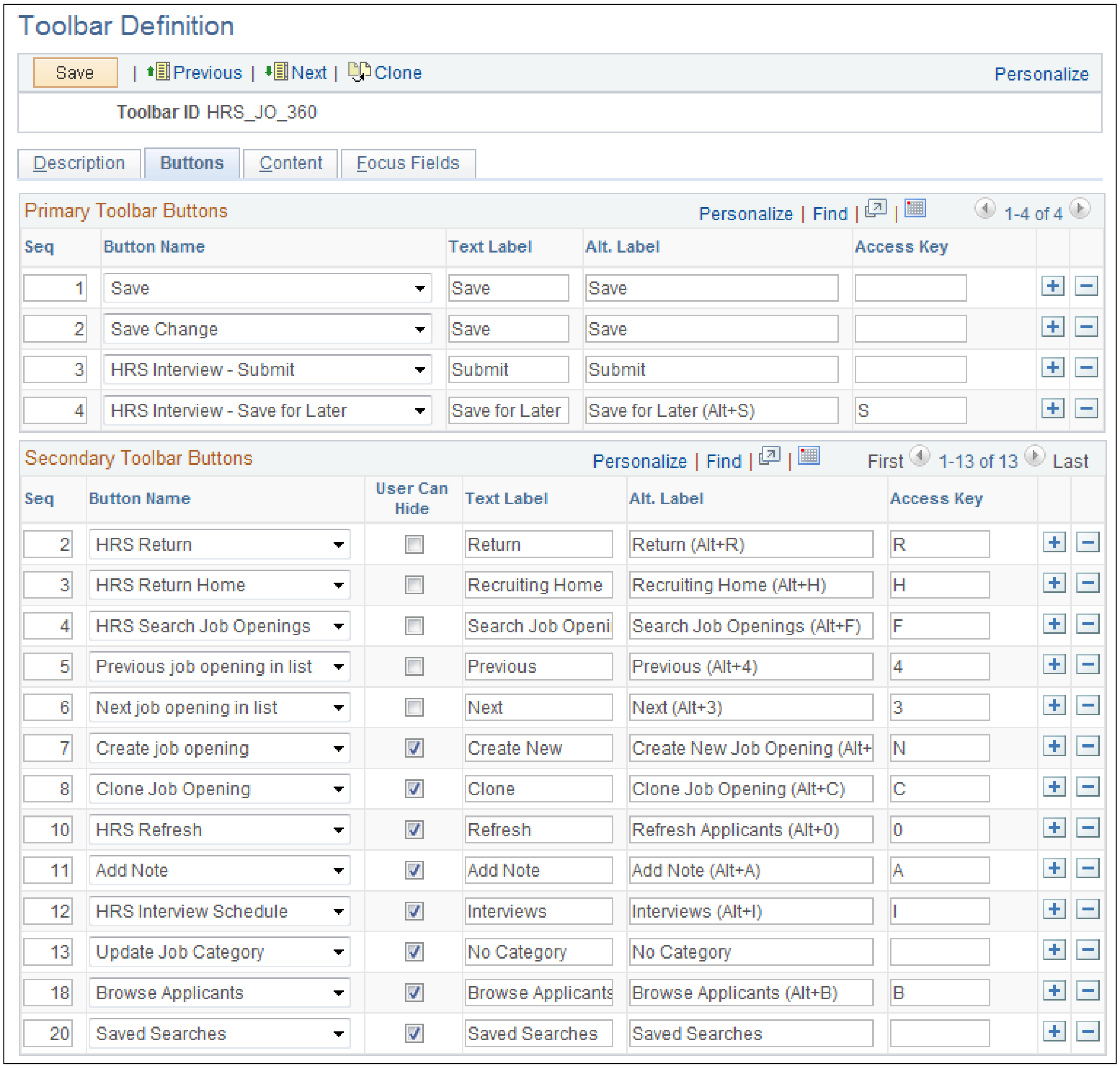
Select to have the toolbar footer, PeopleTools buttons, and PeopleTools links displayed. It is suggested that you disable the PeopleTools buttons and links from being displayed because it may cause confusion to users if the button used for the same function appears twice on a page. When using a new toolbar,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

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.



Field or Control	***Description***
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.

Field or Control	*Description*
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.

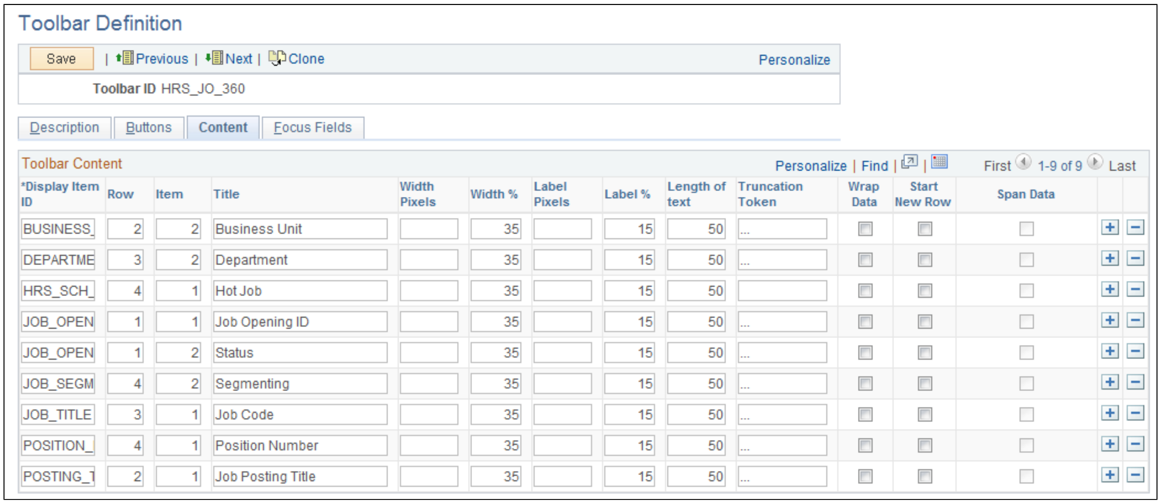
Toolbar Definition - Content Page

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**

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.



Field or Control	***Description***
Display Item ID	Enter the ID of the data to appear on the toolbar. The ID and the data that it references come from an array that component PeopleCode populates.
Row	Enter the toolbar row in which the content appears. Row 1 appears under the button bar. If you define display items for additional rows, those rows appear in order under row 1.
Item	Enter the position of the item in the row. Enter *1* for the item that appears in the leftmost position in the row, *2* for the next label to the right, and so forth.
Title	Enter a label for the item.
Width Pixels, Width %, Label Pixels and **Label %**	Enter the width of the display item label and data in pixels or as a percentage of the total toolbar width. If the latter, be sure that the total percentage for all fields on the same row does not exceed 100%. It is recommended that you indicate widths in percentage because the toolbar layout is adjusted automatically. The general guideline is 20% for the display item label, and 30% for the display item data. If pixel is used (for advanced HTML usage), the total width of all display columns on the same row should not equal or exceed the width of the toolbar as defined.
Length of text	Enter the maximum number of characters of data (not label text) that can appear in this row. The text is truncated with the specified truncation token if it exceeds the length of text value, and is wrapped if it is too long for the width that you specify.

Field or Control	*Description*
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.

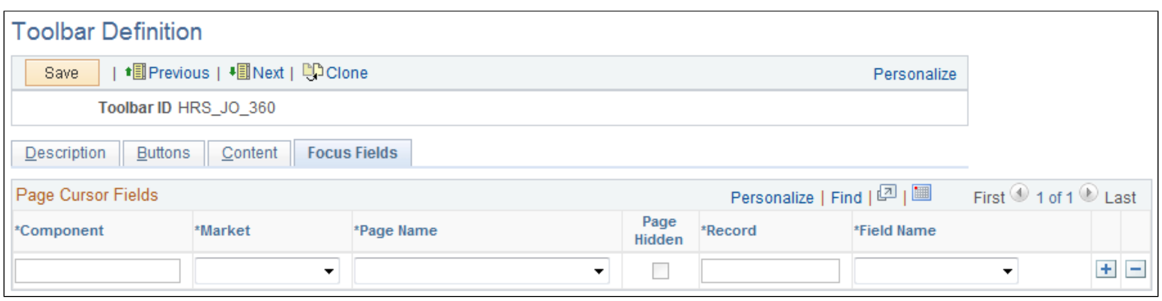
Toolbar Definition - Focus Fields Page

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**

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



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

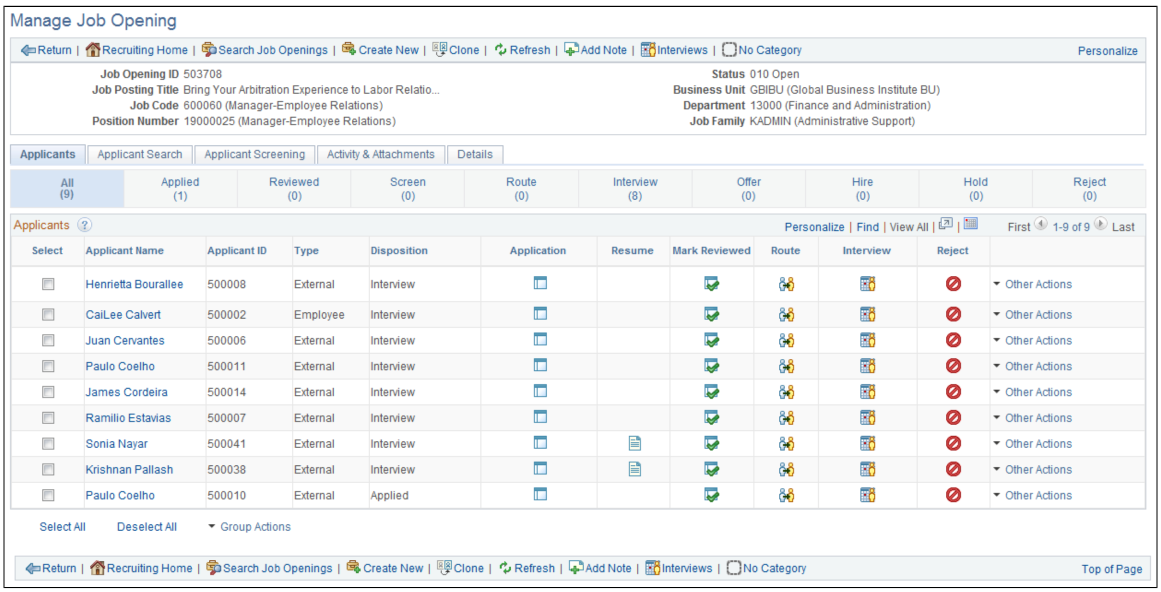
Field or Control	*Description*
Component, **Market**, and **Page Name**	Enter the component and market of the page in which the selected toolbar definition is referenced. The component you enter determines the drop-down values for page names.

Field or Control	*Description*
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.

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



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

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

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

Personalizing Toolbars

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

This section discusses how to set toolbar preferences.

Page Used to Personalize Toolbars

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

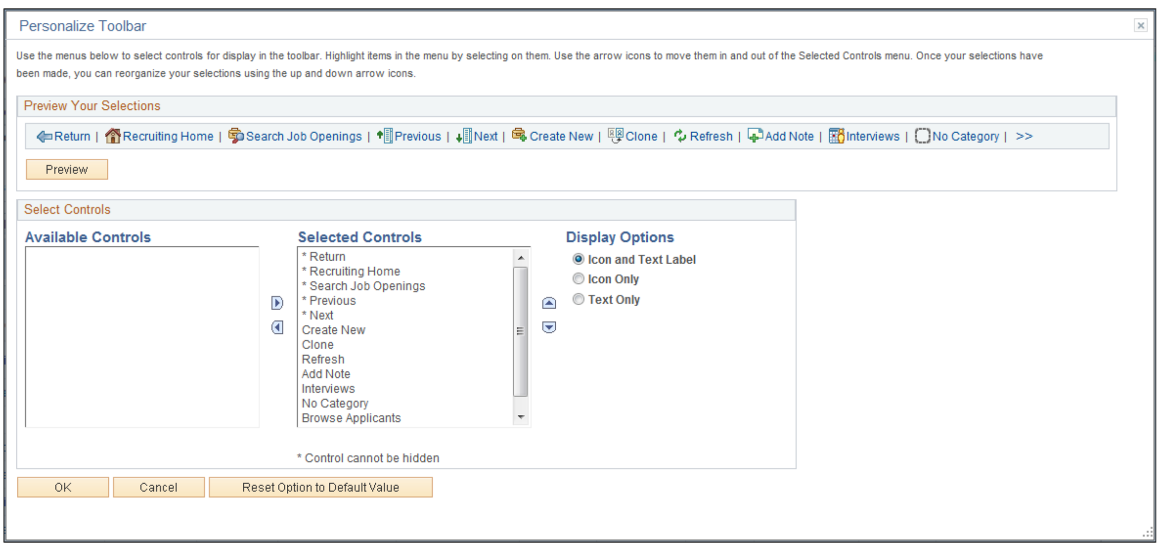
Personalize Toolbar Page

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

Navigation:

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

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.

Chapter 9

Working with the PeopleSoft Fluid User Interface

Understanding the PeopleSoft Fluid User Interface

This overview discusses the PeopleSoft Fluid User Interface.

The PeopleSoft Fluid User Interface

Oracle's PeopleSoft has two user interfaces

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

PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

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

Fluid Transactions and Conditional Navigation

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

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

Understanding Banners in PeopleSoft Fluid User Interface

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

PeopleSoft Fluid User Interface Banner for Tablets

This example illustrates the fluid page banner for the tablet.

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

Field or Control	***Description***
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

This example illustrates the fluid page banner for the smartphone.

The typical banner on a phone displays the following:

Field or Control	***Description***
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.

Field or Control	***Description***
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 2166359.1.

Understanding PeopleSoft Fluid User Interface to Work with Approvals

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

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

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

Pages Used to Configure the Mobile Approval Options

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

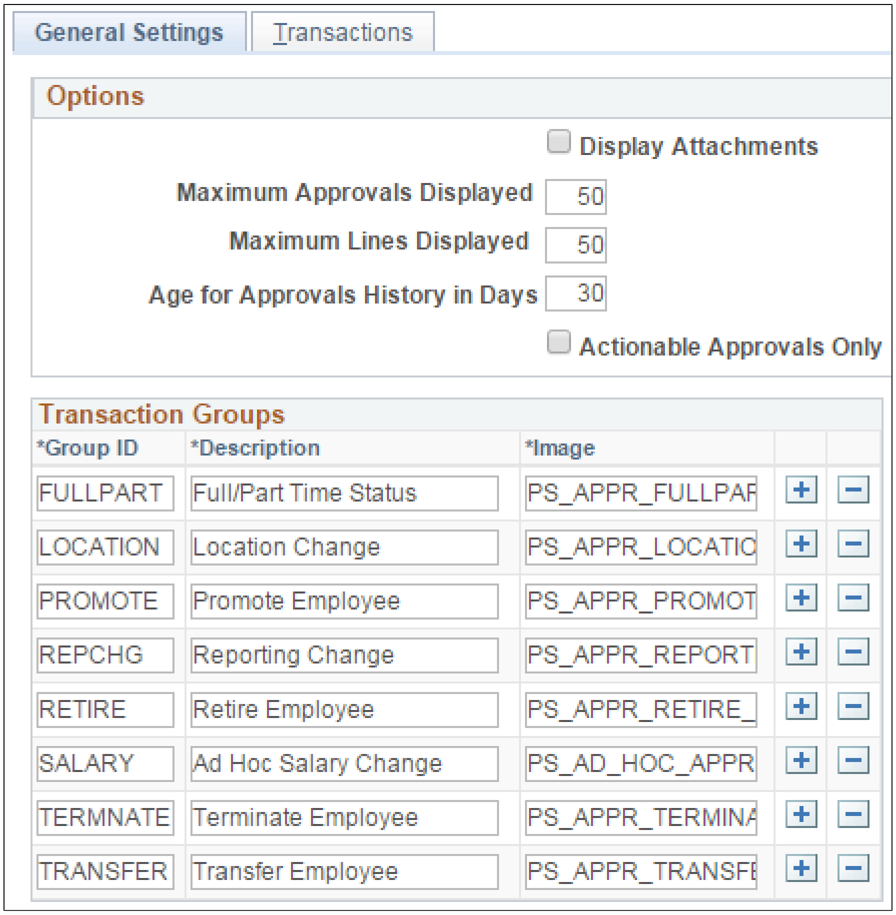
Mobile Approval Options - General Settings Page

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

Navigation:

Enterprise Components > **Approvals** > **Approvals** > **Fluid Approval Setup**

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



Field or Control	***Description***
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.

Field or Control	Description
Maximum Approvals Displayed	Enter the maximum number of approvals to be displayed on the Pending Approvals page. The Pending Approvals page also has a **Load More** button, to display remaining transactions in chunks. This is irrespective of the transactions entered on the Mobile Approval Options - Transactions Page tab.
Maximum Lines Displayed	Enter 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	Enter 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.

Field or Control	Description
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.

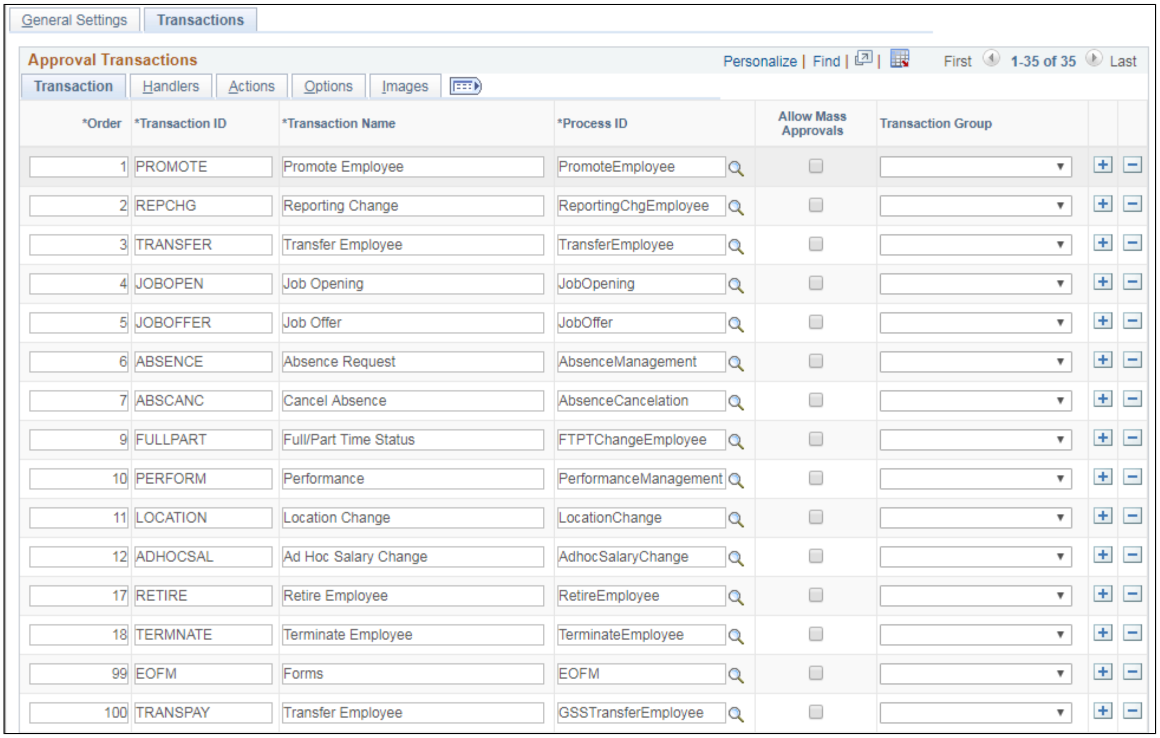
Mobile Approval Options - Transactions Page

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

Navigation:

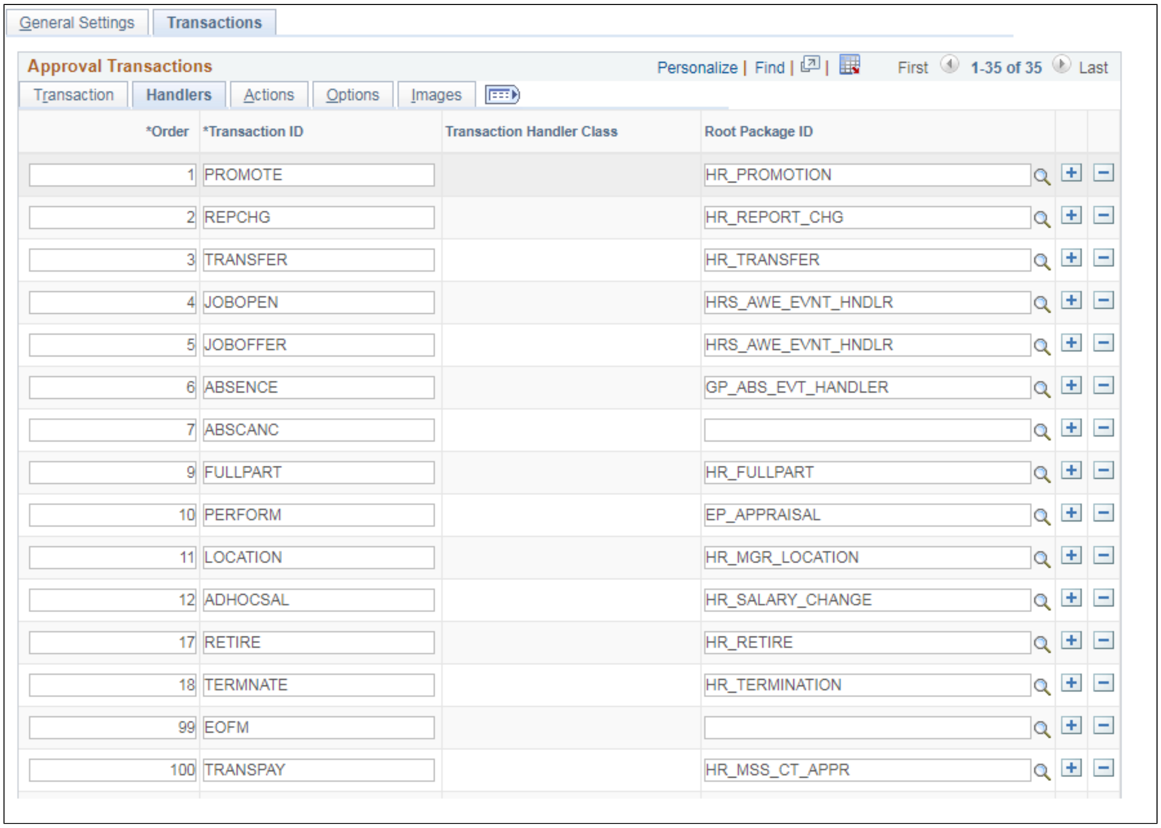
Enterprise Components > **Approvals** > **Approvals** > **Mobile Approval Options** > **Transactions**

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



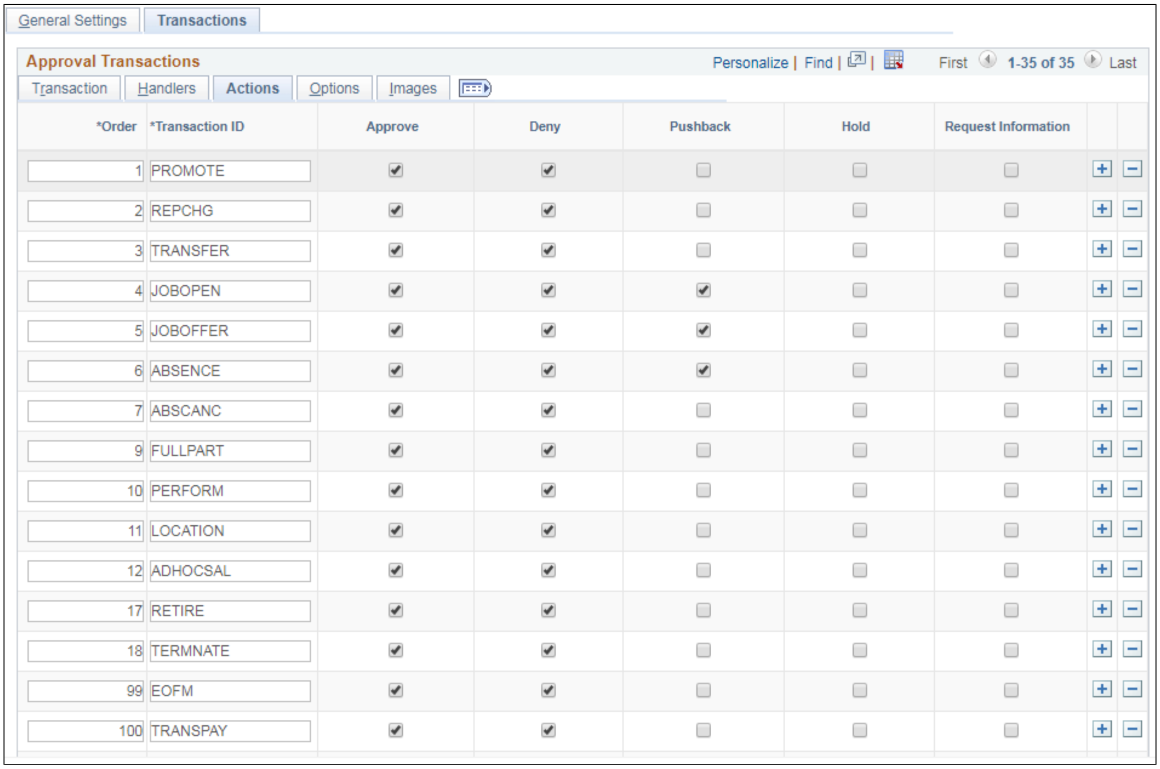
Field or Control	***Description***
Order	Enter a display order for each transaction ID.
Transaction ID	Select the Transaction ID(s) to enable for the Mobile Approvals application.
Allow Mass Approvals	Indicates whether or not users can select multiple transactions in the list when viewing by type and 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.

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



Field or Control	***Description***
Root Package ID	The application package that holds the DataHandler, DetailDocument and SubPage classes for the transaction.

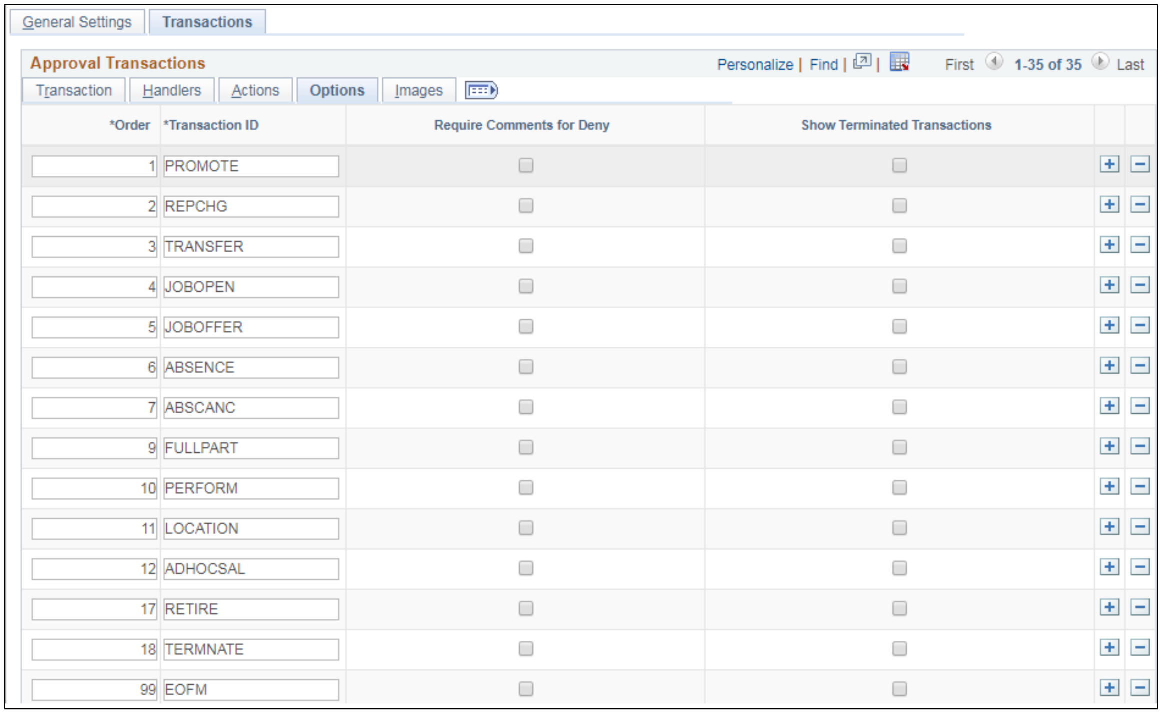
This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Actions tab.



Select the approval Actions that are visible as push buttons in mobile approvals in PeopleSoft Fluid User Interface.

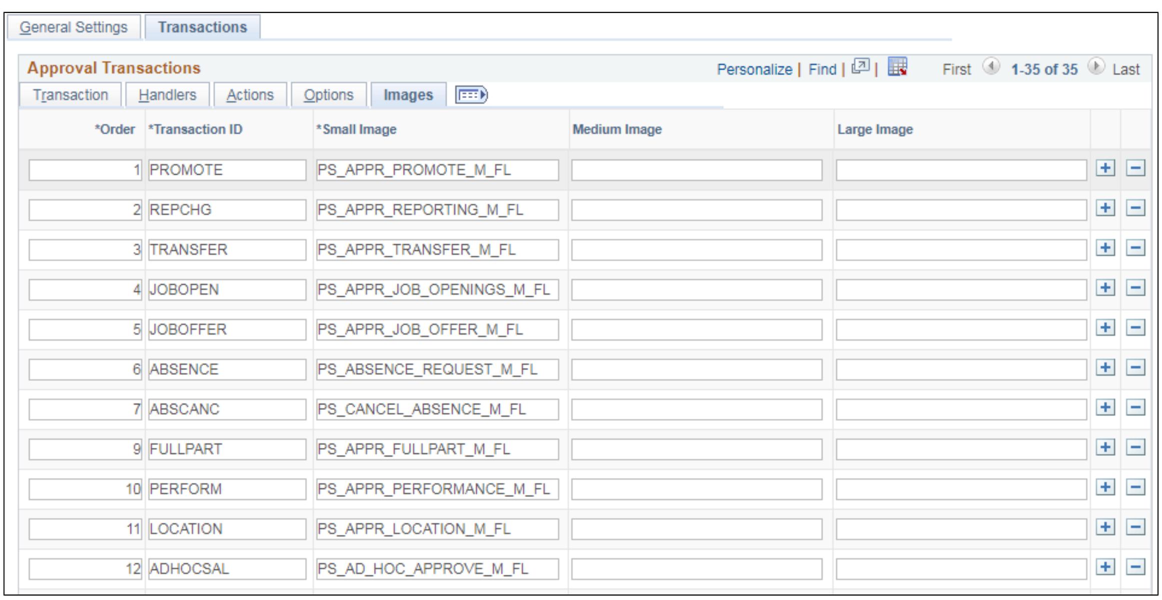
Note: The approval transaction handler must support the transaction.

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



Field or Control	*Description*
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.

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



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.

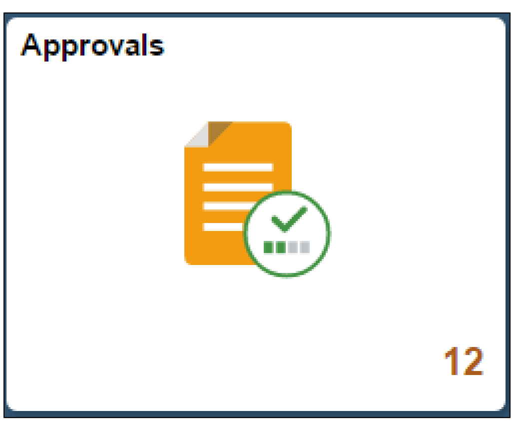
Approvals Tile

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.

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.

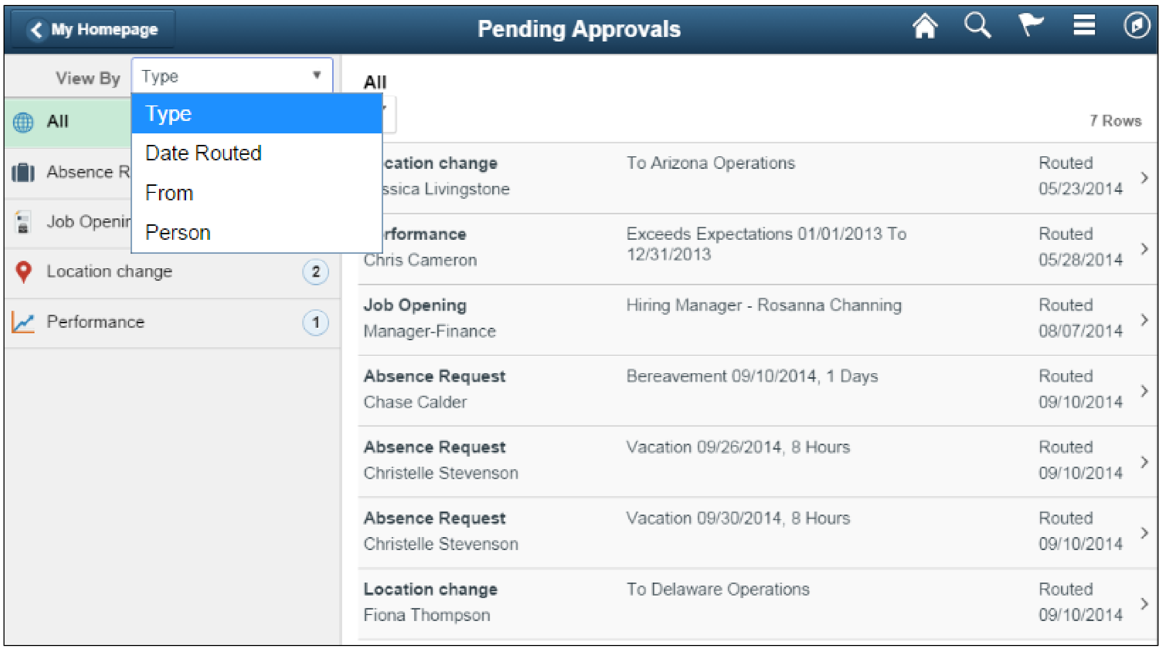
Pending Approvals Page

Click the Approvals tile to access the Pending Approvals page without using traditional menu navigation to review and approve different transactions.

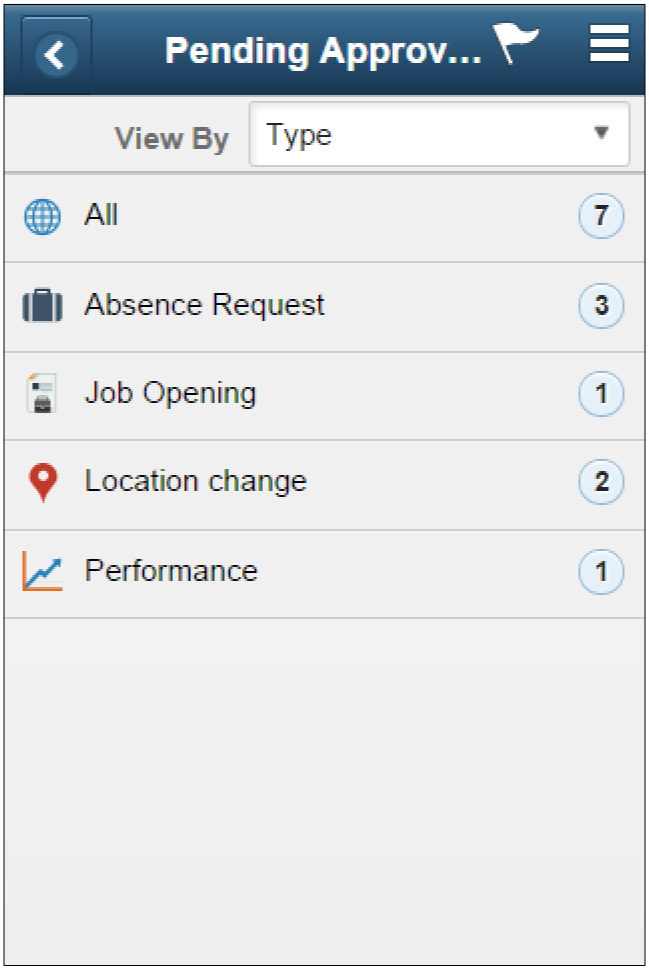
Navigation:

Click the Approvals tile on the Manager Self Service home page.

This example illustrates the fields and controls on the Pending Approvals page for the tablet.



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:

Field or Control	***Description***
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.

Field or Control	***Description***
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.

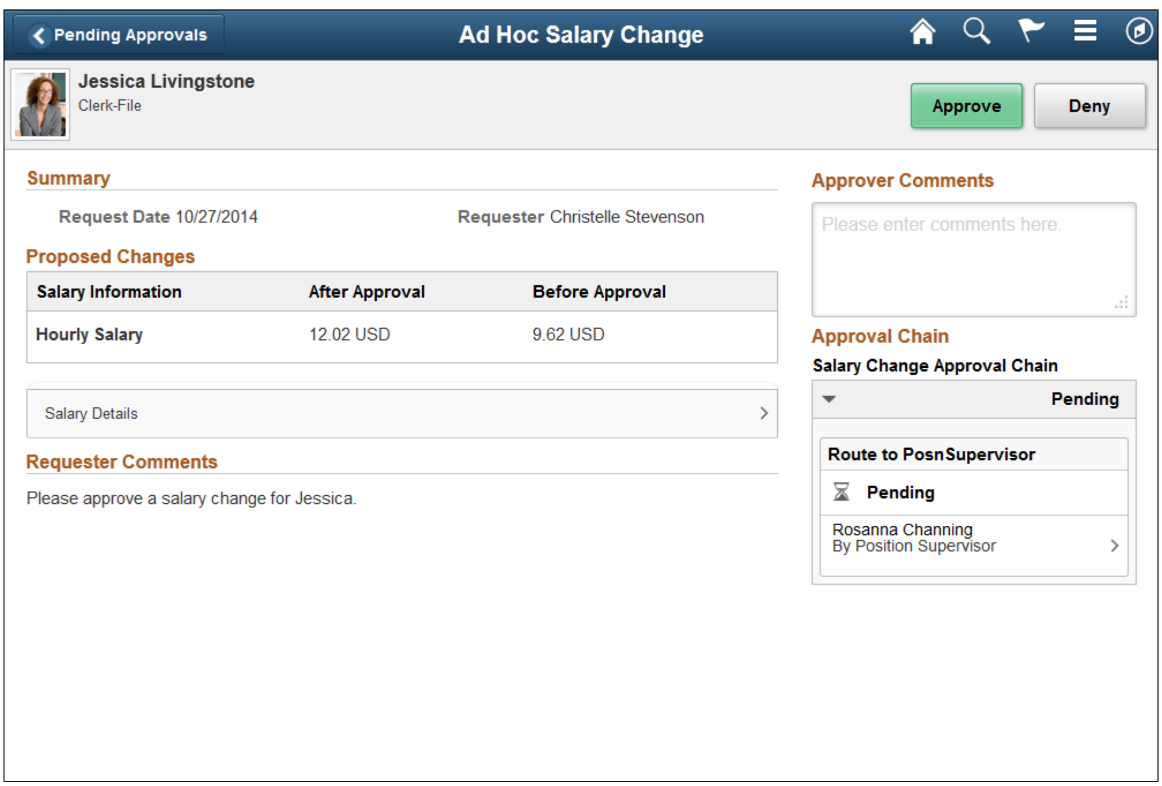
Pending Approvals - <Transaction Details> Page

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.

This example illustrates the fields and controls on the Pending Approvals - <Transaction Details> page.



Actions for Pending Approvals

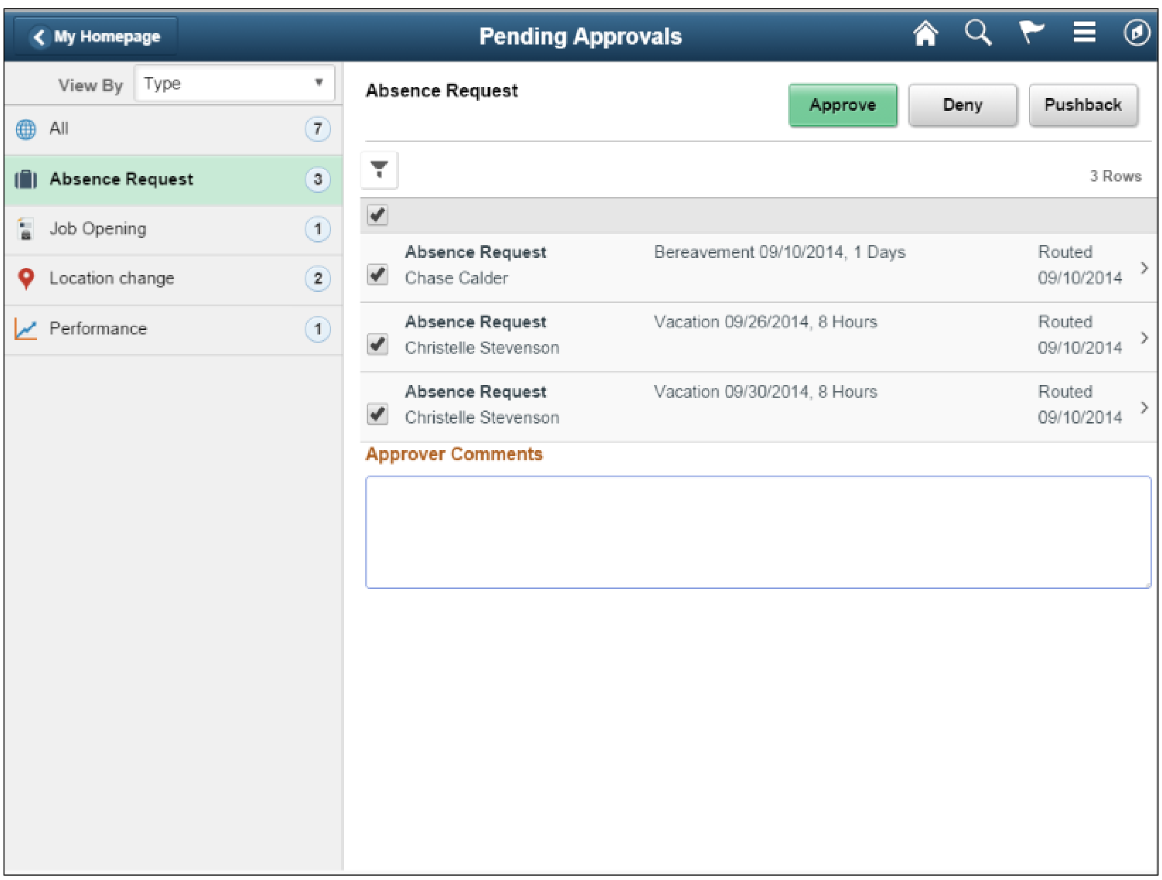
In PeopleSoft Fluid User Interface, you can take five actions on any approvals based on how the transaction has been configured.

1. Approve
2. Deny
3. Pushback
4. Hold
5. Request Information

The applicable action buttons are displayed on the sub-banner to the right.

Mass Action for Pending Approvals

This example illustrates the fields and controls on the Pending Approvals page when Mass Approvals is enabled for a transaction category.



Mass approval is available for the following approvals:

- When the user has Type selected in the View By drop-down.
- When the particular transaction has been configured for mass approval.

- When an individual transaction or transaction group has been selected.

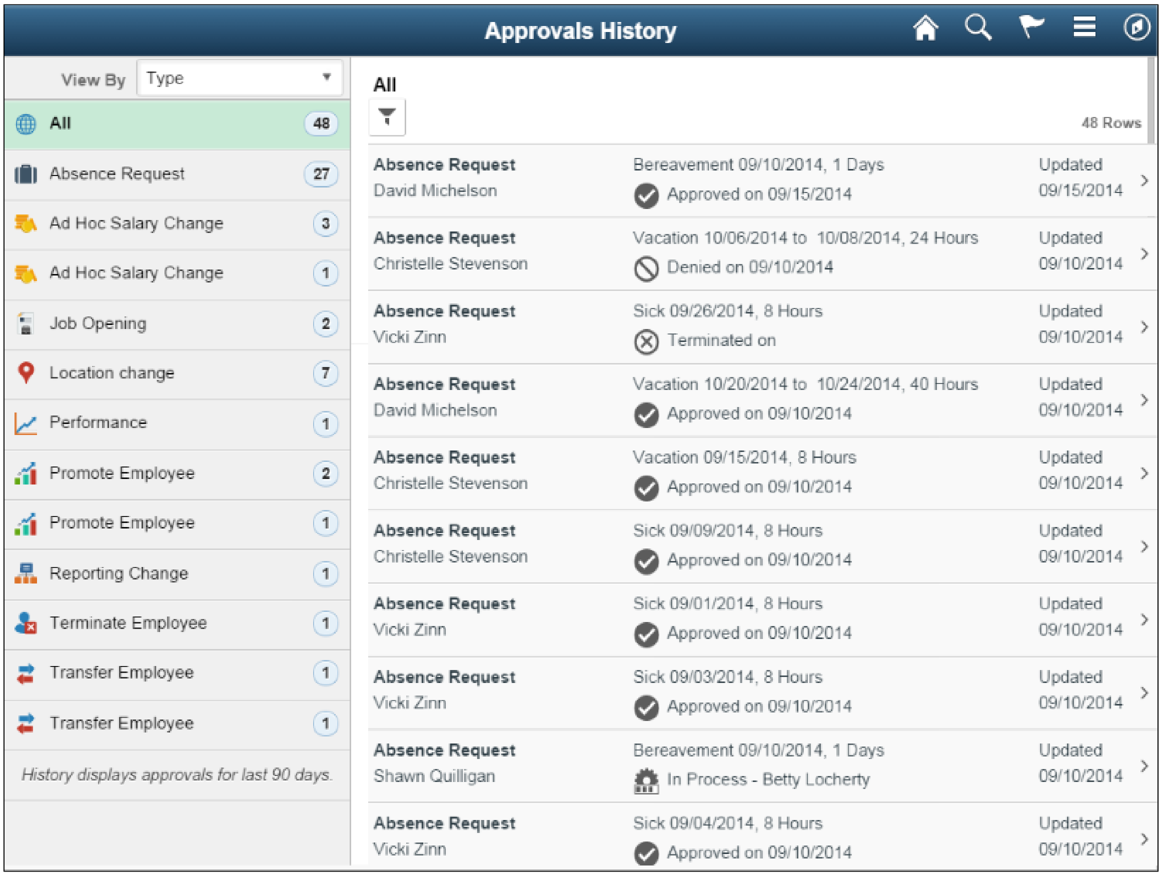
When a transaction type that is enabled for mass approvals is selected in the left panel, the approval requests in the right panel is displayed with check boxes in each row. Applicable action buttons are displayed on the top-right of the grid. The approval requests are deselected by default and the approval action buttons are disabled. The action buttons will be enabled only if at least one row is selected. A Select All check box is available above the grid to select all approvals in the grid. The approver can enter comments before taking an approval action. The comments will be applied to all selected requests.

Approvals History Page

A user can view approvals requests that they already worked on by going to Approvals History. The menu icon in the banner displays a list of options which includes Pending Approvals and Approvals History. These serve as a toggle between the Pending Approvals and Approvals History views.

Menu option to view Approvals History.

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



When the user switches to History, the title in the banner changes to Approvals History. Landscape and Portrait behavior will be the same as Pending Approvals. The History view is also displayed using a two-panel layout, similar to Pending Approvals. There are five views by which a user can view historical approvals.

- Type
- Status
- Priority (not available for HCM)
- Person (not available for FSCM)
- From

Priority and Person grouping are not applicable to all transactions. If none of the transactions in an approver's approval history have a priority associated, the Priority grouping will not be displayed in the dropdown. The same holds true for the Person grouping. A configuration is available to administrators to define how far back in time should the history be displayed. The left panel displays a message at the end of the last category indicating the time period for which the history is displayed, example, "History displays approvals for last 90 days." If this configuration has not been set, no such message will be displayed. For more details on the settings, see Mobile Approval Options - Transactions Page

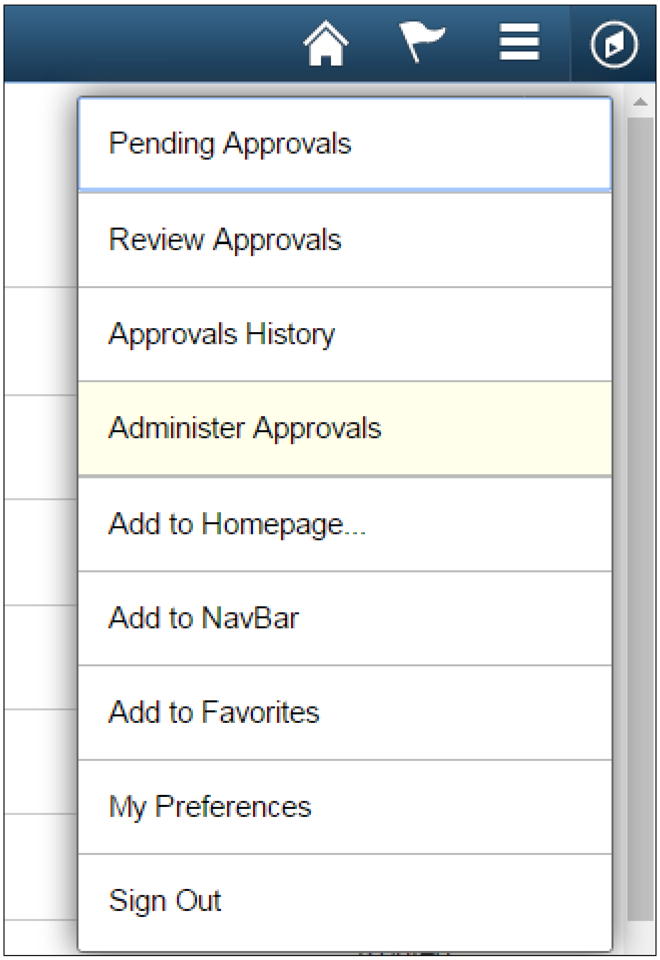
Users can also change the view and design of the Approvals page with the Page Composer Feature. For more details, see Understanding Page Composer

Administer Approvals Page

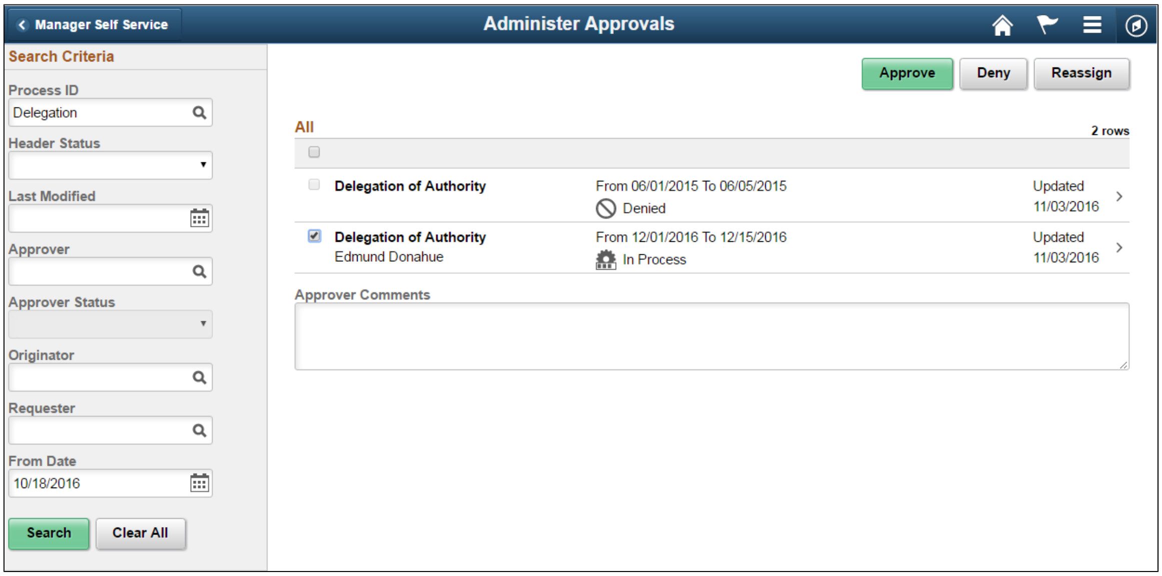
Approvals administrators can use Administer Approvals to view all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

Access the Administer Approvals page from the menu icon in the banner.

Administer Approvals menu option.



Administer Approvals page



You can view the approvals based on the specified search criteria in the left panel. The search criteria are:

Field or Control	***Description***
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.

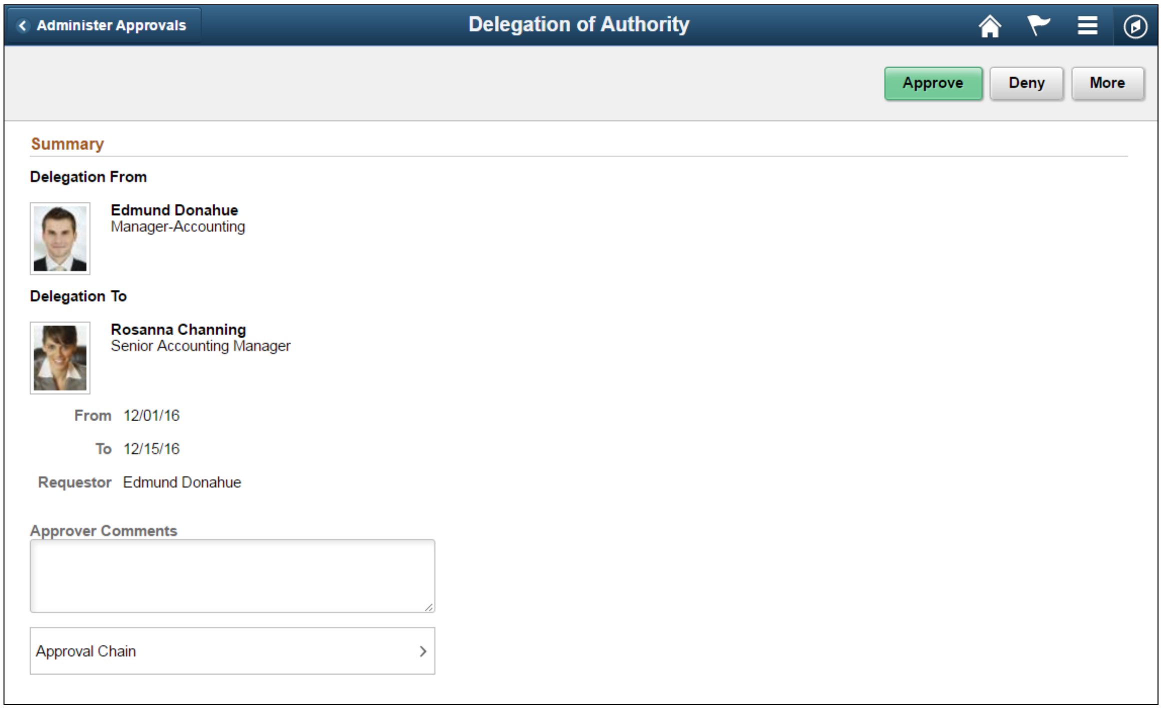
The three approval administration options available for the transactions are:

Field or Control	***Description***
Approve	Approve the transaction.
Deny	Deny the transaction.

Field or Control	Description
Reassign	Re-assign the transaction.

Click on an individual approval transaction to view the details for that transaction.

Administer Approvals Transaction Details page



For example the Delegation of Authority transaction details page shows the details such as the Delegated Authority, period of delegation, the Requestor and the Approval Chain for this transaction. Approval administrators can approve, deny or perform more actions on the approval transaction. The More option includes Reassign, Pushback and Resubmit actions.

Chapter 10

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 of 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

Video: PeopleSoft Fluid Delegations

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:

Term	***Definition***
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.

Term	***Definition***
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:

Request Status	***Delegation Status***	***Description***
Submitted	Inactive	When a delegator creates a new delegation request the system sets the request status to *Submitted* and delegation status to *Inactive.*
Accepted	Active	When a proxy accepts a delegation request, the system sets the request status to *Accepted.* The delegation status becomes *Active* 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 *Active,* 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 *Active* 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 *Inactive* 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 *Rejected.* The delegation status remains *Inactive.*

Request Status	***Delegation Status***	***Description***
Ended	Inactive	When the delegation authority period for the proxy expires, the system sets the request status to *Ended* and changes the delegation status to *Inactive.* 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 *Revoked* and changes the delegation status to *Inactive.* 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.

Steps to Synchronize Portal Security

You must run the Portal Security Synchronization process for users, who have permission, to access some Delegation pages.

1. Navigate to:
   - (PeopleToos 8.58) PeopleTools > Portal > Portal Security Sync
   - (PeopleToos 8.59) PeopleTools > Portal > Sync Portal Security
2. The Synchronize all portals and Delete invalid security check boxes don't need to be selected.
3. In the Portal Name field, enter the portal that is giving you the "You are not authorized to access this component." message.

Registering Workflow Transactions

This topic discusses how to register workflow transactions.

Page Used to Register Workflow Transactions

Page Name	***Definition Name***	***Usage***
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

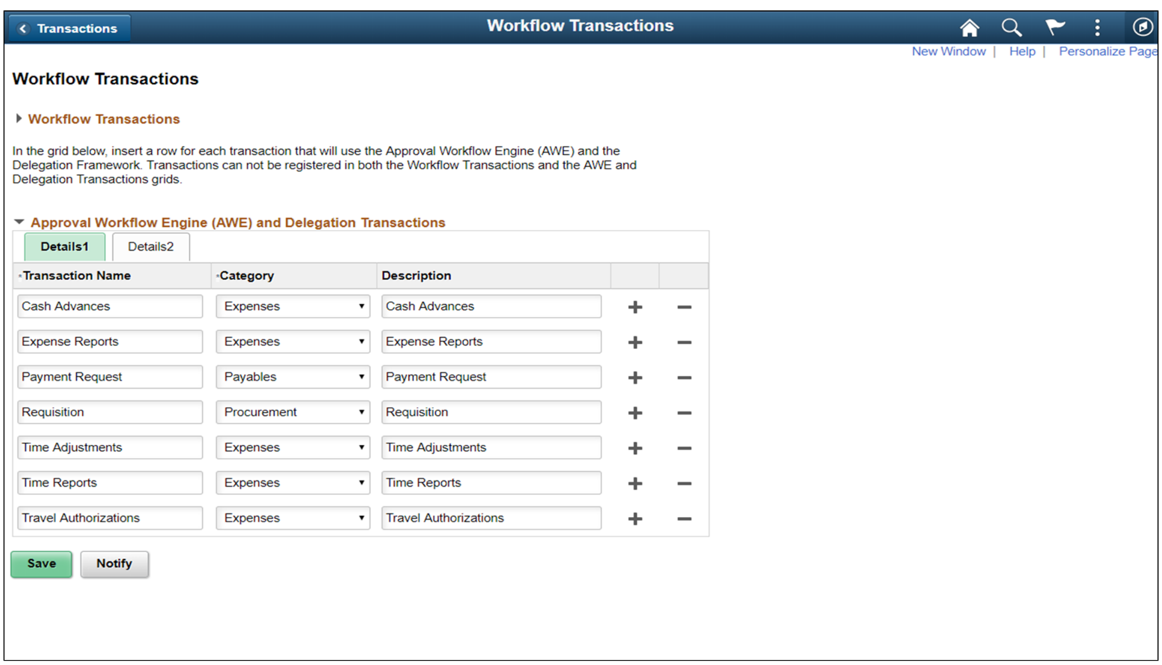
Use the Workflow Transactions page (EO_TRANSACTIONS) to register workflow transactions for self-service transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category.

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.

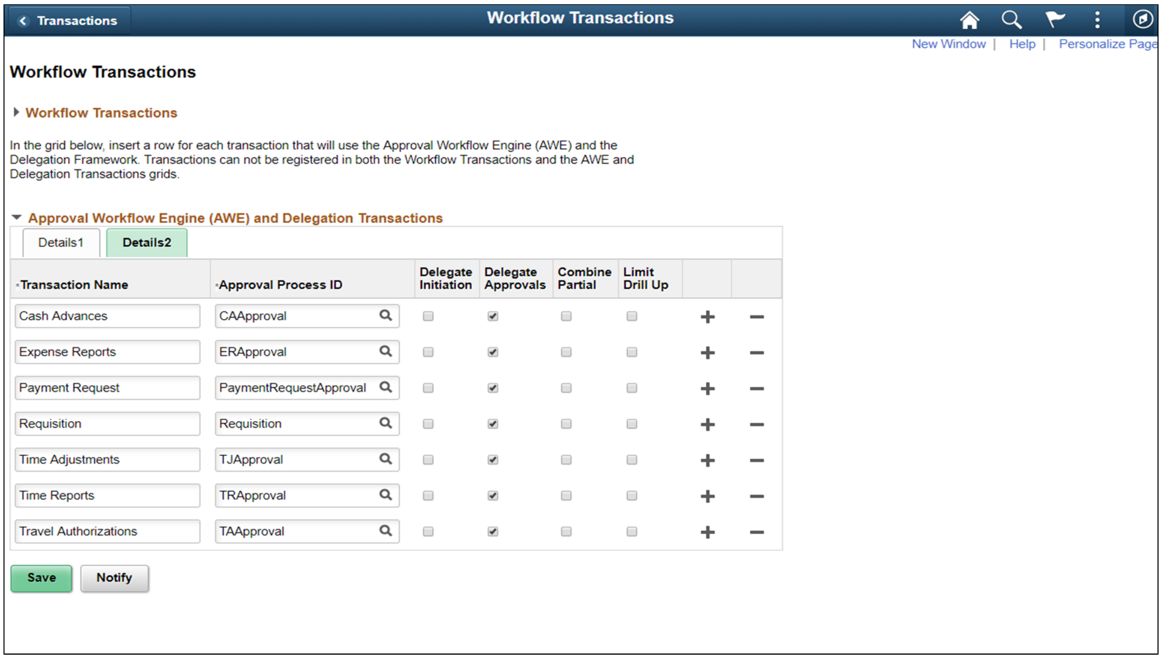
Navigation:

Enterprise Components > **Delegation** > **Workflow Transactions**

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



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



Field or Control	***Description***
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.

Field or Control	*Description*
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

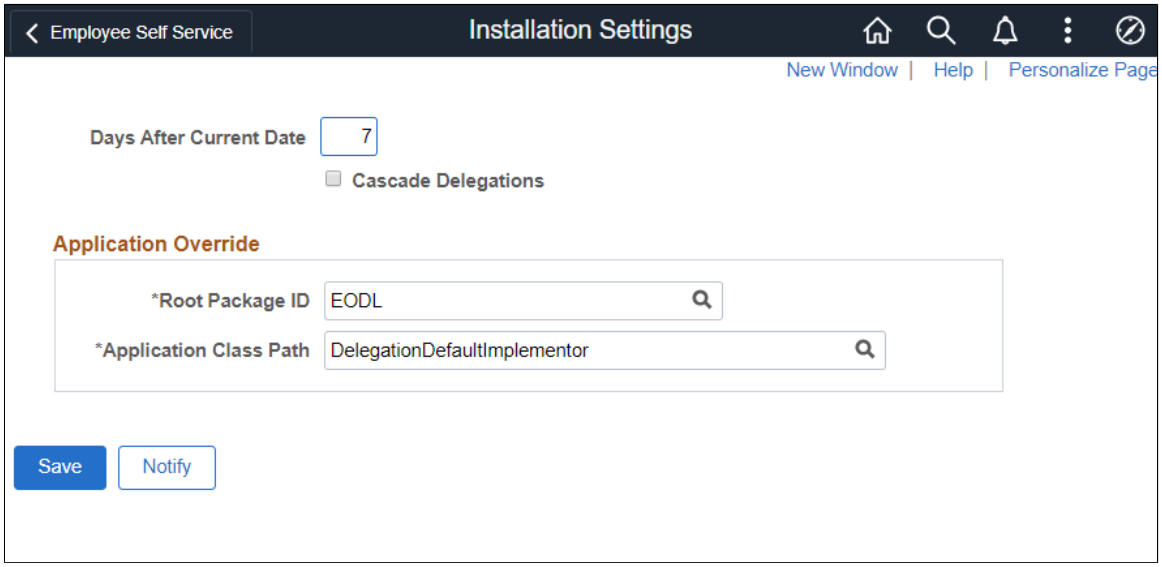
Use the Installation Settings page (EODL_INSTALL_PG) to define delegation installation settings.

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

Navigation:

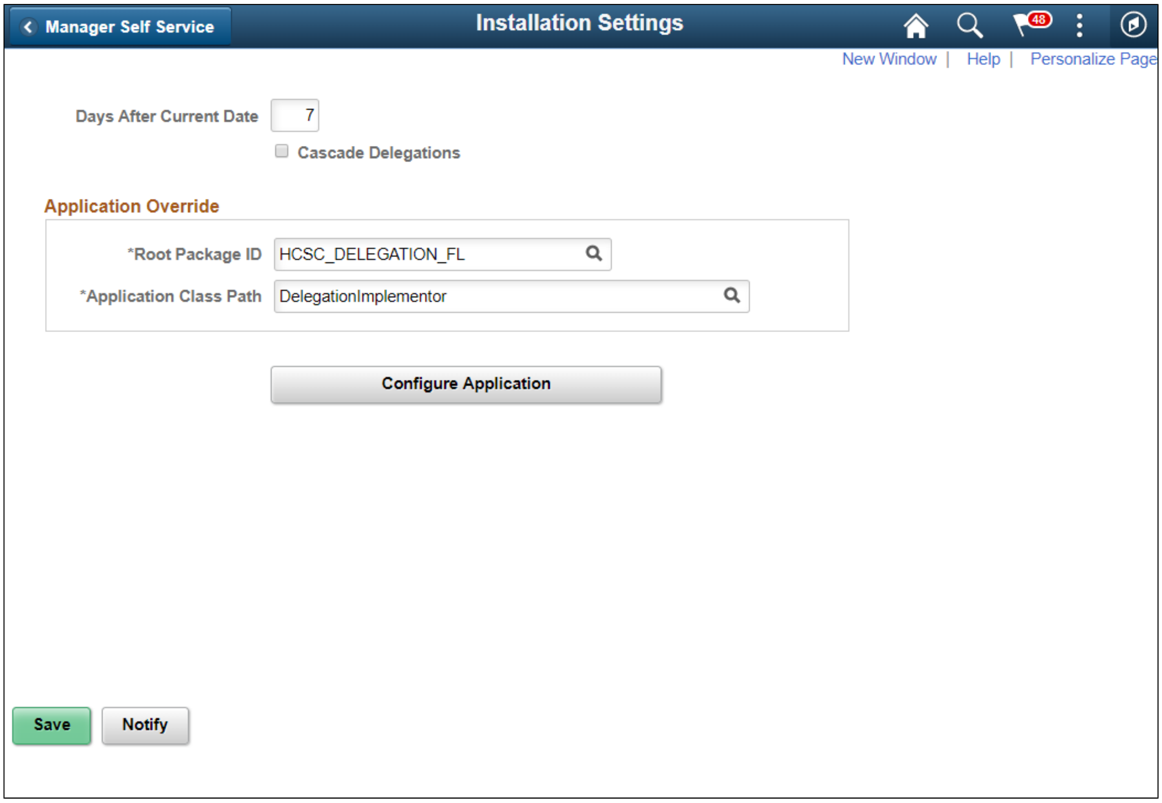
Enterprise Components > **Delegation** > **Installation Settings**

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.



Field or Control	*Description*
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.

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.



Field or Control	*Description*
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.

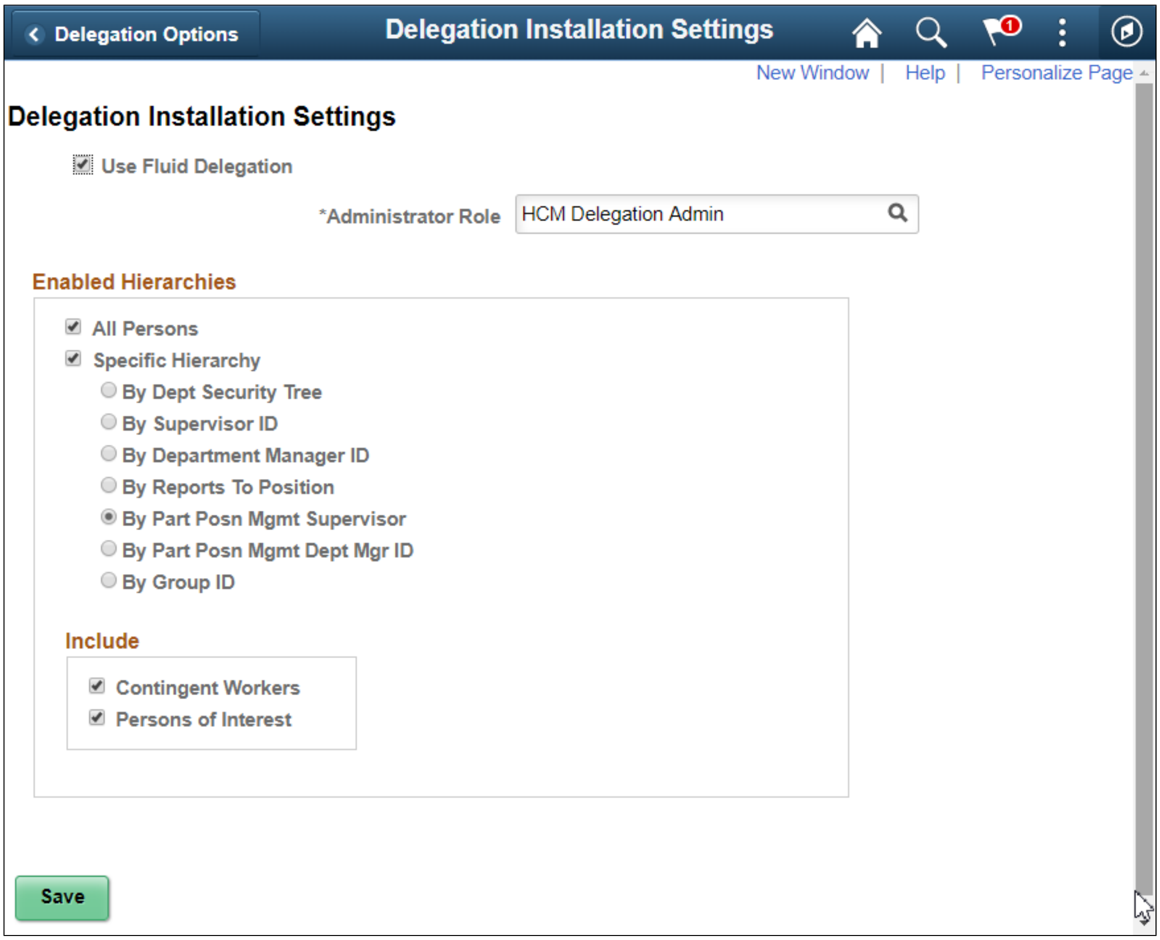
Delegation Installation Settings Page

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.

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.



Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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

Field or Control	***Description***
	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. f 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 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

Page Name	***Definition Name***	***Usage***
Configure Delegation Transaction Page	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

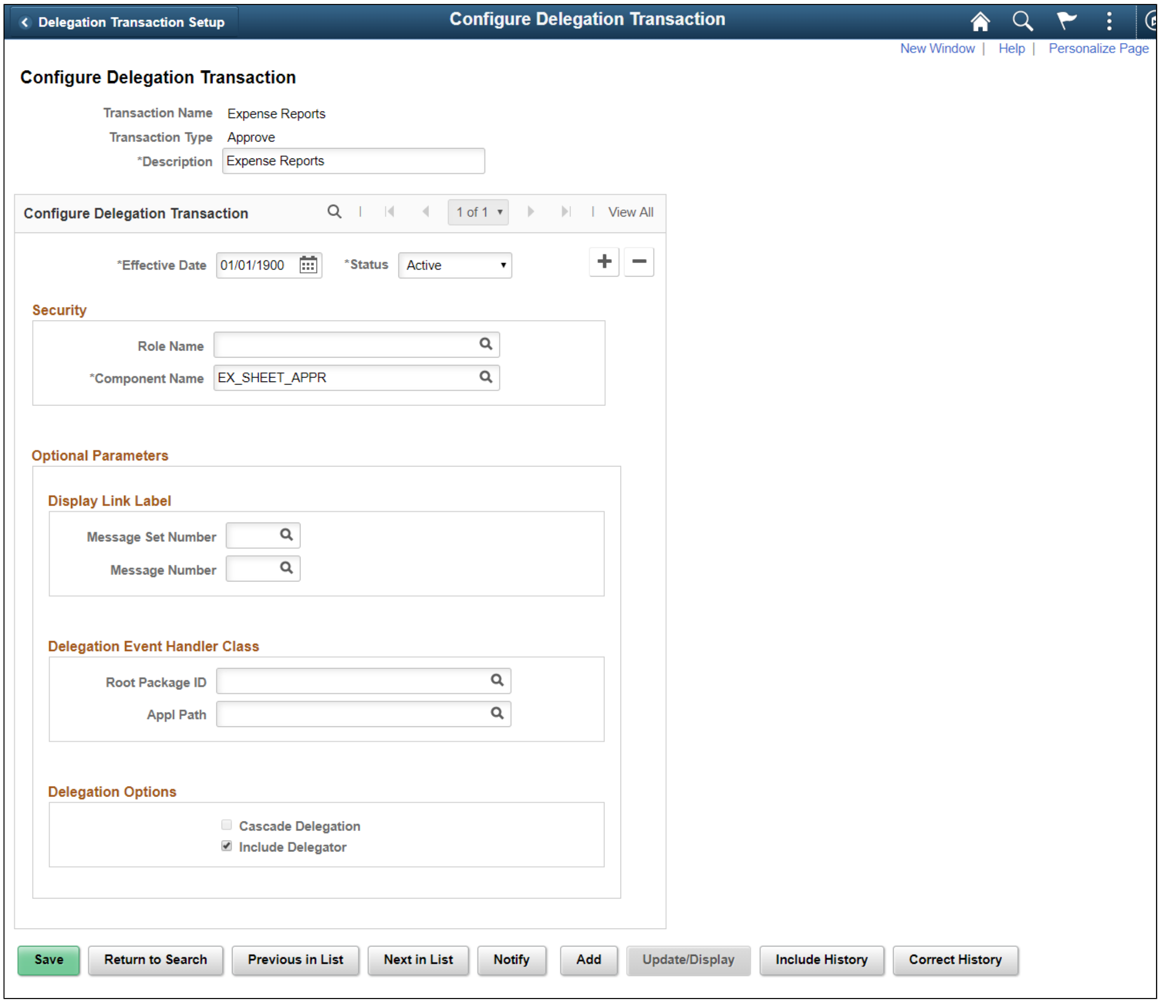
Use the Configure Delegation Transaction page (EODL_TXN_SETUP) to configure transactions for delegation.

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**

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.



Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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 on Search Page	***Unique Role / Permission List***	***Component Name***	***Delegation Transaction Description***
AbsenceCancelation	Delegate Manager Absence Appr	GP_SS_ABS_APPR_L	Delegate the approval of manager absence cancelation requests.

Transaction Name on Search Page	***Unique Role / Permission List***	***Component Name***	***Delegation Transaction Description***
BenefitsDocumentFiling	Delegate_GSS_Approve Permission list: HCCPDL3100	EOAWMA_MAIN_FL	Delegate the approval of documents in Benefits.
Delegate_ePerformance_Dev	delegate_ePerformaceDevDoc_Upd	EP_CURRENT_MY_DVL	Delegate the ability to update development documents.
Delegate_ePerformance_Doc	delegate_ePerformaceDoc_Update	EP_CURRENT_MY_PRF	Delegate the ability to update performance documents.
DependentUpdates	Delegate_GSS_Approve Permission list: HCCPDL3100	EOAWMA_MAIN_FL	Delegate the approval of employee dependent attachments.
EP_APPRAISAL	Delegate_PerformancDoc_Approve	EP_APPRAISAL_APPR	Delegate the approval of ePerformance documents.
GP Payroll Approval CHN	Level 1 Approval GPCN Payroll Approver (the role assigned to permission list HCCPPYAPPCHN) Level 2 Approval HR VP (the role assigned to permission list HCCPPYAPPCHN)	GPCN_PAY_APP	Delegate the approval of payroll requests in Global Payroll China.
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.

Transaction Name on Search Page	***Unique Role / Permission List***	***Component Name***	***Delegation Transaction Description***
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.
HGA_SS_MBAL_FLU	Delegate Manager Abs Bal Fluid	HGA_SS_BAL_FLU	Delegate the initiation of manager absence balance inquires 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.

Transaction Name on Search Page	***Unique Role / Permission List***	***Component Name***	***Delegation Transaction Description***
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_DEMOTION (Approve)	Delegate_GSS_Approve	HR_MSS_CT_FL	Delegate the approval of demotion in Guided Self Service.
HR_DEMOTION (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of demotion in Guided Self Service.
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_FULL_PART_STATUS (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of changes in full-time and part-time status in Guided Self Service.
HR_FULL_PART_STATUS (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of changes in full-time and part-time status in Guided Self Service.

Transaction Name on Search Page	***Unique Role / Permission List***	***Component Name***	***Delegation Transaction Description***
HR_GROUP_UPDATE (Approve)	Delegate_GSS_Approve	HR_MSS_CT_FL	Delegate the approval of job update for group in Guided Self Service.
HR_GROUP_UPDATE (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of job update for group in Guided Self Service.
HR_LOA_PAID (Approve)	Delegate_GSS_Approve	HR_MSS_CT_FL	Delegate the approval of paid leave of absence in Guided Self Service.
HR_LOA_PAID (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of paid leave of absence in Guided Self Service.
HR_LOA_UNPAID (Approve)	Delegate_GSS_Approve	HR_MSS_CT_FL	Delegate the approval of leave of absence in Guided Self Service.
HR_LOA_UNPAID (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of leave of absence in Guided Self Service.
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.
HR_POSITION_CLONE (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of position clone in Guided Self Service.

Transaction Name on Search Page	***Unique Role / Permission List***	***Component Name***	***Delegation Transaction Description***
HR_POSITION_CLONE (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of position clone in Guided Self Service.
HR_PROMOTE_PAY (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of promotions in Guided Self Service.
HR_PROMOTE_PAY (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of promotions in Guided Self Service.
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_REPORTING_ CHANGE (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of reporting changes in Guided Self Service.
HR_REPORTING_ CHANGE (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of reporting changes in Guided Self Service.
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_RETIREMENT (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of retirements in Guided Self Service

Transaction Name on Search Page	***Unique Role / Permission List***	***Component Name***	***Delegation Transaction Description***
HR_RETIREMENT (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of retirements in Guided Self Service.
HR_SALARY_CHANGE (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of ad hoc salary changes in Guided Self Service.
HR_SALARY_CHANGE (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of ad hoc salary changes in Guided Self Service.
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_TERMINATE (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of terminations in Guided Self Service.
HR_TERMINATE (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of termination in Guided Self Service.
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.

Transaction Name on Search Page	***Unique Role / Permission List***	***Component Name***	***Delegation Transaction Description***
HR_TRANSFER_PAY (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of transfers in Guided Self Service.
HR_TRANSFER_PAY (Initiate)	Delegate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of transfers in Guided Self Service
JPMNonpersonProfiles	Delegate_NPersonProfile_Approv	JPM_JP_NONPER_APPR	Delegate the approval of non-person profiles.
JPMPersonProfiles	Delegate_PersonProfile_Approve	JPM_JP_PERS_APPR	Delegate the approval of changes in person profiles.
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.
ManageReportTimeFluid (Approve)	Delegate Manage Report Time	TL_ENTER_TIME_FLU	Delegate the approval of time using fluid timesheet.
ManageReportTimeFluid (Initiate)	Delegate Manage Report Time	TL_ENTER_TIME_FLU	Delegate the initiation of reporting time using fluid timesheet.
TL_MSS_EE_SECH_PRD (Approve)	Delegate Manage AppRpt Time	TL_MSS_EE_SRCH_PRD	Delegate the approval of managing reported time.
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.

Transaction Name on Search Page	***Unique Role / Permission List***	***Component Name***	***Delegation Transaction Description***
TL_SRCH_APPRV_GRP	Delegate Manage App Pay Time	TL_SRCH_APPRV_GRP	Delegate the approval of payable time.
W3EB_APPR_SUMMARY	Delegate Manage Appr Document	W3EB_APPR_SUMMARY	Delegate the approval of life event documents.
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.

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.
Cash Advances	EX_ADV_APPR	Delegate approval of cash advances.

Transaction Name	***Component Name***	***Delegation Transaction Description***
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.
SCMT Document	CS_DOC_MAINT	Delegate the approval of supplier contract documents.
SCMT Clause	CS_CLAUSE_DEFN	Delegate the approval of supplier contract clauses.
Purchase Order	PO_APPROVAL	Delegate the approval of purchase orders.
Voucher Approval	VCHR_APPROVE2	Delegate the approval of vouchers.
Invoice Header Approval	EM_VCHR_APPROVE2	Delegate the approval of invoice headers.
EMInvoiceLineApproval	EM_VCHR_APPROVE3	Delegate the approval of invoice lines.
Credit Invoice	BI_ENTRY	Credit Invoice
Express Credit Invoice	BI_ENTRY_X	Express Billing Credit Invoice
Supplier Change Request	SUP_OB_MNG_APR	Delegate Supplier Change Requests.
User Registration	SUP_OB_USR_APR	Delegate User Registration.
Supplier Registration	SUP_OB_MNG_APR	Delegate Supplier Registration.
Bidder Registration	SUP_OB_MNG_APR	Delegate Bidder Registration.

Transaction Name	***Component Name***	***Delegation Transaction Description***
Sourcing Plan	EOAWMA_MAIN_FL	Delegate the approval of sourcing plans.
Sourcing Events	EOAWMA_MAIN_FL	Delegate the approval of sourcing events.
AR Draft Writeoff	DRAFT_WORKS_IC	Delegate the approval of receivables draft writeoffs.
AR Maintenance Writeoff	WS_WORKSHEET_IC	Delegate the approval of receivables maintenance writeoffs.
AR Payment Writeoff	PAYMENT_WS_IC	Delegate the approval of receivables payment writeoffs.
AR Refund	WS_WORKSHEET_IC	Delegate the approval of receivables refunds.
Services Work Order	SPF_WO_APPR_CMP	Delegate the approval of Services Work Orders.
Services Timesheet	SPA_TIME_APPROVAL	Delegate the approval of Services Timesheets.
Services Expense	SPA_EXPENSE2	Delegate the approval of Services Expenses.
Services Progress Log	SPA_PLOG	Delegate the approval of Services Progress Logs.
Services Invoice	SPF_INV_APR_LNDTL	Delegate the approval of Services Invoices.
Assignment Status	RS_ASSIGNMENT	Delegate the approval of Resource Assignments.
Assignment Date	RS_ASSIGNMENT	Delegate the approval of Resource Assignment Schedule Changes.
Treasury Settlement Approvals	EOWMA_MAIN_FL	Delegate the approval of treasury settlements.

Transaction Name	***Component Name***	***Delegation Transaction Description***
Treasury Deal Approvals	EOWMA_MAIN_FL	Delegate the approval of deals.
Treasury Deal Confirmation	EOWMA_MAIN_FL	Delegate confirmation of deals.
Project Requests	BC_PROJECT_APPROVAL	Delegate project request approvals.
Program Budgets	PGM_BUD_APPROVE	Delegate program budget approvals.
Proposals	GM_PROPOSAL_APPR	Delegate proposal approvals.
GL Journal Approval	EOAWMA_MAIN_FL	Delegate the approval of GL journal posting.
GL Reconciliation	EOAWMA_MAIN_FL	Delegate the approval of GL reconciliation.
KK Journal Approval	EOAWMA_MAIN_FL	Delegate the approval of budget journal.
Journal Unpost Approval	EOAWMA_MAIN_FL	Delegate the approval of GL journal unposting.
AM Cost Adjust Transfer	EOAWMA_MAIN_FL	Delegate the approval of cost adjust transfers.
Asset Cost IUT	EOAWMA_MAIN_FL	Delegate the approval of asset cost interunit transfers.
Asset Cost Transfer	EOAWMA_MAIN_FL	Delegate the approval of asset cost transfers.
Asset Reversal ADJ	EOAWMA_MAIN_FL	Delegate the approval of asset reversal adjustments.
Asset Reversal ADD	EOAWMA_MAIN_FL	Delegate the approval of asset reversal additions.
Asset Reversal IUT	EOAWMA_MAIN_FL	Delegate the approval of asset reversal interunit transfers.

Transaction Name	***Component Name***	***Delegation Transaction Description***
Asset Reversal TRF	EOAWMA_MAIN_FL	Delegate the approval of asset reversal ChartField transfers.
AM Self Service Retire	EOAWMA_MAIN_FL	Delegate the approval of self service retirements.
AM Self Service Transfer	EOAWMA_MAIN_FL	Delegate the approval of self service transfers.
AM Mass Transaction	EOAWMA_MAIN_FL	Delegate the approval of mass transactions.
AM Upload Spreadsheet	EOAWMA_MAIN_FL	Delegate the approval of upload spreadsheet data.
AM Disposal	AM_DISPOSAL_APPR	Delegate the approval of asset disposals.
AM Self Service	AM_MY_APPROVE_PNLG	Delegate the approval of asset self service.
Audit Expense Monitoring	RE_OPEXAUDIT	Delegate the approval of expense monitoring.
Sales Amount Monitoring	RE_SLSRPT_INV	Delegate the approval of sales monitoring.
Lease Clause Monitoring	RE_LEASE_MAINT	Delegate the approval of lease clause monitoring.
Critical Date Notify	RE_LEASE_MAINT	Delegate the approval of critical date notifications.
Transaction Queue	RE_TXN_MANAGER	Delegate the approval of transaction queues.
SAR Critical Date Notify	RE_SAR	Delegate the approval of site acquisition request critical date notifications.

Transaction Name	***Component Name***	***Delegation Transaction Description***
SAR Approval	RE_SAR	Delegate the approval of sight acquisition requests.
Lease Transaction	RE_LEASE_MAINT	Delegate the approval of lease transactions.
Finalize Sites	RE_SAR_APPR	Delegate the approval of finalize site acquired requests.
PM Schedule Approval	WM_PM_SCHD	Delegate the approval of preventive maintenance schedules.
Work Order Approval	WM_WO_APPR	Delegate the approval of work orders.

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***
Administer Create Delegation Page	EODL_ADMIN_SEL_FL	Add delegation requests that administrators create on behalf of delegators.

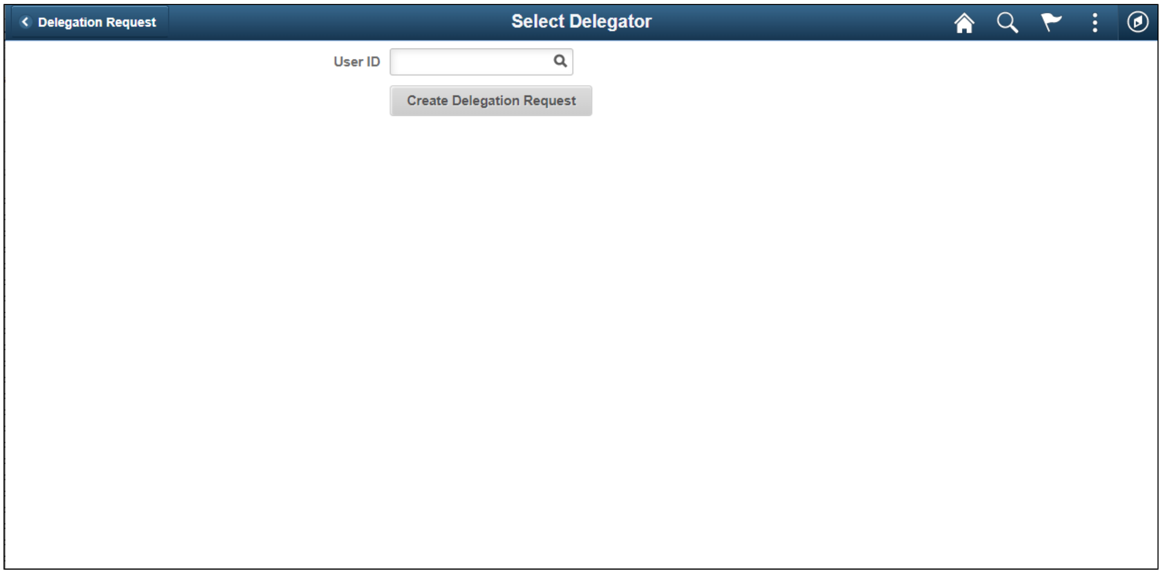
Administer Create Delegation Page

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**

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.

Field or Control	***Description***
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***
Administer Delegation Page	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

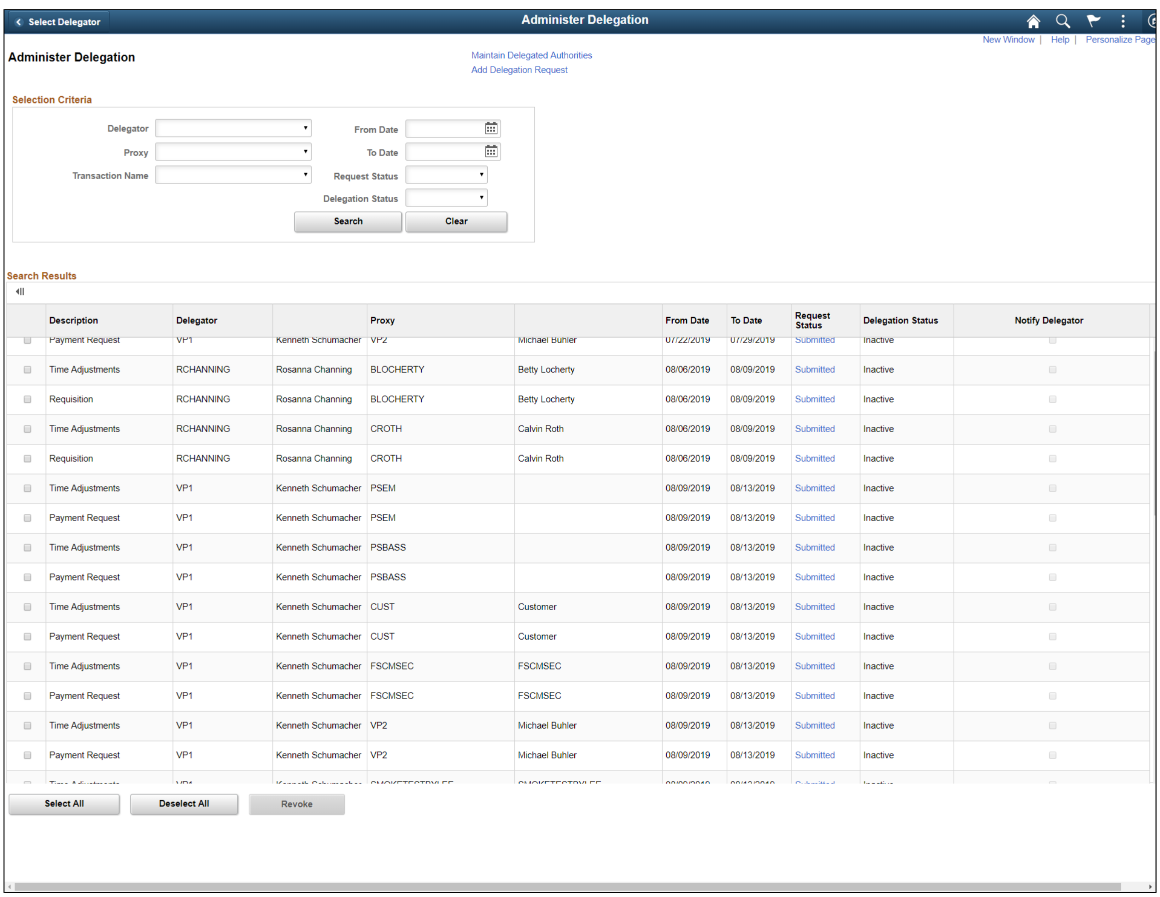
Use the Administer Delegation page (EODL_ADMIN_DLG) to administer delegation requests.

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

Navigation:

Enterprise Components > **Delegation** > **Administer Delegation**

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.



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.

Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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

Page Name	*Definition Name*	*Usage*
Maintain Delegated Authorities Page	EODL_BATCH	Process batch delegation requests in a daily batch.

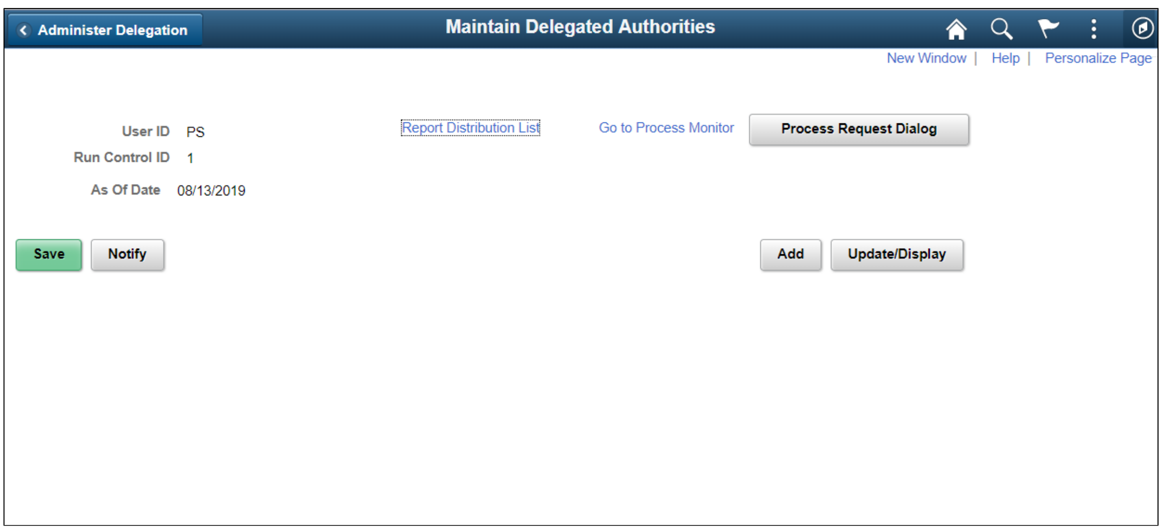
Maintain Delegated Authorities Page

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

Navigation:

Enterprise Components > **Delegation** > **Maintain Delegated Authorities**

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.



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***
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.
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.
My Delegates Page	EODL_MY_PROXIES_PG	Manage delegation requests you have initiated for others.
My Delegated Authorities Page	EODL_DLGT_AUTH_PG	Manage delegations requested of you by others

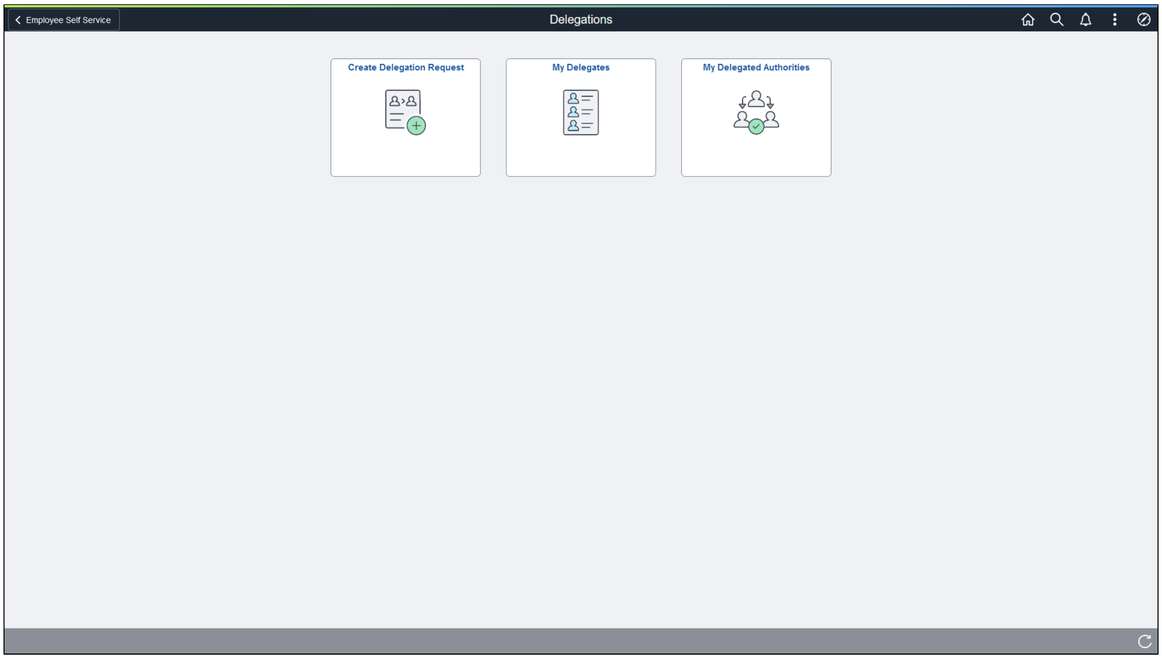
Accessing Fluid Self-Service Delegations

Access Fluid Self-Service Delegations using the **Delegations** tile on the Self Service Fluid Homepage.

Delegations tile in the Self-Service Homepage

Select the Delegations tile to view a collection of Fluid Delegations tiles that correspond to various delegation transactions.

Collection of Fluid Delegations tiles



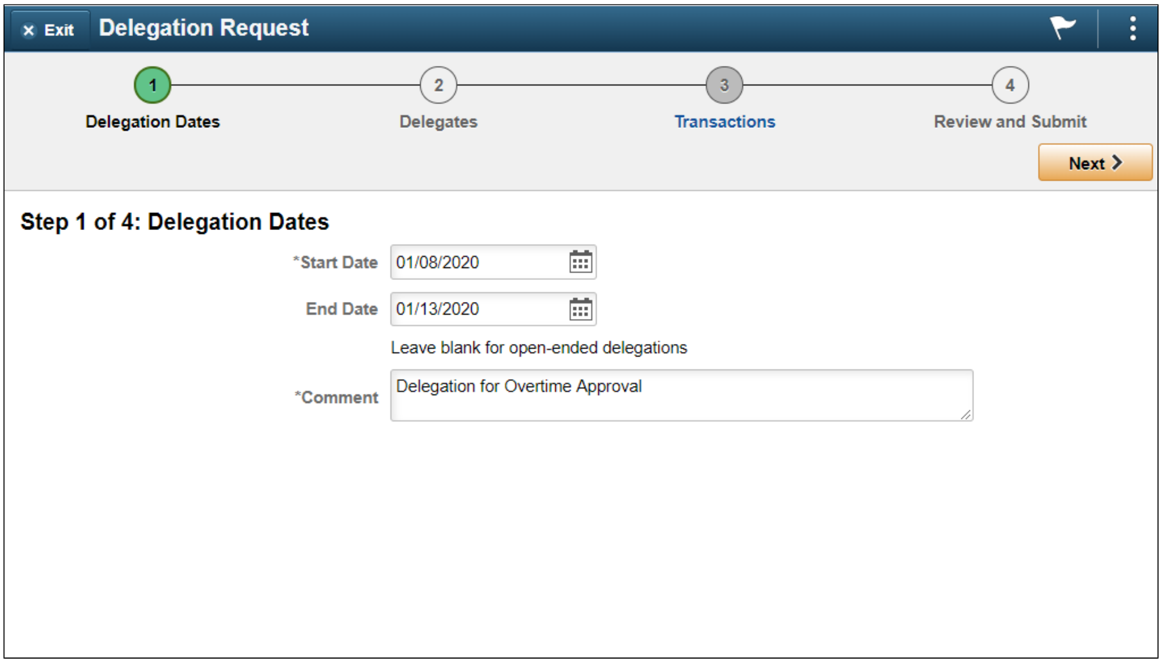
Create Delegation Request - Delegation Dates Page

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.

Navigation:

Fluid Home Page > **Employee Self Service** > **Delegations tile** > **Create Delegation Request tile**

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



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

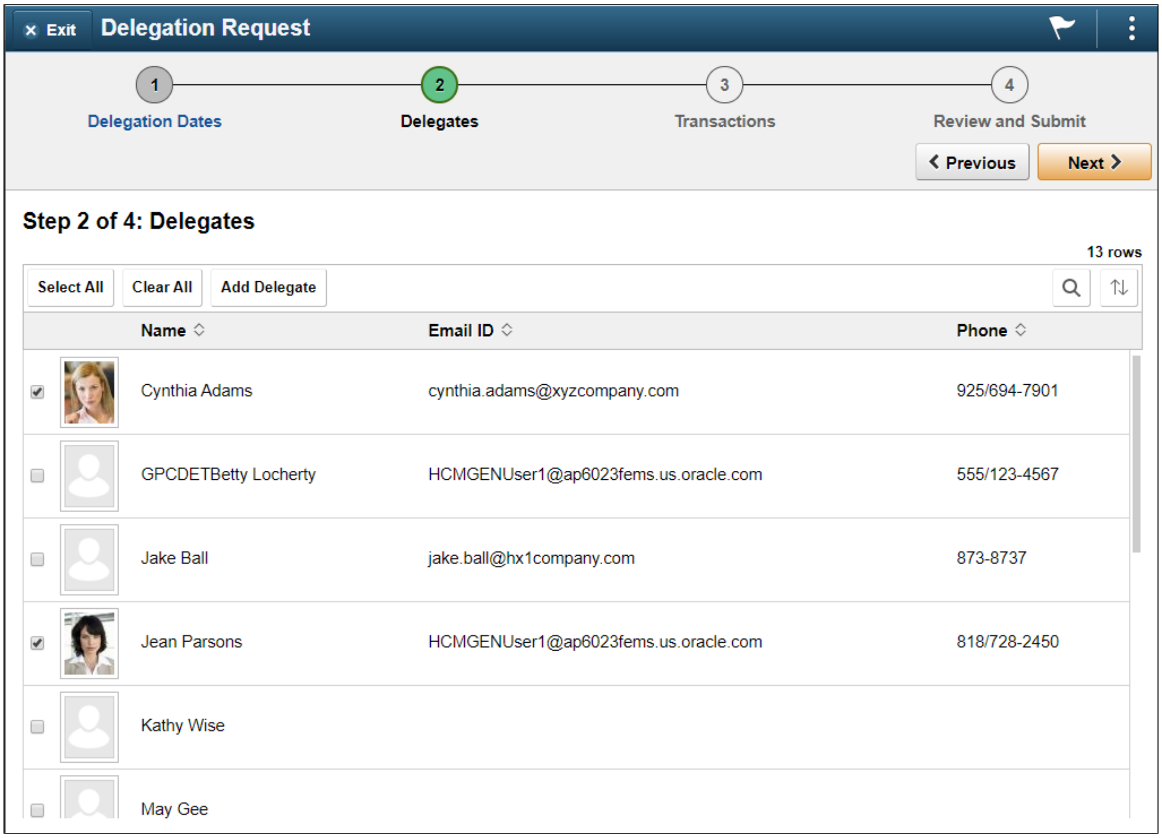
Create Delegation Request - Delegates Page

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

Navigation:

Click the **Next** button on the Delegation Dates page.

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



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

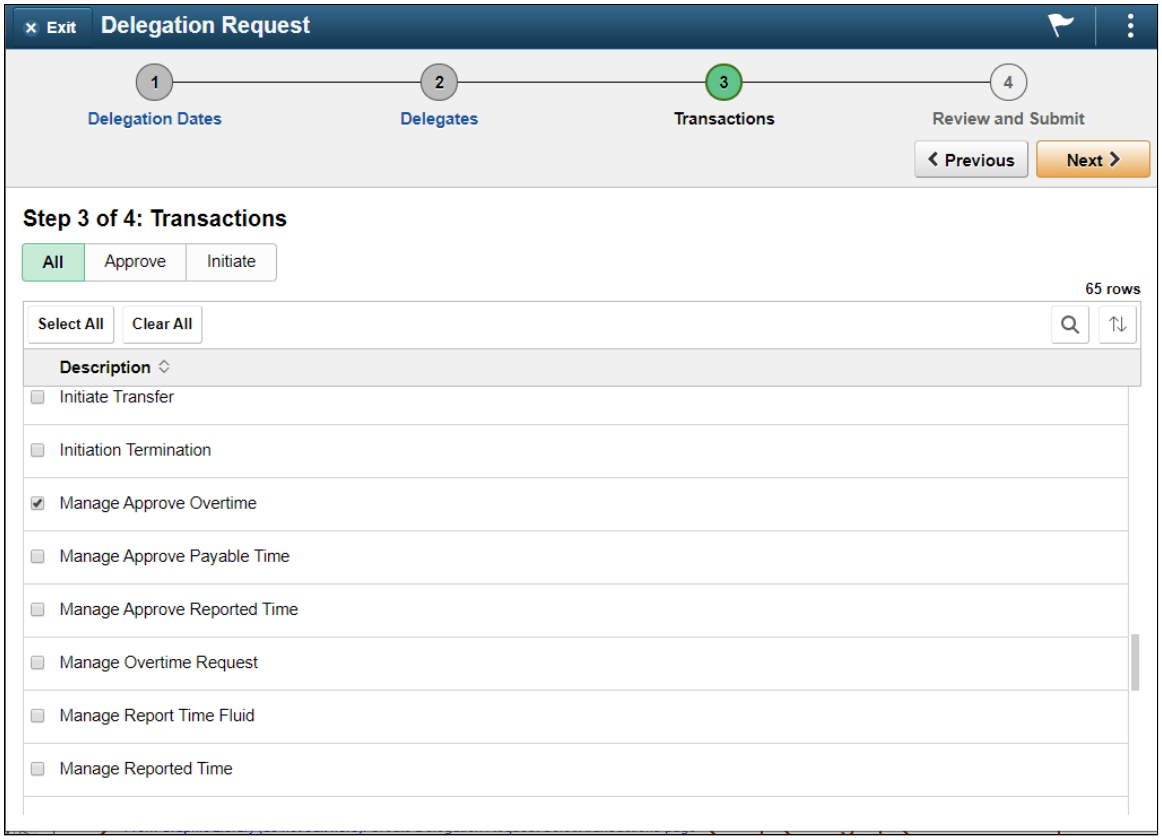
Use the Create Delegation Request - Transactions page (EODL_TRANS_SEL_FL) to select transactions for delegation.

Users can select one or more transactions to delegate.

Navigation:

Click the **Next** button on the Delegates page.

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



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

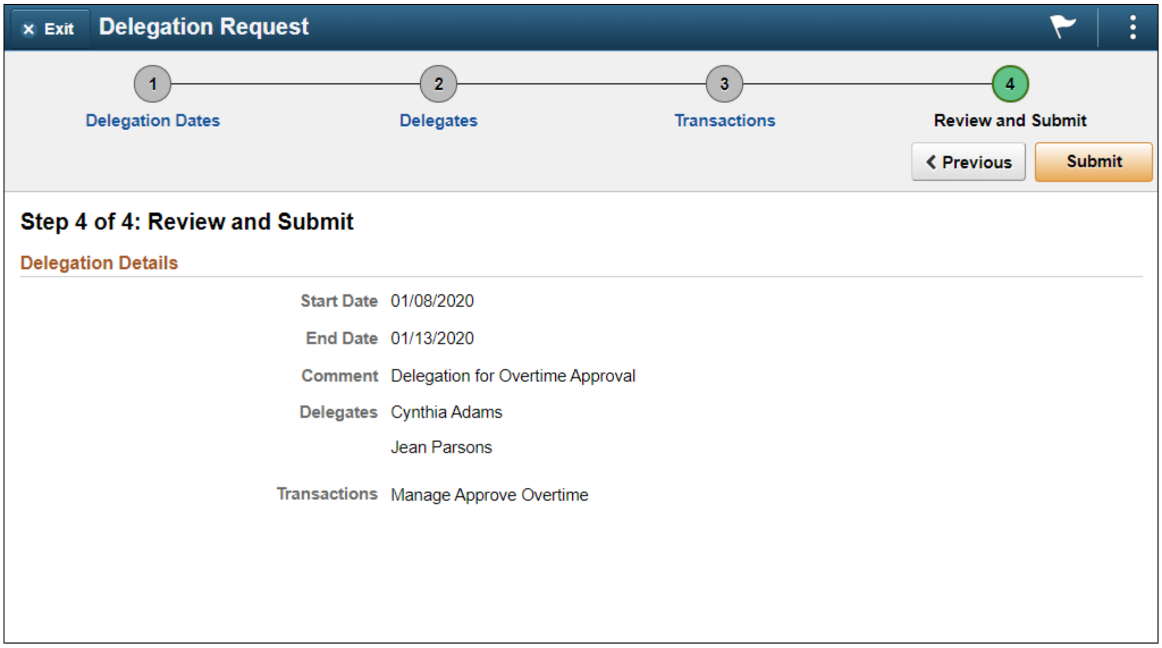
Use the Create Delegation Request - Review and Submit page (EODL_DLGRQST_SM_FL) to review and submit a delegation request.

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

Navigation:

Click the **Next** button on the Transactions page.

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



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.

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

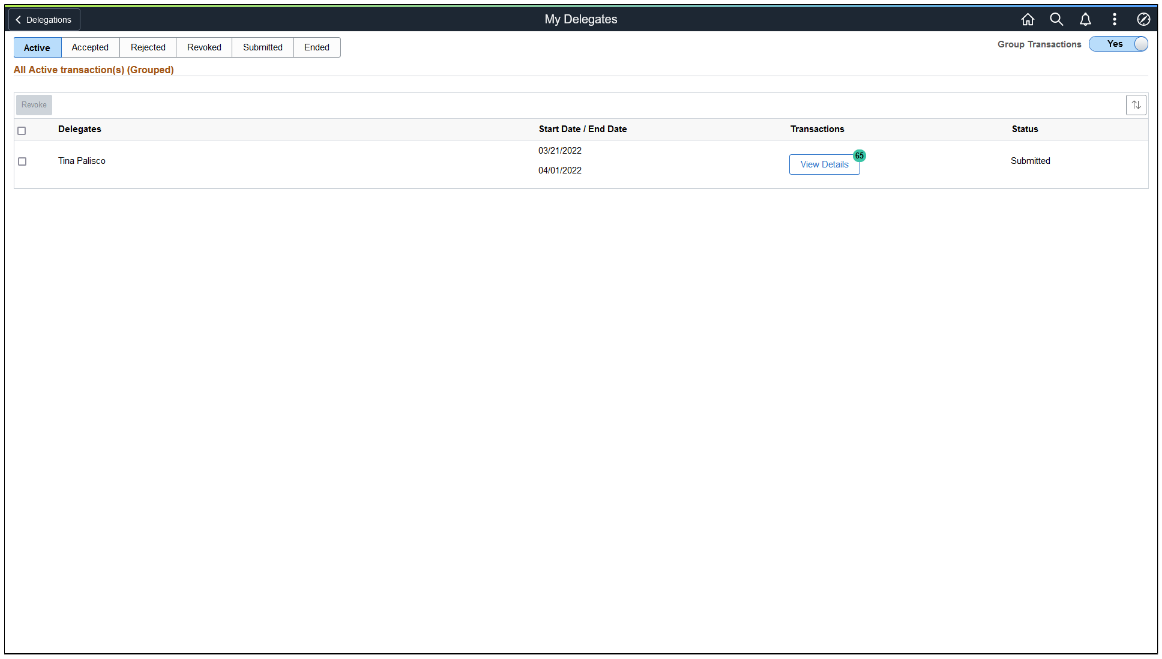
Use the My Delegates page (EODL_MY_PROXIES_PG) to manage delegation requests you have initiated for others.

Navigation:

Fluid Home Page > **Employee Self Service** > **Delegations tile** > **My Delegates tile**

Enterprise Components > **Delegation** > **My Delegates**

This example illustrates the fields and controls on the My Delegates page.



Field or Control	*Description*
Group Transactions	Select *Yes* to display delegation requests grouped by delegate. Select *No* to display individual delegation requests.
Revoke	Select this button to revoke delegation requests for a delegate. You must select at least one check box for this button to function. You can revoke individual or grouped delegation requests, depending on the **Group Transactions** selection. When you revoke a request, the system changes the status to *Revoked* and automatically sends an email notification to the delegate (proxy) about the status of the delegation request. **Note:** When requests are grouped, selecting a single row revokes all requests for a delegate.
Delegates	Displays the delegate associated with the delegation request.
Start Date, End Date	Displays the start and end date associated with the delegation request.
Transactions	When individual delegation requests are displayed (**Group Transactions** set to No), this field displays the transaction associated with the delegation request. When delegation requests are grouped (**Group Transactions** set to Yes), this field displays the **View Details** button and a count of the number of transactions that have been delegated.

Field or Control	***Description***
View Details	Select to access the Details page and view the transactions associated with the delegate.
Status	Displays the status of the transaction associated with the delegate. Status is only available in the Active tab.

The **Accepted** tab displays delegation requests that the delegate has accepted.

The **Ended** tab displays delegation requests that are expired.

The **Rejected** tab displays delegation requests that the delegate has rejected.

The **Revoked** tab displays delegation requests that you have revoked.

The **Submitted** tab displays delegation requests that you have submitted.

My Delegated Authorities Page

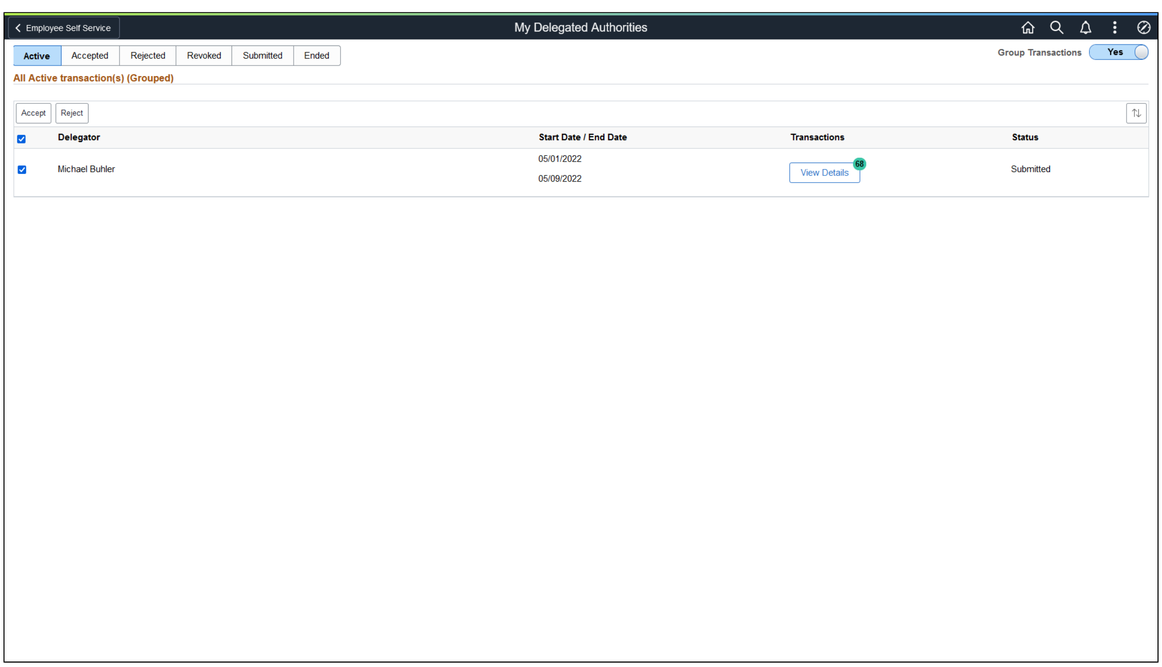
Use the My Delegated Authorities page (EODL_DLGT_AUTH_PG) to manage delegations requested of you by others.

Navigation:

Fluid Home Page > **Employee Self Service** > **Delegations tile** > **My Delegated Authorities tile**

Enterprise Components > **Delegation** > **My Delegated Authorities**

Fields or controls and descriptions for the My Delegated Authorities page.



Field or Control	***Description***
Group Transactions	Select *Yes* to display requests grouped by delegator. Select *No* to display individual requests.
Accept	Select this button to accept delegations requested of you. You must select at least one check box for this button to function. You can accept individual or grouped requests, depending on the **Group Transactions** selection. **Note:** When requests are grouped, selecting a single row accepts all requests for a delegator.
Reject	Select this button to reject delegations requested of you. You must select at least one check box for this button to function. You can reject individual or grouped requests, depending on the **Group Transactions** selection. **Note:** When requests are grouped, selecting a single row rejects all requests for a delegator.
Delegator	Displays the delegator associated with the request.
Start Date, End Date	Displays the start and end date associated with the request.
Transactions	When individual requests are displayed (**Group Transactions** set to No), this field displays the transaction associated with the request. When delegation requests are grouped (**Group Transactions** set to Yes), this field displays the **View Details** button and a count of the number of transactions that have been requested.
View Details	Select to access the Details page and view the transactions associated with the request.
Status	Displays the status of the transaction associated with the delegator. Status is only available in the Active tab.

The **Accepted** tab displays requests that you have accepted.

The **Ended** tab displays requests that are expired.

The **Rejected** tab displays requests that you have rejected.

The **Revoked** tab displays requests that have been revoked by the delegator.

The **Submitted** tab displays delegation requests that have been submitted by the delegator.

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
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

Template Name	***Notification Description***	***Trigger***	***Recipients***
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

Chapter 11

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*
CAVF Configuration Setup Page	EOATT_CONFIG_DTLS	Set up the Comments and Attachments View configuration.
CAVF Configuration ID Component Mapping Page	EOATT_MAPCO_PG	Configure the transaction page and to specify where to display the comments and attachments.
CAVF Configuration ID Page Composer Mapping Page	EOATT_MAPPC_PG	Configure the Page Composer page where the Comments and Attachments View framework is to be used

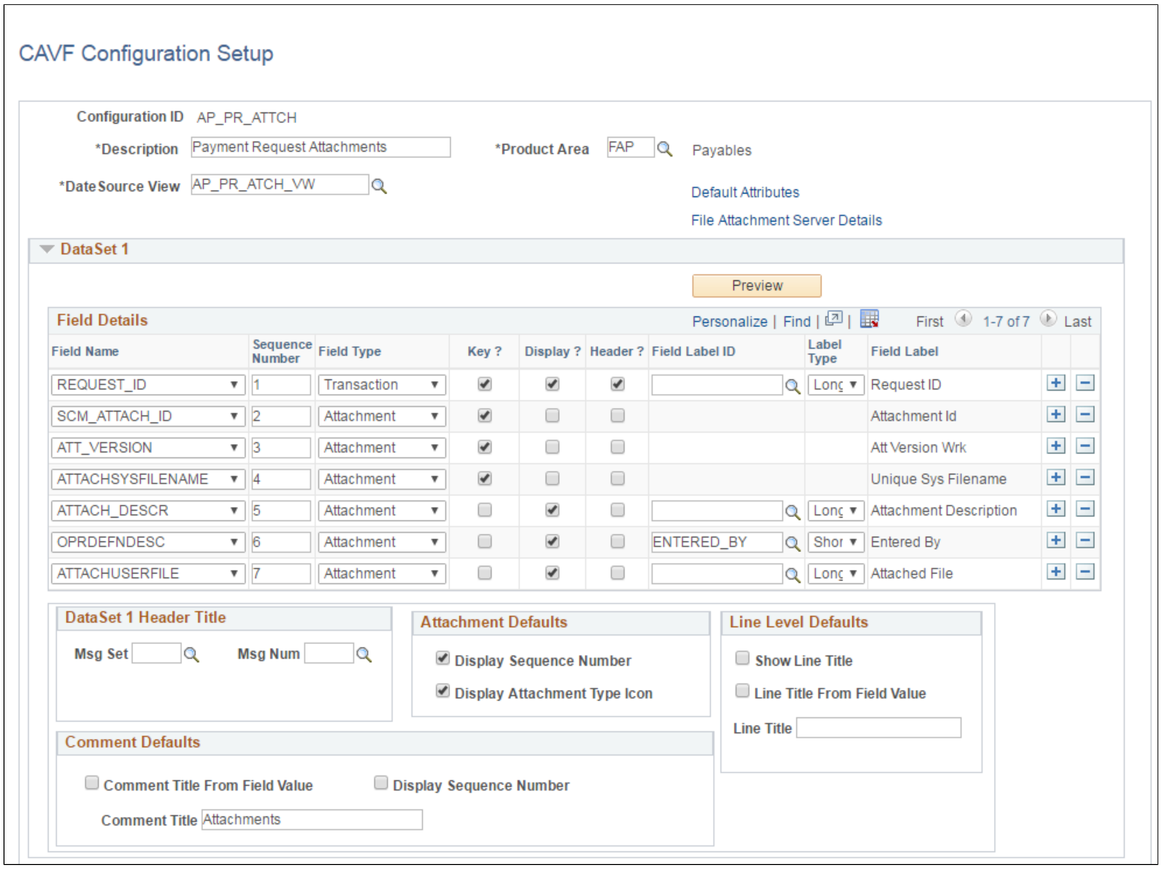
CAVF Configuration Setup Page

Use the CAVF Configuration Setup page (EOATT_CONFIG_DTLS) to create a unique Configuration ID and to configure the comments and attachments.

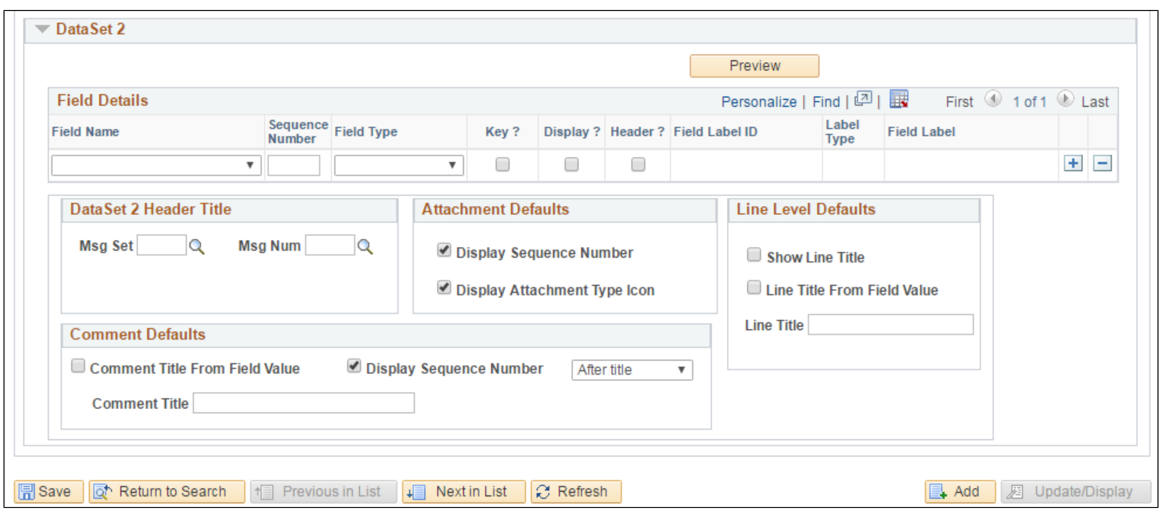
Navigation:

Enterprise Components > **CA View Framework** > **CAVF Configuration Setup**

CAVF Configuration Setup screenshot 1 of 2



CAVF Configuration Setup screenshot 2 of 2



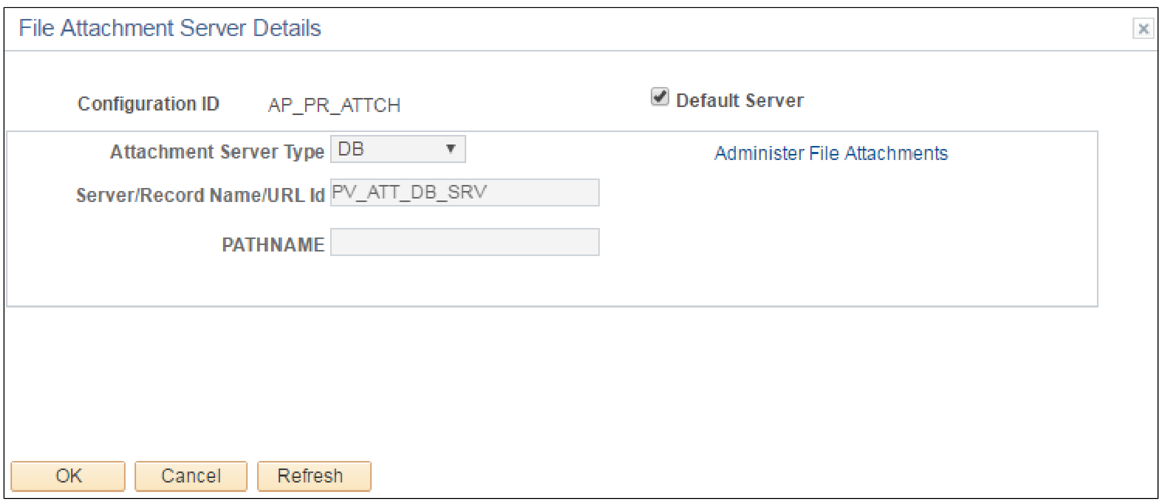
The fields and description are mentioned below in this page.

Field or Control	***Description***
Configuration ID	Unique ID for the configuration.

Field or Control	*Description*
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

File Attachment Server Details



Field or Control	*Description*
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.

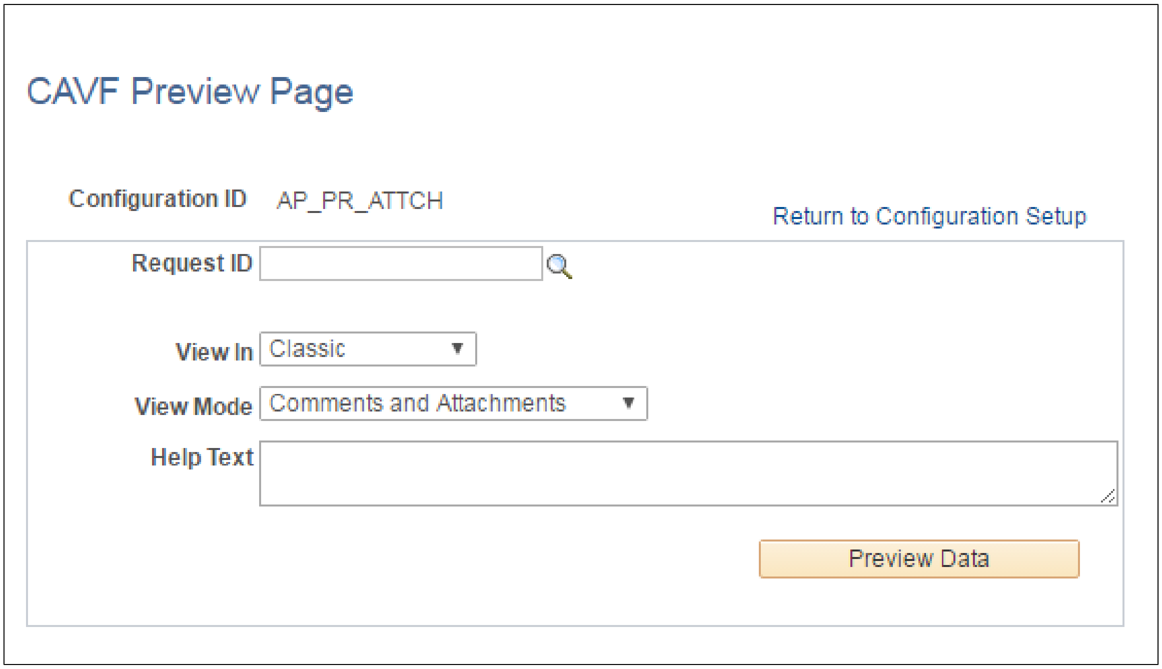
Field or Control	*Description*
Server/Record Name/Url Id	specify the server name or record name or URL.
PATHNAME	specify the path details from where to pick the attachments.
Administer File Attachments	Use this link to manage the file servers. Users can add or make changes to existing file servers.

Data Set 1

Field or Control	*Description*
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 or Control	***Description***
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.

CAVF Preview Page



Field or Control	***Description***
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

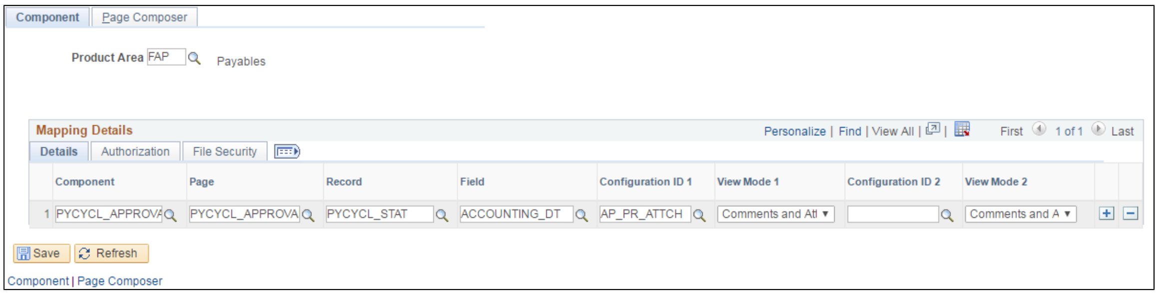
Use the CAVF Configuration ID Component Mapping page (EOATT_MAPCO_PG) to configure the transaction page and to specify where to display the comments and attachments.

Navigation:

Enterprise Components > **CA View Framework** > **CAVF Configuration ID Mapping**

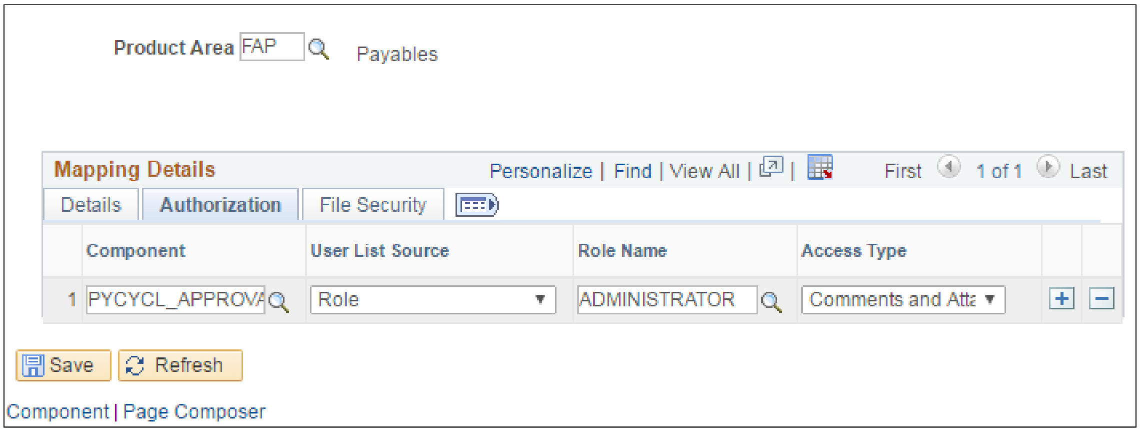
(choose the Component tab).

CAVF Configuration ID Mapping of Component.



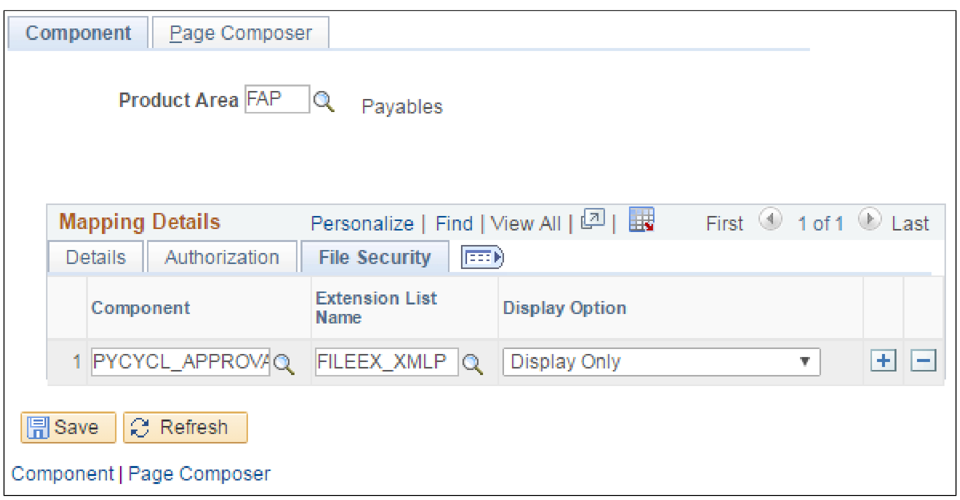
Field or Control	***Description***
Product Area	Select the Product Area.
Component	Select the Component within the selected Product Area.
Page	Select the Page associated with the Component.
Record	Select the record in the Page.
Field	Select the Field in the Record.
Configuration ID 1	Select the Configuration 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.

CAVF Component Mapping Authorization



Field or Control	*Description*
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.

CAVF Mapping File Securing



Field or Control	*Description*
Component	Name of the Component.

Field or Control	Description
Extension List Name	File extension list name.
Display Option	Choose to display or hide.

CAVF Configuration ID Page Composer Mapping Page

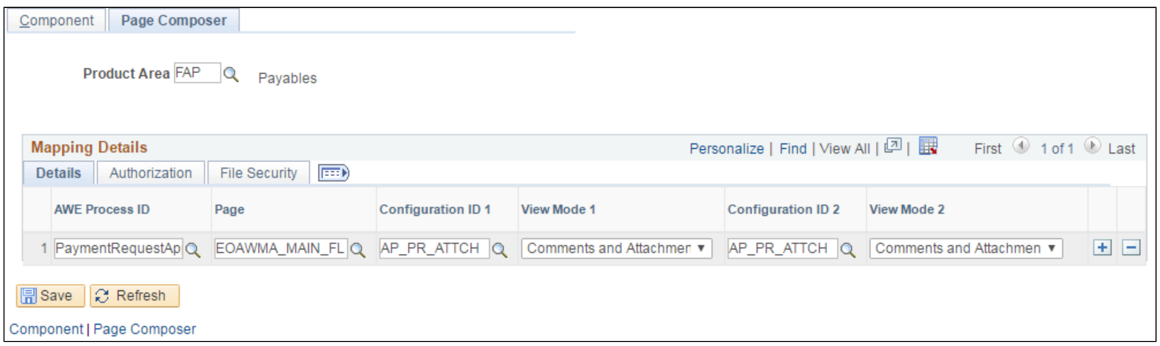
Use the CAVF Configuration ID Page Composer Mapping page (EOATT_MAPPC_PG) to configure the Page Composer page where the Comments and Attachments View framework is to be used.

Navigation:

Enterprise Components > **CA View Framework** > **CAVF Configuration ID Mapping**

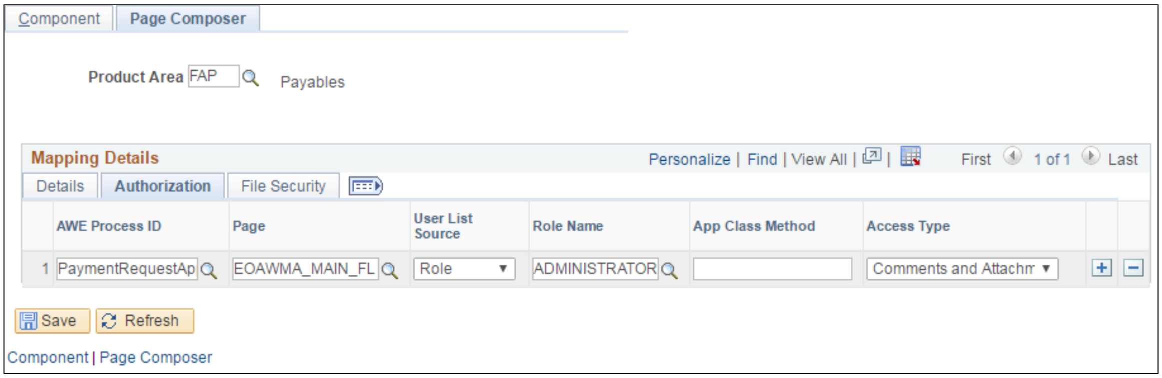
(choose the Page Composer tab).

CAVF Mapping to Page Composer — Details



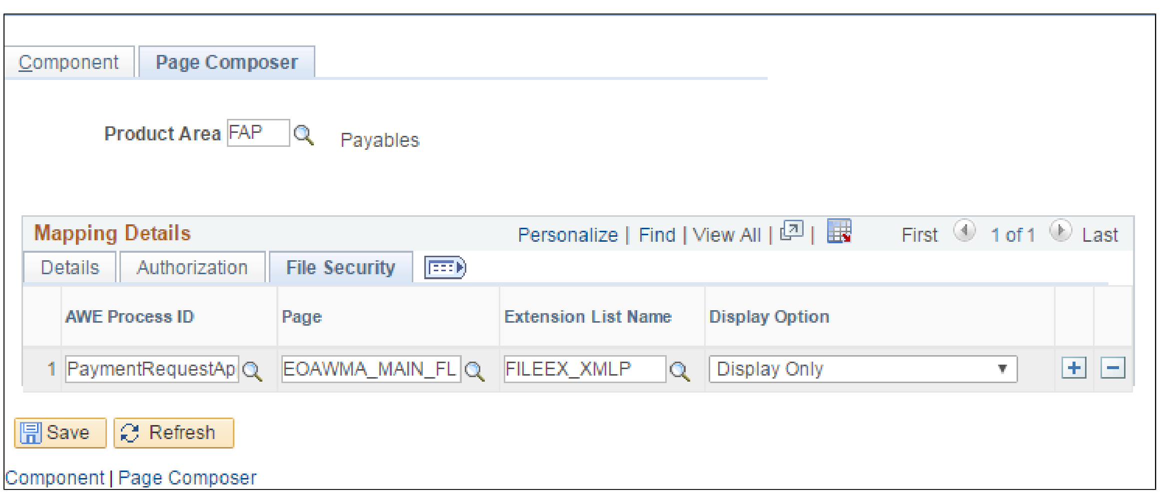
Field or Control	Description
AWE Process ID	Select the Approval Process ID associated to the Product Area.
Page	Select the Page Composer page where the Comments and Attachments View framework is being used.
Configuration ID 1	Select the Configuration ID of Data Set 1.
View Mode 1	Select the Data Set 1 View Mode.
Configuration ID 2	Select the Configuration ID of Data Set 2.
View Mode 2	Select the Data Set 2 View Mode.

CAVF mapping to Page Composer Authorization



Field or Control	***Description***
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.

CAVF Mapping to Page Composer File Security.



Field or Control	*Description*
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.

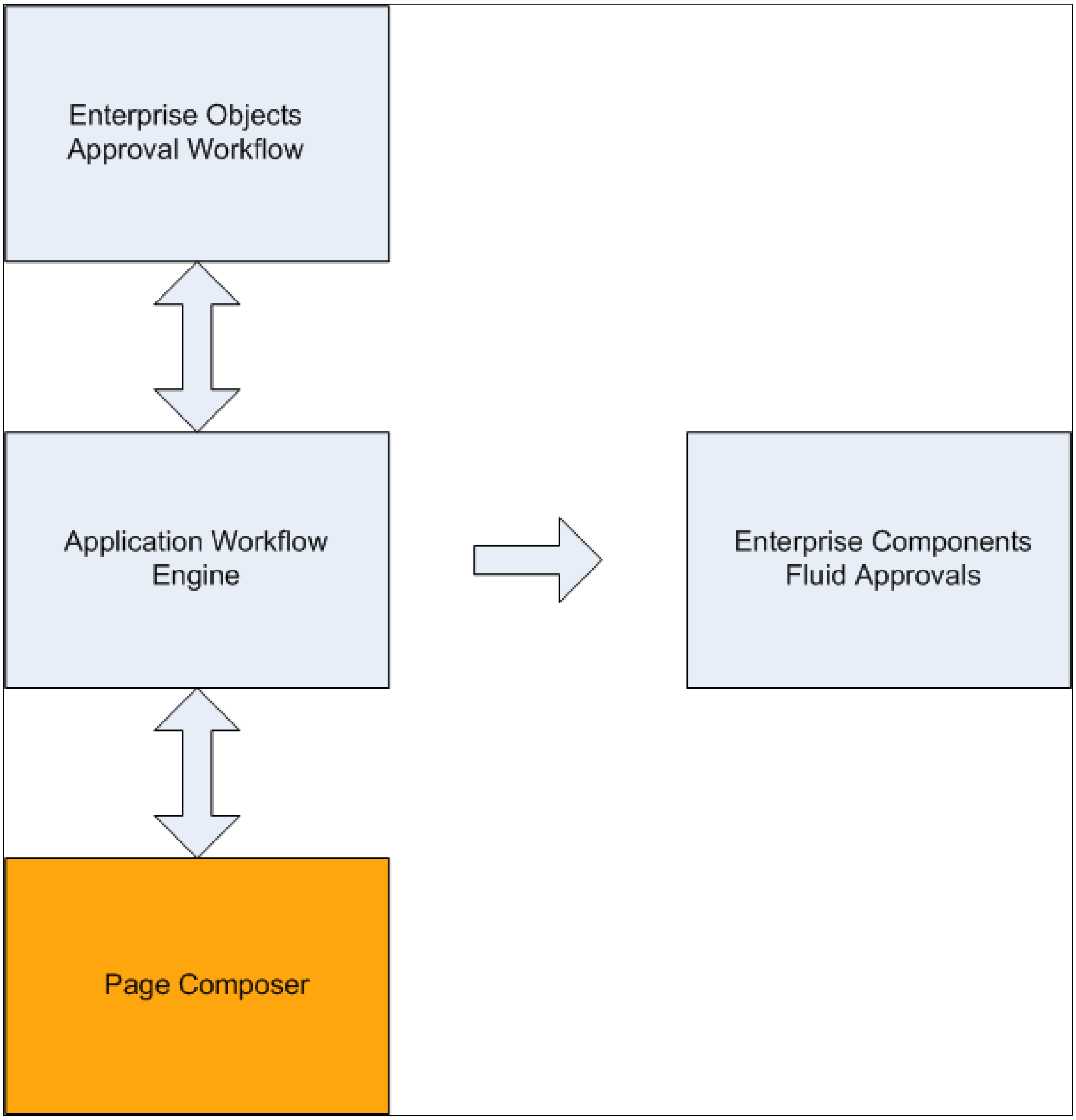
Chapter 12

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

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.

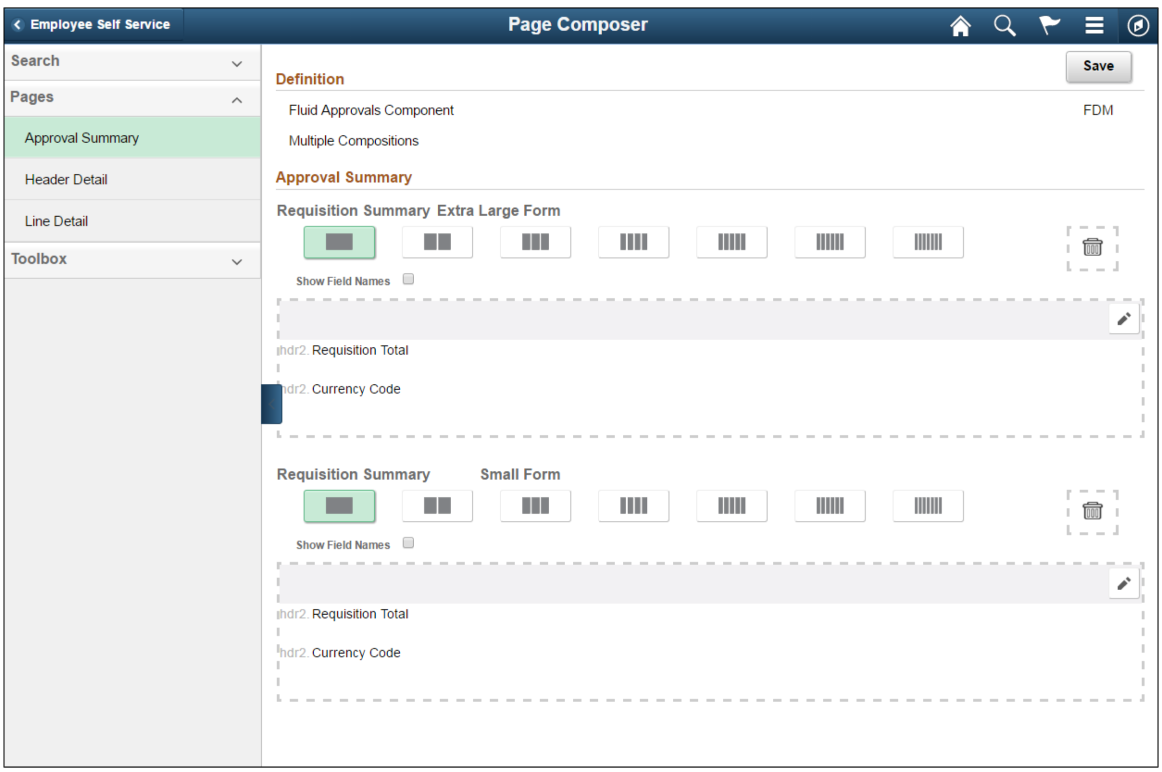
Page Composer Page

Use the Page Composer page (EOPC_MAIN_FL) to create page compositions..

Navigation:

Enterprise Components > **Page Composer** > **Page Composer**

Page Composer Main Page

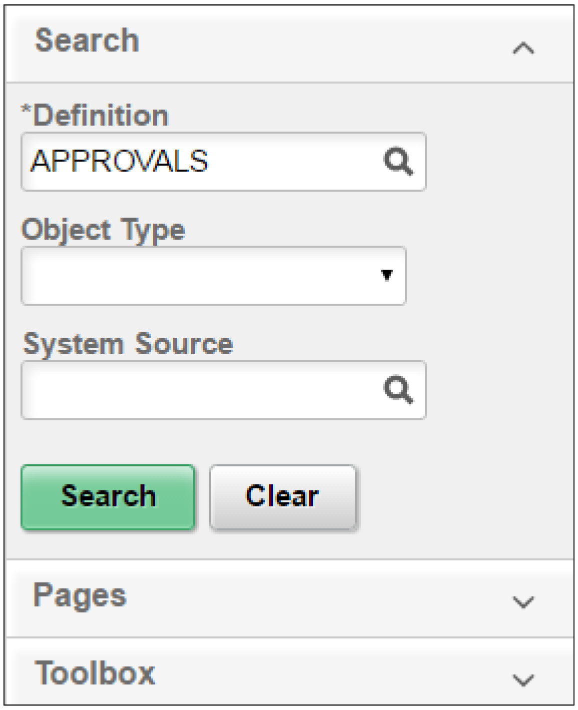


The Page Composer main page consists of the left and right panel. Use the Search field in the left panel to search for the definitions.

Note: Only Fluid Approvals definition is available in Page Composer.

Search

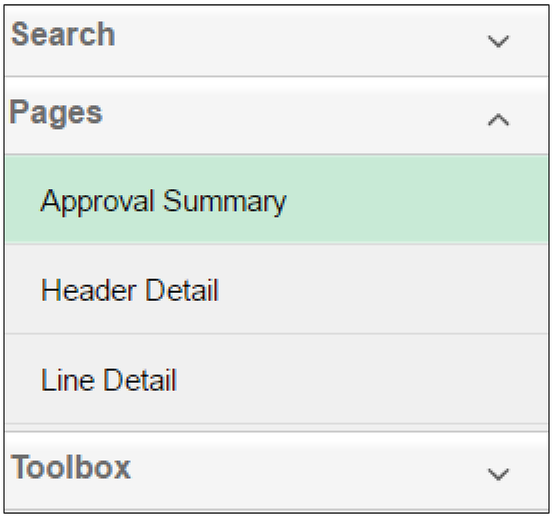
Search panel



Field or Control	*Description*
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

Pages panel

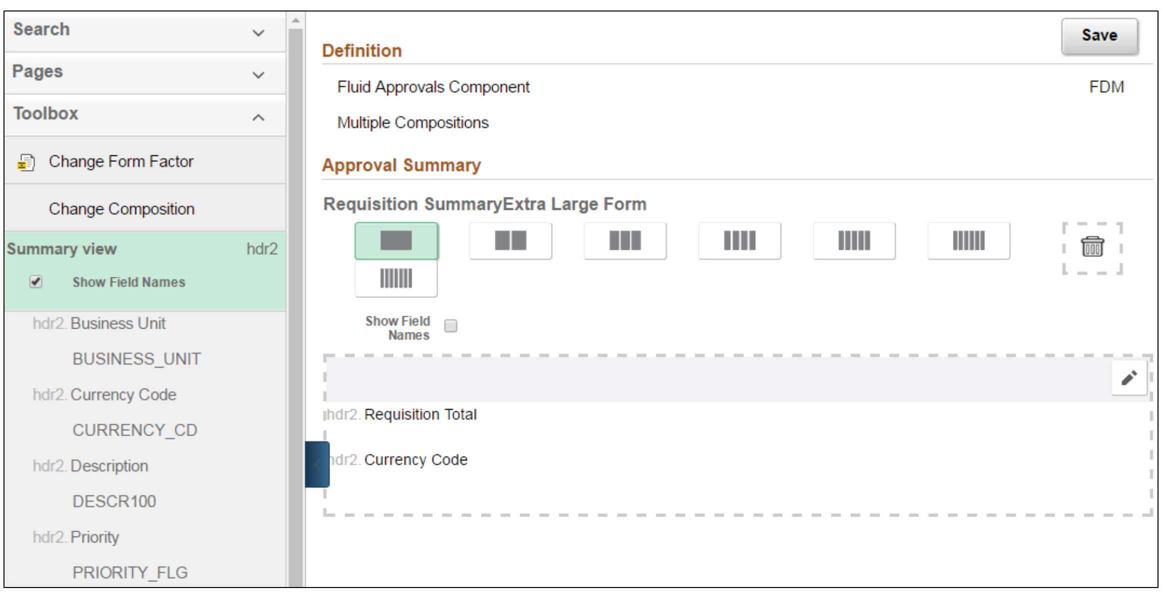


The Page Composer allows users to compose and configure the view of three sections in the Fluid approval pages.

- Approval Summary
- Header Detail
- Line Detail

Toolbox

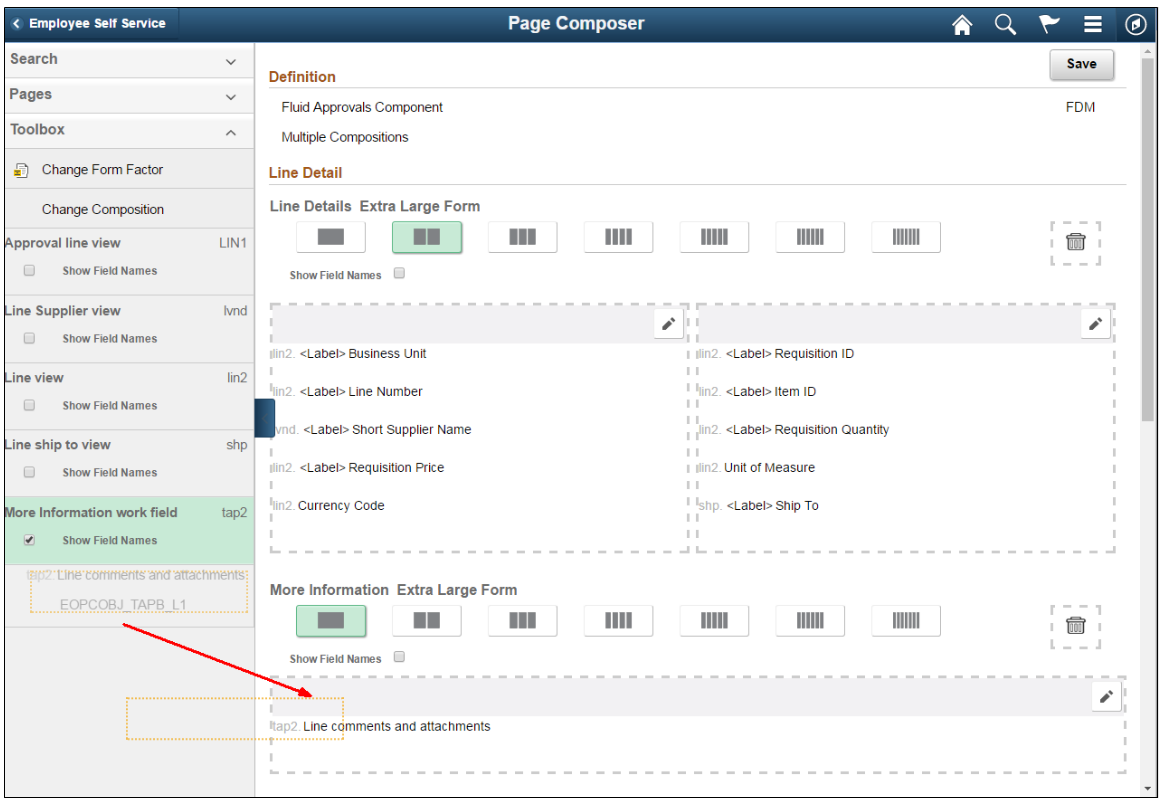
Toolbox panel



Use the Toolbox panel to configure the different sections in the Fluid Approval page.

Field or Control	***Description***
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.

Drag and Drop the fields to page sections.



Registering Components in Page Composer

The Composer 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***
Registration Page	EOPC_DEVREG_FL	Use and edit the components available in the Registration page for Page Composer.

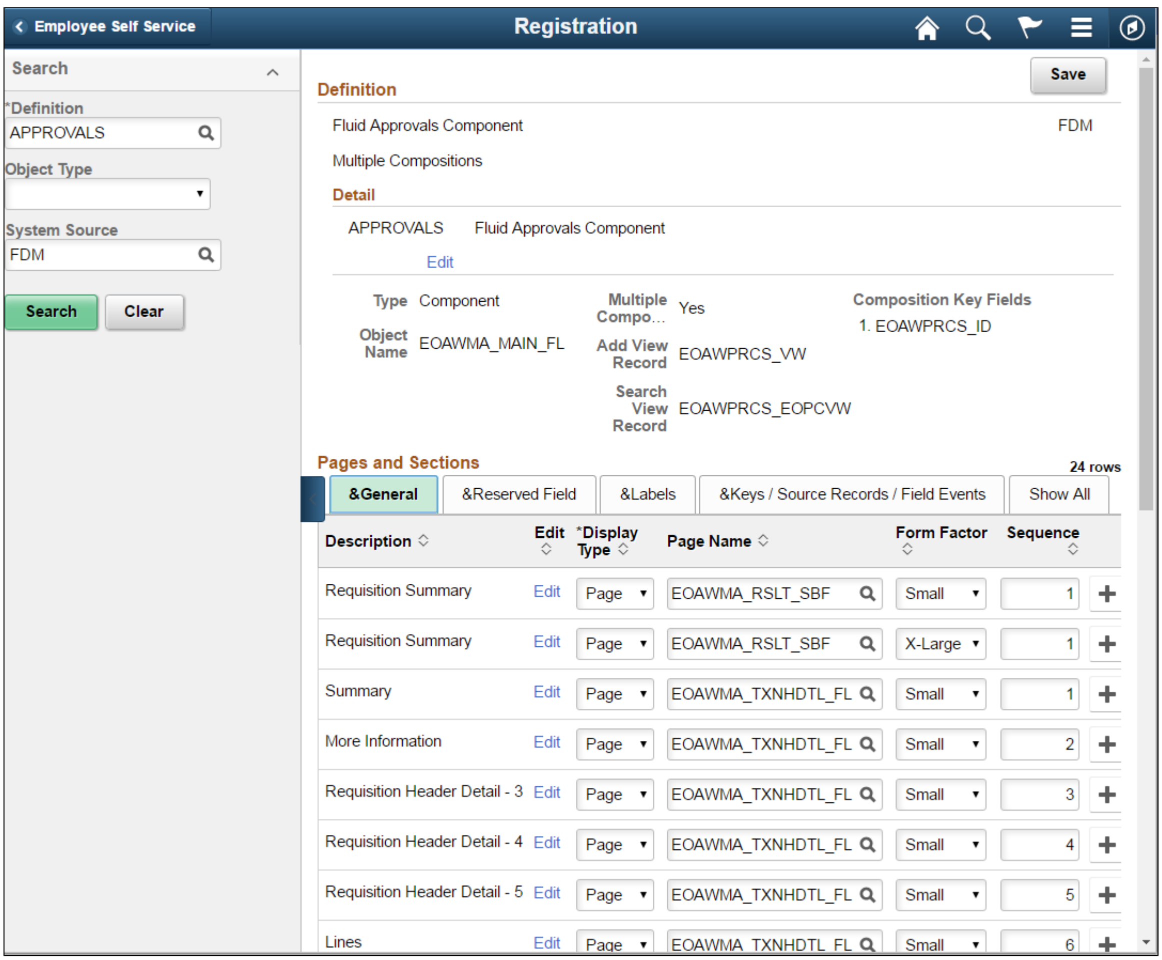
Registration Page

Use the Registration page (EOPC_DEVREG_FL) to view and edit the records available for Page Composer.

Navigation:

Enterprise Components > **Page Composer Administrator** > **Composer Registration**

Page used to Register Page Composer transactions.

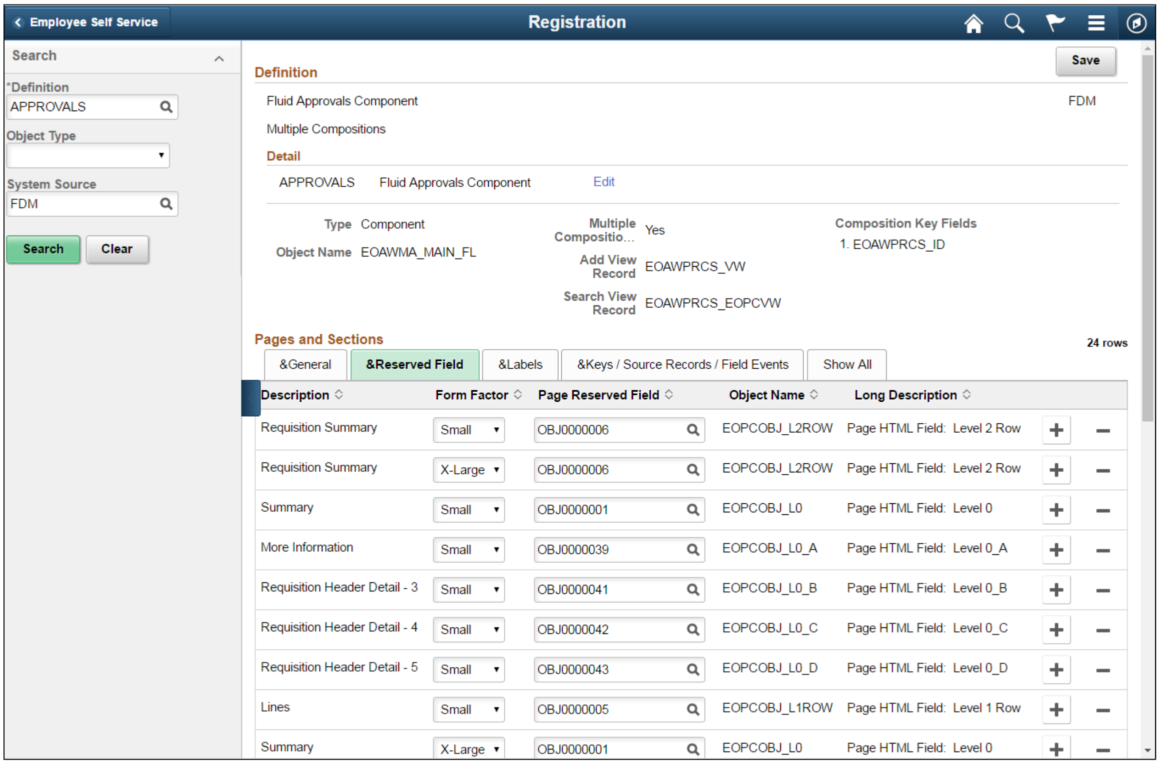


The Approvals definition the only definition currently registered for Page Composer. Use the Search pane to search for the Approval transactions that are registered to AWE

Field or Control	Description
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.

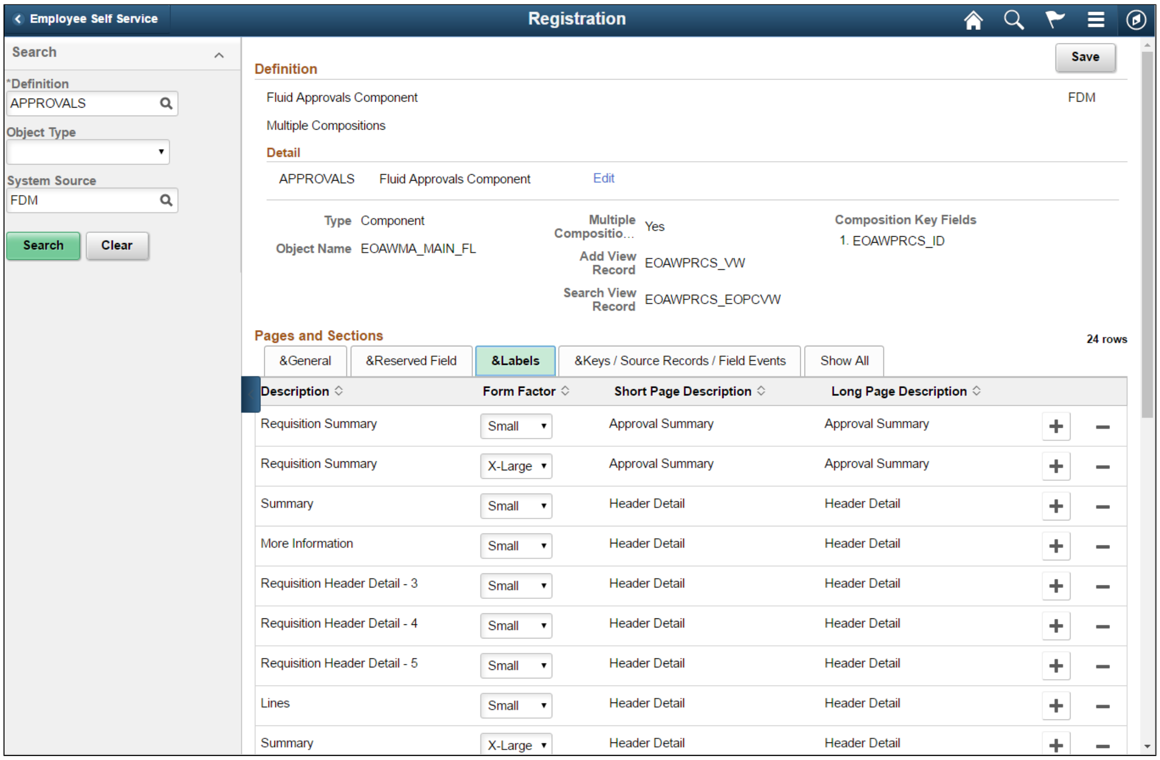
Field or Control	Description
Description	Name of the page.
Edit	Edit the page name.
Display Type	Display Type. Currently only the display type Page is available.
Page Name	Content reference of the page.
Form Factor	The form factor for the page to support different devices. Available form factors are 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.

Page Composer Registration Reserved Field.



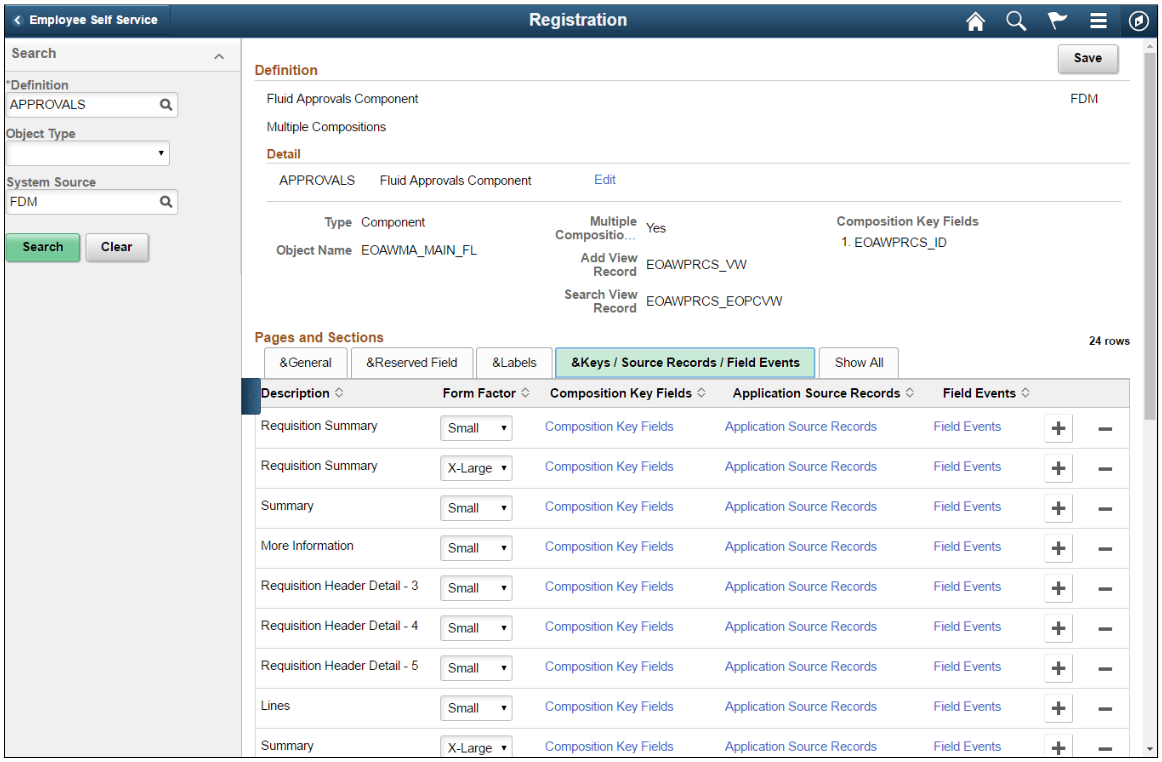
Field or Control	***Description***
Page Reserved Field	
Object Name	PeopleTools Component name.
Long Description	

Page Composer Registration Labels.



Field or Control	***Description***
Short Page Description	Short Page Description.
Long Page Description	Long Page Description.

Page Composer Registration Keys/Source Records/Field Events.



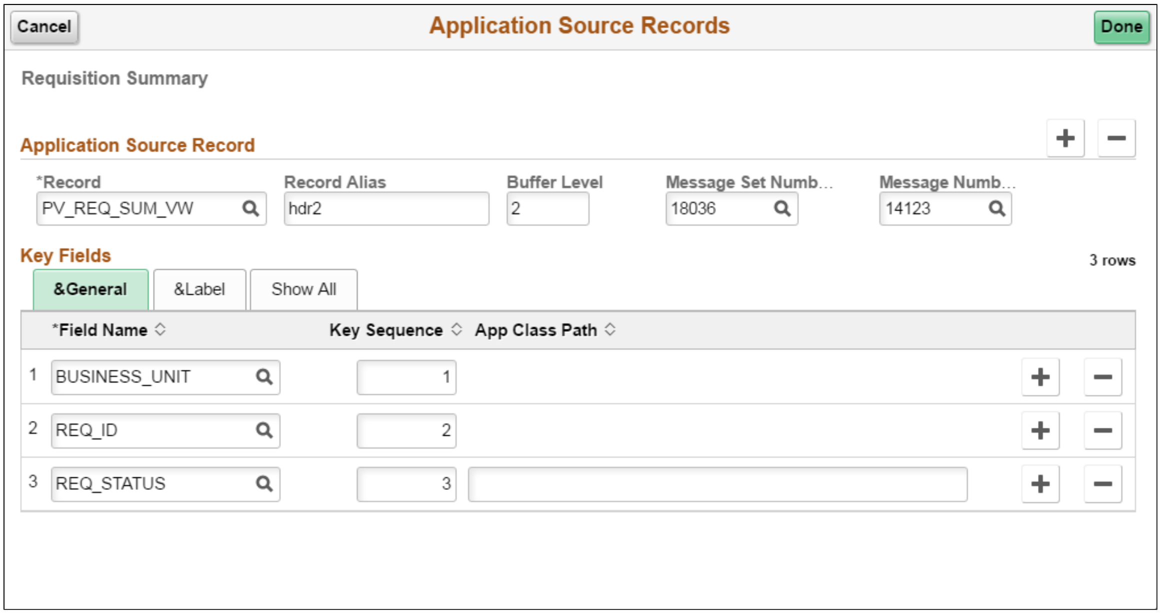
Field or Control	*Description*
Composition Key Fields	Enter Composition Key Field.
Application Source Records	Add an Application Source Record for the Approval page in Page Composer.
Field Events	Field Events for the desired page section and form factor.

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.

Application Source Records.



Field or Control	***Description***
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 13

Page and Field Configurator

Understanding Page and Field Configurator

PeopleSoft Page and Field Configurator feature enables the users to define properties of pages and fields of Classic and Fluid pages based on their business requirements. You can define multiple configurations for a component based on different user roles. You can define multiple criteria based on the component fields and system variables and selectively apply the configuration at run time if the criteria is satisfied based on the run time values. Page and Field Configurator also enables you to mask data in pages and search fields and track a history of changes to specific fields on specific pages.

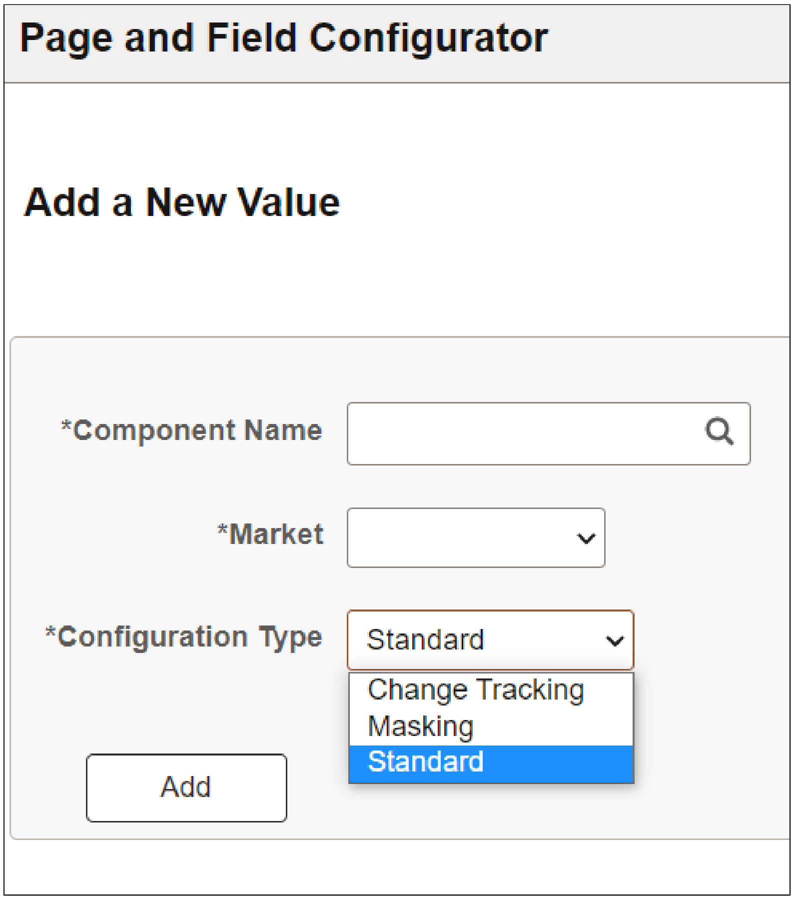
For an overview of Page and Field Configurator, you can view the following Video Feature Overview (VFO): PeopleSoft Page and Field Configurator

Configuration Types

Page and Field Configurator delivers the following configuration types: *Standard, Masking,* and *Change Tracking.* Each configuration type provides a unique set of capabilities and configuration properties for pages and fields.

You define the configuration type using the Page and Field Configurator - Add a New Value page.

Configuration Type options on the Page and Field Configurator - Add a New Value page



Standard Configuration

Using Standard configuration, you can hide a field or page, change the label of a field, add a default value to a field, make the field or 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.

To configure the component for Standard Configuration Type, see Using Page and Field Configurator.

Masking Configuration

Using Masking configuration you can mask page fields and search fields based on a chosen Mask profile.

To configure the component for Masking Configuration Type, see Masking Data in Page and Field Configurator.

Note: Only users assigned the role *PFC Data Masking Admin* can see the Masking configuration type.
The configuration can only be applied to a registered component in the system.
The PeopleTools version must be 8.57.11 or higher.

Change Tracking Configuration

Using Change Tracking configuration you can track the changes made by users to information on a page. You can display the log of changes to users as related content.

To configure the component for Change Tracking Configuration Type, see:

Tracking Changes to Information with Page and Field Configurator.

Using Page and Field Configurator

Note: Only users assigned the role *PFC Change Tracking Admin* can see the Change Tracking configuration type.

Using Page and Field Configurator

Page and Field Configurator gives users the flexibility to configure fields and pages in any component without having to customize delivered application pages or fields.

To configure any component using Page and Field Configurator, use the Page Configuration (EOCC_CONFIGURE), User Lists (EOCC_CONFIG_USER) and Map to Portal registry (EOCC_MAP_EVENT) pages.

Pages Used to Configure Pages Using Page and Field Configurator

Page Name	***Definition Name***	***Usage***
Page Configuration Page	EOCC_CONFIGURE	Use this page to capture the page and field configuration and criteria.
User List Page	EOCC_CONFIG_USER	Use this page to capture the list of users and/or roles to which the configuration defined on the Page Configuration page should be applied to or excluded from.
Map to Portal Registry Page	EOCC_MAP_EVENT	Use this page to map the configuration to the Portal Registry.
Advanced Options Page	EOCC_ADVANCED_TAB	Use this page to select the fields that should be available in the field list or as criteria.
Validate Page Configurations Page	EOCC_CONFIG	Use this page to verify the validity of the configurations defined using the Page Configuration page.

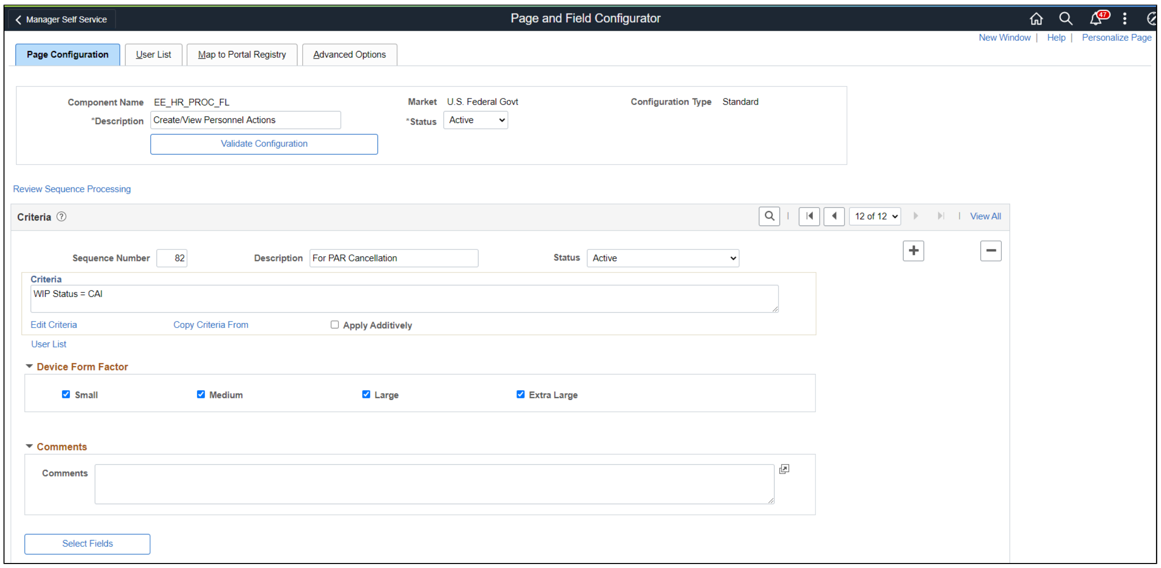
Page Configuration Page

Use the Page Configuration page (EOCC_CONFIGURE) to define the changes needed for the component.

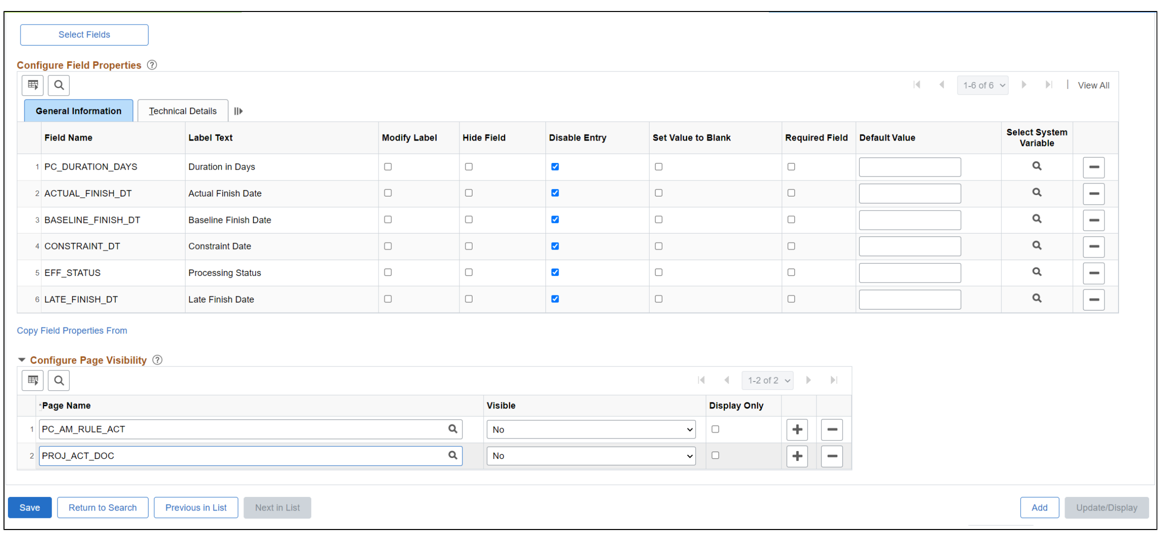
Navigation:

Enterprise Components > Page and Field Configuration > Page and Field Configurator > Page Configuration

This example illustrates the Page Configuration page (1-2).



This example illustrates the Page Configuration page (2-2).



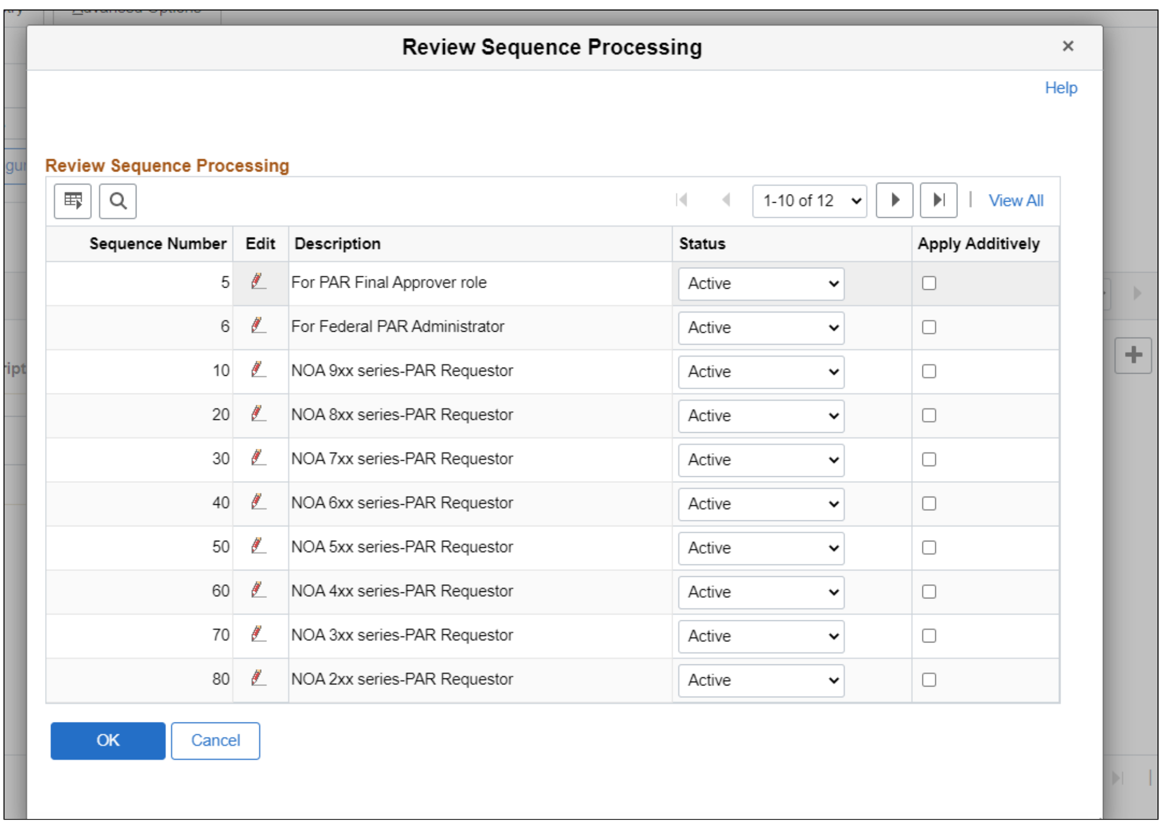
Field or Control	***Description***
Component Name	Displays the name of the component as selected by the user.

Field or Control	***Description***
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 information, see Validate Page Configurations Page.

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.

This example illustrates the Review Sequence Processing page listing all the sequences.



Criteria

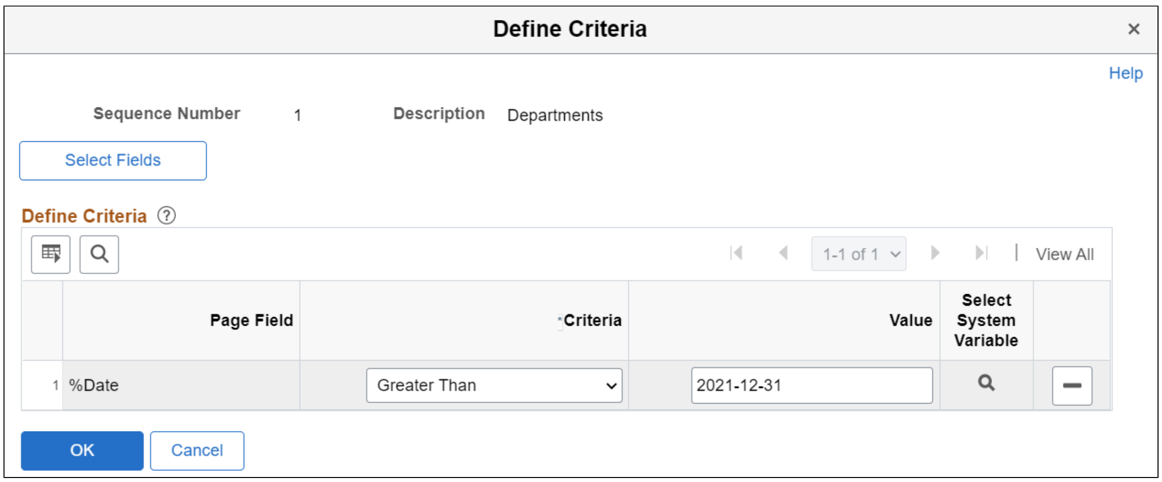
You can associate criteria with each configuration. In this section, you can capture the criteria for the component with sequence number.

Field or Control	*Description*
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 900 and higher. These are reserved by Oracle. **Note:** Larger components and components with more than 100 configurations may take longer to evaluate and process at run time and result in delays in the online rendering of pages to the end user.
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 or level one of the component, an operator, and enter a value to be compared at the run time, per Sequence Number.

This example illustrates the Define Criteria page.

This example illustrates the Define Criteria page when a system variable is selected for defining criteria.

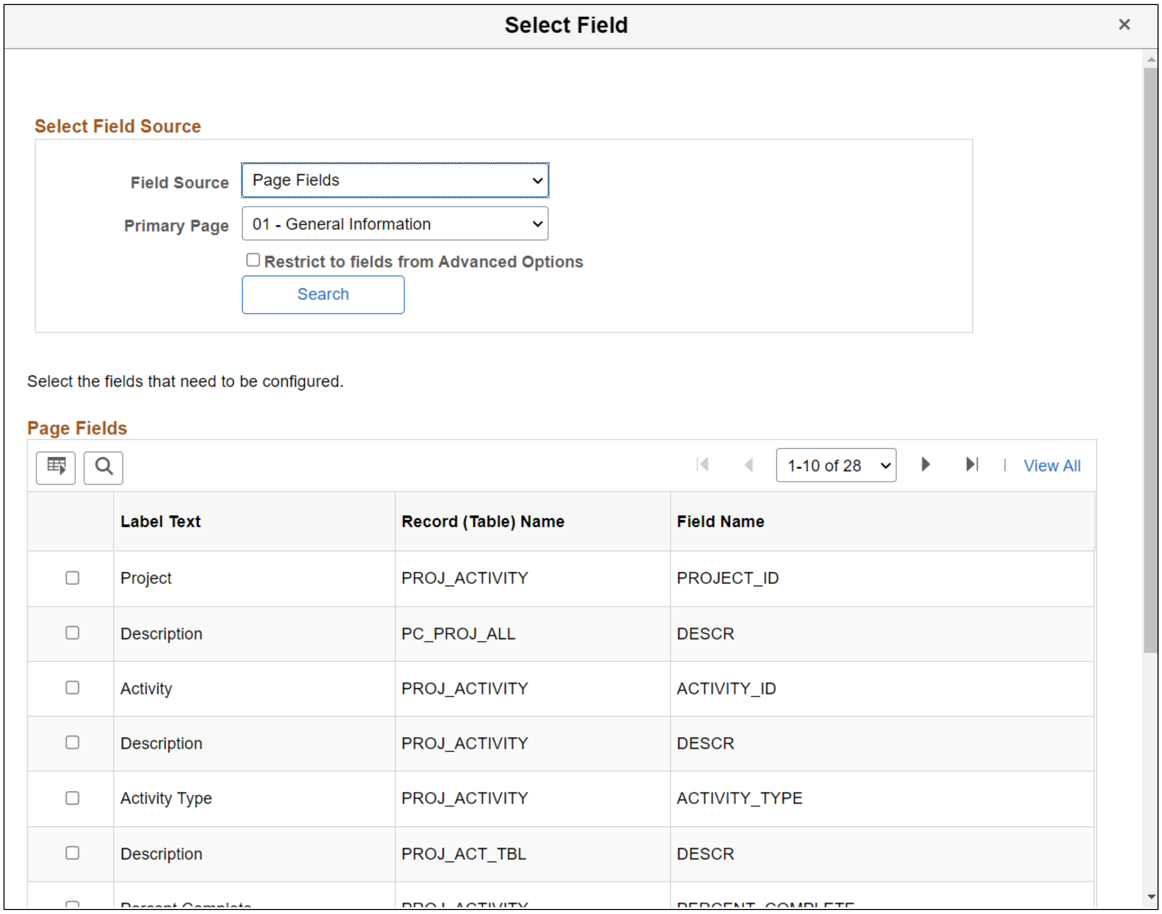


For an existing record, **Edit Criteria** link will appear where you can edit the criteria details. You can add a new row to add more than one condition (Field, Criteria and Value combination) for the same sequence level using the Select Fields button.

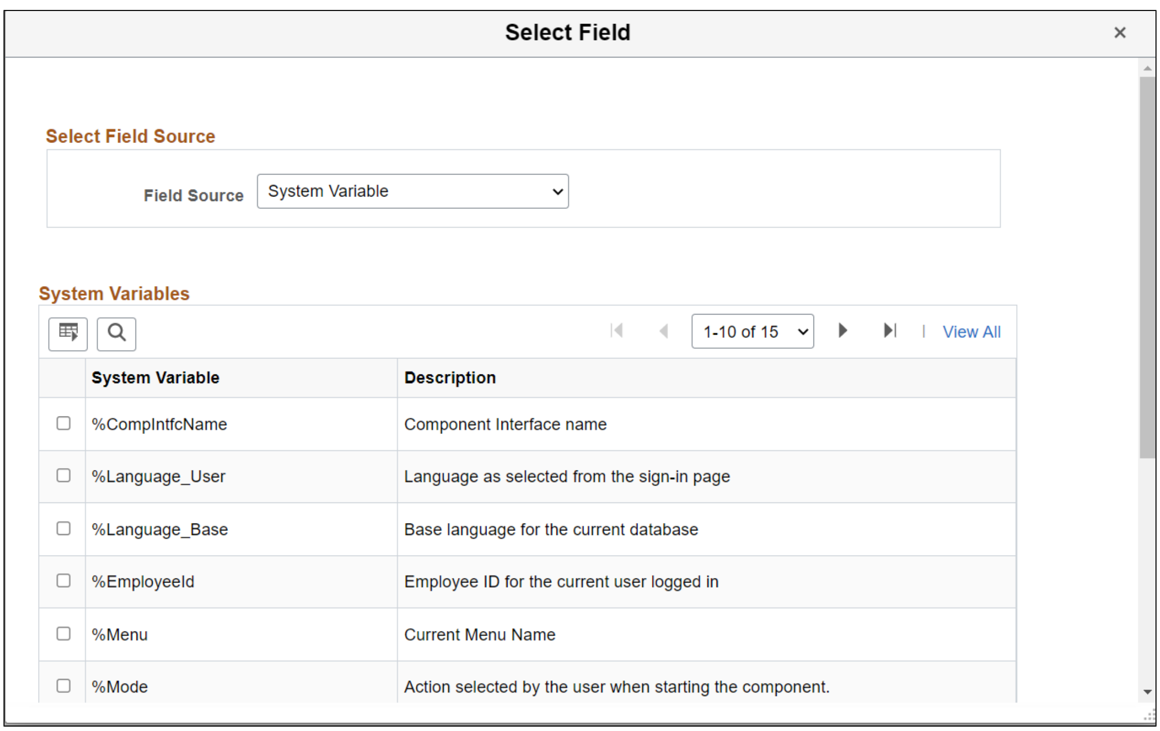
You can define criteria based on page name and field name. Once you select the page field, select the condition and enter the required value.

Field or Control	***Description***
Select Fields	Use the Select Fields button to open the Select Field page. Here, you can select the field or system variable for defining criteria. By default, the Select Fields page lists the available fields based on the selected Primary Page. To view the list of available system variables, select System Variable in the Field Source field.

This example illustrates the Select Field page when Page Fields is selected as the Field Source.



This example illustrates the Select Field page when System Variable is selected as the Field Source.



For example, you can use the Current System Date as criteria to determine whether to apply a configuration. To set a date to activate a configuration, select the system variable' %Date' in the Page Field and enter the required date in the Value field. The configuration takes effect based on the date defined.

Field or Control	***Description***
Page Field	The field /system variable selected in the Select Fields page is displayed here.
Criteria	Select the condition for defining criteria.
Value	The value specified here is compared to the value in the Page Field. You can enter a value or select a system variable.
Select System Variable	Use this field to select a system variable in the Value field. Video: Image Highlights, PeopleSoft HCM Update Image 40: Page and Field Configurator - System Variables

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.
The criteria will be evaluated at the time of component load and reevaluated when a field used as criteria is modified by the user or when a row is inserted.

Field or Control	***Description***
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.

Note: If field in the criteria is set to deferred processing, then PFC will not recalculate the criteria when this field is modified by user. It would be processed only when there is another Application server trip like, adding a new row, switching tabs etc.

Apply Additively

Use the 'Apply Additively' check box when you want multiple sequences to impact the page viewed by the user. The component configuration is evaluated as follows:

The system evaluates sequences and their criteria in ascending order starting with sequence 1.Once the Page and Field Configurator finds a match in criteria (this could be sequence 1 or a later sequence and may have the 'Apply Additively' box selected or not selected), the system proceeds to evaluate only the later sequences that are marked as 'Apply Additively'.

Note: For a configuration sequence to be applied and impact the page viewed by the user, the criteria for the sequence must be met. Selecting the 'Apply Additively' check box ensures that the sequence and its criteria will always be evaluated and if met, will be applied to the page viewed by the user in addition to other sequences.

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.

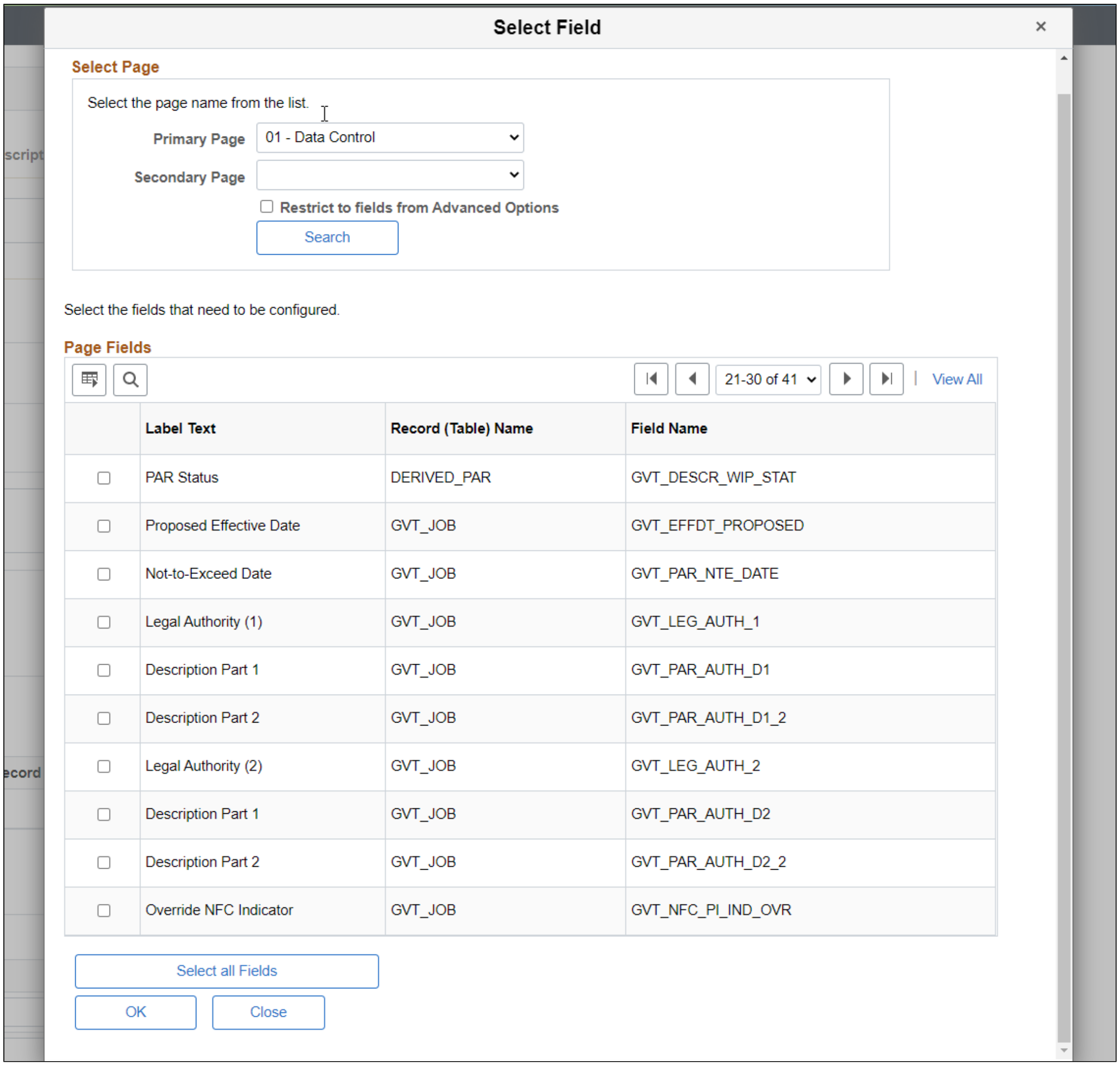
Select Fields

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.

This example illustrates the Select Field page.



Field or Control	***Description***
Primary Page	Choose the main page.
Secondary page	Choose the secondary page listed under the selected primary page.
Restrict to Fields from Advanced Options	Select the check box to display only the selected fields from Advanced Options tab. Once selected, the ‘Page Fields’ grid lists only the fields from Advanced Options page with ‘Include in Criteria List’ or ‘Include in Field List’ check boxes selected .

Choose the fields to be configured from the list of page field results. Use ‘Select all Fields’ button to select all the fields from the page for configuration.

Device Form Factor

Select the device form factor using the given check boxes. The options are:

- Small
- Medium
- Large
- Extra Large

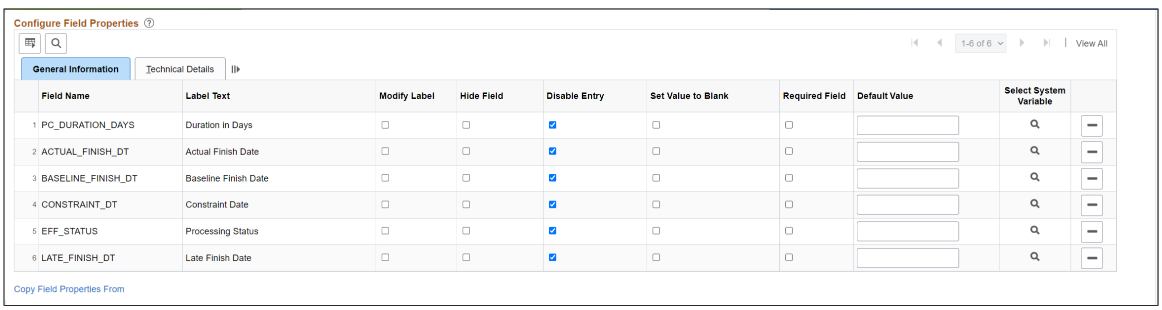
Comments

You can specify any additional comments here.

Configure Field Properties

The Configure Field Properties section consists of two tabs, General Information and Technical Details. This section is used to capture the field level changes that need to be made for a component.

This example illustrates the General information tab

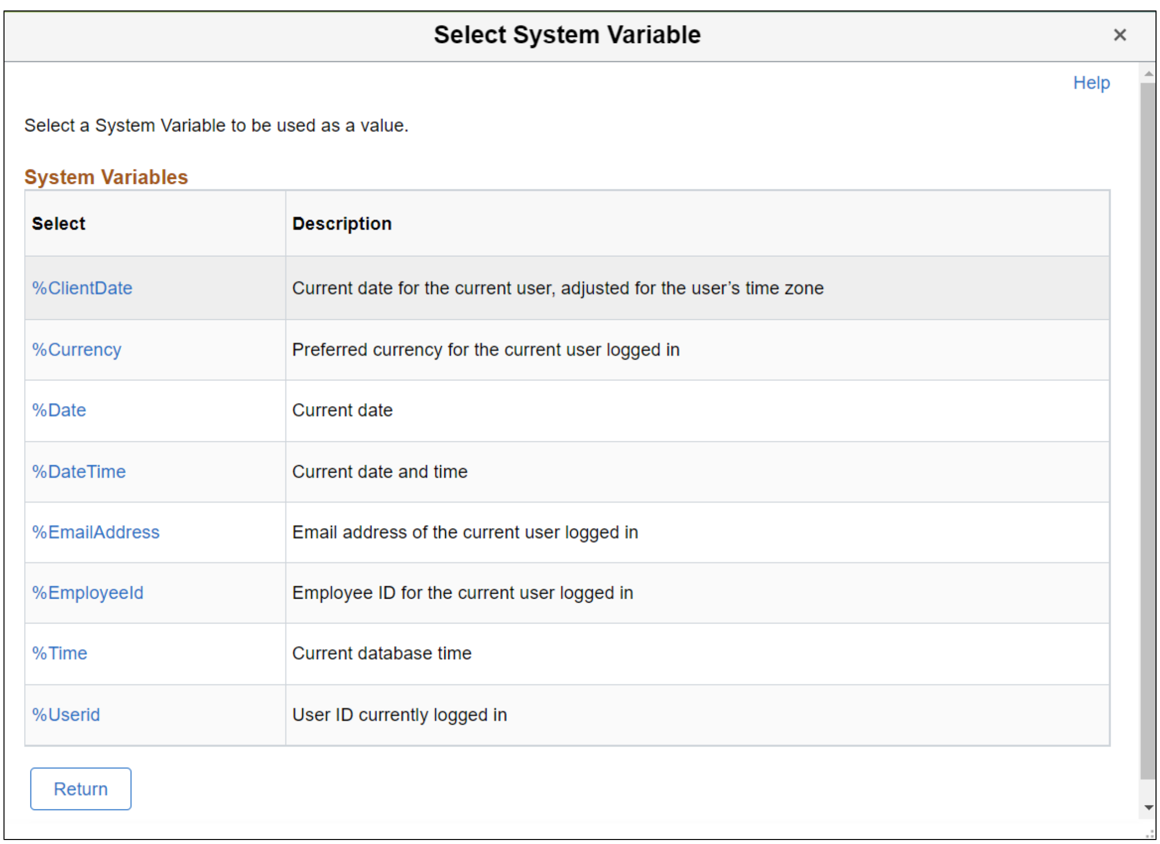


Field or Control	***Description***
Field Name	Based on the selected field, name of field is displayed.
Label Text	Label of the field is displayed based on your selection. **Note:** This field is enabled only if ‘Modify Label’ check box is selected.
Modify Label	Select the check box if you need to modify the label.

Field or Control	Description
Hide Field	Select the check box if you need to hide the field. **Note:** You can only hide the fields which are 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.
Set Value to Blank	Select the check box if you need to leave a specific field blank when it is disabled or hidden through PFC. **Note:** The ‘Set Value to Blank’ can be checked only if ‘Hide Field’ or ‘Disable Entry’ is selected for that field. Also, ‘Set Value to Blank’ can be used only if the sequence has criteria. For example, you need to restrict users from entering any value for a field and the value in the field should appear as blank. Then, you should select ‘Disable Entry’ and ‘Set Value to Blank’. **Note:** Once ‘Set Value to Blank’ is selected for a field in Page and Field Configurator page, any previously entered data in the field will be cleared.
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. Also, the Required Field selection should not be used on fields that are displayed as a Yes/No checkbox or slider. These fields will always have a value. For required fields, the validation is executed during the component SavePreChange event. If the SavePreChange event is not called in certain components, then the required fields will not be validated in those components.

Field or Control	***Description***
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 opened in Add mode or when a new row is inserted. Default values should not be used on fields that already have a default through the application. The Page and Field Configurator will not override a default created through the delivered application pages. 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 the run time of the selected component. You should not default a value for a field that already has additional processing associated with it such as field change.
Select System Variable	Use this button to select a system variable as the default value for a field. Click the icon to open the Select System Variable page.

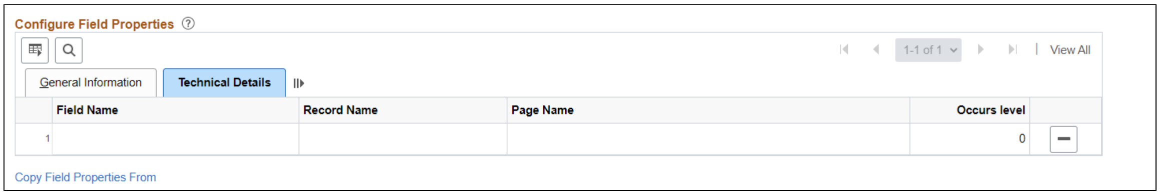
Select System Variable Page



The selected value appears in the Default Value field. Page and Field Configurator uses a subset of system variables available through PeopleTools, and the variables available to use as Default are different from those available as Criteria. For more information on system variables in PeopleSoft, see *PeopleTools: Products, Development Tools, PeopleCode Language Reference, System Variables*.

Click the Technical Details tab on the Page Configuration page.

This example illustrates the Technical Details tab.



Field or Control	*Description*
Field Name	Based on the selected field, name of the field is displayed.
Record Name	Record (table) name of the selected field is displayed.
Page Name	Page name of the selected field is displayed.
Occurs Level	Occurs level indicates the level of the selected field.

You can use Copy Field Properties From link and select a sequence number from which you can copy the field properties.

Configure Page Visibility

The Configure Page Visibility section is used to hide or show an entire page in the component. It also has the capability to make a page as display only.

Field or Control	*Description*
Page Name	Select the page that needs to be configured.

Field or Control	*Description*
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. Pages cannot be hidden if the sequence criteria includes a level one field. 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*

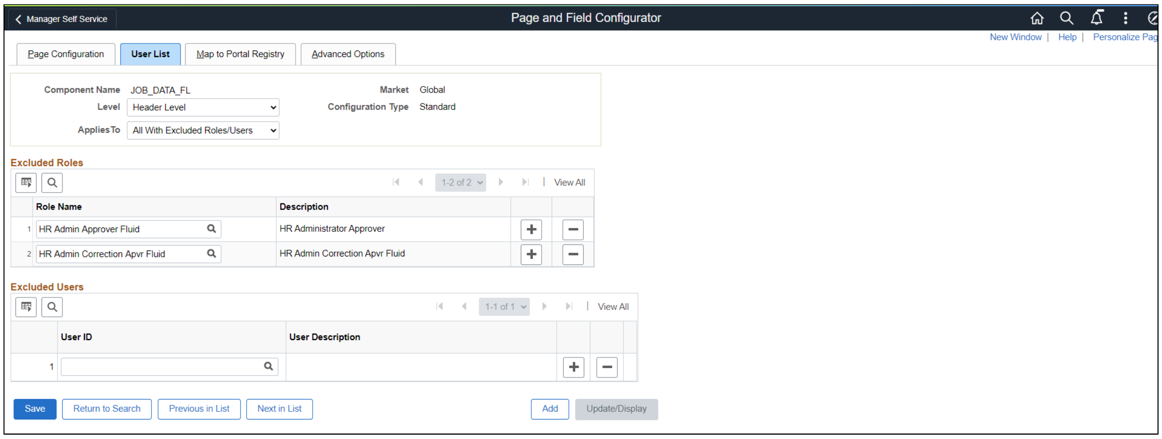
User List Page

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

This example illustrates the User List page.



Field or Control	***Description***
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.

Field or Control	***Description***
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

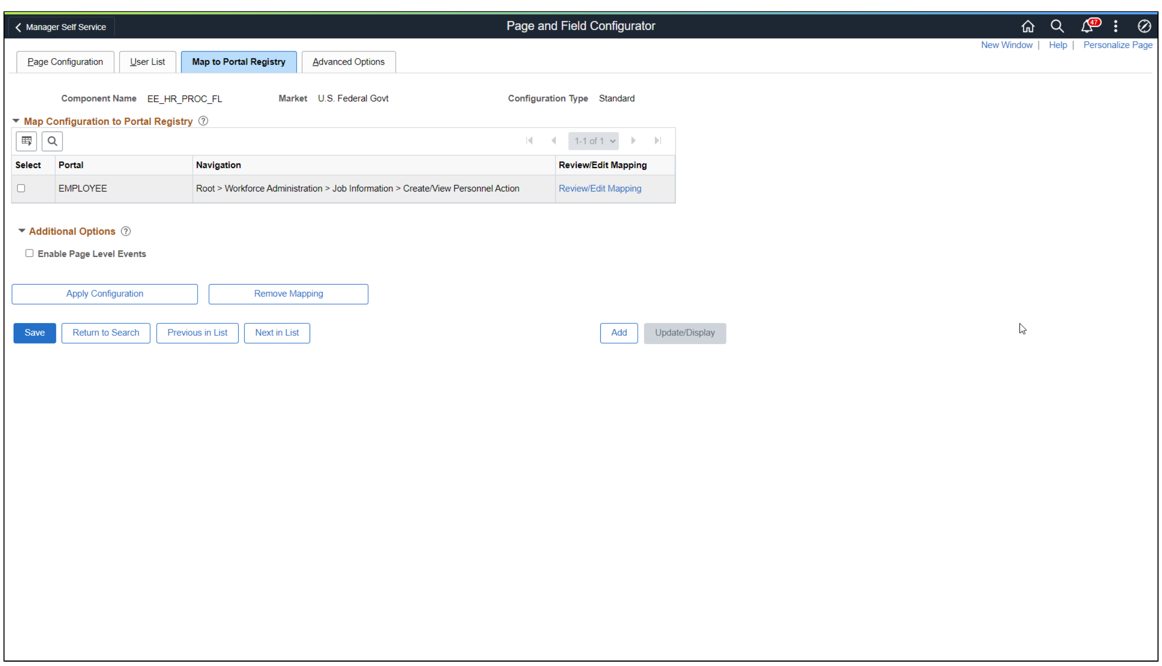
Use the Map to Portal Registry page (EOCC_MAP_EVENT) to map the configurations to Portal Registry. The defined configuration will be effective only when the Services defined by the utility are mapped to the corresponding portal registry entries.

Note: Access to this page is restricted based on the access to People Tools Events Mapping component.

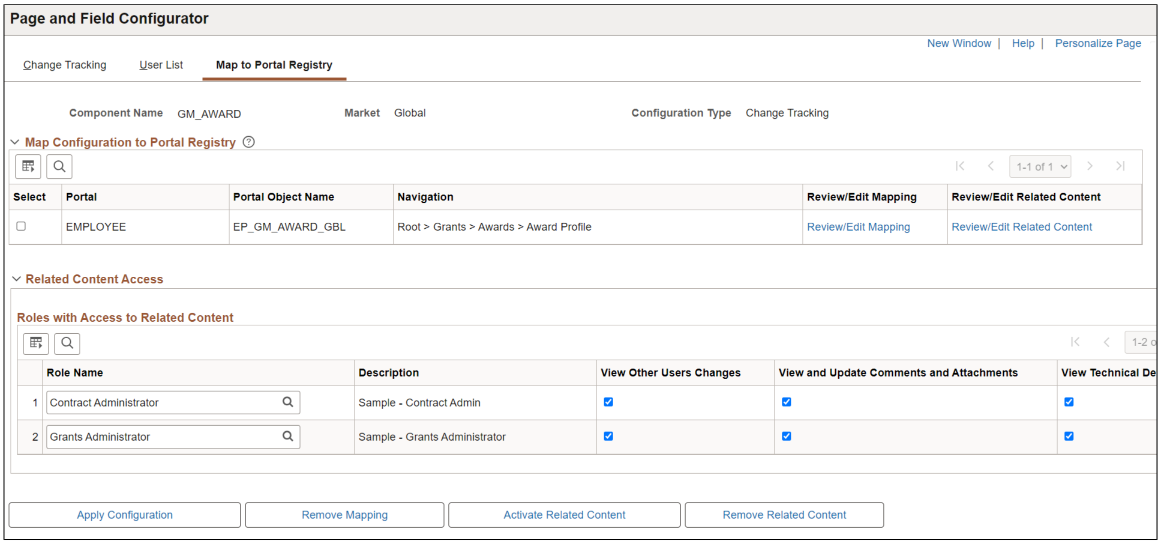
Navigation:

Enterprise Components, Page and Field Configuration, Page and Field Configurator, Map to Portal Registry

This example illustrates Map to Portal Registry page with Standard configuration.



This example illustrates Map to Portal Registry page with Change Tracking configuration.



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.

Map Configurations to Portal Registry

Field or Control	***Description***
Select	Select the required portal registry entries to map the configuration.
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.

Field or Control	Description
Review/Editing Mapping	Click this link to review/edit the mappings generated by the Page and Field Configurator on 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.

Additional Options

Field or Control	Description
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 on 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.

Related Content Access

Use this section to grant role-level access to change tracking related information on the selected component. Users assigned to the role can view a history of changes for the transaction as related content.

You define the field-level tracking using the Change Tracking Page.

When enabled, users can view transaction history using the Related Information frame (Fluid pages) or the Related Content drop-down (classic pages). Related information displays the field that changed, the date of the change, the user who made the change, the new value, and the prior value.

Entry Mode is also tracked and displayed as related content if the component uses correction functionality. If the fluid component uses correction functionality it is displayed when you have PeopleTools 8.60 or higher installed.

Note: This section is only visible with Change Tracking configuration.

Field or Control	Description
Role Name	Enter one or more roles that can access the related content.

Field or Control	***Description***
Description	Displays the role description.
View Other Users Changes	Select this check box to allow the role to view field-level changes made by other users.
View and Update Comments and Attachments	Select this check box to allow the role to view and update comments and attachments related to the change.
View Technical Details	Select this check box to allow the role to view technical details associated with the field-level change, such as record key details.

Advanced Options Page

Use the Advanced Options page (EOCC_ADVANCED_TAB) to streamline the selection of fields on other pages in the Page and Field Configurator. On the Advanced Options tab, you can select the fields that should be available in the field list or as criteria. For complex components with a large number of fields to choose from, you can select the fields available to use on the Advanced Options tab as a one-time activity. The PFC user can filter their search results to the list of fields on the Advanced Options tab, saving the functional PFC user's time from having to sort through a long list of fields or as criteria.

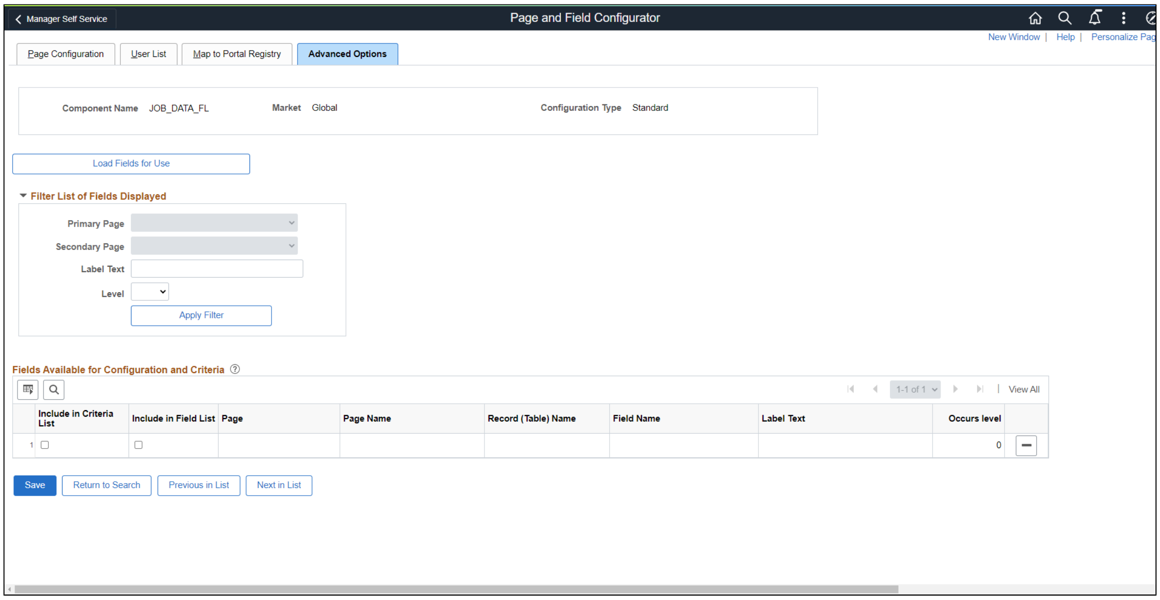
Note: The Advanced Options tab is targeted for use by technical resources familiar with the structure of the component's data. Only technical resource can modify the Advanced Options page. The page will appear as read-only to others.
This page is not available when using the Change Tracking configuration.

User Role	***Page Name***
EOCC Technician	Advance Options Page

Navigation:

Enterprise Components > **Page and Field Configuration** > **Page and Field Configurator** > **Advanced Options**

This example illustrates the Advanced Options page.

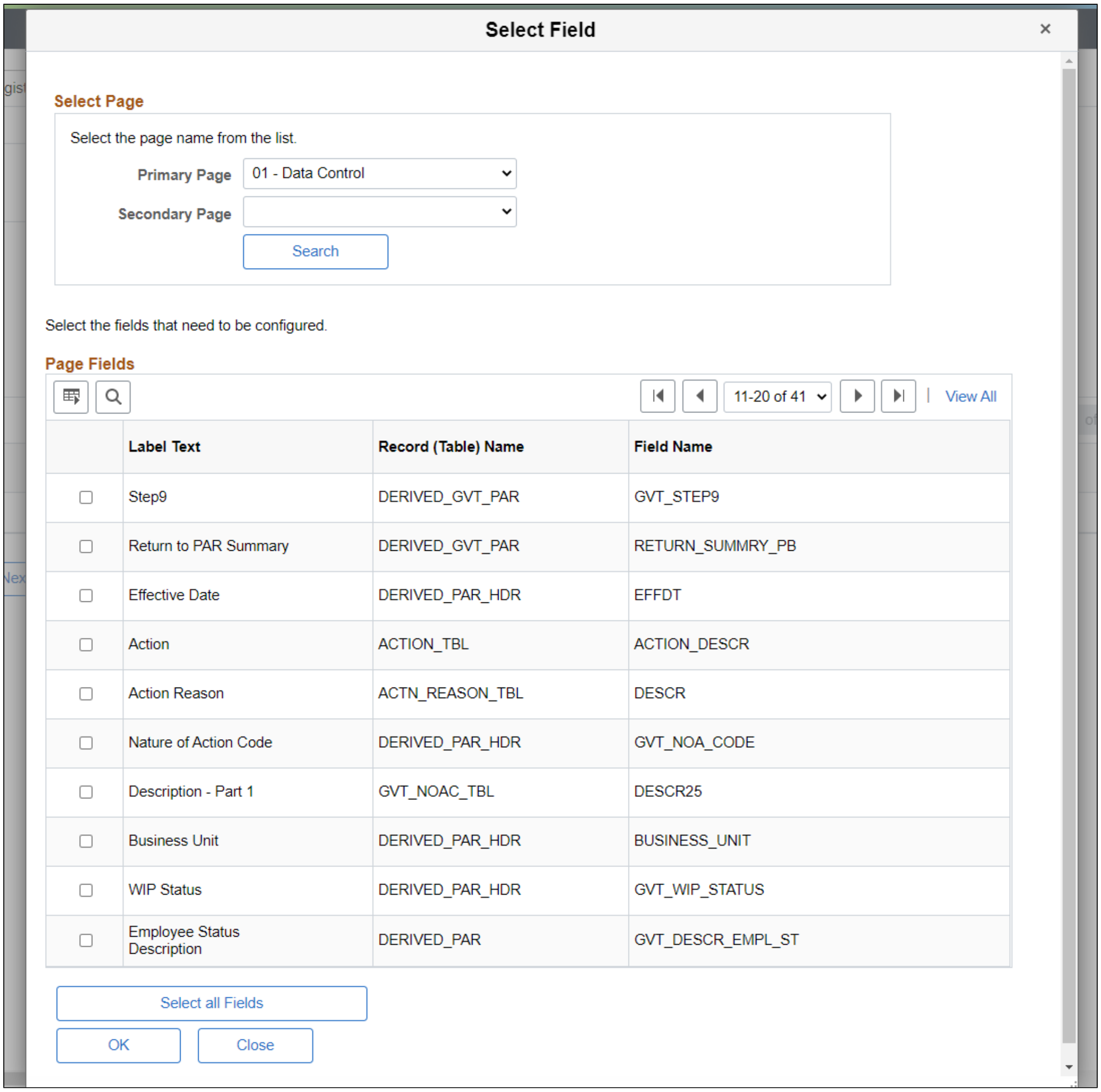


Field or Control	*Description*
Component Name	Displays the name of the component as selected by the user.
Market	Displays the market for which the configuration is defined as selected by the user.

Load Fields for Use

Use this button to open Select Field page and select the fields that need to be configured. On the page, you can search the required page based on Primary and Secondary page.

This example illustrates the Select Field page.



From the Page Fields grid, select the fields that need to be configured. On save, the selected fields get listed on the Page Configuration page.

Filter Result

Use the filter option to find a specific field already loaded on the Advanced Options page. You can filter the fields to be displayed in the 'Fields Available for Configuration and Criteria' grid based on Primary page, Secondary Page, Level, and Field Label.

Fields Available for Configuration and Criteria

Field or Control	***Description***
Page Name, Record (Table) Name, Field Name, Label Text, Occurs Level	By default, values in these fields are displayed.
Include in Criteria List and Include in Field List	Select these checkboxes to include the field in the field list or criteria list when the 'Restrict to Fields from Advanced Options' check box is selected. • Select ‘ Include in Field List’ to indicate that the field should be included in the list of fields that are available for configuration. • Select ‘ Include in Criteria List’, to indicate that the field should be included in the list of fields that can be set as criteria. For example, if you select these check boxes for five fields, only those five fields will be listed when ‘Restrict to fields from Advanced Options’ checkbox is selected in Select Field modal.

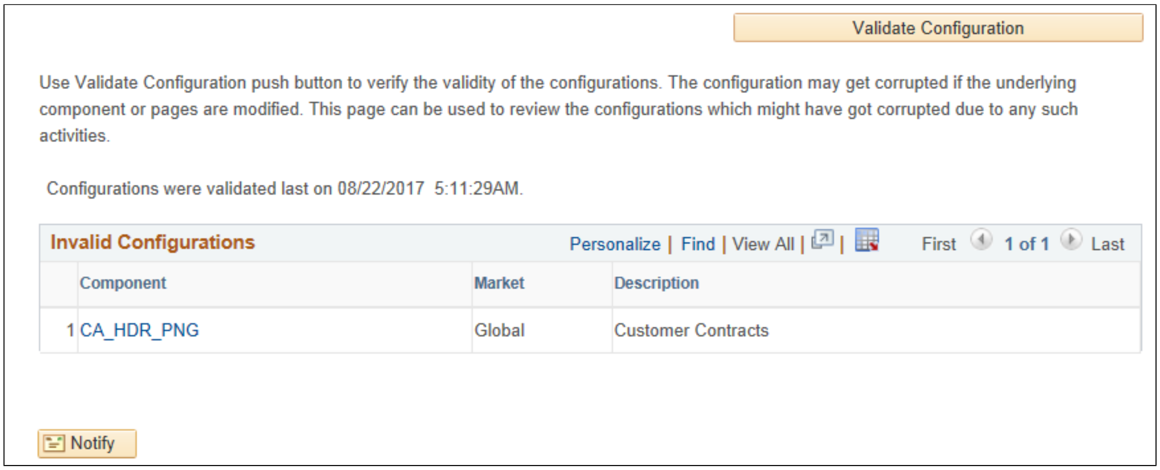
Validate Page Configurations Page

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

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.

Manual event mapping is required when the ‘Apply Configuration’ push button on the Map to Portal Registry page fails to map the events automatically or to handle other use cases not supported by Page and Fields Configurator as delivered.

The configuration can be mapped to each of the registered entity of the component using the Event Mapping page.

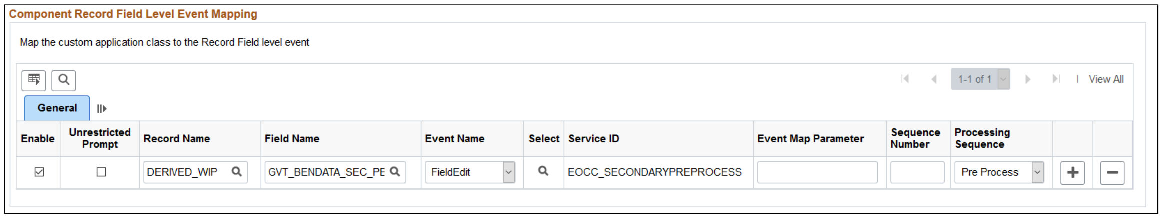
Navigation:

- **Main Menu** > **PeopleTools** > **Portal** > **Related Content Service** > **Manage Related Content Service** > **Event Mapping**

- You can also use the link from the Map to Portal Registry page in Page and Fields Configurator.

On the Event Mapping page, create a mapping for the Record field (obtained earlier) in the ‘Component Record Field Level Event Mapping’ section.

This example illustrates the Event Mapping page.



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.
- For Page and Field Configurator to work correctly on secondary pages, a Related Content Service needs to be manually mapped to the PushButtons/Hyperlinks to open the secondary page. When fields from secondary/Modal pages are used, map the service EOCC_SECONDARYPREPROCESS (for Standard) and EOCC_PREPROCESS_MASK (for Masking) to the event FieldEdit of the link/ button used to invoke the secondary page.
- If a Page Field is populated after Component PostBuild, configurations may not work as expected. This may occur either for the Standard or Masking configurations. In this case, you should consider mapping the PostBuild Service (EOCC_POSTBUILD) to PageActivate event in Event Mapping Configuration for standard configuration and EOCC_MASK_POSTBUILD for Masking configuration.

Note: On save, if you get an error stating 'Page Data is inconsistent with database', reload the event mapping component and add the mapping again.

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.

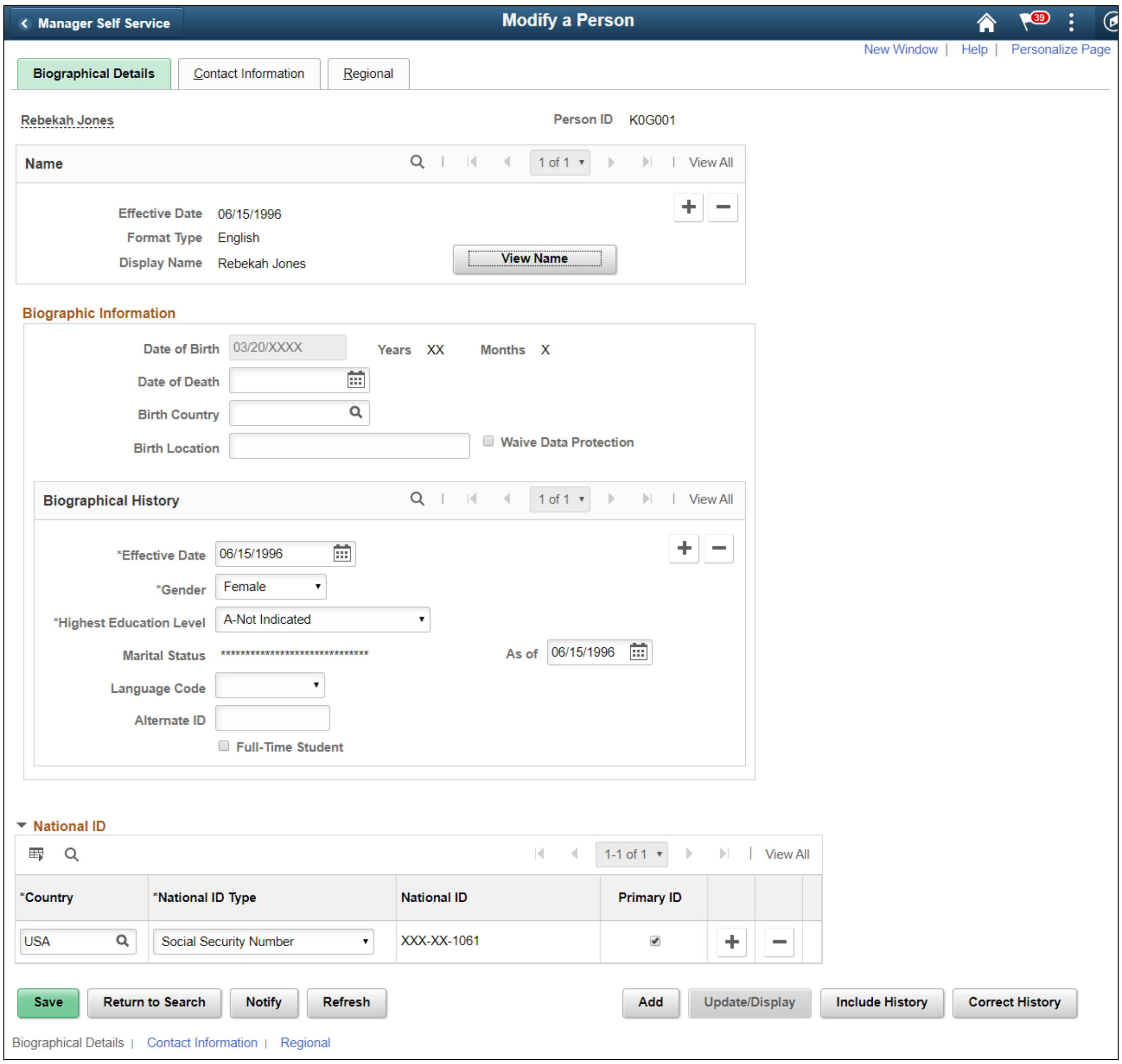
5. Map the configurations to the corresponding portal registry entries using the Map Configuration to Portal Registry page.

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:

Video: Image Highlights, PeopleSoft HCM Update Image 33: Data Masking Related Changes for PFC

The image depicts masking of sensitive fields for the Modify a Person component.



Tracking Changes to Information with Page and Field Configurator

Using Change Tracking configuration, you can track changes made by users to information on a page. You can select specific fields on specific pages with applied criteria. In addition, the log of changes can be displayed to users as related content.

Pages Used to Track Changes in Page and Field Configurator

Page Name	***Definition Name***	***Usage***
Change Tracking Record Group Page	EOCC_TRK_RECGRP	View, edit, and define new change tracking tables and record groups. You can also activate or deactivate record groups.
Change Tracking Product Default Page	EOCC_TRK_PRDGRP	View and edit default mappings of product IDs to delivered record groups. You can also add new mappings. If you have used a custom product ID for custom components, you must add a mapping for it here.
Change Tracking Page	EOCC_CONFIG_CHGTRK	Select fields and define criteria for change tracking.
Change Tracking Log Tables Page	EOCC_TRK_TBLS	View the change tracking record group tables being used for the component. Defaults are provided from the Product Default Page and can be changed, but not after change tracking history has been stored for the component.
User List Page	EOCC_CONFIG_USER	Capture the list of users and/or roles to which the configuration defined on the Page Configuration page should be applied to or excluded from. You can also select roles or users who should be excluded from change tracking.
Map to Portal Registry Page	EOCC_MAP_EVENT	Map the configuration to the Portal Registry and grant role-level access to change tracking related information on the selected component.

Understanding Change Tracking with Page and Field Configurator

Page and Field Configurator change tracking enables you to track the changes made by users to information on a page. You can track changes to specific fields on specific components using criteria such as fields on the page and role. In addition, you can display the log of changes to users as related content.

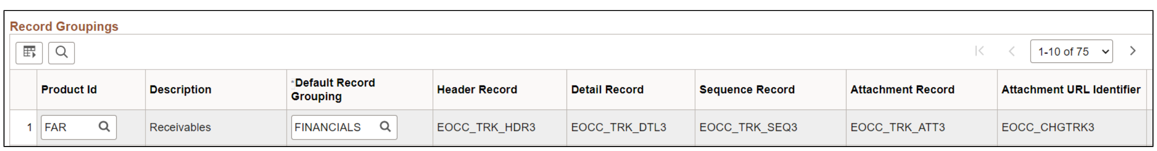
Change history information is stored in a series of tables known as a record group. Record groups consist of a set of these base tables:

- Header Record
- Detail Record
- Sequence Record
- Attachment Record
- Attachment URL Identifier

A component's change history is stored in a single record group using the component's product ID. When you create a change tracking configuration, the system uses the product ID for the component to set the record group where change tracking information is stored. A component is assigned a product ID in its PeopleTools metadata. In addition to the product ID, record groups can also be identified by Record Grouping.

For example, the Record Grouping *FINANCIALS* and Product ID *FAR* identify the Financials-Receivables record group. Change tracking configurations created for Receivables components use this record group.

Page and Field Configurator Change Tracking - Sample Record Group



Record Groupings

1-10 of 75

	Product Id	Description	*Default Record Grouping	Header Record	Detail Record	Sequence Record	Attachment Record	Attachment URL Identifier
1	FAR	Receivables	FINANCIALS	EOCC_TRK_HDR3	EOCC_TRK_DTL3	EOCC_TRK_SEQ3	EOCC_TRK_ATT3	EOCC_CHGTRK3

PeopleSoft delivers ten sets of each record group, providing you with the ability to add more custom record groups.

To simplify the application of change tracking functionality, Oracle provides default mappings of product IDs to delivered record groups. The default mappings can be viewed using the Change Tracking Product Default Page. You can edit the default mappings or add new mappings. If you have used a custom product ID for custom components, you must add it to the product default page.

Use the Change Tracking Record Group Page to view and edit change tracking tables and record groups. You can also add new record groups and tables, and activate or deactivate record groups.

Note: If a field is masked through Page and Field Configurator, the log table stores an asterisk for the value.

Using Related Content to Display Change History

You can display a history of changes to users as related content. When enabled, users can view transaction history using the Related Information frame (Fluid pages) or the Related Content drop-down (classic pages). Related information displays the field that changed, the date of the change, the user who made the change, the new value, and the prior value.

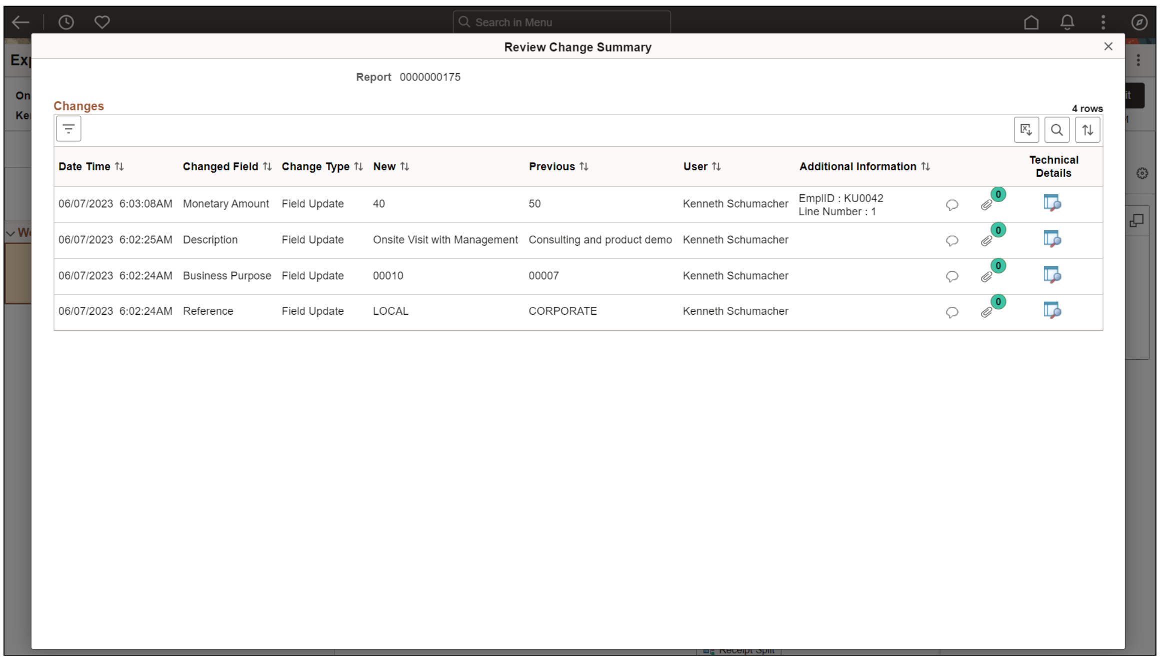
Entry Mode is also tracked and displayed as related content if the component uses correction functionality. If the fluid component uses correction functionality it is displayed when you have PeopleTools 8.60 or higher installed.

Changes to lower level information is further identified in the Additional Information column.

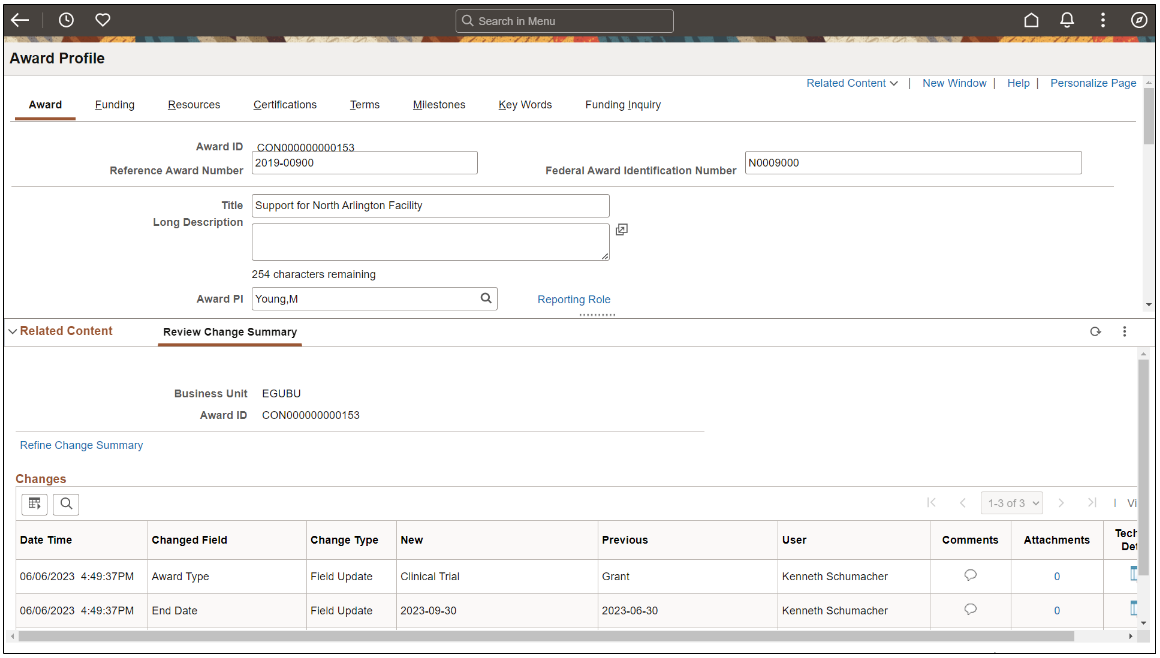
Based on security, the user may enter comments and upload attachments related to the change.

Technical details provides the detail record and fields that were changed and the key structure for the changed record.

Related Information for Fluid pages



Related Content for Classic Pages



You can control which users have access to the related content using role based security on the Map to Portal Registry Page .

For more information about using related content, see "Working with Related Content Services" in the PeopleTools: PeopleTools Portal Technology documentation.

Archiving Change Tracking Tables with PeopleSoft Data Archive Manager

PeopleSoft Data Archive Manager provides a framework for archiving data from PeopleSoft applications. You can use Data Archive Manager to archive your change tracking data. PeopleSoft delivers the archive objects, templates, queries, and jobs to perform the archiving process for each delivered record group. You should review the query used to archive transactions and adjust it as necessary.

If you create additional record groups, you must create your own archive objects, templates, queries, and jobs. Ensure that new archive objects follow the same naming and numbering convention as the delivered archive objects.

Note: The Sequence Record is not archived.

For more information about PeopleSoft Data Archive Manager, see the topic 'Understanding PeopleSoft Data Archive Manager' in the PeopleTools Data Management documentation.

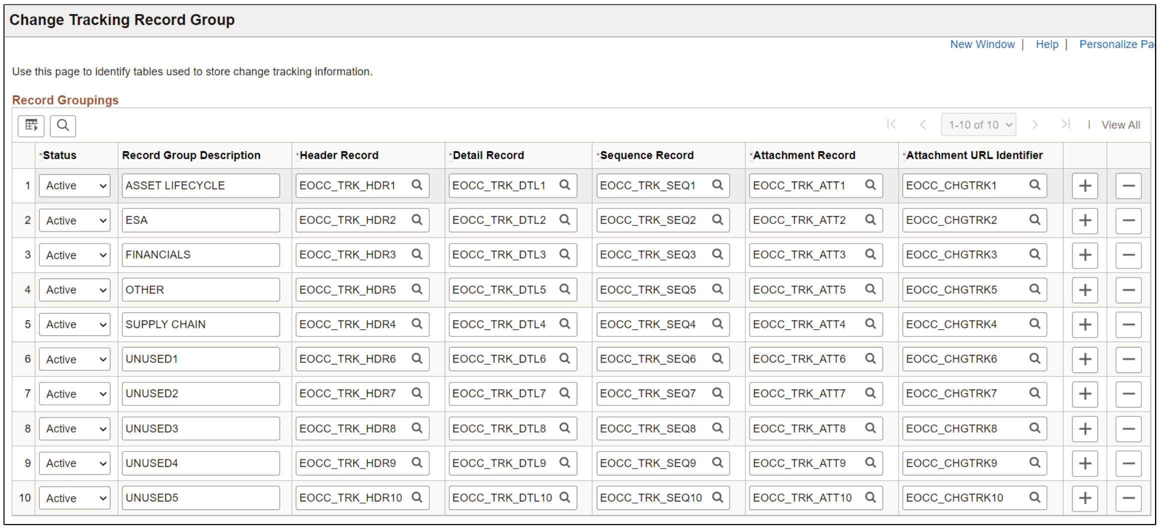
Change Tracking Record Group Page

Use the Change Tracking Record Group page (EOCC_TRK_RECGRP) to view, edit, and define new change tracking tables and record groups. You can also activate or deactivate record groups.

Navigation:

Enterprise Components > **Page and Field Configuration** > **Change Tracking Record Group** > **Change Tracking Record Group**

This example illustrates the fields and controls on the Change Tracking Record Group page.



Change Tracking Record Group

New Window | Help | Personalize Pa

Use this page to identify tables used to store change tracking information.

Record Groupings

1-10 of 10 View All

	Status	Record Group Description	Header Record	Detail Record	Sequence Record	Attachment Record	Attachment URL Identifier
1	Active	ASSET LIFECYCLE	EOCC_TRK_HDR1	EOCC_TRK_DTL1	EOCC_TRK_SEQ1	EOCC_TRK_ATT1	EOCC_CHGTRK1
2	Active	ESA	EOCC_TRK_HDR2	EOCC_TRK_DTL2	EOCC_TRK_SEQ2	EOCC_TRK_ATT2	EOCC_CHGTRK2
3	Active	FINANCIALS	EOCC_TRK_HDR3	EOCC_TRK_DTL3	EOCC_TRK_SEQ3	EOCC_TRK_ATT3	EOCC_CHGTRK3
4	Active	OTHER	EOCC_TRK_HDR5	EOCC_TRK_DTL5	EOCC_TRK_SEQ5	EOCC_TRK_ATT5	EOCC_CHGTRK5
5	Active	SUPPLY CHAIN	EOCC_TRK_HDR4	EOCC_TRK_DTL4	EOCC_TRK_SEQ4	EOCC_TRK_ATT4	EOCC_CHGTRK4
6	Active	UNUSED1	EOCC_TRK_HDR6	EOCC_TRK_DTL6	EOCC_TRK_SEQ6	EOCC_TRK_ATT6	EOCC_CHGTRK6
7	Active	UNUSED2	EOCC_TRK_HDR7	EOCC_TRK_DTL7	EOCC_TRK_SEQ7	EOCC_TRK_ATT7	EOCC_CHGTRK7
8	Active	UNUSED3	EOCC_TRK_HDR8	EOCC_TRK_DTL8	EOCC_TRK_SEQ8	EOCC_TRK_ATT8	EOCC_CHGTRK8
9	Active	UNUSED4	EOCC_TRK_HDR9	EOCC_TRK_DTL9	EOCC_TRK_SEQ9	EOCC_TRK_ATT9	EOCC_CHGTRK9
10	Active	UNUSED5	EOCC_TRK_HDR10	EOCC_TRK_DTL10	EOCC_TRK_SEQ10	EOCC_TRK_ATT10	EOCC_CHGTRK10

Field or Control	***Description***
Status	Activate or deactivate a record group.
Record Group Description	Enter a unique description to identify the record group. This identifier works in conjunction with the Product ID on the component and the Default Record Grouping to identify the record group. You specify Product ID using the Change Tracking Product Default Page. **Note:** The record group description cannot be changed after it has been used by a component to track history.
Header Record	Select a header record for the record group.
Detail Record	Select a detail record for the record group.
Sequence Record	Select a sequence record for the record group. This record identifies the sequences used for the record group. Sequences help differentiate changes for a transaction over time and are not visible online.
Attachment Record	Select an attachment record for the record group.
Attachment URL Identifier	Select an attachment URL identifier record for the record group.

Change Tracking Product Default Page

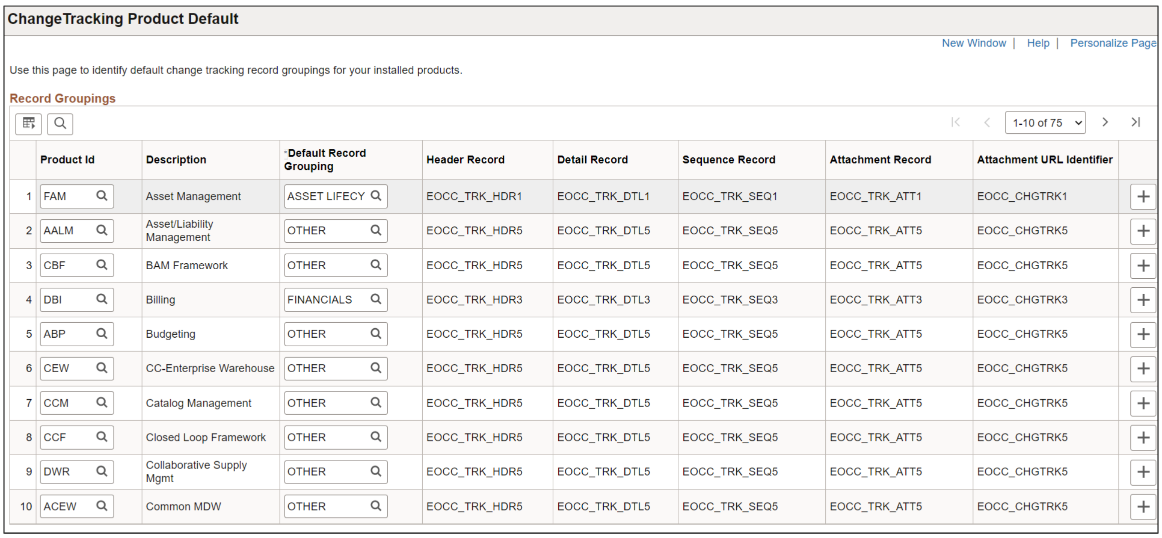
Use the Change Tracking Product Default page (EOCC_TRK_PRDGRP) to view and edit default mappings of product IDs to delivered record groups. You can also add new mappings. If you have used a custom product ID for custom components, you must add a mapping for it here.

To simplify the application of change tracking functionality, Oracle provides . The default mappings can be viewed using the Change Tracking Product Default Page. You can edit the default mappings or add new mappings.

Navigation:

Enterprise Components > **Page and Field Configuration** > **Change Tracking Product Default** > **Change Tracking Product Default**

This example illustrates the fields and controls on the Change Tracking Product Default page.



ChangeTracking Product Default

New Window | Help | Personalize Page

Use this page to identify default change tracking record groupings for your installed products.

Record Groupings

1-10 of 75

	Product Id	Description	*Default Record Grouping	Header Record	Detail Record	Sequence Record	Attachment Record	Attachment URL Identifier
1	FAM	Asset Management	ASSET LIFECY	EOCC_TRK_HDR1	EOCC_TRK_DTL1	EOCC_TRK_SEQ1	EOCC_TRK_ATT1	EOCC_CHGTRK1
2	AALM	Asset/Liability Management	OTHER	EOCC_TRK_HDR5	EOCC_TRK_DTL5	EOCC_TRK_SEQ5	EOCC_TRK_ATT5	EOCC_CHGTRK5
3	CBF	BAM Framework	OTHER	EOCC_TRK_HDR5	EOCC_TRK_DTL5	EOCC_TRK_SEQ5	EOCC_TRK_ATT5	EOCC_CHGTRK5
4	DBI	Billing	FINANCIALS	EOCC_TRK_HDR3	EOCC_TRK_DTL3	EOCC_TRK_SEQ3	EOCC_TRK_ATT3	EOCC_CHGTRK3
5	ABP	Budgeting	OTHER	EOCC_TRK_HDR5	EOCC_TRK_DTL5	EOCC_TRK_SEQ5	EOCC_TRK_ATT5	EOCC_CHGTRK5
6	CEW	CC-Enterprise Warehouse	OTHER	EOCC_TRK_HDR5	EOCC_TRK_DTL5	EOCC_TRK_SEQ5	EOCC_TRK_ATT5	EOCC_CHGTRK5
7	CCM	Catalog Management	OTHER	EOCC_TRK_HDR5	EOCC_TRK_DTL5	EOCC_TRK_SEQ5	EOCC_TRK_ATT5	EOCC_CHGTRK5
8	CCF	Closed Loop Framework	OTHER	EOCC_TRK_HDR5	EOCC_TRK_DTL5	EOCC_TRK_SEQ5	EOCC_TRK_ATT5	EOCC_CHGTRK5
9	DWR	Collaborative Supply Mgmt	OTHER	EOCC_TRK_HDR5	EOCC_TRK_DTL5	EOCC_TRK_SEQ5	EOCC_TRK_ATT5	EOCC_CHGTRK5
10	ACEW	Common MDW	OTHER	EOCC_TRK_HDR5	EOCC_TRK_DTL5	EOCC_TRK_SEQ5	EOCC_TRK_ATT5	EOCC_CHGTRK5

Field or Control	***Description***
Product ID	Enter a product ID to map to the record group. PeopleSoft delivered record groups have a product ID assigned, which uses the product ID associated with the component. You can modify delivered mappings. Record groups are defined on the Change Tracking Record Group Page.
Description	Displays the record group description associated with the Default Record Grouping.
Default Record Grouping	Enter a default record grouping for the Product ID. Record groups are defined on the Change Tracking Record Group Page.

Field or Control	***Description***
Header Record	Displays the header record used for the record group.
Detail Record	Displays the detail record used for the record group.
Sequence Record	Displays the sequence record used for the record group.
Attachment Record	Displays the attachment record used for the record group.
Attachment URL Identifier	Displays the attachment URL identifier record used for the record group.

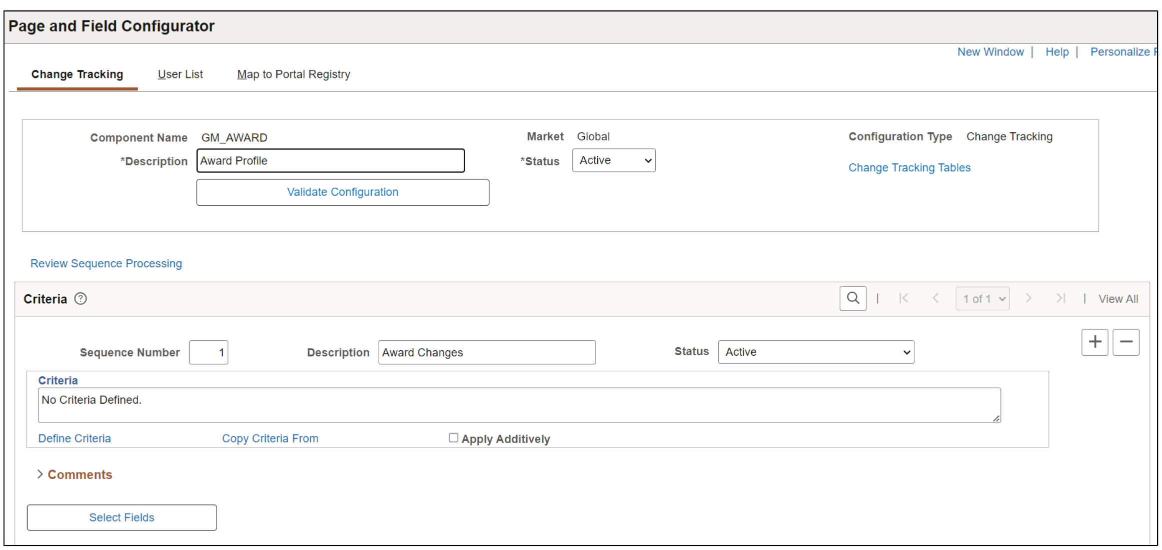
Change Tracking Page

Use the Change Tracking page (EOCC_CONFIG_CHGTRK) to select fields and define criteria for change tracking.

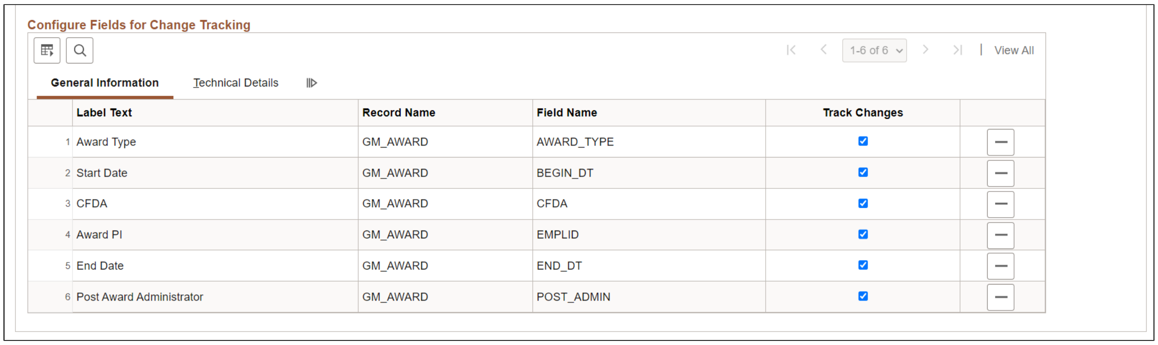
Navigation:

Enterprise Components > Page and Field Configuration > Page and Field Configurator > Change Tracking

This example illustrates the fields and controls on the <Page Name> page.



This example illustrates the fields and controls on the <Page Name> page.



Field or Control	***Description***
Component Name	Displays the name of the component you selected on the Page and Field Configurator - Add a New Value page.
Market	Displays the market you selected on the Page and Field Configurator - Add a New Value page.
Configuration Type	Displays the type of configuration you selected on the Page and Field Configurator - Add a New Value page. For change tracking, the value should be *Change Tracking.*
Change Tracking Tables	Select this link to access the Change Tracking Log Tables Page and view the change tracking record group tables being used for the component. Defaults are provided from the Product Default Page and can be changed, but not after change tracking history has been stored for the component. Record groups are defined on the Change Tracking Record Group Page.

Note: For definitions of all other fields in this section of the page, see the documentation for the Page Configuration Page

Criteria

For definitions of the fields in this section of the page, see the documentation for the Page Configuration Page.

Configure Fields for Change Tracking

Field or Control	***Description***
Track Changes	Select this check box to enable change tracking for a field.

Note: For definitions of all other fields in this section of the page, see the documentation for the Page Configuration Page

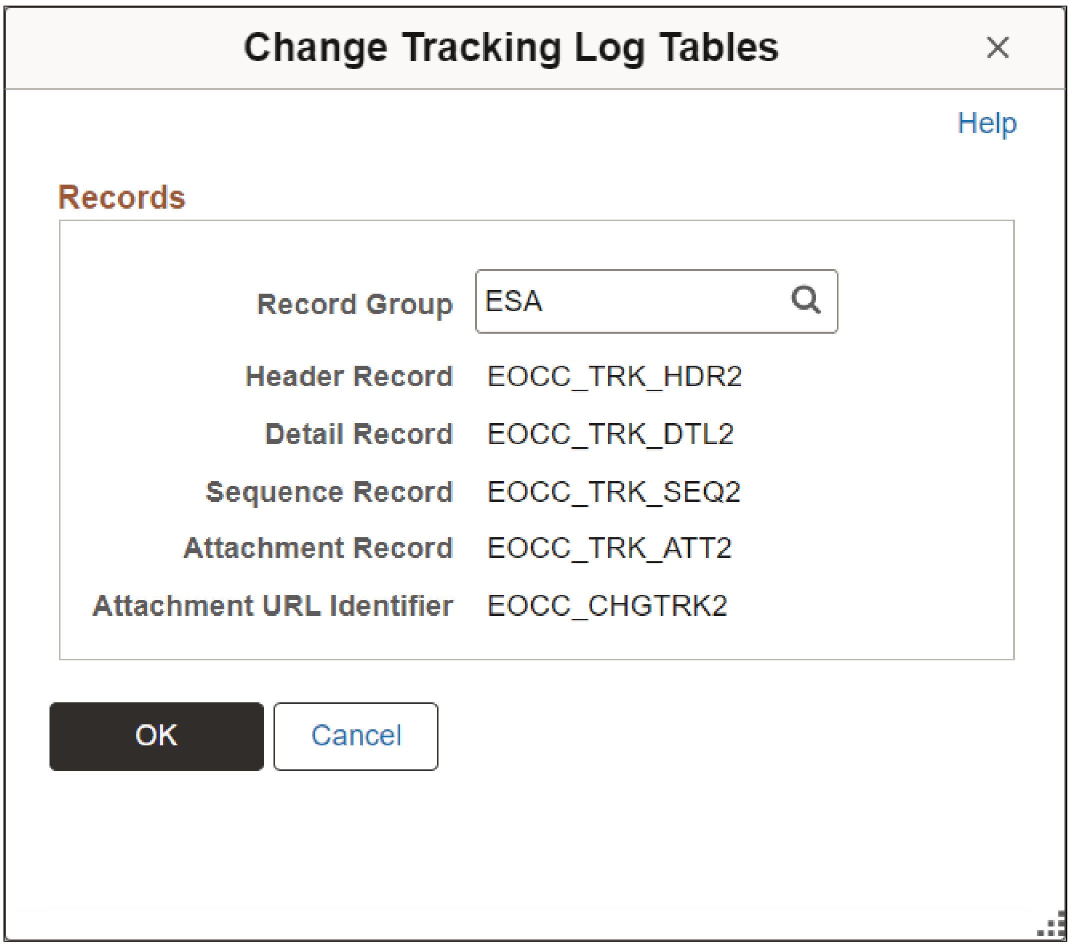
Change Tracking Log Tables Page

Use the Change Tracking Log Tables page (EOCC_TRK_TBLS) to view the change tracking record group tables being used for the component. Defaults are provided from the Product Default Page and can be changed, but not after change tracking history has been stored for the component.

Navigation:

Select the Change Tracking Tables link on the Change Tracking Page.

This example illustrates the fields and controls on the Change Tracking Log Tables page.



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**

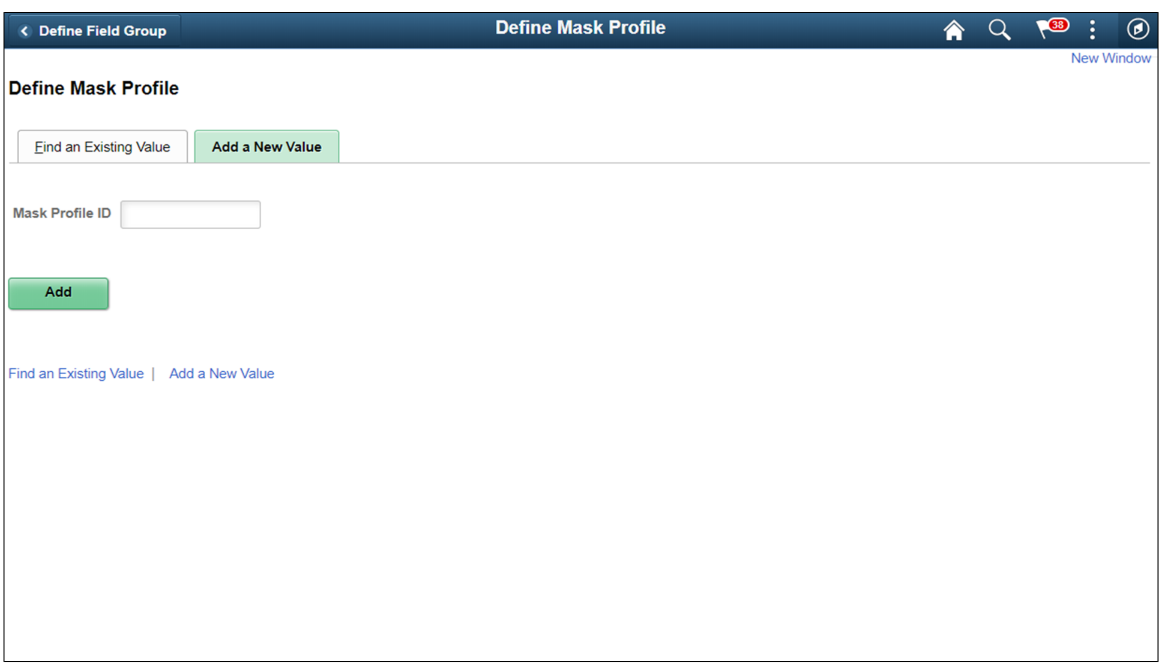
Page and Field Configurator supports four types of masking configuration:

- 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.

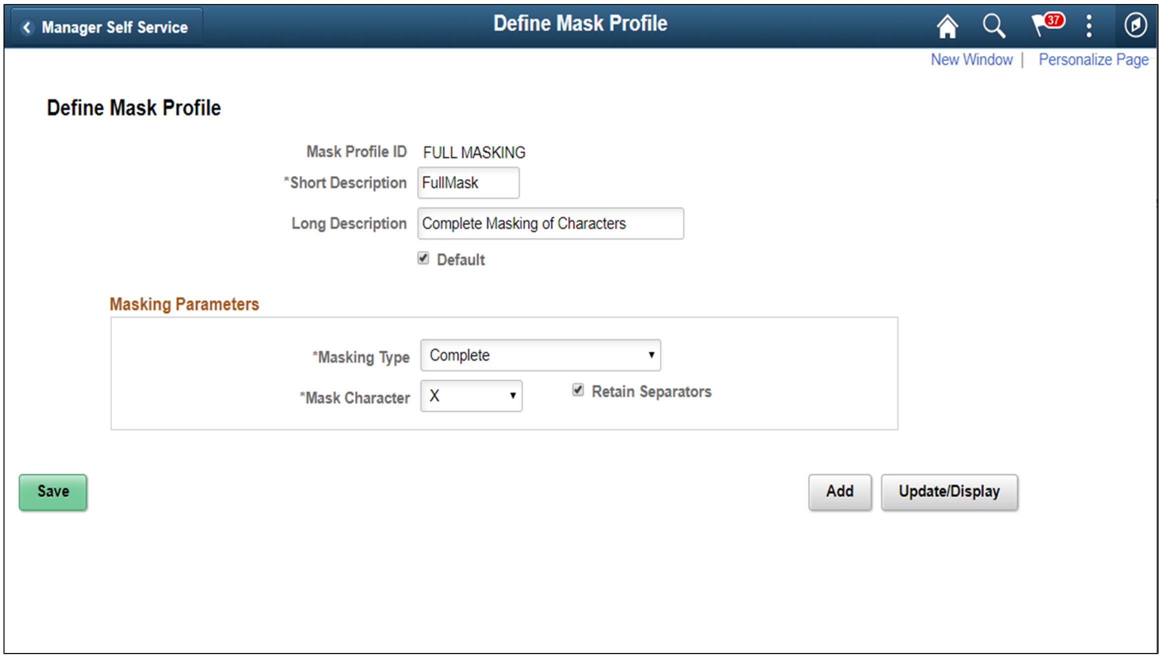
Define a new Mask Profile



Complete Masking

This type of masking masks all the characters of the field.

Complete Masking in Define Mask Profile page

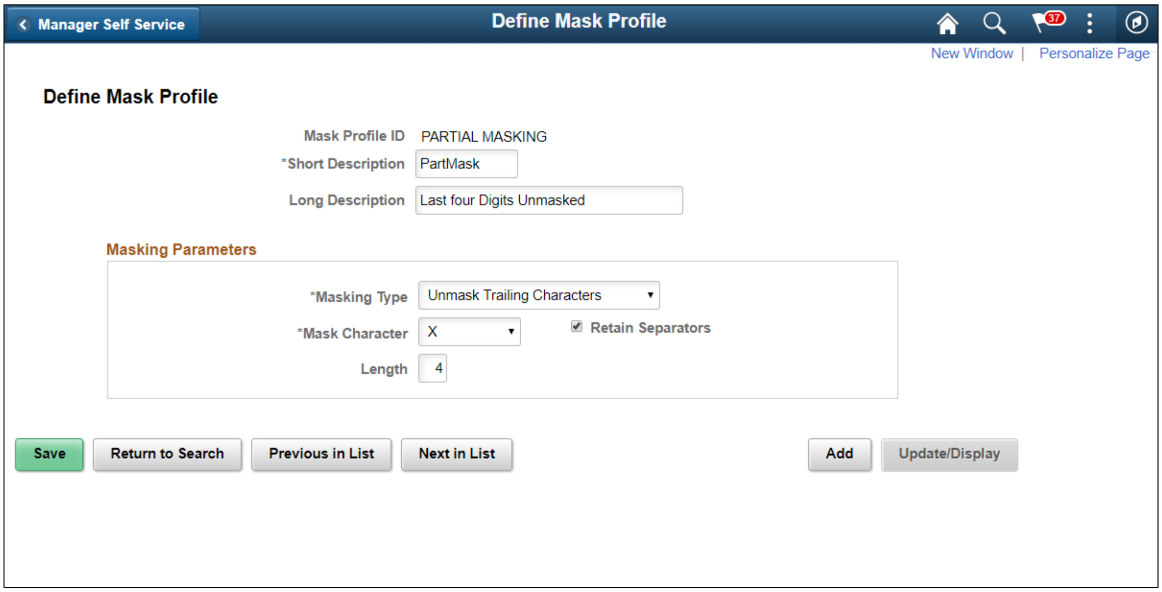


Field or Control	***Description***
Short Description	Enter a short description for the mask profile ID
Long Description	Enter a detailed description.
Default	Select this box for a Mask Profile of type Complete to mark it as a system level default. This Mask Profile will be used for masking in case no 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.

Unmask trailing characters

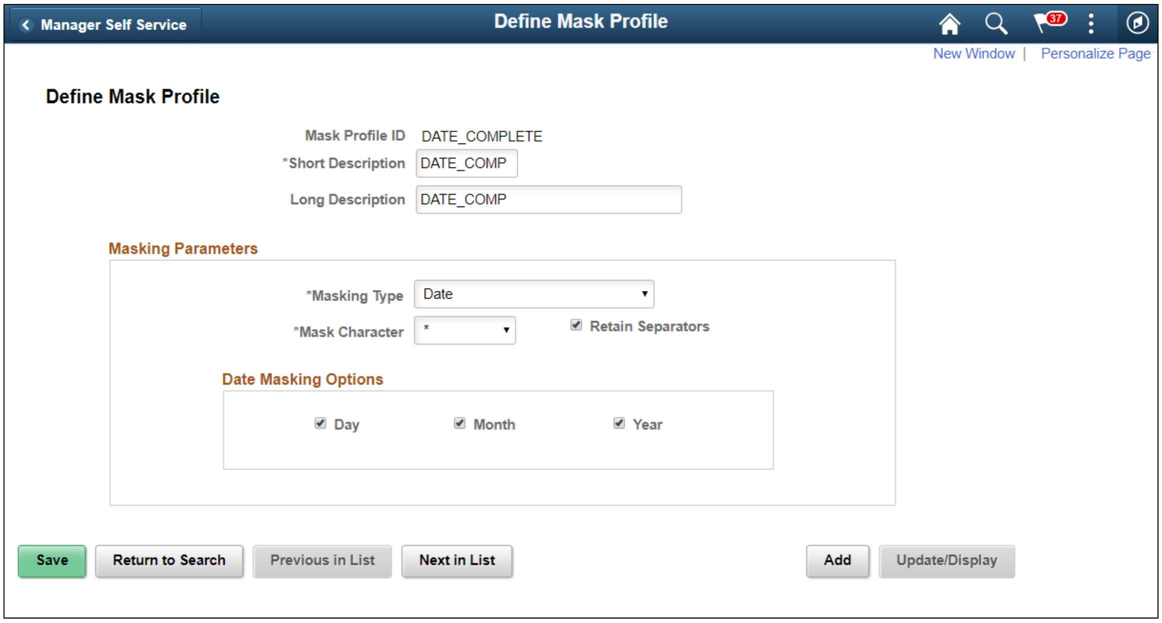


Field or Control	***Description***
Length	Choose the length or number of trailing characters that needs to be kept unmasked.

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.

Date type masking

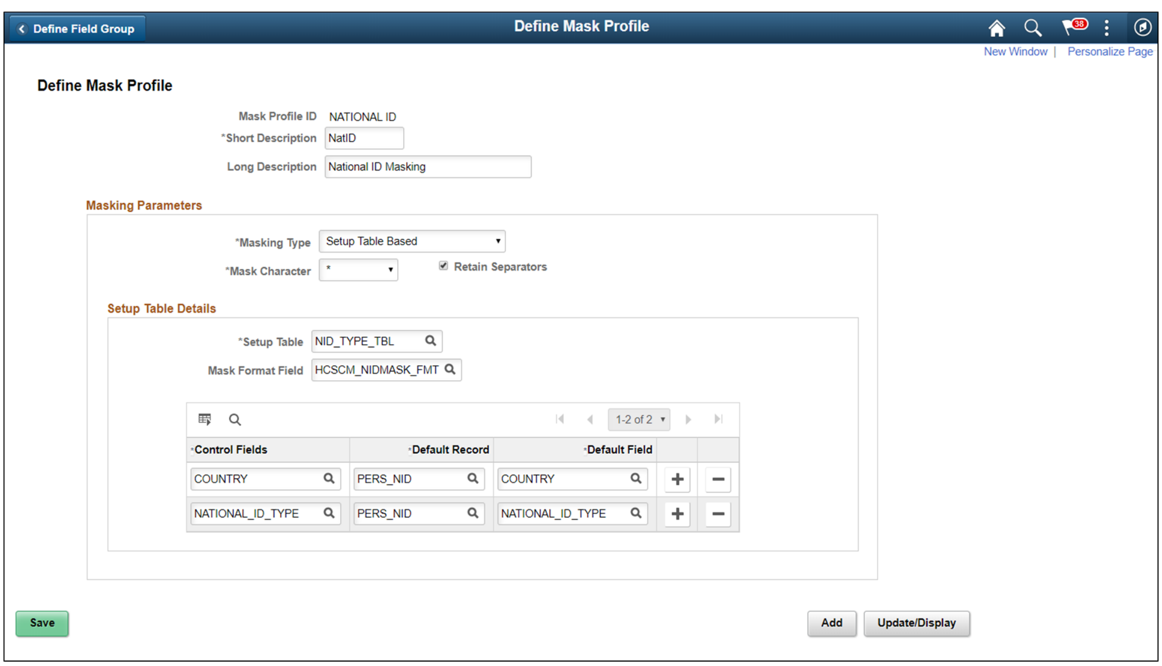


Field or Control	***Description***
Date Masking Options	Select which part of the date (Day, Month or Year) needs to be masked.

Setup Table Based Masking

Use this masking profile to mask data from a defined setup table that has the masking format defined in it.

Setup table based masking



Field or Control	*Description*
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.

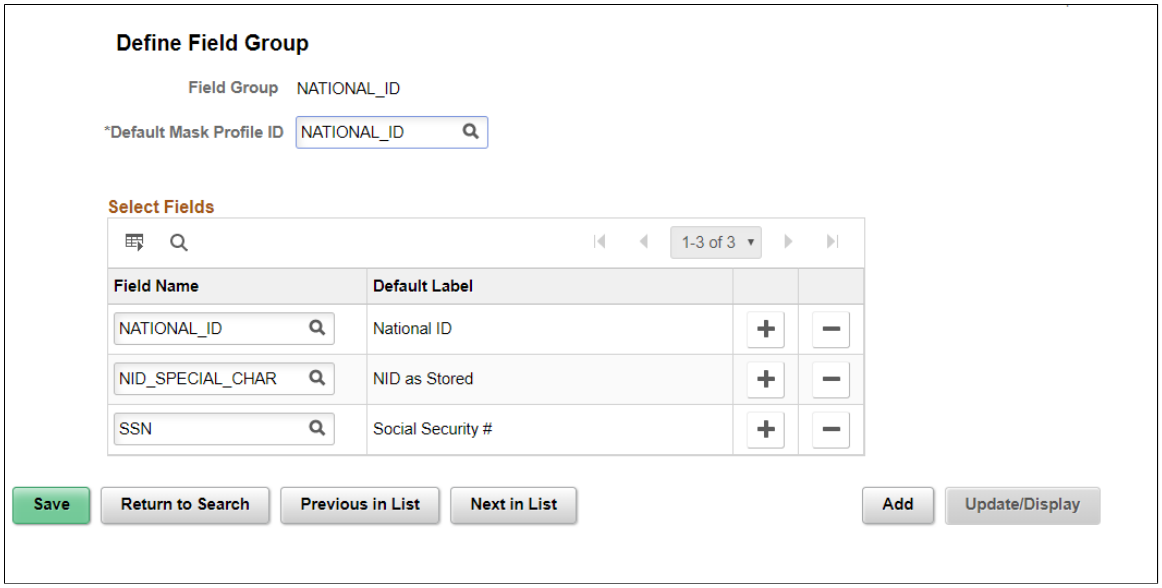
Define Field Group Page

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**

Define Field Group



Field or Control	***Description***
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.
Map to Portal Registry Page	EOCC_MAP_EVENT	Use this page to map the configuration to the Portal Registry.

Page Name	*Definition Name*	*Usage*
Advanced Options Page	EOCC_ADVANCED_TAB	Use this page to identify the fields that should be available in the Page and Field Configurator prompts to be selected as criteria.

Masking Page

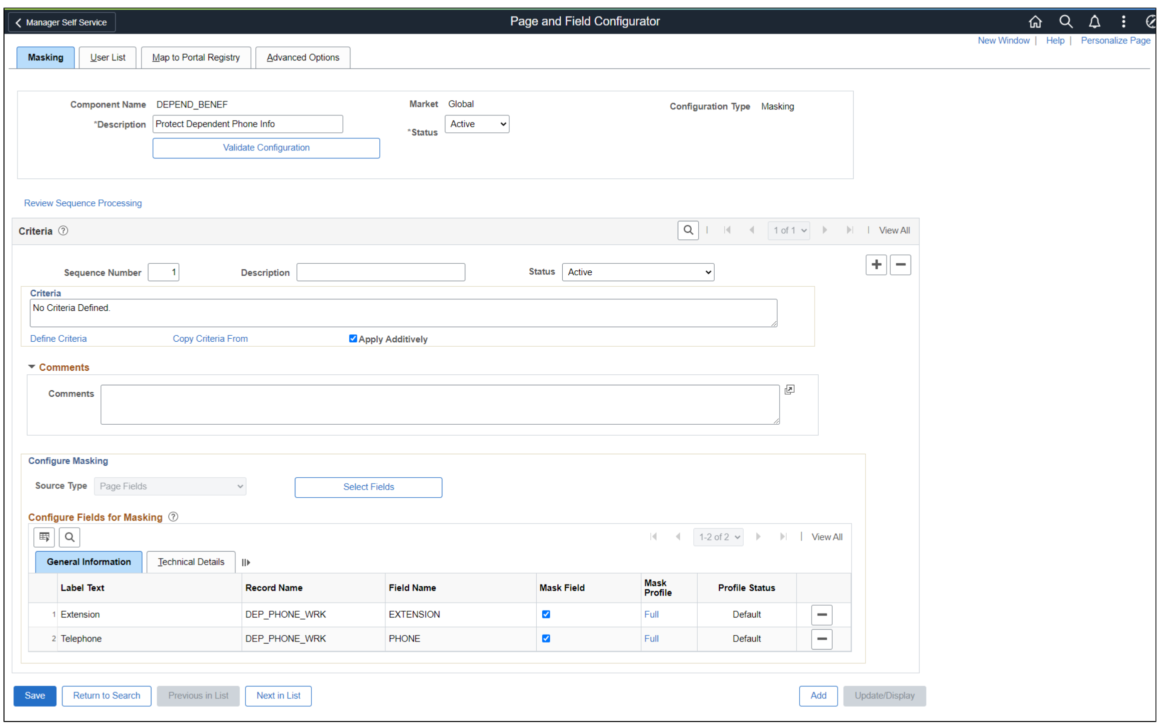
Use the Masking page (EOCC_CONFIG_MASK) to configure data masking for a component.

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.

Masking page in Page and Field Configurator



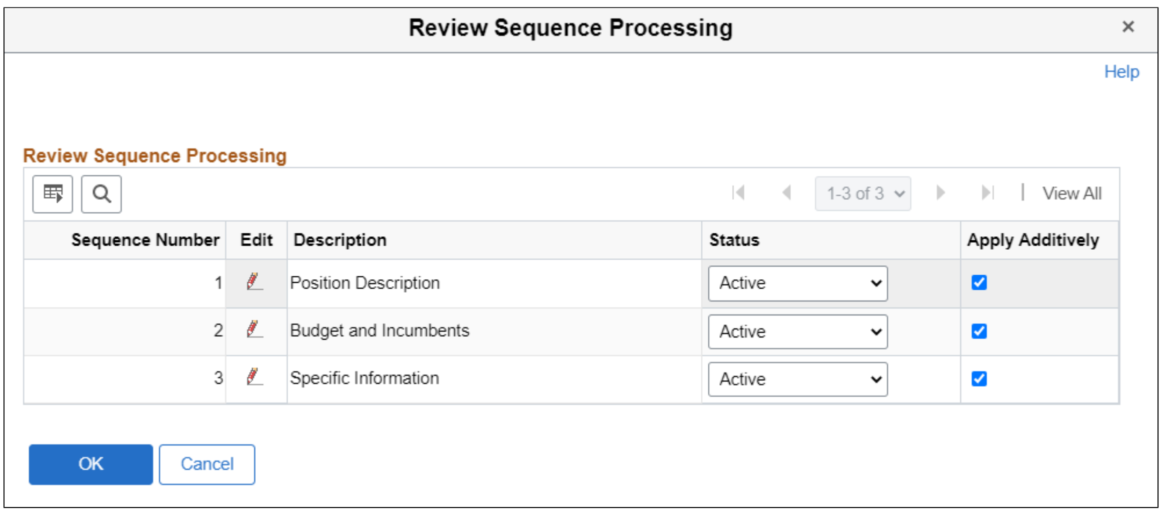
Field or Control	*Description*
Component Name	Displays the name of the component as selected by the user.
Description	Enter an appropriate description.
Market	Displays the market for which the configuration is defined as selected by the user.

Field or Control	*Description*
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

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.

This illustration shows the Review Sequence Processing page listing all the sequences.



Use the Edit button to modify the description.

Criteria

This functionality is the same as the Criteria for a Standard Page Configuration. For details, refer the Criteria Section in Page Configuration Page.

Comments

You can specify any additional comments here.

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

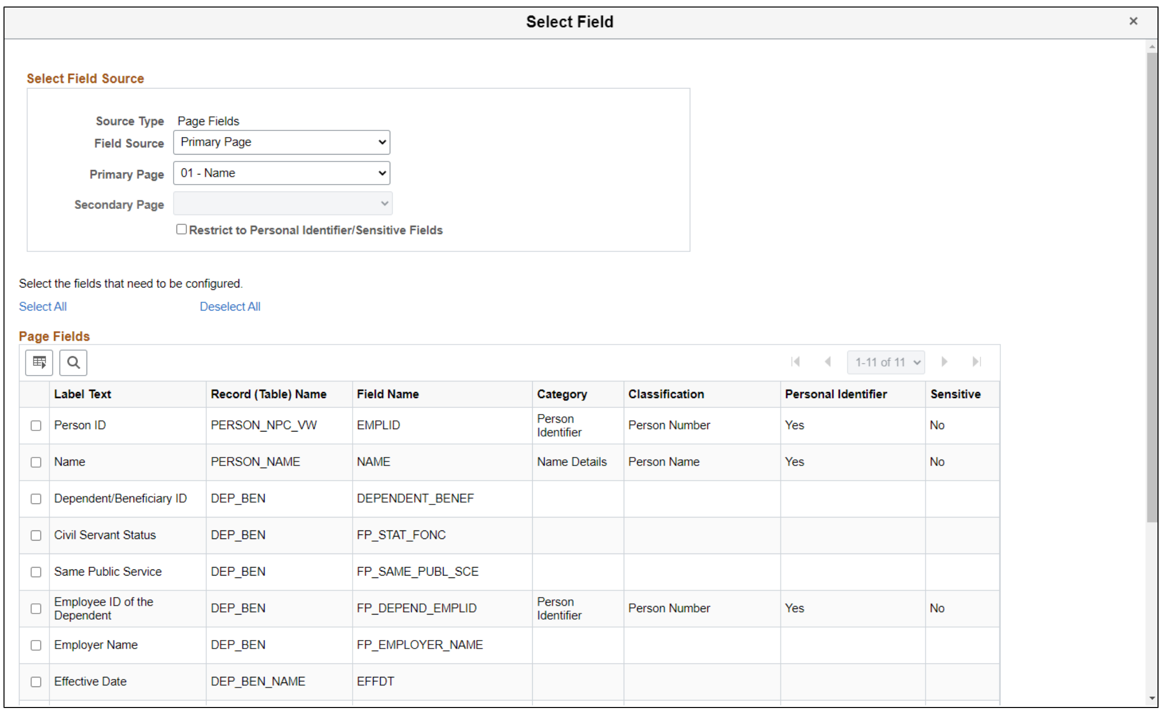
- Secondary Page fields
- Search Record fields
- Prompt Record fields

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.

Note: As of FSCM Update Image 43, PeopleSoft added the **Bank Account Number Encryption** feature. If you want to use this feature to encrypt and mask bank account numbers, but you previously used this page to mask bank account numbers, delete the row in the Configure Fields for Masking section prior to using this feature.
For more information about securing bank account numbers in FSCM, see PeopleSoft FSCM 9.2: Application Fundamentals, Securing Bank Accounts in FSCM.

Select Fields for masking



Field or Control	***Description***
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.

Field or Control	***Description***
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 the 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.

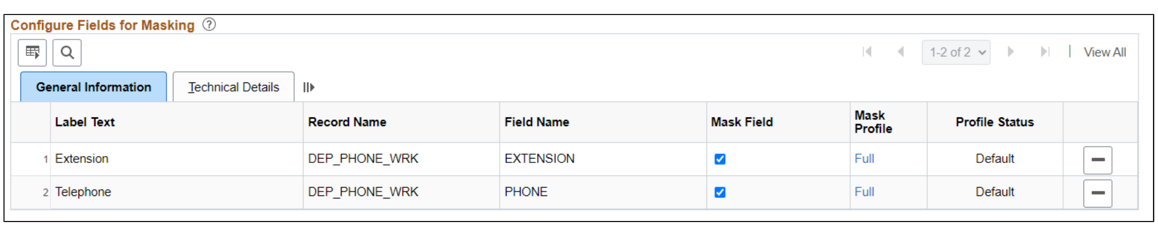
Configure Fields for Masking

Once the fields are selected, they are listed in the Configure Fields for Masking section. The Configure Fields for Masking section consists of two tabs, General Information and Technical Details.

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.

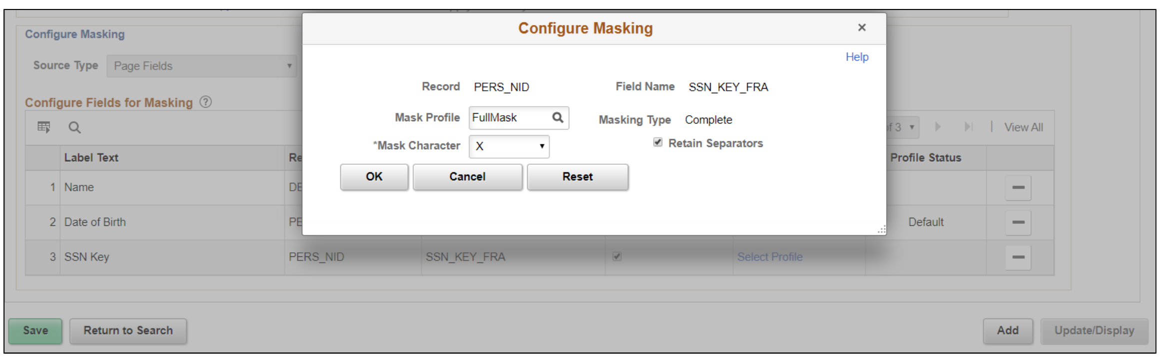
Note: See note above about the **Bank Account Number Encryption** feature in FSCM.

This example illustrates the General Information tab.



Field or Control	***Description***
Label Text	Label of the field is displayed based on your selection.
Record Name	Record (table) name of the selected field is displayed.
Field Name	Based on the selected field, name of field is displayed
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.

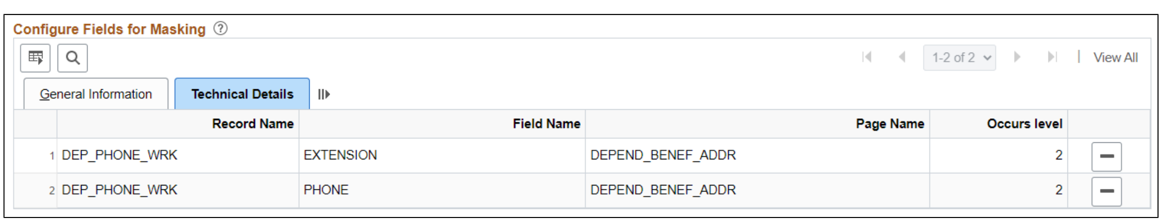
Choose Mask Profile



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.

This example illustrates the Technical Details tab



Field or Control	***Description***
Record Name	Record (table) name of the selected field is displayed.

Field or Control	***Description***
Field Name	Based on the selected field, name of field is displayed.
Page Name	Page name of the selected field is displayed.
Occurs Level	Occurs level indicates the level of the selected field.

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.

Note: For PeopleTools 8.60 or higher, data masking is also supported for Search Records configured in PeopleTools Configurable Search.
For Keyword Search fields, masking is supported only for fields that are part of Component Search Record. Masking of Search Fields that are only part of the Search Index is not supported.
For more information, see 'Managing Configurable Search' in the *PeopleTools Search Technology* documentation.

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 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.

For more details refer the Map to Portal Registry Page .

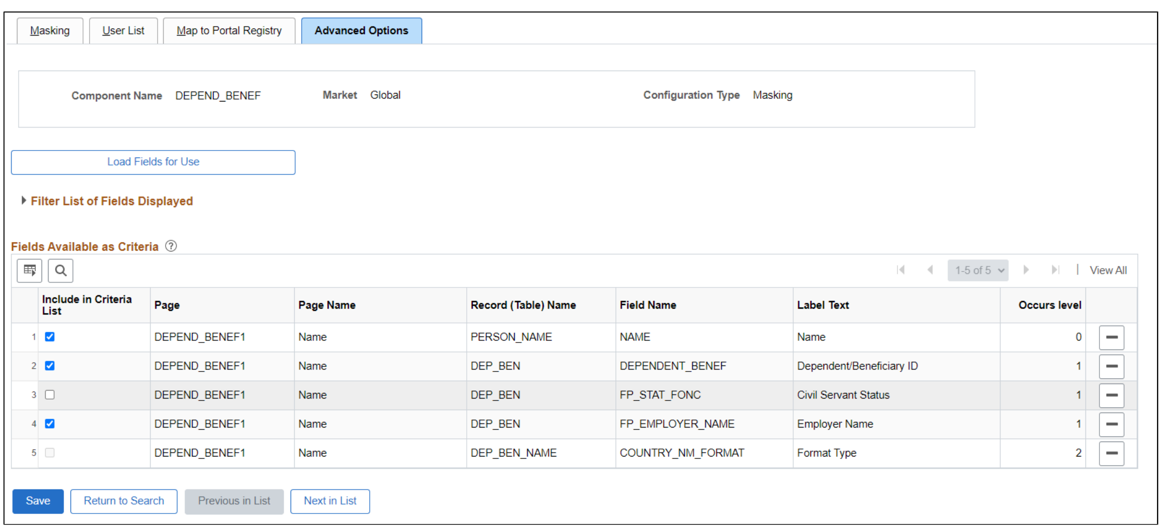
Advanced Options Page

Use the Advanced Options page (EOCC_ADVANCED_TAB) to select the fields that should be available to be used as criteria.

Note: The Advanced Options page is targeted to technical staff for use on complex components with a large number of fields and is optional. This helps to reduce the list of fields available for the functional administrator to select in the Page and Field Configurator feature.

Use the Advanced Options page to identify specific fields as available to be used as criteria. After selection, the functional administrator has a filtered list of fields to choose from in the Page Configuration tab.

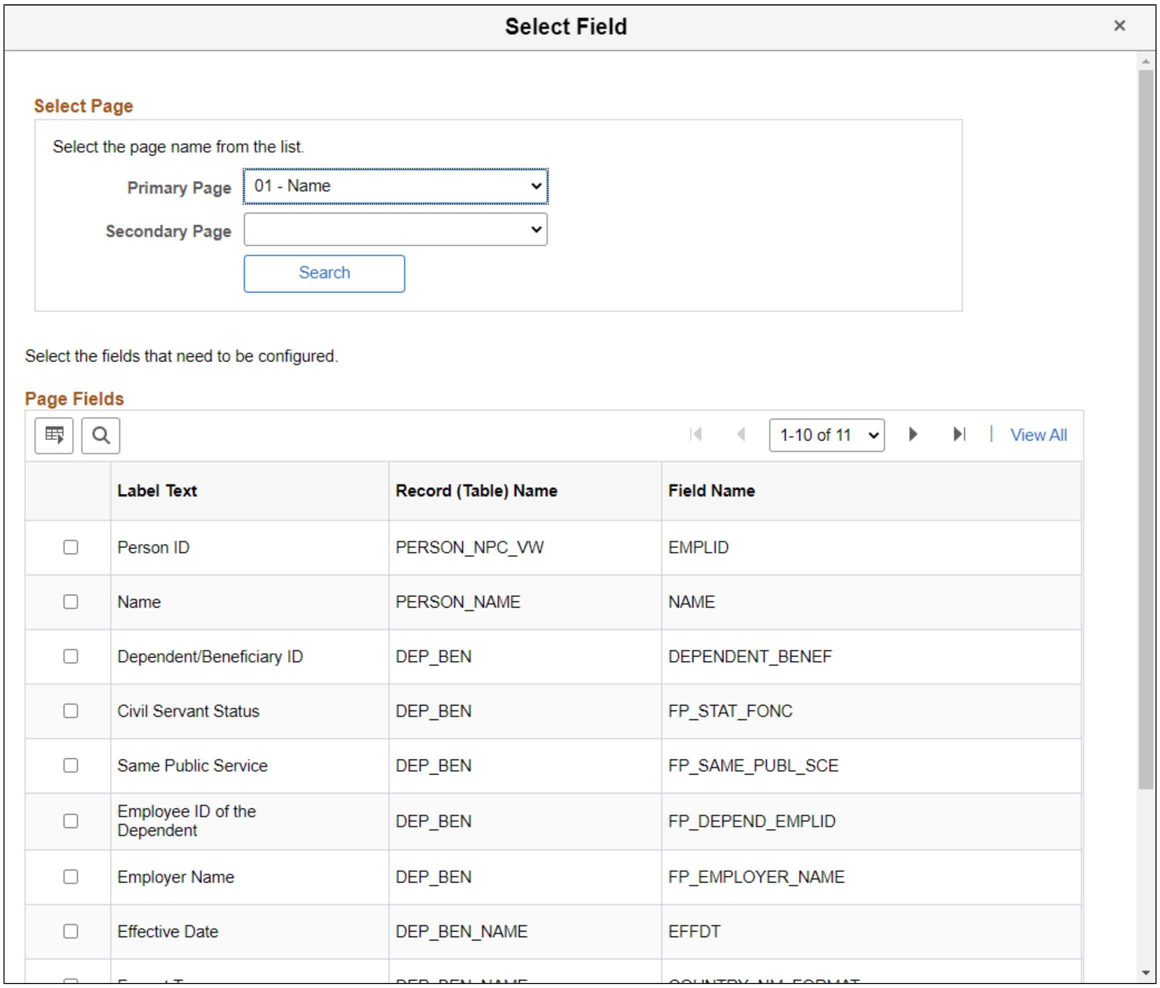
This example illustrates the Advanced Options Page.



Load Fields for Use

Use this button to open the Select Field modal. You can select the fields for configuration based on primary and secondary page. This example illustrates the Select Field modal in Advanced Options page.

This example illustrates the Select Field modal in Advanced Options page.



Fields Available as Criteria

Here you can configure the fields that can be used as criteria.

Field or Control	***Description***
Page Name, Record (Table) Name, Field Name, Label Text	By default, values in these fields are displayed.

Field or Control	***Description***
Include in Criteria List	Select this checkbox to indicate that this field is available to be to be used as criteria. The fields selected here will be available for the functional administrator to select in the Page and Field Configurator feature. By default, this checkbox is selected. Note: This field will be deselected and disabled for criteria fields in levels higher than 1.

Chapter 14

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.

Video: PeopleSoft PFC Data Masking

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:

Video: Image Highlights, PeopleSoft HCM Update Image 27: Data Privacy Enhancements — Sensitive Data Setup

Pages Used in Data Privacy Framework

Page Name	***Definition Name***	***Usage***
Maintain Category Page	EODP_CTGRY_DTLS_FL	View and maintain categories.
Maintain Classification Page	EODP_CLSFCN_FL	View and maintain classifications.
Maintain Data Privacy Settings Page	EODP_RECFLD_MNT_FL	Maintain Data Privacy mappings for PeopleSoft Records and Fields.
Select Reference Type Page	EODP_GENPARM_SCF	Select to refresh or update references.
References Last Run Page	EODP_RF_LSTRUN_SCF	View the timestamps for the references which were last updated for each Reference type.
View Reference Page — Component/ Page Tab	EODP_VIEW_REF_FL	View Components/Pages where Record Fields configured in Maintain Data Privacy Settings page are used.
Component Page Details for Standard page	EODP_COMP_REF_SCF	View more details of the reference used.
View Reference Page — Query Tab	EODP_VIEW_REF_FL	View Queries where Record Fields configured in Maintain Data Privacy Settings are used.
Query Details Page	EODP_QRY_REF_SCF	Shows the details of connected query search result.
View Reference Page — Reports Tab	EODP_VIEW_REF_FL	View Reports of type Business Intelligence Publisher (BIP) and Structured Query Report (SQR) where Record Fields configured in Maintain Data Privacy Settings are used.
BIP Report Details Modal	EODP_REPT_DTL_SCF	View BIP Report details based on the selected Query type.
SQR Report Details Modal	EODP_SQR_DTL_SCF	View the details of SQR programs. This also includes SQR Run Control Component and Navigation information.
View Reference Page — Search Tab	EODP_VIEW_REF_FL	View Search Definitions and Search Categories where Record Fields configured in Maintain Data Privacy Settings are used.

Page Name	*Definition Name*	*Usage*
Search Details Modal	EODP_SRCH_DTL_SCF	View details of Search Definition such as Query information, and whether the search is used as a component keyword search or global search.
View Reference Page — Analytics Tab	EODP_VIEW_REF_FL	View pivot grid reference to Records and Fields configured in Maintain Data Privacy Settings page.
Pivot Grid Details Modal	EODP_PIVOT_DTL_SCF	View pivot grid details such as Query information and publish options for pivot grids.
View Reference Page — Integration Tab	EODP_VIEW_REF_FL	Lists the Services and Service Operations using messages that reference Record Fields configured in Maintain Data Privacy Settings page.
Integration Details Modal	EODP_IB_REF_SCF	View the details of Integration Broker messages. These are details such as message Information and Integration group references.

Maintain Category Page

Use the Maintain Category page (EODP_CTGRY_DTLS_FL) to view, modify or add a new category value.

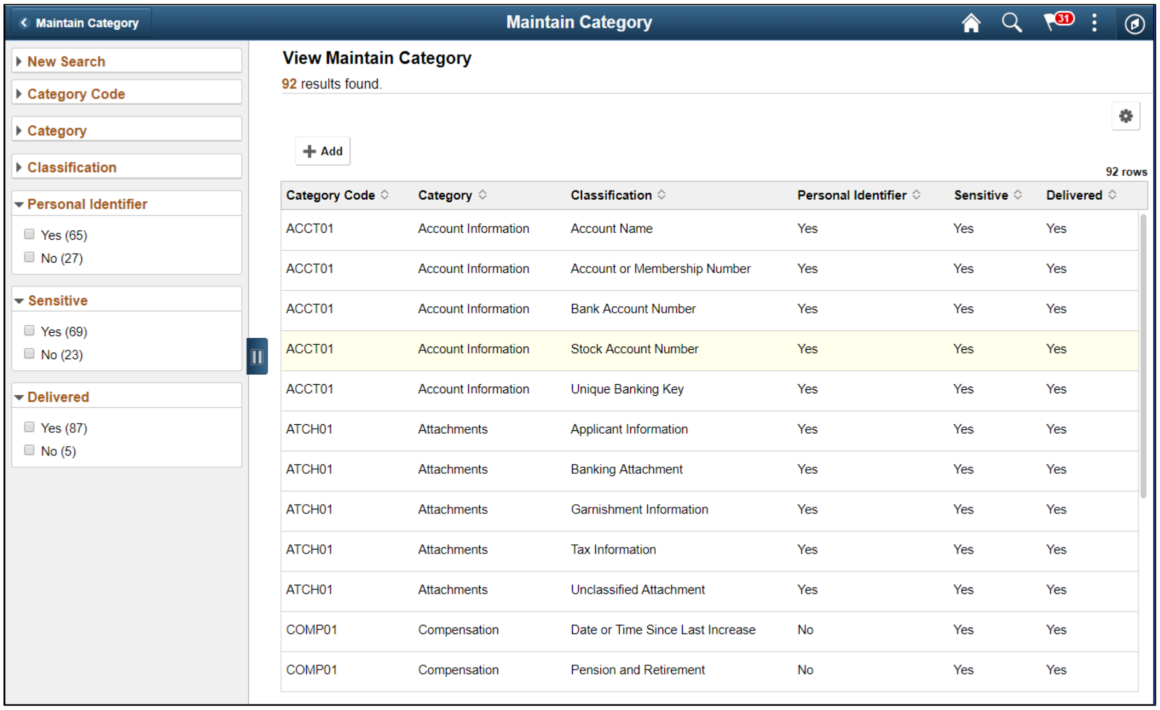
Navigation:

Enterprise Components > **Data Privacy Framework** > **Maintain Data Privacy 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.

This initial page for View Maintain Category is used to search the classifications and categories and add a new one as needed.

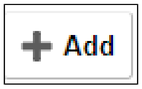


Note: System Data is delivered for Categories and Classifications. System data cannot be deleted, but it can be modified or new data added. Also the Categories being referenced in the Maintain Data Privacy Settings cannot be deleted.

The left panel lists the facets for component real time search and other options as listed:

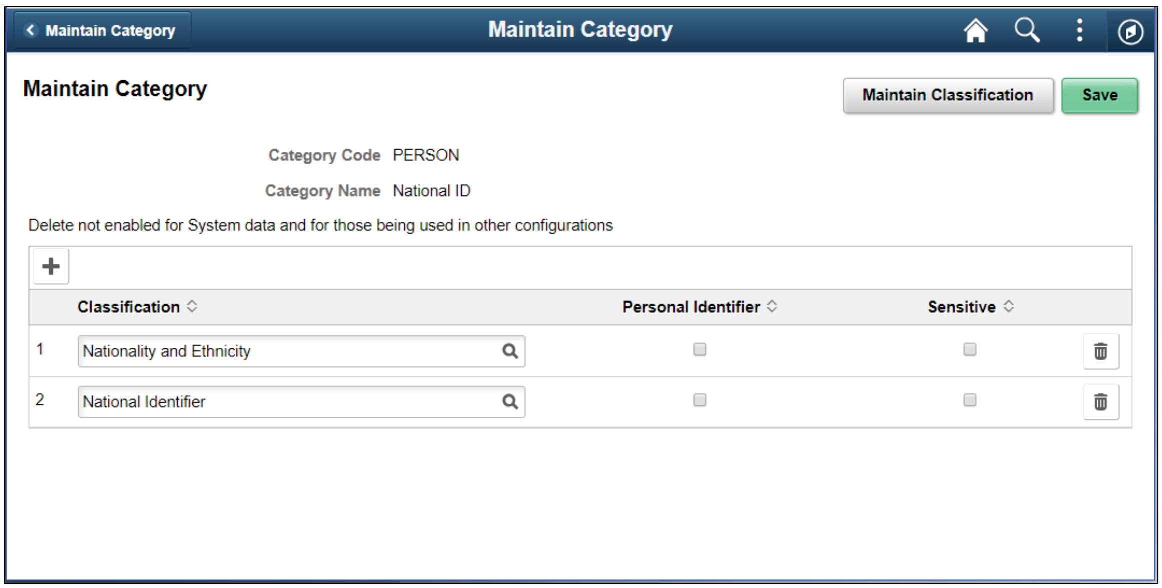
- Category Code
- Category
- Classification
- Personal Identifier
- Sensitive
- Delivered

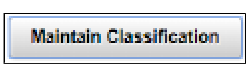
The search right panel lists all delivered categories and any categories that you have added. Delivered flag is turned on for all the Categories which are delivered as System data.

Field or Control	***Description***
	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.

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.



Field or Control	***Description***
	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

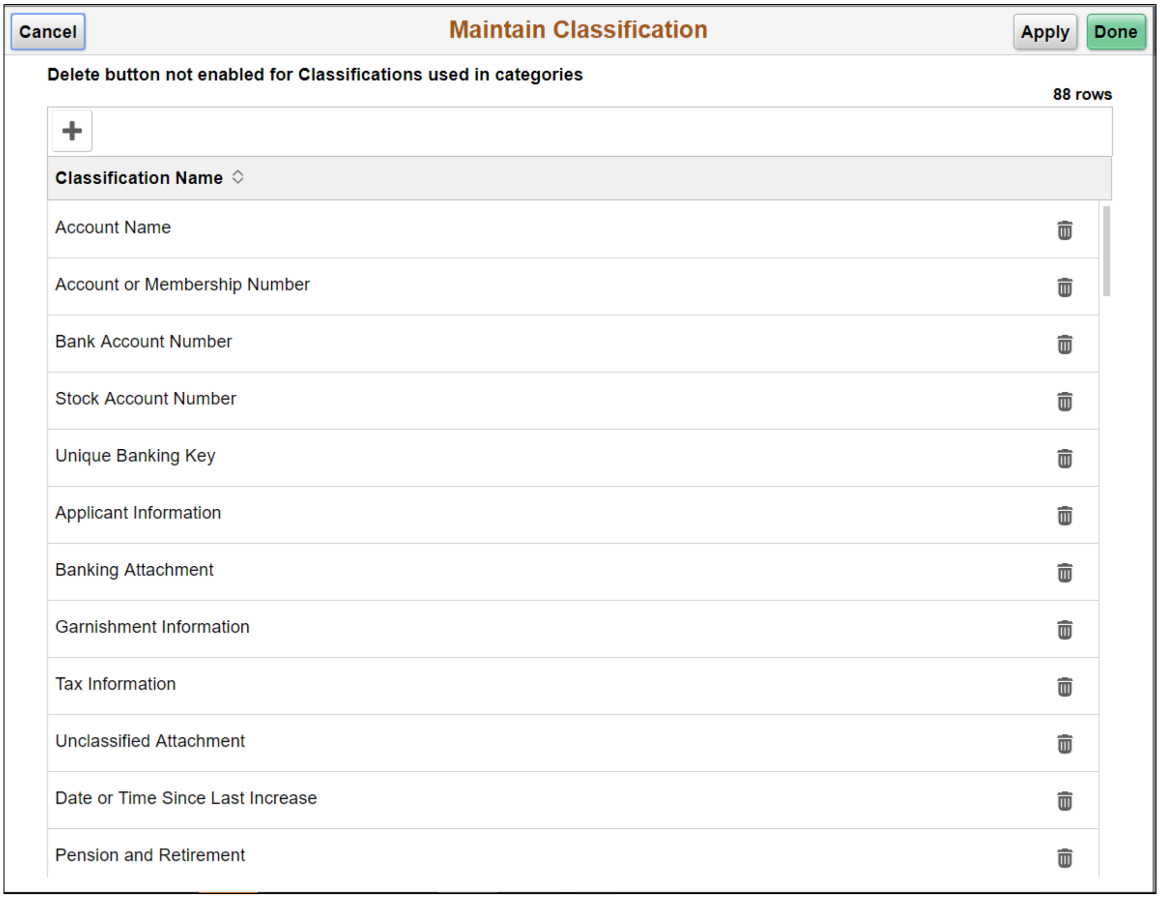
Use the Maintain Classification (EODP_CLSFCN_FL) page to define new classifications or view available classifications.

Navigation:

Enterprise Components > **Data Privacy Framework** > **Maintain Data Privacy Category**

Select the **Maintain Classification** button.

This example illustrates the fields and controls on the Maintain Classification page.



Field or Control	***Description***
	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.

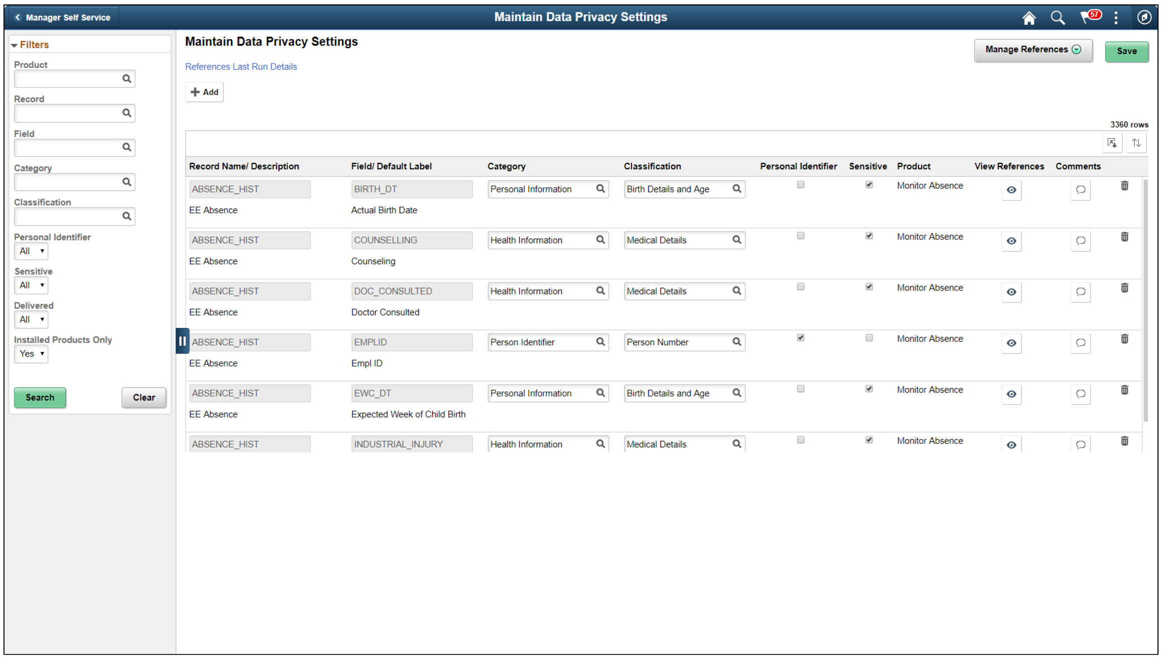
Data Privacy Attributes are mapped to Records and Fields in Maintain Data Privacy Settings Page. System data is delivered for Record Fields and their Data Privacy Attributes. You can modify Delivered information, but delete is disabled for such rows. You can add new Records and Fields to the configuration, 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**

This example illustrates the fields and controls on the Maintain Data Privacy Settings page.

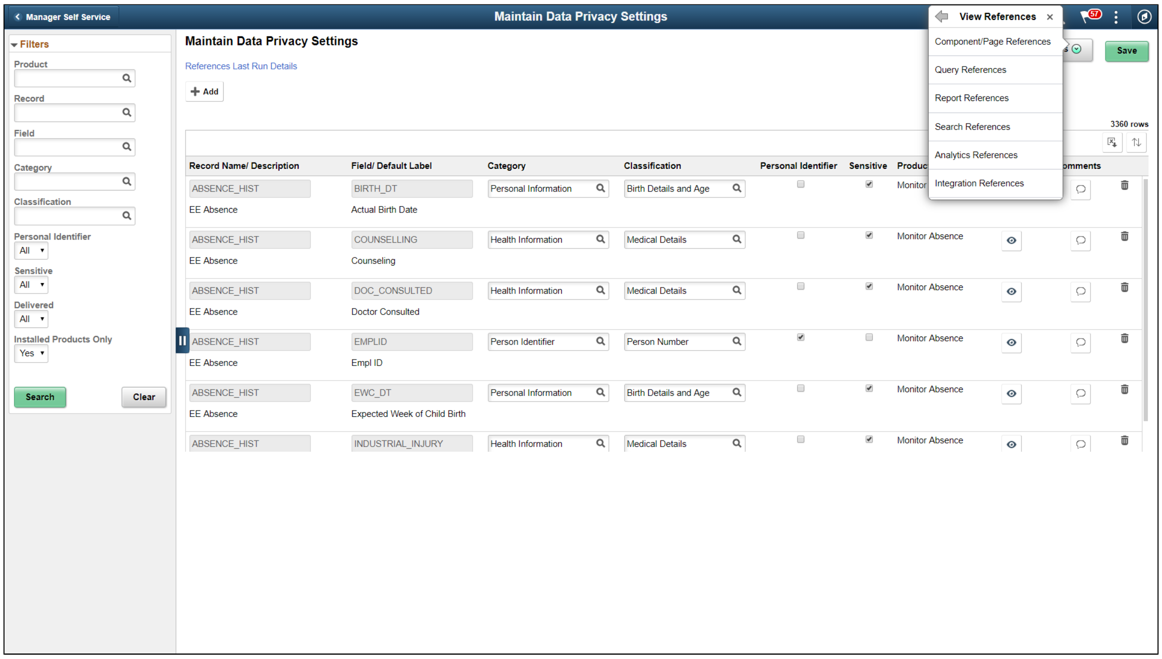


The left pane lists different filters available for Data Privacy Settings maintenance page. Available filters are:

- Product
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive
- Delivered
- Installed Products Only

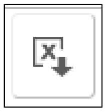
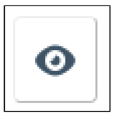
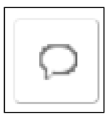
Note: By default, all Record Fields and their references are displayed in Data Privacy framework. A filter *Installed Products Only* is added to Maintain Data Privacy settings page and View References pages all tabs to display information on installed products alone. The products to be displayed are selected from the Products page (Set Up HCM, Install, Installation Table, Products). By default the option for **Installed Products Only** will be selected as **No**.

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.

Field or Control	***Description***
	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.

Field or Control	***Description***
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.

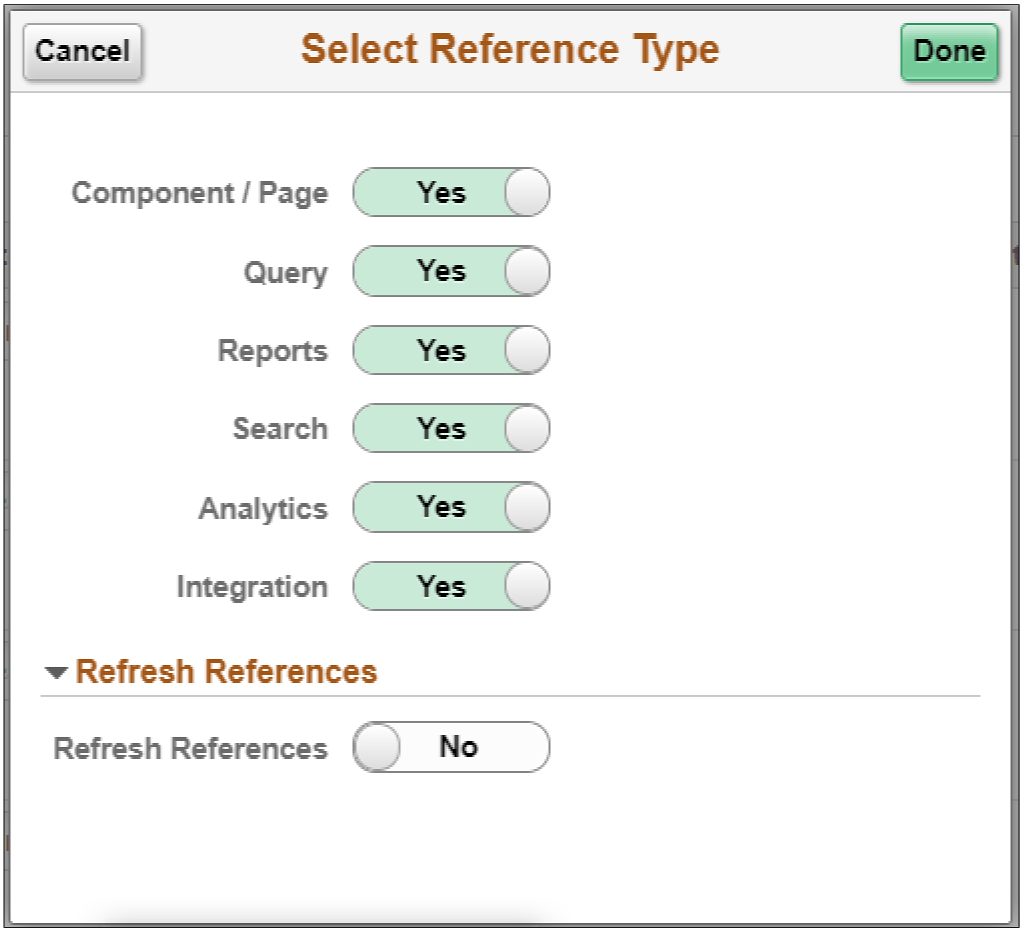
The Component / Page and Query should be selected to generate Report References. Select Refresh References to delete and reload all references except for the system data.

Navigation:

Enterprise Components > **Data Privacy Framework** > **Maintain Data Privacy Settings**

Select **Update References** from the Actions menu of the **Manage References** button.

This example illustrates the Select References page.



References Last Run Page

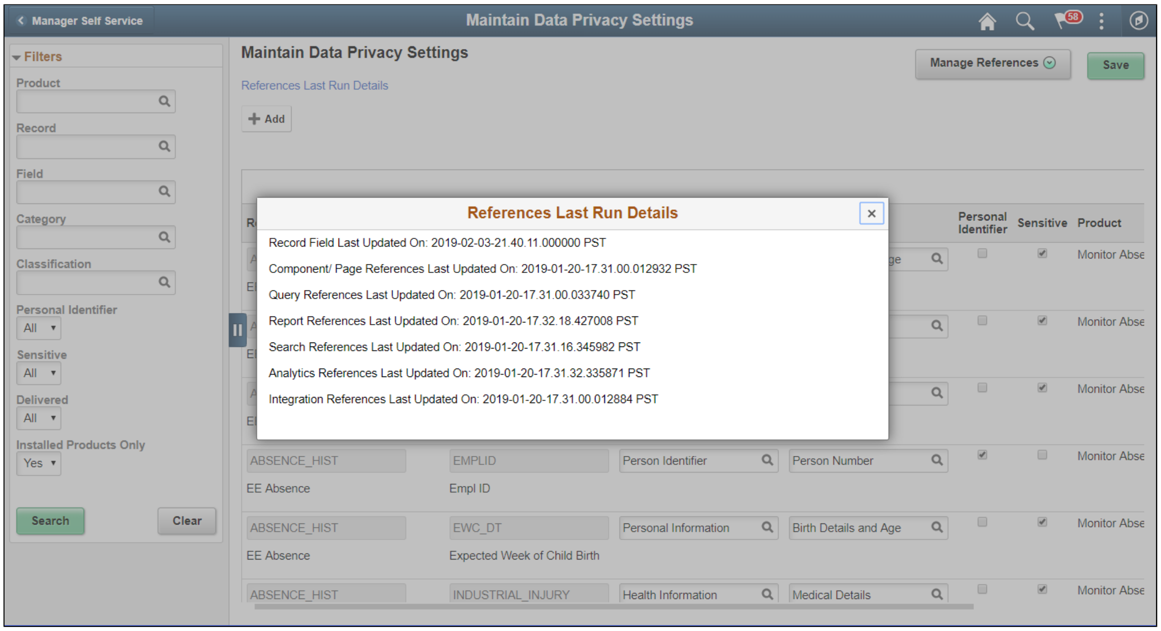
Use the Reference Last Run (EODP_RF_LSTRUN_SCF) page to view last run times of each reference type. The page also displays when Record Field information was last updated.

Navigation:

Enterprise Components > **Data Privacy Framework** > **Maintain Data Privacy Settings**

Select Reference Last Run Details link.

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.

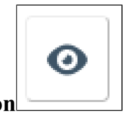
This illustration represents the comments modal for Record field.

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**

Field or Control	***Description***
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

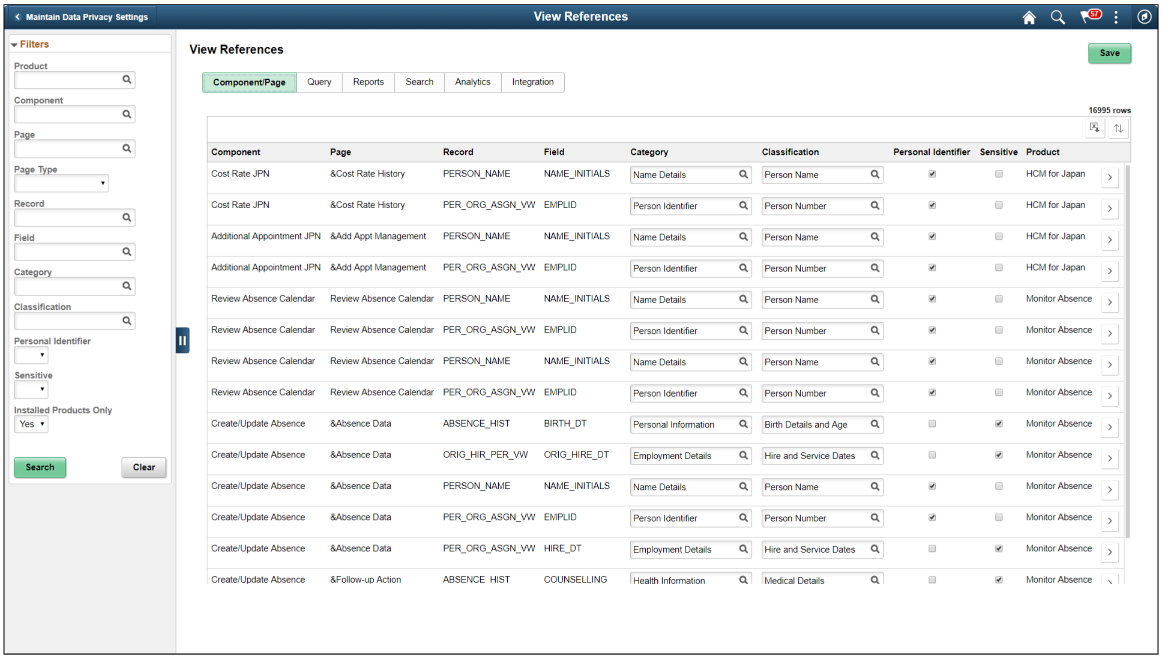
Use the Component/Page (EODP_VIEW_REF_FL) tab to view the references on Record Field References in Components and Pages.

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**

This example illustrates the fields and controls on the Component/Page tab.

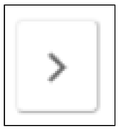


The left panel have Filters listed as follows:

- Product
- Component
- Page
- Page Type
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive
- Installed Products Only

Page Type has three options:

- **Search**: Show references of Record Fields in Component Search Records. This reference is displayed only if the Record field is a Key / Search Key / Alternate Search Key / List Box Item in the Search Record for the Component.
- **Secondary/ Popup**: Show references in Secondary Page or Popup page. Component Name is blank for this Page type.
- **Standard**: Show references in Standard pages.

Field or Control	***Description***
	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.

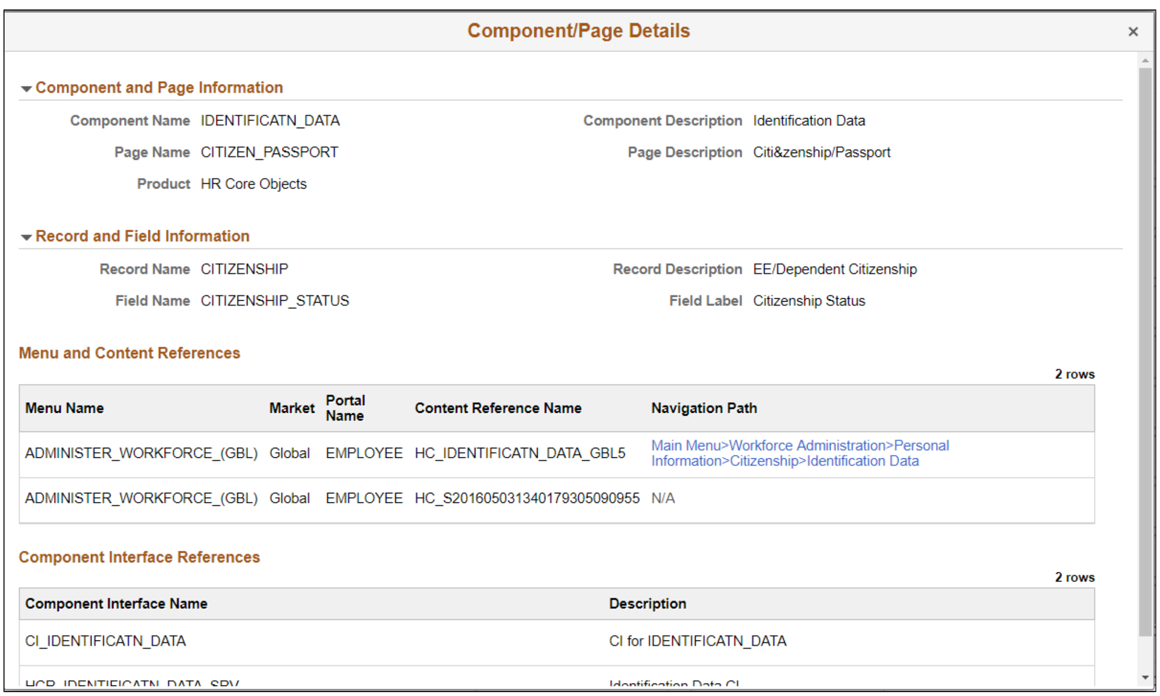
The details display portal navigation and any component interface references.

Navigation:

Enterprise Components > **Data Privacy Framework** > **View Data Privacy References**

Select the chevron in the Component/Page tab.

This example illustrates the fields and controls on the Component/Page Details.



Select the navigation link to open a new window for the particular component. For a user who do not have access to the components, the navigation link is disabled. If there is no Navigation to a Component, the navigation column shows **N/A**.

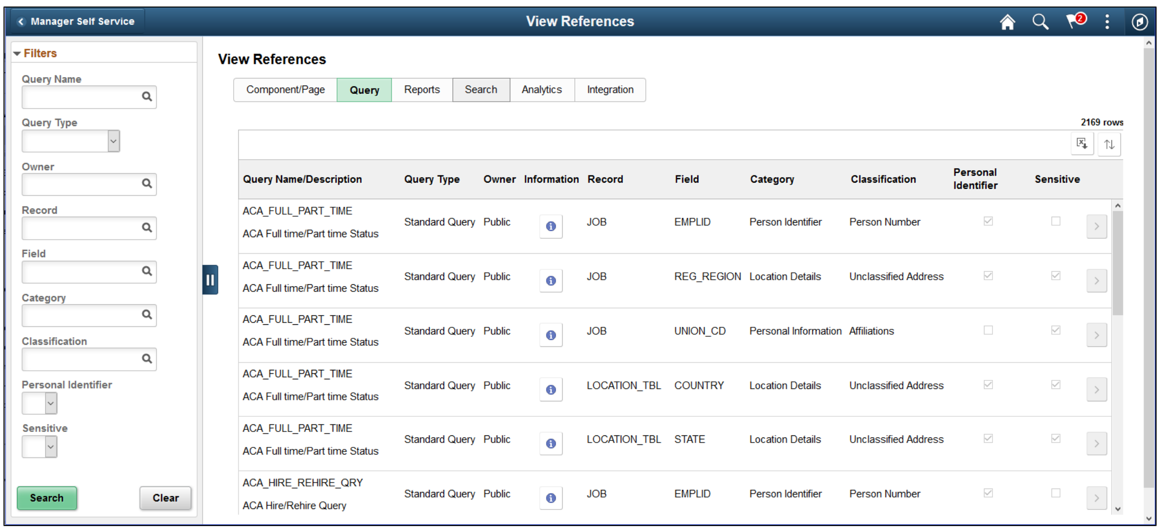
View Reference Page — Query Tab

Use the View References (EODP_VIEW_REF_FL) Query tab to view references for Record Fields in Queries, Connected Queries and Composite Queries.

Navigation:

Enterprise Components > **Data Privacy Framework** > **View References** > **Query** tab

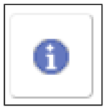
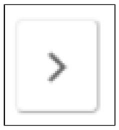
This example illustrates the fields and controls on the Query tab listing standard query results.



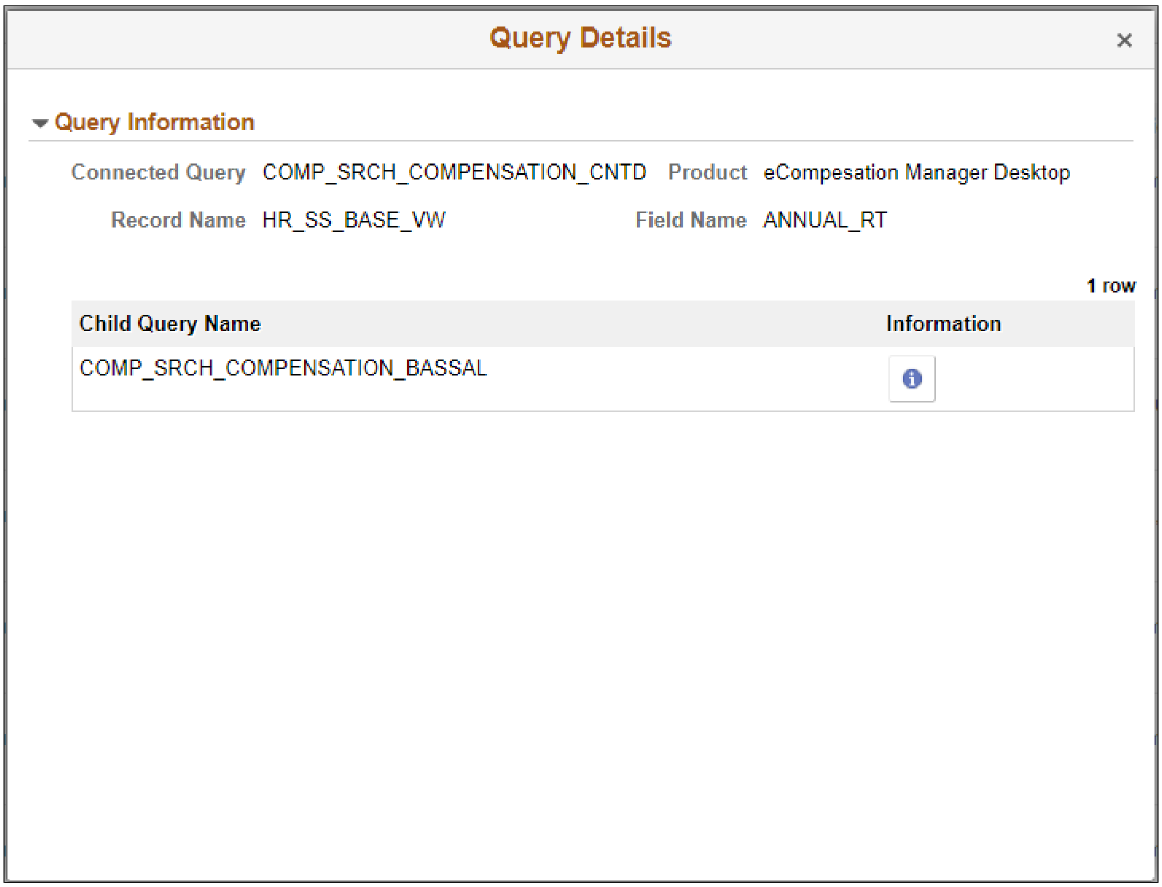
The left panel have Filters listed as follows:

- Query name
- Query Type

  Query Type has three options: Composite, Connected and Standard.
- Owner
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive

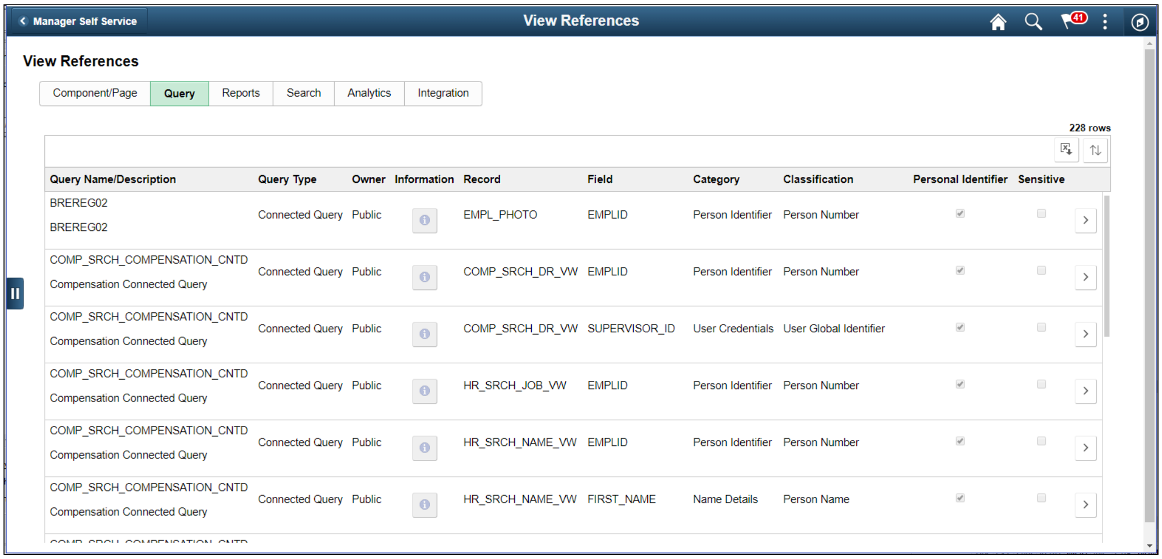
Field or Control	Description
	Select to view the usage of Record Field in the Query.
	Select to open the Query Details page. **Note:** The chevron is enabled for *Composite Query* and *Connected Query*.

This example illustrates the fields and controls in Query Details (EODP_QRY_REF_SCF) page.



Note: For connected and composite queries, the chevron is enabled, and selecting this opens the Query Details modal which displays the child queries that uses the Record Field.

This example illustrates the search result for a type of connected query.



Query Details Page

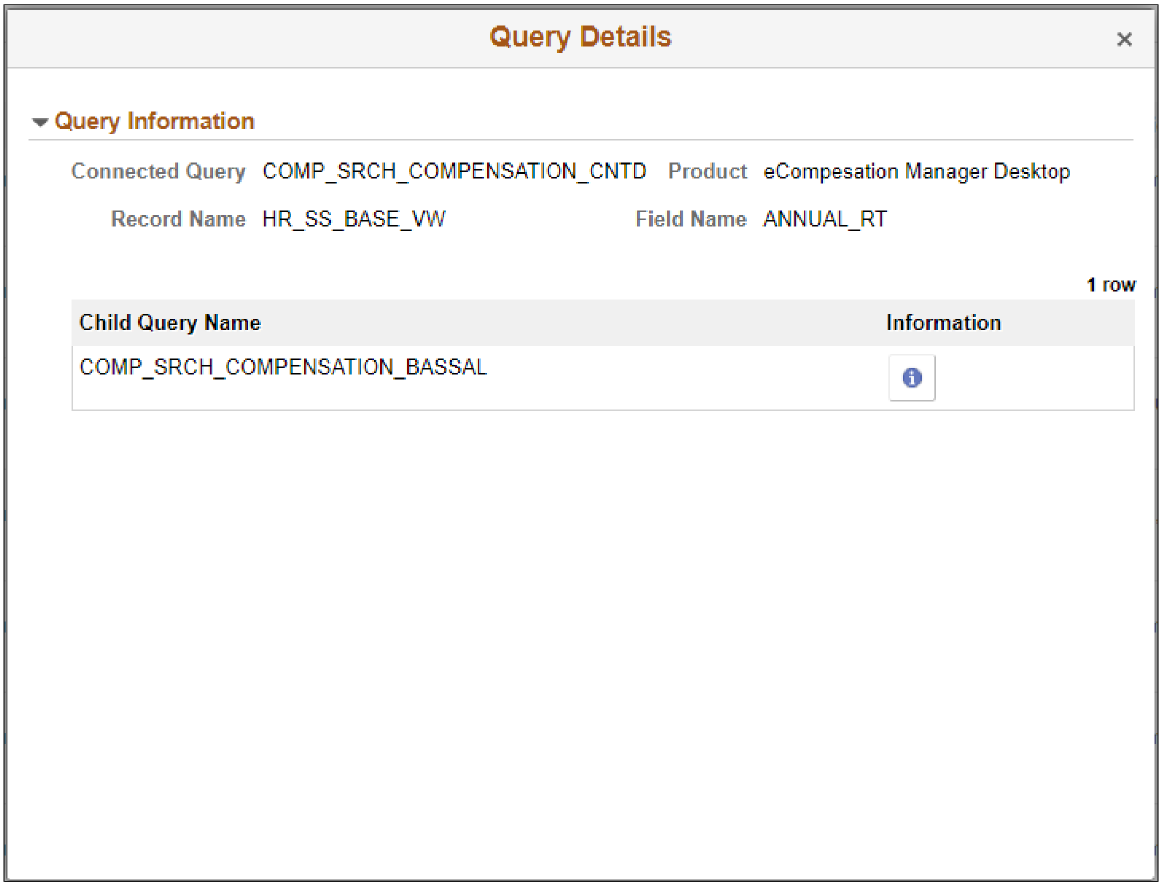
The Connected Query Details (EODP_QRY_REF_SCF) modal displays details of connected queries.

Navigation:

Enterprise Components > **Data Privacy Framework** > **View References** > **Query tab**

Select the Query Type as Connected Queries and select the chevron for details.

This example illustrates the fields and controls in Query Details (EODP_QRY_REF_SCF) page.



View Reference Page — Reports Tab

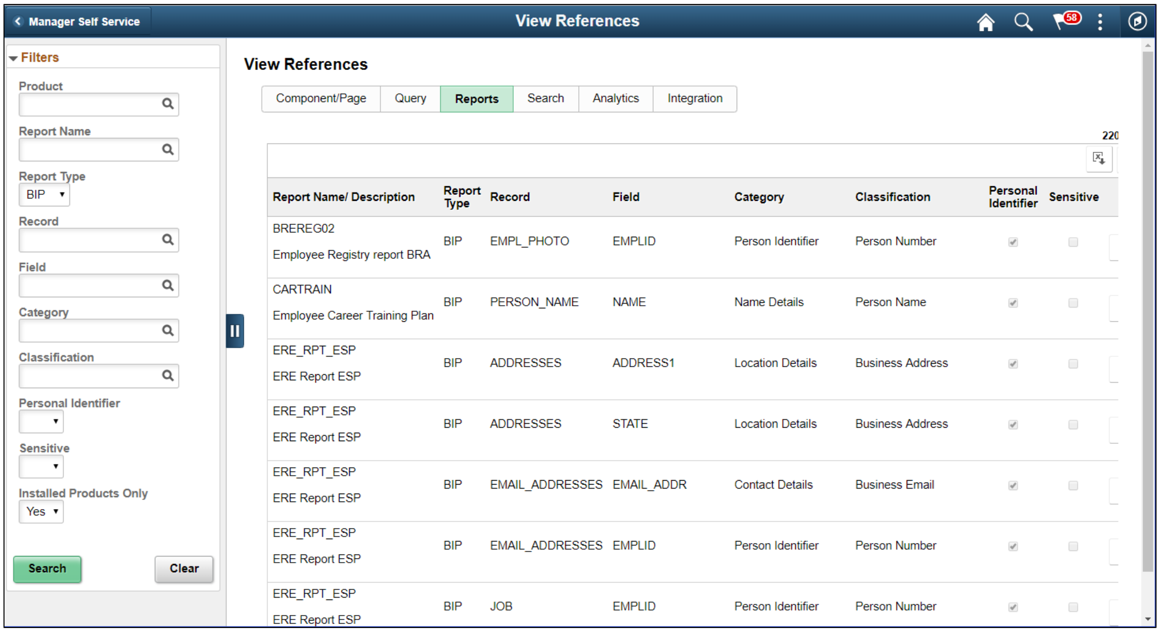
Use the View References (EODP_VIEW_REF_FL) page Reports tab to view the Report References in Business Intelligence Publisher Reports (BIP) and Structured Query Reports (SQR).

Navigation:

Enterprise Components > **Data Privacy Framework** > **View References** > **Reports tab**

Select Report Type as BIP to view references in BI Publisher Reports.

This example illustrates the fields and controls on the View References — Reports Tab for Report Type BIP.

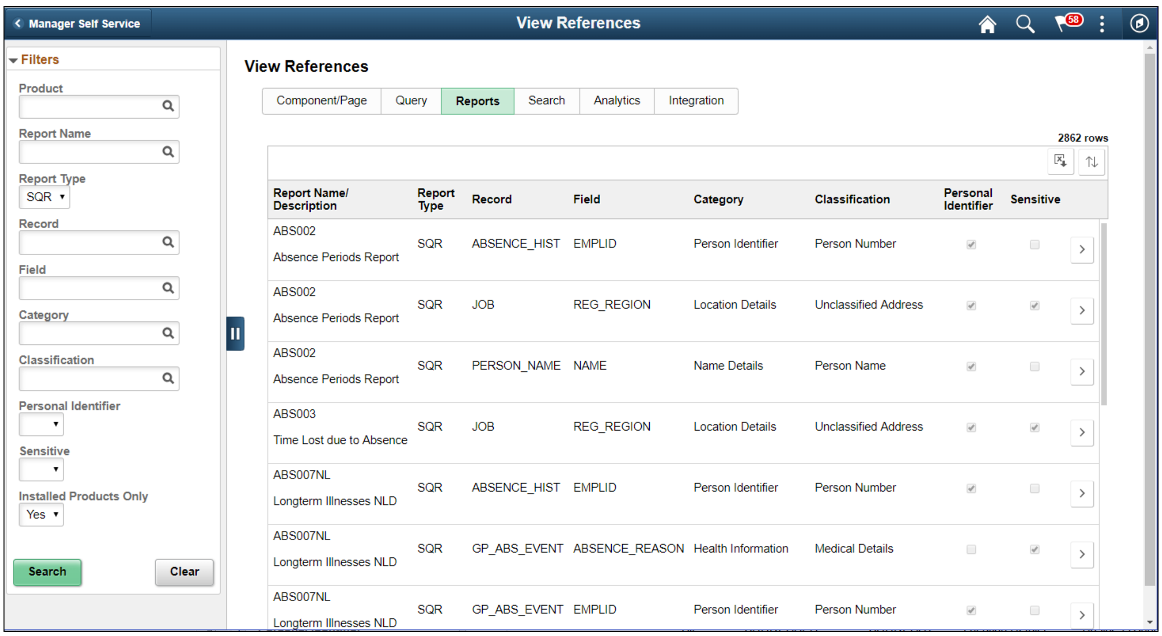


Select Report Type as SQR to view references in SQR Reports.

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.

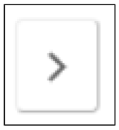


The left panel have Filters listed as follows:

- Product
- Report Name
- Report Type:

  Report Type has two options: **SQR** and **BIP** .
- Record
- Field
- Category
- Classification
- Personal Identifier

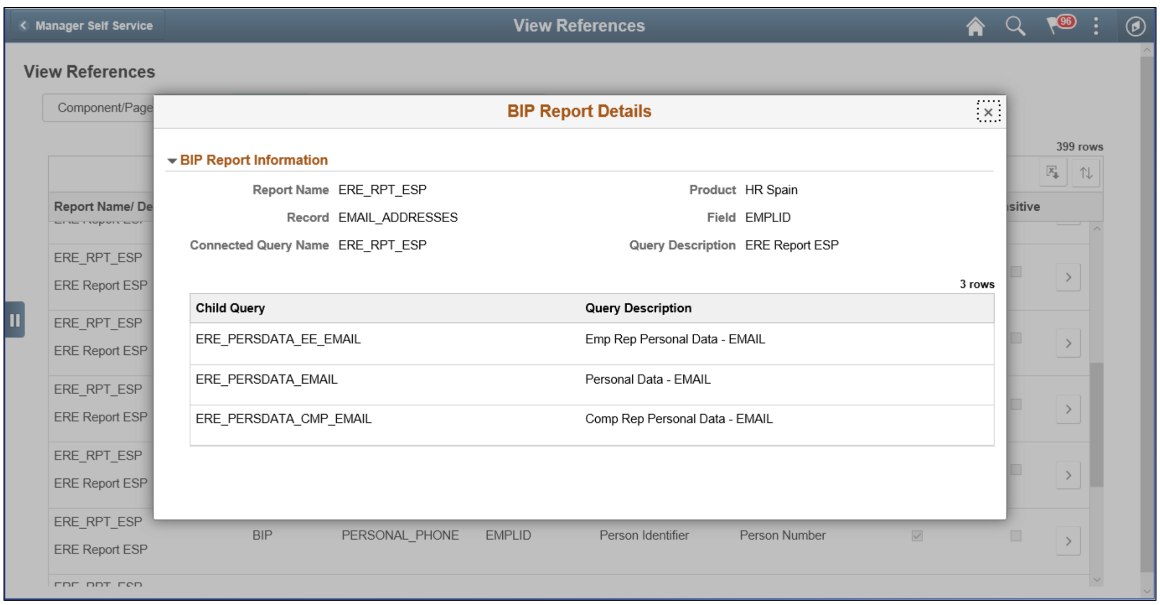
- Sensitive
- Installed Products Only

Field or Control	***Description***
	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.

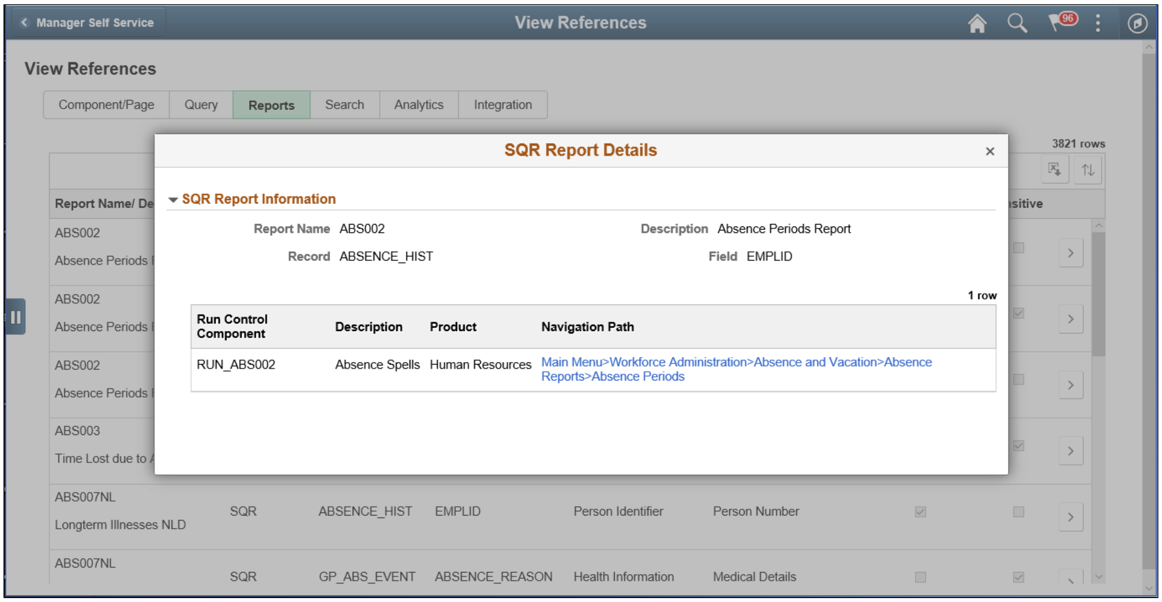
This example illustrates the BIP Report Details Modal.



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.

This example illustrates the SQR Report Details Modal.



View Reference Page — Search Tab

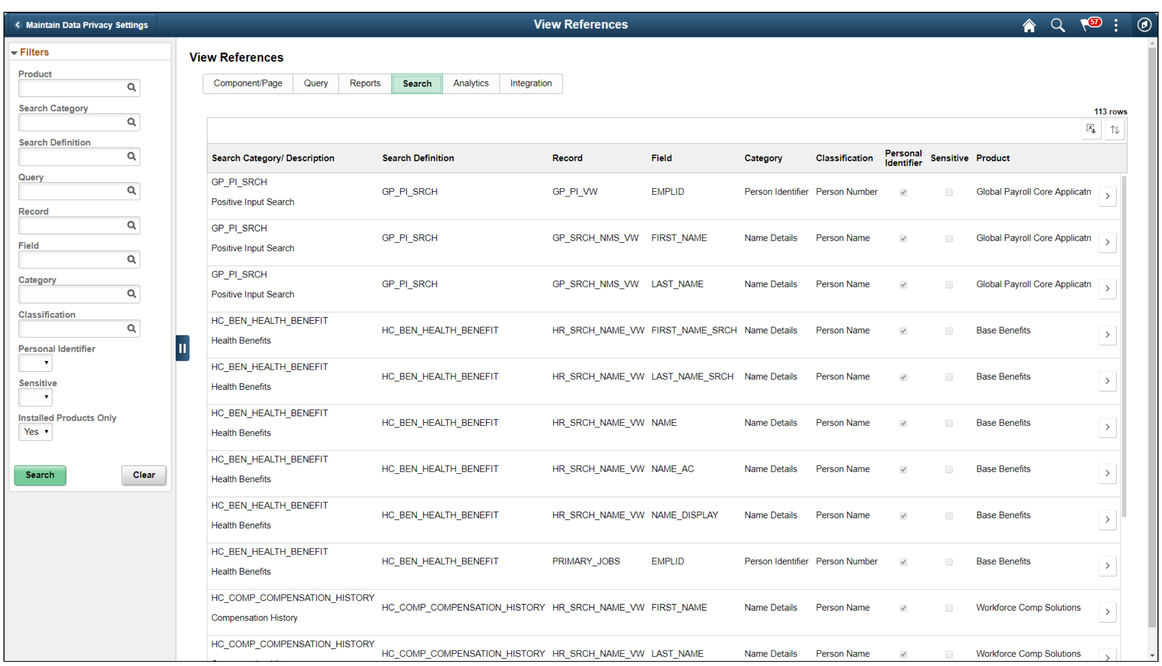
Use the View References Search (EODP_VIEW_REF_FL) tab to view references in Search Definitions and Search Categories.

Navigation:

Enterprise Components > **Data Privacy Framework** > **View References** > **Search tab**

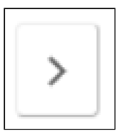
Note: Query Expressions used in Search Definitions are excluded from Search References.

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

Field or Control	***Description***
	Select to open the Search Details Modal.

Search Details Modal

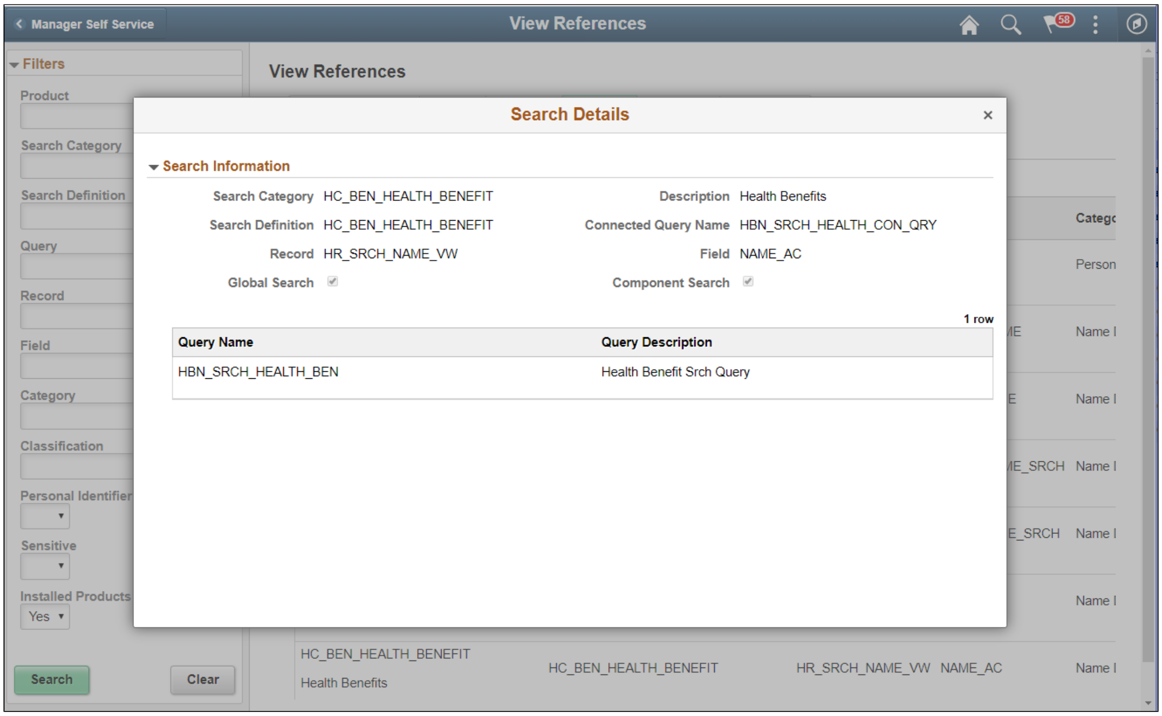
The Search Details (EODP_SRCH_DTL_SCF) modal displays details of queries in each search definition.

Navigation:

Enterprise Components > **Data Privacy Framework** > **View References** > **Search tab**

Select the chevron in the Search Results.

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.

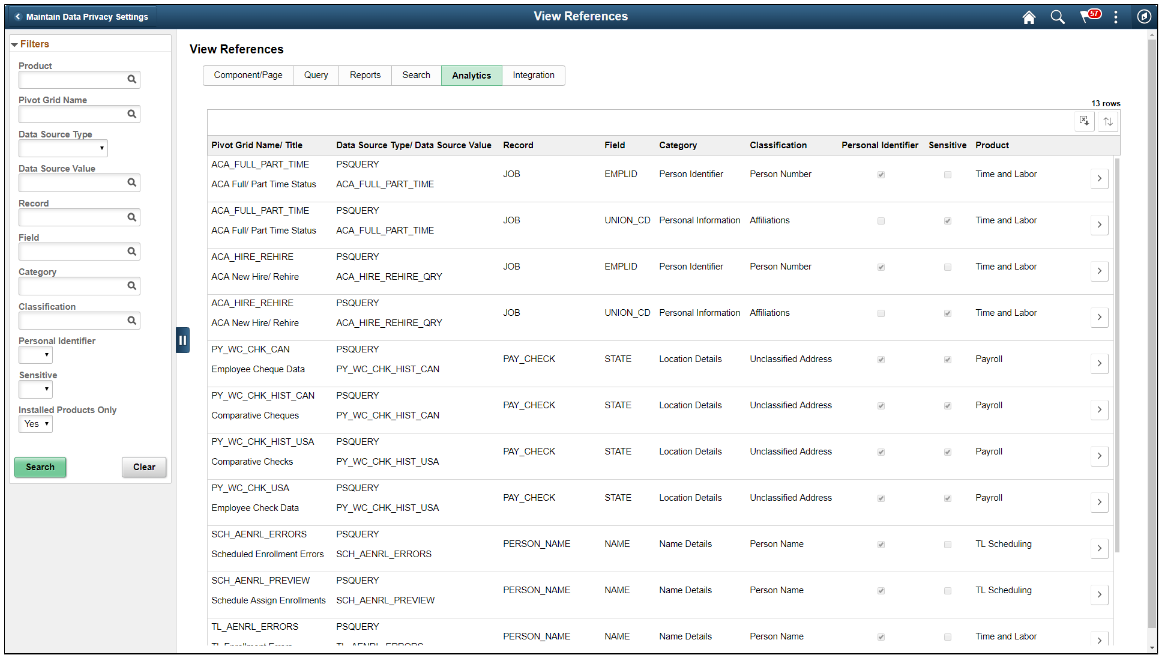
View Reference Page — Analytics Tab

The Analytics (EODP_VIEW_REF_FL) tab list references in Pivot Grids.

Navigation:

Enterprise Components > **Data Privacy Framework** > **View References** > **Analytics tab**

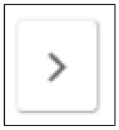
This example illustrates the fields and controls on the Analytics tab.



The left panel have Filters listed as follows:

- Product
- Pivot Grid Name
- Data Source Type

  Data Source Type has three options: **COMPONENT**, **PSCOMPQUERY** and **PSQUERY**.
- Data Source Value
- Record
- Field
- Category
- Classification
- Personal Identifier
- Sensitive
- Installed Products Only

Field or Control	*Description*
	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.

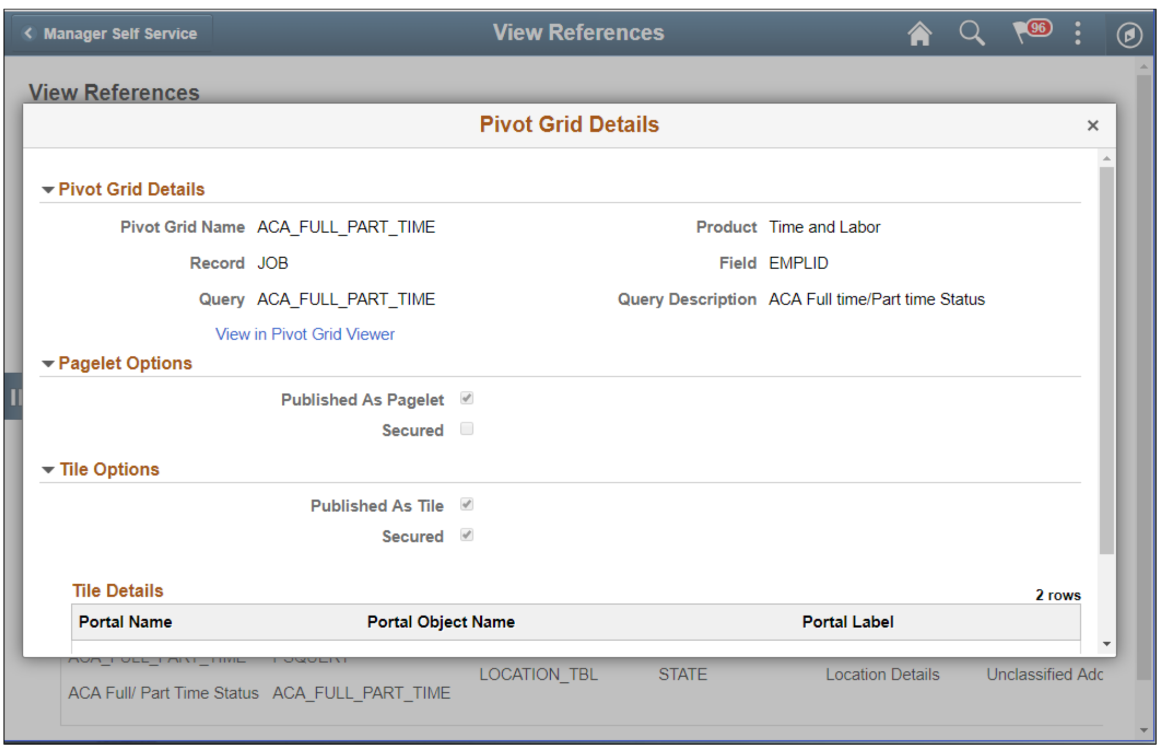
The modal also lists the tile details. You can view the Pivot Grid in Pivot Grid Viewer.

Navigation:

Enterprise Components > **Data Privacy Framework** > **View References** > **Analytics tab**

Select the chevron in the Search Results.

This example illustrates the Pivot Grid Details Modal.



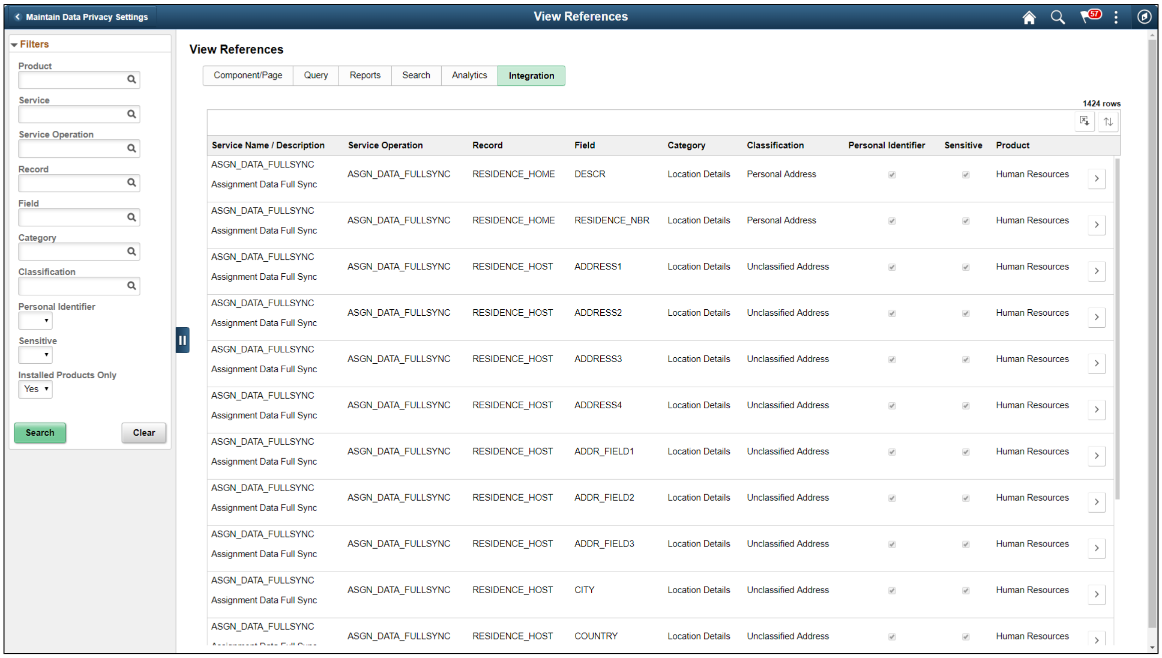
View Reference Page — Integration Tab

Use the Integration (EODP_VIEW_REF_FL) tab to view references to Integration Broker related objects.

Navigation:

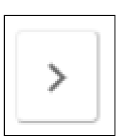
Enterprise Components > Data Privacy Framework > View References > Integration tab

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

Field or Control	*Description*
	Select to open the Integration Details Modal.

Integration Details Modal

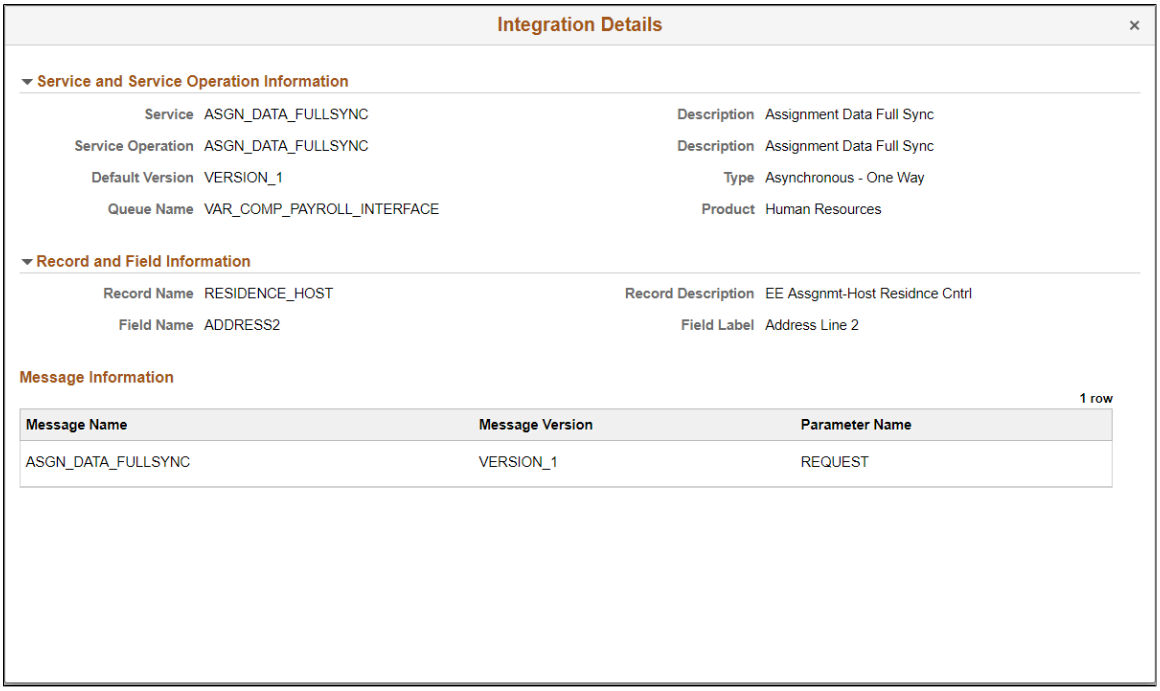
The Integration Details (EODP_IB_REF_SCF) modal displays details of Integration Broker Objects. Some details displayed are the Default Service Operation Version, Queue Name, Type and Message Information. This modal also displays the Integration Group References, if any.

Navigation:

Enterprise Components > **Data Privacy Framework** > **View References** > **Integration tab**

Select the Action icon in the Search Results.

This example illustrates the Integration Details Modal.



Enabling Query Data Masking

PeopleSoft provides the ability to protect data in PS Query and ensure that only authorized users have access to PII/sensitive data used in the query.

Note: Query masking is applicable to all the PII/Sensitive fields configured in Data Masking.

This topic provides an understanding of query masking, the pages used to enable query masking, and Query Masking Examples.

Note: Query Masking requires PeopleTools 8.58.02.

Pages Used to Enable Query Data Masking

Page Name	***Definition Name***	***Usage***
Authorized Roles Page	EODP_RRF_MNT_FL	Identify PeopleSoft Roles and define access to PII and/or sensitive fields.
Synchronize Data Page	EODP_QRYMSK_RUN_FL	Synchronize data privacy mappings defined in Data Privacy Framework with the Query system and authorized roles and their access to PII and/or sensitive fields.
Exclude Fields Page	EODP_QMSK_EXCLU_FL	Identify fields to be excluded from the Data Sync process.
System Settings Page	EODP_QRYSWITCH_FL	Enable/disable the Query Masking feature.
Query Masking Utility Page	EODP_QRMSK_UTILITY	Generate a list of users who can access PII/sensitive data.

Understanding Query Masking

Query Masking is a configurable feature that can mask PII and /or Sensitive field used in PS Queries. Only authorized users have access to view or run a PS Query that uses PII/sensitive data.

When a query is run, 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 Sensitive fields.

Note: Data Privacy Framework maintains all the PII and/or sensitive fields in the product and the roles that have access to these fields. You can mark a field as PII/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, a PII and/or sensitive field can be part of the query SELECT, WHERE or ORDER BY clause. For an unauthorized user:

- If a PII and/or sensitive field is in the SELECT statement of the PS Query, then the PII/sensitive column output is masked.

- If a PII and/or sensitive field is in the WHERE or ORDER BY clause, then PS Query stops the query process and does NOT return any output.

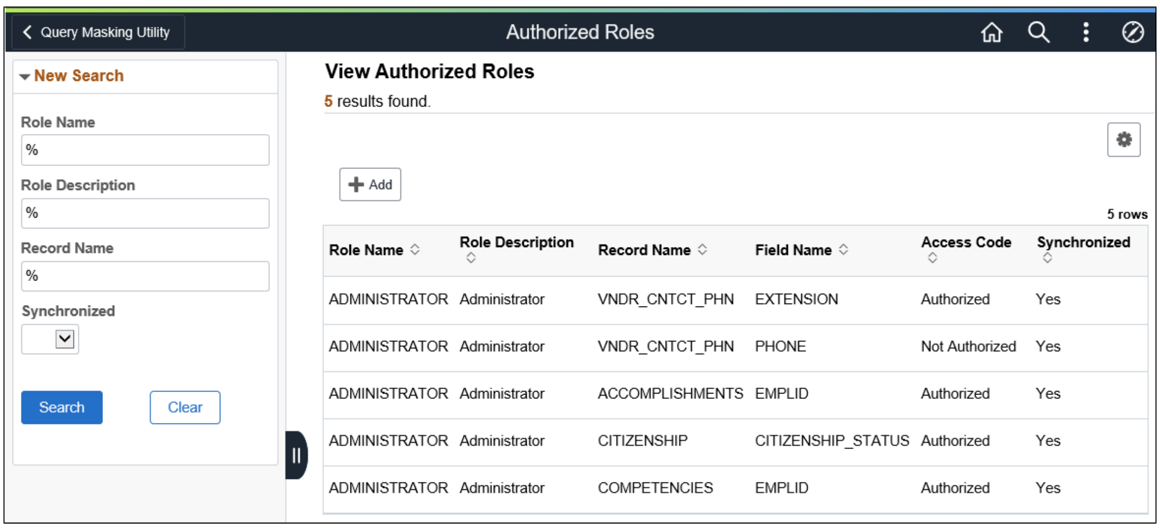
Authorized Roles Page

Use the Authorized Roles page (EODP_RRF_MNT_FL) to identify PeopleSoft Roles and define access to PII and/or sensitive fields.

Navigation:

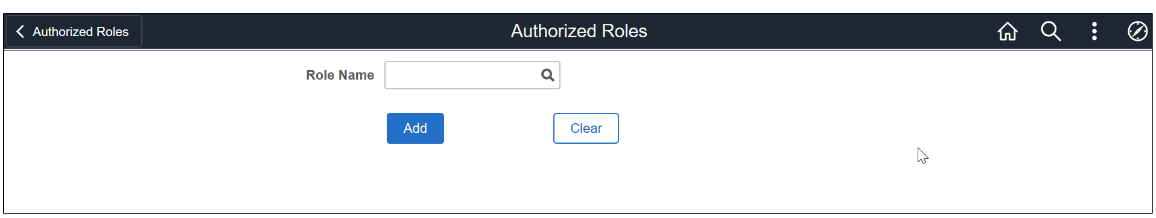
Enterprise Components > **Data Privacy Framework** > **Query Masking** > **Query Masking Authorized Roles**

This example illustrates the fields and controls on the Authorized Roles page.



To add a role, click the Add button.

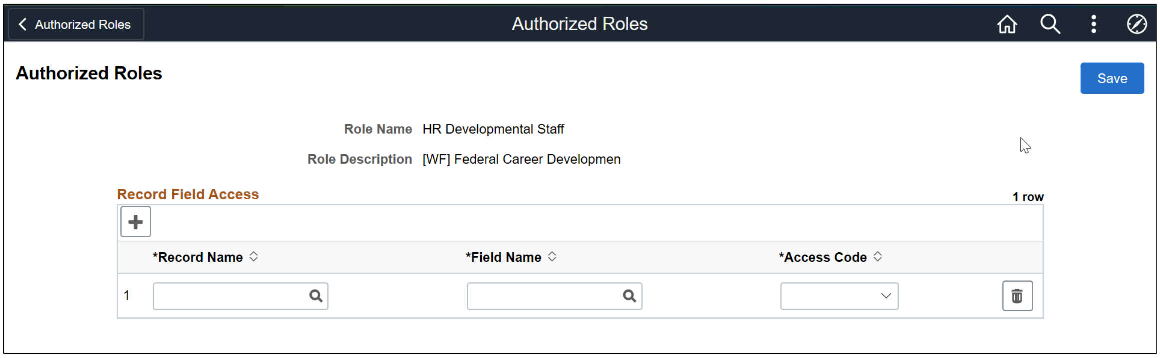
This example illustrates the Authorized Roles page when you click the Add button.



Field or Control	***Description***
Role Name	Select the role to be authorized.

To enter further details, select the role and click Add.

This example illustrates the Authorized Roles page (EODP_RRF_MNT_FL) to enter more details in a HCM database.



Field or Control	*Description*
Record Name	Select the record name of the field that displays PII/sensitive information.
Field Name	Select the field name that displays PII/sensitive information.
Access Code	Select to indicate that the role has access to this field. Options include: • **Authorized**: Indicates that the role is authorized to view the information in the specified record field. • **Not Authorized**: Indicates that the role is restricted from viewing the information in the specified record field.

Note: If a PII and/or sensitive field is not defined for any PeopleSoft role, then no users has access to view the information in PS Query.

For more information, about PS Query behavior, see Query Masking Examples .

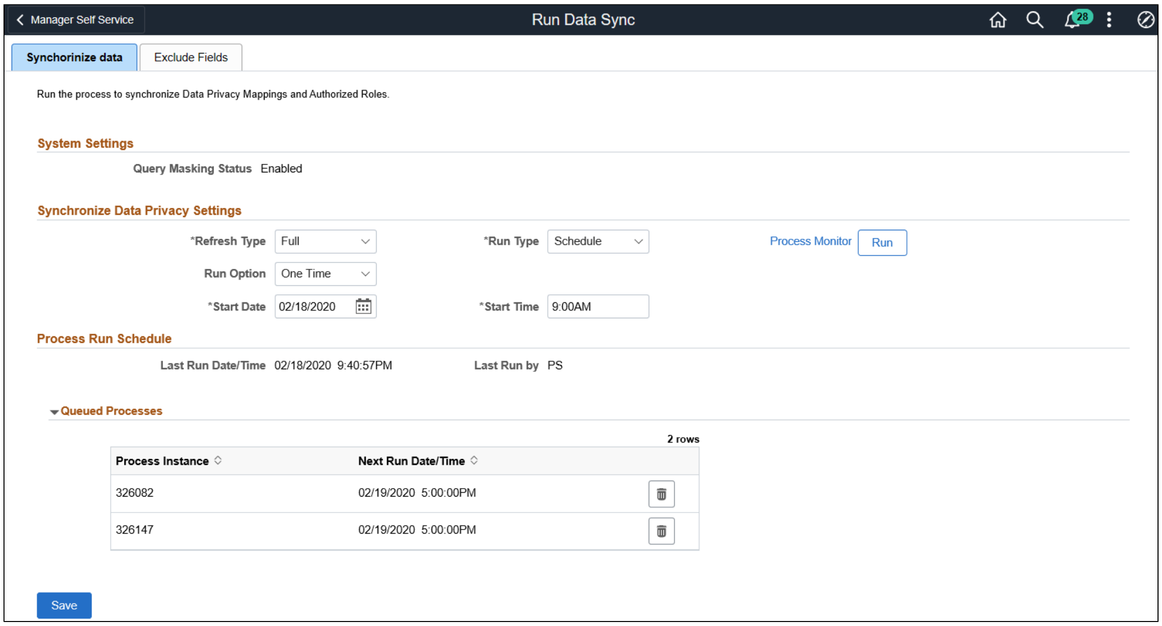
Synchronize Data Page

Use the Synchronize Data page (EODP_QRYMSK_RUN_FL) to synchronize data privacy mappings in Data Privacy Framework with the Query system and authorized roles and their access to PII and/or sensitive fields.

Navigation:

Enterprise Components > **Data Privacy Framework** > **Query Masking** > **Run Query Masking Data Sync** > **Synchronize Data**

This example illustrates the Synchronize Data page.



System Setting

Field or Control	***Description***
Query Masking Status	Displays the query masking system status. For more information about enabling or disabling the query masking functionality, see System Settings Page.

Synchronize Data Privacy Settings

Field or Control	***Description***
Refresh Type	Select to determine the synchronization method. Options are: • *Full*: Select to synchronize all PII and/or sensitive fields in the Data Privacy Framework and Authorized Roles data with the Query system. • *Incremental*: Select to synchronize the changes in the Data Privacy Framework and Authorized Roles data with the Query system.

Field or Control	*Description*
Run Type	Select to set the process run schedule. Options include: • *Run Now*: Select to run the process immediately. • *Schedule*: Select to run the process at a specified date and time or based on a defined recurrence.
Run Option	Select an option: • *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. **Note:** This field is available only if you select *Schedule* as the **Run Type**.
Process Recurrence ID	Select a Recurrence ID. **Note:** This field is only available if you select *Recurrences* as the Run Option. Recurrence ID’s are defined in the Process Scheduler.
Start Date and Start Time	Specify the start date and time for the sync process. **Note:** These fields are only available if you select *One Time* as the Run Option.

Queued Processes

This section lists the process runs that are scheduled with the date and time. A request can be cancelled.

Note: PeopleSoft recommends that you schedule this 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

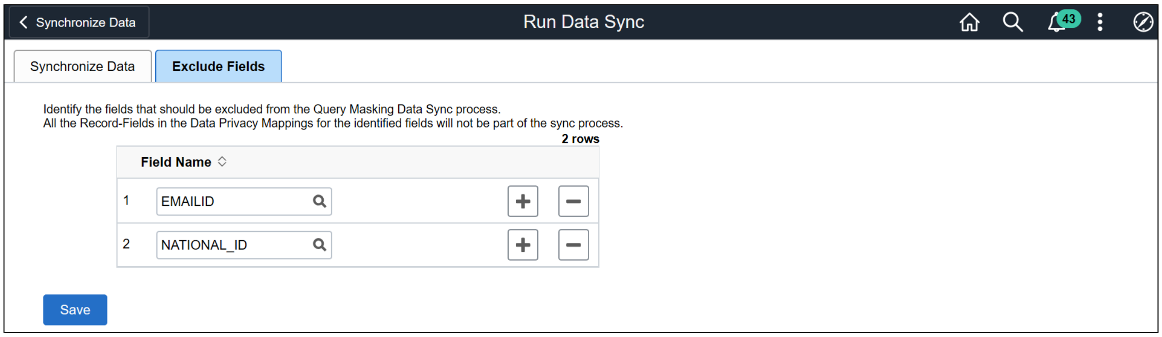
Use the Exclude Fields page (EODP_QMSK_EXCLU_FL) to identify the fields to be excluded from the Data Sync process.

Note: All record fields in the Data Privacy Mappings for the identified fields are not part of the sync process.

Navigation:

Enterprise Components > Data Privacy Framework > Query Masking > Run Query Masking Data Sync > Exclude Fields

This example illustrates the Exclude Fields page.



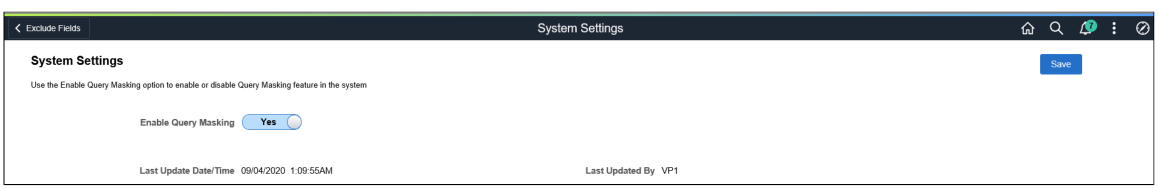
System Settings Page

Use the System Settings page (EODP_QRYSWITCH_FL) to enable or disable the Query Masking feature.

Navigation:

Enterprise Components > Data Privacy Framework > Query Masking > Query Masking System Settings

This example illustrates the fields and controls on the System Settings page.



Field or Control	***Description***
Enable Query Masking	Select Yes or No to enable or disable Query Masking feature for the system.

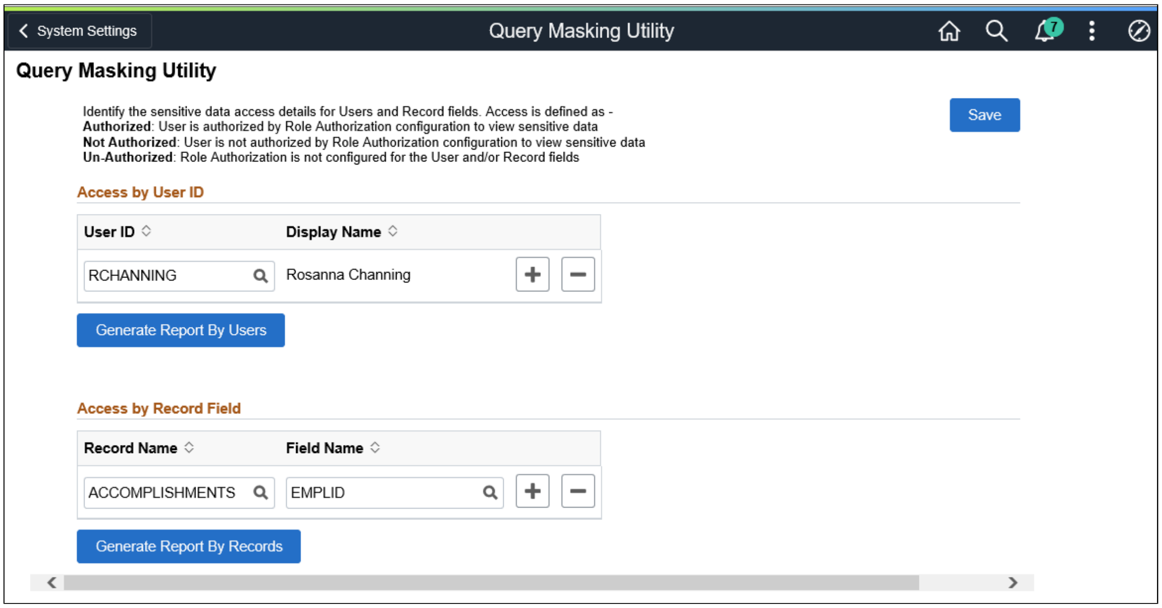
Query Masking Utility Page

Use the Query Masking Utility page (EODP_QRMSK_UTILITY) generate a list of users who have access to PII/sensitive data.

Navigation:

Enterprise Components > Data Privacy Framework > Query Masking > Query Masking Utility

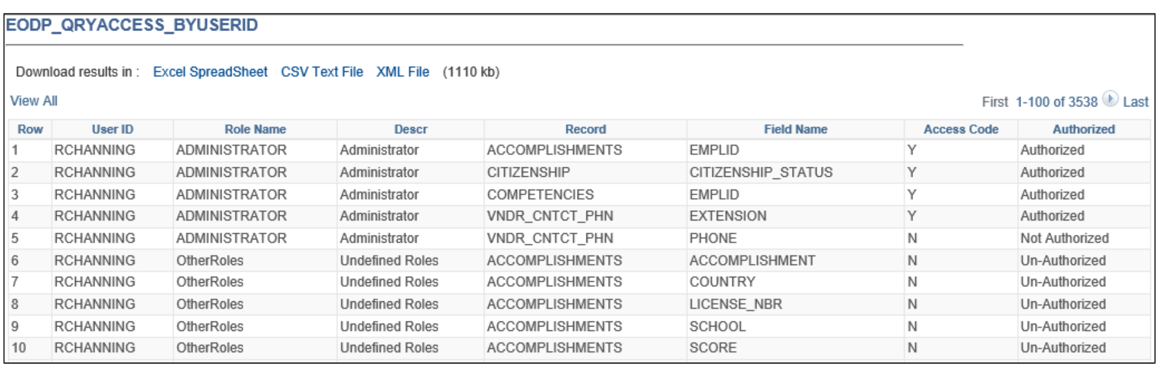
This example illustrates the fields and controls on the Query Masking Utility page.



Field or Control	***Description***
Access by User ID - User ID	Select the User ID(s) to generate the access details report.
Generate Report By Users	Select to generate PII/sensitive data access details for the selected user(s).
Access by Record Field - Record Name	Select record name of the field that displays PII/sensitive information.
Generate Report By Records	Select to generate a list of user and roles that have access to the selected record fields.

Report by Users

Report by User Access



EODP_QRYACCESS_BYUSERID

Download results in : Excel SpreadSheet CSV Text File XML File (1110 kb)

View All First 1-100 of 3538 Last

Row	User ID	Role Name	Descr	Record	Field Name	Access Code	Authorized
1	RCHANNING	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
2	RCHANNING	ADMINISTRATOR	Administrator	CITIZENSHIP	CITIZENSHIP_STATUS	Y	Authorized
3	RCHANNING	ADMINISTRATOR	Administrator	COMPETENCIES	EMPLID	Y	Authorized
4	RCHANNING	ADMINISTRATOR	Administrator	VNDR_CNTCT_PHN	EXTENSION	Y	Authorized
5	RCHANNING	ADMINISTRATOR	Administrator	VNDR_CNTCT_PHN	PHONE	N	Not Authorized
6	RCHANNING	OtherRoles	Undefined Roles	ACCOMPLISHMENTS	ACCOMPLISHMENT	N	Un-Authorized
7	RCHANNING	OtherRoles	Undefined Roles	ACCOMPLISHMENTS	COUNTRY	N	Un-Authorized
8	RCHANNING	OtherRoles	Undefined Roles	ACCOMPLISHMENTS	LICENSE_NBR	N	Un-Authorized
9	RCHANNING	OtherRoles	Undefined Roles	ACCOMPLISHMENTS	SCHOOL	N	Un-Authorized
10	RCHANNING	OtherRoles	Undefined Roles	ACCOMPLISHMENTS	SCORE	N	Un-Authorized

Report by Record

This example illustrates the Report by Record Field.

EODP_QRYACCESS_BYRFIELD- Record Field Access

Download results in : Excel SpreadSheet CSV Text File XML File (227 kb)

View All First 1-100 of 752 Last

Row	User ID	Role Name	Descr	Record	Field Name	Access Code	Authorized
1	ADIAZ	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
2	AERICKSON	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
3	AJAMES	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
4	ALEE	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
5	AMANZONI	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
6	AMARTIN	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
7	BARRY	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
8	BLOCHERTY	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
9	BMURKAMI	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized
10	BSUPER	ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Y	Authorized

Field or Control	***Description***
Authorized	This column indicates whether the user has access to the record and field combination. Options include: • **Authorized**: User is authorized by Role Authorization configuration to view PII/sensitive data. • **Not Authorized**: User is not authorized by Role Authorization configuration to view PII/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 describe Query Masking behavior.

Example 1 (FSCM)

Consider three FSCM users: User A, User B, and User C, and the roles assigned to each:

User A (VP1)	***User B (SVP1)***	***User C (FVP1)***
Administrator	Administrator	Treasurer
Bank Manager	System Administrator	Bank Manager

The Role Authorization configuration for Administer is:

This example illustrates the Authorized Roles setup for FSCM example 1.

View Authorized Roles

5 results found.

Add

5 rows

Role Name	Role Description	Record Name	Field Name	Access Code	Synchronized
ADMINISTRATOR	Administrator	VNDR_CNTCT_PHN	EXTENSION	Authorized	Yes
ADMINISTRATOR	Administrator	VNDR_CNTCT_PHN	PHONE	Authorized	Yes
ADMINISTRATOR	Administrator	ACCOMPLISHMENTS	EMPLID	Authorized	Yes
ADMINISTRATOR	Administrator	CITIZENSHIP	CITIZENSHIP_STATUS	Authorized	Yes
ADMINISTRATOR	Administrator	COMPETENCIES	EMPLID	Authorized	Yes

User A, User B and User C run this query.

This example illustrates a Query SQL.

Query SQL

```
SELECT A.SETID, A.VENDOR_ID, A.CNTCT_SEQ_NUM, TO_CHAR(A.EFFDT,'YYYY-MM-DD'), A.PHONE_TYPE, A.COUNTRY_CODE,
A.PHONE, A.EXTENSION, TO_CHAR(SYSDATE,'YYYY-MM-DD')
  FROM PS_VNDR_CNTCT_PHN A
```

The PS Query output for User A and B is:

Row	SetID	Supplier	Sequence	Eff Date	Type	Prefix	Phone	Ext
1	WCARE	HC10000	3	10/16/2015	Business Phone		713/230-0909	
2	WCARE	HC10000	2	10/16/2015	Business Phone		713/230-0909	
3	WCARE	HC10000	1	10/16/2015	Business Phone		708/613-9021	
4	WCARE	EPRO000003	1	10/16/2015	Business Phone	855	248-2208	
5	WCARE	EPRO000002	1	10/16/2015	Business Phone	888	618-8634	
6	WCARE	0000000004	1	01/01/2016	Business Phone	617	312-3456	
7	WCARE	0000000001	1	10/16/2015	Business Phone		814/694-2237	
8	SHARE	USA00HIER2	1	08/29/2012	Business Phone	444	888-9999	
9	SHARE	USA00HIER1	1	08/29/2012	Business Phone	925	444-2222	
10	SHARE	USA0000051	1	01/01/2000	Business Phone	508	4431	
11	SHARE	USA0000025	1	01/01/1900	Business Phone	800	555-1212	121
12	SHARE	USA0000011	1	01/01/1900	Business Phone	925	442-3322	
13	SHARE	USA0000010	1	04/17/2000	Business Phone	303	430-1223	
14	SHARE	UKPAPER	1	11/06/2001	Business Phone		020 7103 9800	
15	SHARE	AUSCOMP	1	11/06/2001	Business Phone		9226 2605	
16	SHARE	0000000072	1	02/02/2019	Business Phone		510/323-4045	
17	WCARE	HC10001	1	10/16/2015	Cellular Phone		612/901-9002	
18	SHARE	0000000072	1	02/02/2019	FAX			

Phone and Ext (extension) are defined as “Authorized” for the Administrator role. Therefore, FSCM User A and B can view those values in the output.

The PS Query output for User C is:

Row	SetID	Supplier	Sequence	Eff Date	Type	Prefix	Phone	Ext
1	WCARE	HC10000	3	10/16/2015	Business Phone		************************	******
2	WCARE	HC10000	2	10/16/2015	Business Phone		************************	******
3	WCARE	HC10000	1	10/16/2015	Business Phone		************************	******
4	WCARE	EPRO000003	1	10/16/2015	Business Phone	855	************************	******
5	WCARE	EPRO000002	1	10/16/2015	Business Phone	888	************************	******
6	WCARE	0000000004	1	01/01/2016	Business Phone	617	************************	******
7	WCARE	0000000001	1	10/16/2015	Business Phone		************************	******
8	SHARE	USA00HIER2	1	08/29/2012	Business Phone	444	************************	******
9	SHARE	USA00HIER1	1	08/29/2012	Business Phone	925	************************	******
10	SHARE	USA0000051	1	01/01/2000	Business Phone	508	************************	******
11	SHARE	USA0000025	1	01/01/1900	Business Phone	800	************************	******
12	SHARE	USA0000011	1	01/01/1900	Business Phone	925	************************	******
13	SHARE	USA0000010	1	04/17/2000	Business Phone	303	************************	******
14	SHARE	UKPAPER	1	11/06/2001	Business Phone		************************	******
15	SHARE	AUSCOMP	1	11/06/2001	Business Phone		************************	******
16	SHARE	0000000072	1	02/02/2019	Business Phone		************************	******
17	WCARE	HC10001	1	10/16/2015	Cellular Phone		************************	******
18	SHARE	0000000072	1	02/02/2019	FAX		************************	******

User C does not have the Administrator role, therefore the Phone and Ext (extension) column values are masked.

Note: The **Phone** and **Ext** (extension) column values are masked as these fields are not defined as "*Authorized*" in the role authorization setup for the Treasurer and Bank Manager roles.

Example 2 (HCM)

Consider User A, User B, and User C run this query on a HCM database:

User A	***User B***	***User C***
HR Administrator	HR Administrator	Payroll Administrator
Payroll Administrator	Benefits Administrator	Benefits Administrator

The Authorized Role page is configured:

This example illustrates the Authorized Roles page.

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

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' ))
```

This PS Query uses a PII and/or sensitive field ETHNIC_GRP_CD in the WHERE clause.

User A, User B and User C are not assigned to roles that authorizes access the ETHNIC_GRP_CD field. Unlike the first query, PS Query stops the query and returns an error stating ‘ You have insufficient access to retrieve this data’.

This PS Query behavior protects PII/sensitive information.

Example 3 (HCM)

Consider the same HCM users from the previous example.

In this example, for the HR Administrator role, the Role Authorization configuration is:

Authorized Role 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

The PERSON.BIRTHCOUNTRY has an access code “Not Authorized”. This specification restricts all users with HR Administrator role from accessing the record field information.

Note: All other users who do not have the HR Administrator role can access the information.

When User A, User B and User C run the query, User A and User B do not have access to PERSON.BIRTHCOUNTRY field.

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, User C does not have the HR Administrator role, and can view the Birth Country.

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	*	*

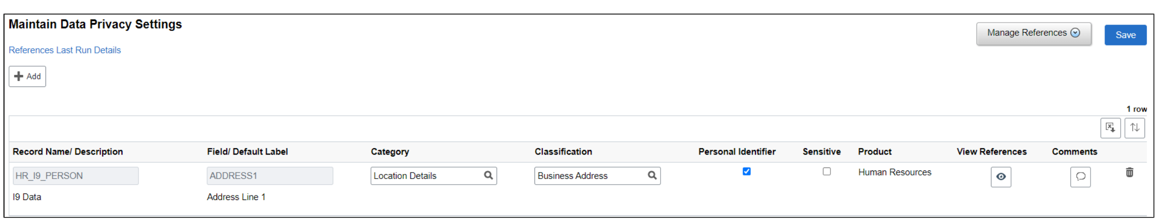
Note: PeopleSoft recommends that all users and their associated roles are reviewed in detail before setting a “Not Authorized” access.

Example 4 (HCM Subrecord Fields Masking)

Consider the same users from the previous HCM examples.

In this example, the Maintain Data Privacy Settings page is configured for HR_I9_PERSON:

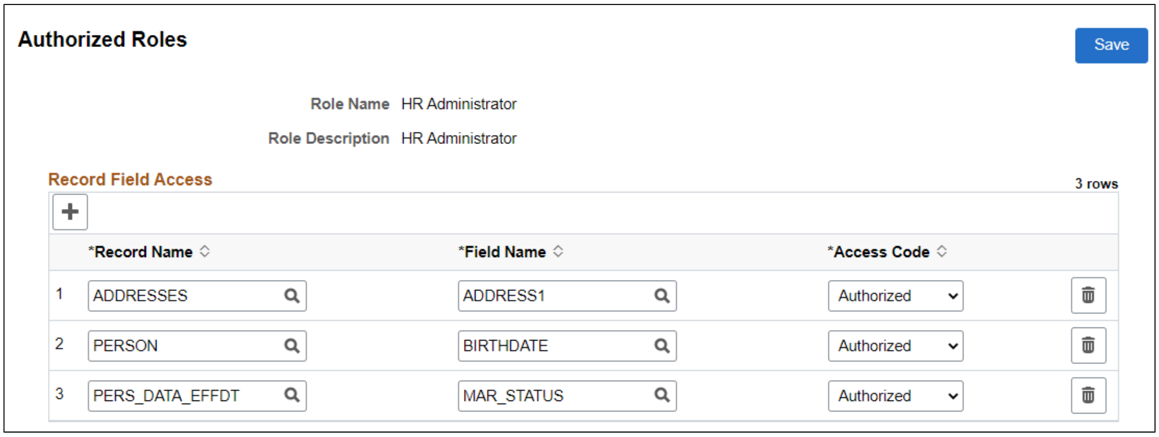
Maintain Data Privacy Settings for HR_I9_PERSON



If Role Authorization is not configured, then because the ADDRESS1 field in both the ADDRESSES record and HR_I9_PERSON are from the ADDRESS_SBR sub-record, the ADDRESS1 field from both the records are masked.

This Role Authorization configuration for the HR Administrator role allows Users A and B to see the ADDRESS1 field from the ADDRESSES record:

Role Authorization configuration for the HR Administrator role:



Query:

Query SQL

```
SELECT A.EMPLID, A.ADDRESS1
  FROM PS_ADDRESSES A
```

When User A, User B, and User C run the query, User A and User B have access to the Address1 field.

Example 4 Results User A and User B

Row	ID	Address 1
1	L00008	4359 Valentino Avenue
2	L00008	4359 Valentino Avenue
3	L00008	4359 Valentino Avenue
4	L00009	4443 Robin Lane
5	L00009	4443 Robin Lane
6	L00009	4443 Robin Lane
7	L00010	4367 Stone Cliff Ridge
8	L00010	4367 Stone Cliff Ridge
9	L00010	4367 Stone Cliff Ridge
10	L00010	4367 Stone Cliff Ridge
11	L00010	4367 Stone Cliff Ridge

Example 4 Results User C

Row	ID	Address 1
1	L00008	**
2	L00008	**
3	L00008	**
4	L00009	**
5	L00009	**
6	L00009	**
7	L00010	**
8	L00010	**
9	L00010	**

Chapter 15

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.

Reviewing Delivered Security Changes

Change Packages include steps to import delivered security related changes into your target environment. Once these changes are imported you should review the delivered changes to determine whether you would like each change to be processed.

- Menus, see Manage Menus Page.
- Roles - see Manage Roles Page.
- Permission Lists - see Manage Permissions Page.

Each delivered change defaults with a status of *Imported* and a **Process Flag** selected (turned ON). If you do not want the change applied to your target environment, you must clear the **Process Flag** check box and select **Save** on the page. Rows of data that do not have the **Process Flag** check box select are not applied to your target environment in subsequent steps of the Change Package.

See the Manage Menus Page, which illustrates that several menus have been imported and have a status of *Imported*.

If you do not wish to update your target environment with a delivered change, clear the **Process Flag** check box for the row of data and click **Save**. This updates the status to *Changed* and the row of data is ignored in the subsequent steps executed in your Change Package.

Once you have reviewed all of the delivered changes for Menus, Roles, and Permissions, return to the Change Assistant and mark the Review the Changes in Security Tool step as Complete and continue with the Change Package.

Configuring Metadata for Security Automation

There are three metadata pages to set security for Permissions, Roles, and Menus.

Pages Used to Configure Metadata for Security Automation

Page Name	*Definition Name*	*Usage*
Manage Permissions Page	EOPM_SUPD_PERM	Set security metadata for new permissions or change the security for existing permissions.
Manage Roles Page	EOPM_SUPD_ROLE	Set security metadata for new roles or change the security for existing roles.
Manage Menus Page	EOPM_SUPD_MENU	Set security metadata for new menus or change the security for existing menus.

Common Definitions

This table provides common fields and definitions.

The fields on this page may be display only or open fields depending on whether you are importing the data from an update image, or adding a row. The field or control descriptions use *Displays* for imported data and *Enter*, or *Select* for added rows.

Field or Control	*Description*
Status	Applied - Displays when an AE change is successfully applied. Changed - Displays when an existing data is changed. Error - Displays when the change is not applied successful. Imported - Displays when changes are to be imported via Change Assistant. New - Displays when new data is entered. Tested - Displays when Permission List updates are applied in Test mode.

Field or Control	*Description*
Bug Number	Displays the Bug ID that delivered the change in an Update Image.
Process Flag	Select the check box to apply the specified changes to your environment.
Description (Additional Information tab)	Displays the description of the updates being applied.
Updated by user (Additional Information tab)	Displays the user name who added or updated the row.
+/-	Add or remove rows from the grid.

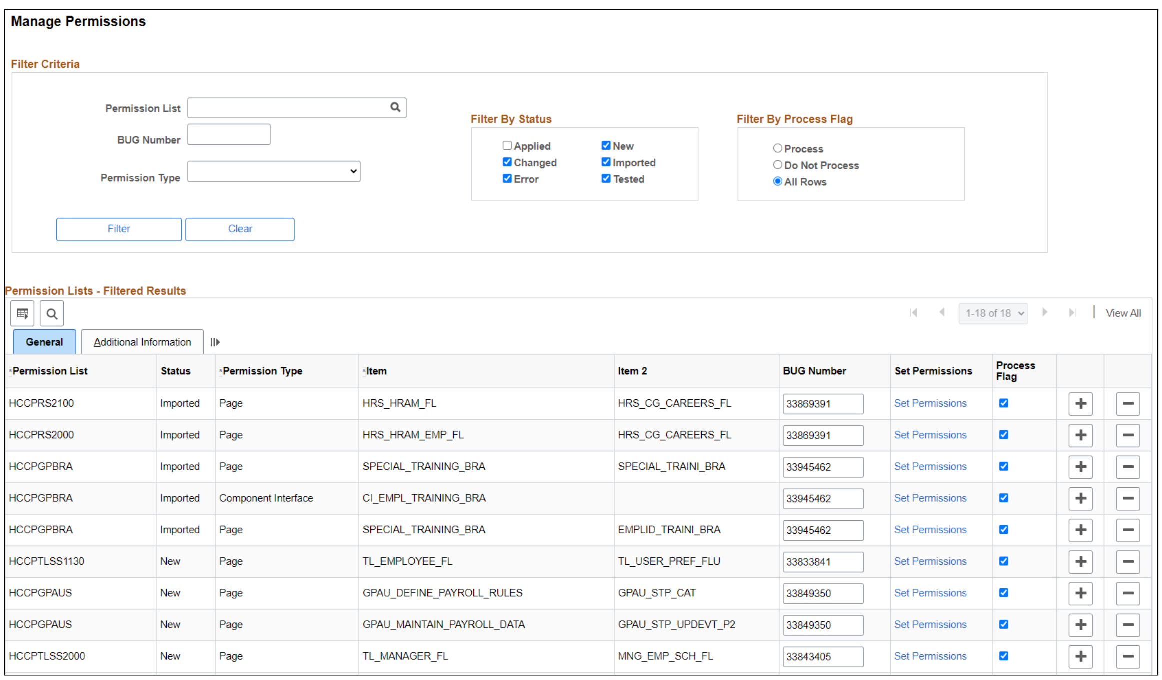
Manage Permissions Page

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 Sec Deploy Permission**

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



Users can filter on existing rows of the metadata. Filtering can be done based on:

- Permission List

- Bug Number
- Permission Type
- Status
- Filter By Process Flag

The following are the field definitions for the permission lists:

Field or Control	***Description***
Permission List	Enter the Permission List that security updates are to be applied.
Status	Applied - Displays when an AE change is successfully applied. Changed - Displays when an existing data is changed. Error - Displays when the change is not applied successful. Imported - Displays when changes are to be imported via Change Assistant. New - Displays when new data is entered. Tested - Displays when Permission List updates are applied in Test mode.
Permission Type	Enter the type of permission for the metadata. Available options are: • Application Services • Autom. Config Template • Data Migration • Page • Component Interfaces • Query Trees and Access Group Permission • Search Groups • Process Groups and Process Profile Permissions • Web Libraries • Web Services
Item	Displays the name for the corresponding Menu/CI/Query Tree/Search/Application Service/ACM Template based on permission type.

Field or Control	***Description***
Item 2	Displays if the **Permission Type** is *Page*, *Application Services*, or *Web Library*.
Bug Number	Displays the Bug ID that deliverd the change in an Update Image.
Set Permissions	Select to access the Set Permissions page. Depending on the Permission type, a different modal window appears.
Process Flag	Select the check box to apply the specified changes to your environment.

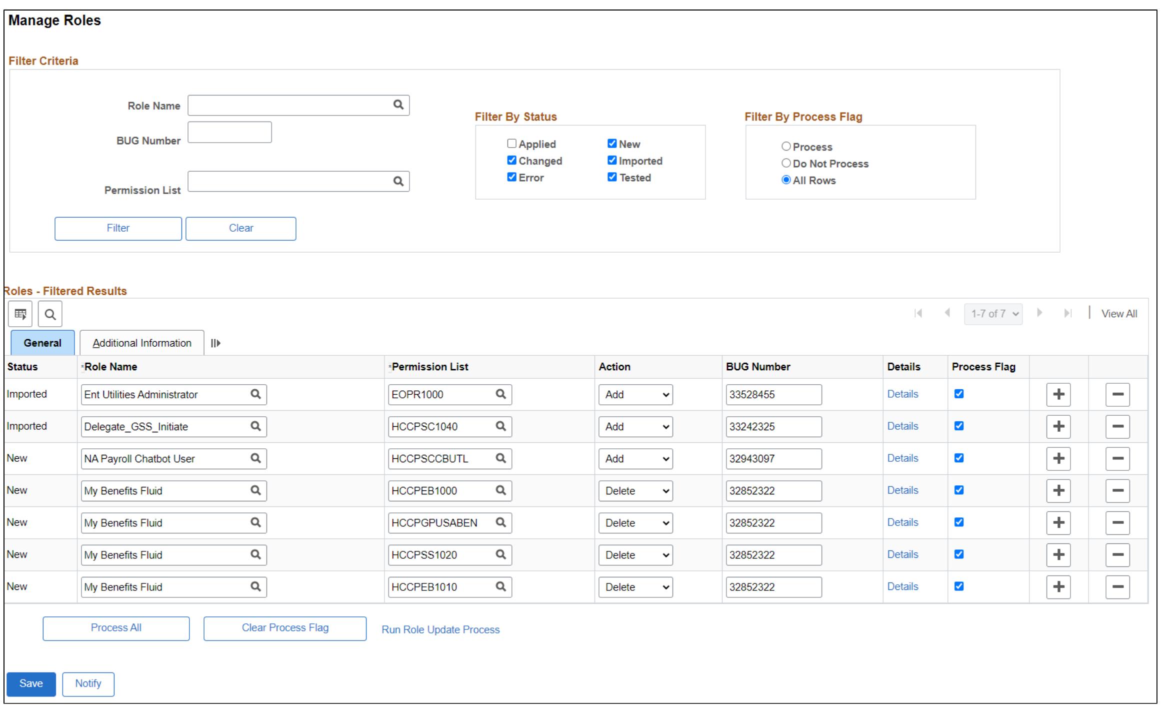
Manage Roles Page

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 Sec Deploy Role**

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



General Tab

Field or Control	***Description***
Role Name	Enter the Role Name that security updates are to be applied.
Permissions List	Select the Permission List that is to be added or removed from the role.
Action	Action to be taken for the permission for that role.
Details	Select the link to open the Referencing Roles window. This window lists all roles cloned from the role being modified. To apply the same updates to cloned roles, select the Process Flag for each reference.

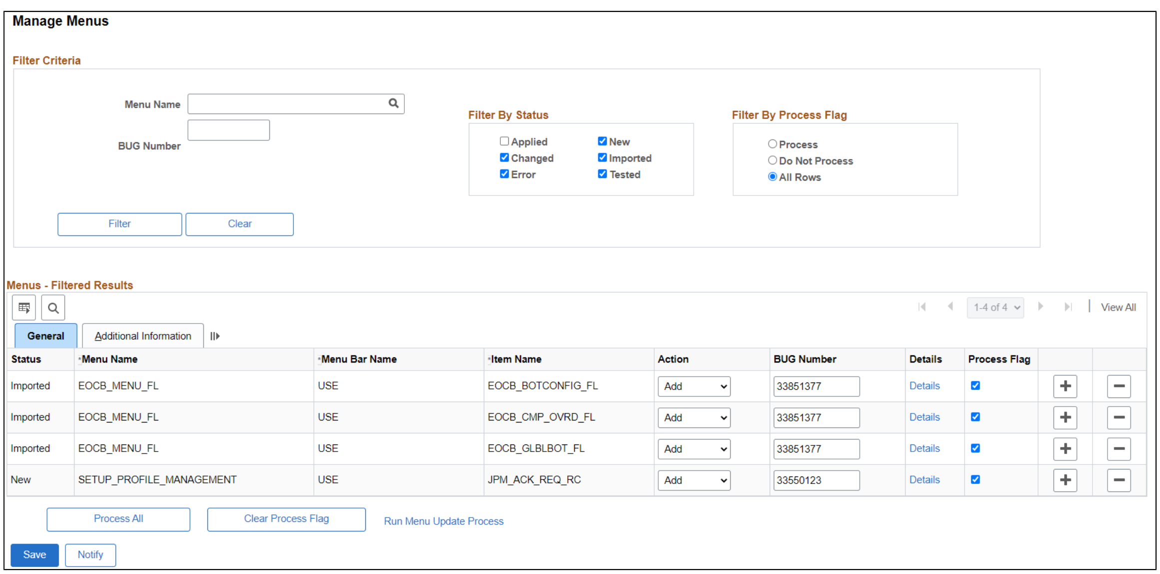
Manage Menus Page

Use the Manage Menus page (EOPM_SUPD_MENU) to set security for new menu or to change the security for existing menu.

Navigation:

Enterprise Components > **Security Deployment** > **Update Menus**

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



General Tab

Field or Control	***Description***
Menu Name	Enter the Menu Name that security updates are to be applied.
Action	Select the action to be performed on the Menu.
Details	Select the link to open a window that lists all menus cloned from the menu being modified. To apply the same updates to cloned menus, select the Process Flag for each reference.

Chapter 16

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:

Term	***Definition***
Supplemental Data Field	Defined in the Supplemental Data Record, mapped to fields of the data store record. Also referred to as "Field" in the context of supplemental data setup.
Display Group	Grouping of supplemental data fields, for display purpose.
Supplemental Data Page	The page where supplemental data will be displayed or entered in runtime. Also referred to as *Page* in the context of supplemental data setup.
Supplemental Data Record	Logical data model for supplemental data. Also referred to as *Record* in the context of supplemental data setup.
Supplemental Data Store	The physical table where supplemental data is stored. Also referred to as *Data Store* or *Data Store Record.*
Search Record	Record that saves search criteria for the base record.
Supplemental Search Record	Record that saves search criteria for the base record. The criteria are based on the supplemental data defined for the base record.

Supplemental Data Record Details

The Supplemental Data components, Register Record and Register Component are system-defined by PeopleSoft. The purpose of these options is to associate the supplemental data storage and optional search records with a PeopleSoft Maintenance Management base record and a PeopleSoft Maintenance Management component.

For each base PeopleSoft Maintenance Management record, there is an associated supplemental data storage record:

Base Record	***Supplemental Data Storage Record***
WM_WO_HDR	WM_WO_HDR_SD
WM_WO_TSK	WM_WO_TSK_SD
WM_WR_HDR	WM_WR_HDR_SD

The following components and pages are enabled for supplemental data. There are AAF contexts and terms defined for the components. You can define an AAF condition to show different display groups based on business rules.

Component	***Page***	***Base Record***
WM_ADD_WR_SS	WM_WORK_REQUEST_SS	WM_WR_HDR
WM_ADD_WR_WIZARD	WM_WR_SUMMARY_WIZ	WM_WR_HDR
WM_ADD_WR_WIZARD	WM_WR_SUPLDATA_WIZ	WM_WR_HDR
WM_WO	WM_TSK_SD_SEC	WM_WO_TSK
WM_WO	WM_WO_DETAIL	WM_WO_HDR
WM_WO	WM_WOHDR_SD_SEC	WM_WO_HDR
WM_WO_WR	WM_WOHDR_SD_SEC	WM_WO_HDR
WM_WOE_SD	WM_WOE_SD	WM_WO_TSK
WM_WORK_REQUEST	WM_WORK_REQUEST	WM_WR_HDR

The following delivered system data enables users to search work order tasks based on a work order header's supplemental data. There can be supplemental display groups with no AAF condition on a search page. Since the advanced search page is implemented as a secondary page, which users can invoke from the main page, you need to have the same assignment for these two pages:

Base Record	***Storage Record***	***Base Search Record***	***Supplemental Data Search Record***
WM_WO_HDR	WM_WO_HDR_SD	WM_TSK_SRCH	WM_TSK_SRCH_SD

The system stores the search criteria in the Supplemental Data Search Record using the same mapping defined for the Supplemental Record. There are no AAF contexts and terms defined for the components used for the search:

Component	***Page***	***Base Record***
WM_WOE_TWP	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOE_TWP	WM_WOE_TWP	WM_WO_HDR
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

Page Name	***Definition Name***	***Usage***
Register Record Page	SD_REG_REC	Registers the supplemental data base record and optionally registers the record that saves the search criteria for the base record. This is PeopleSoft system-defined data and is not set up by users. It should not be modified.

Page Name	Definition Name	Usage
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.
Supplemental Data Record - Record Page	SD_RECDEFN	Defines the supplemental data record associated with the base record and identifies where to store this record.
Supplemental Data Record - Fields Summary Page	SD_RECFLD	Maps fields to the data storage fields.
Supplemental Data Record - Fields Detail Page	SD_RECFLD_DTL	Defines a field's detail information.
Define Display Group Page	SD_GRPDEFN	Defines a display group and associates any records and fields, as well as identifies the order in which the fields appear on the page.
Assign Display Group Page	SD_PAGE_GRP	Assigns one or more display groups to a supplemental data-enabled component and page.
Assign Display Group - Conditions Page	SD_PHRASE_SEC SD_TERM_SEC	Specify conditions that control when a display group appears.

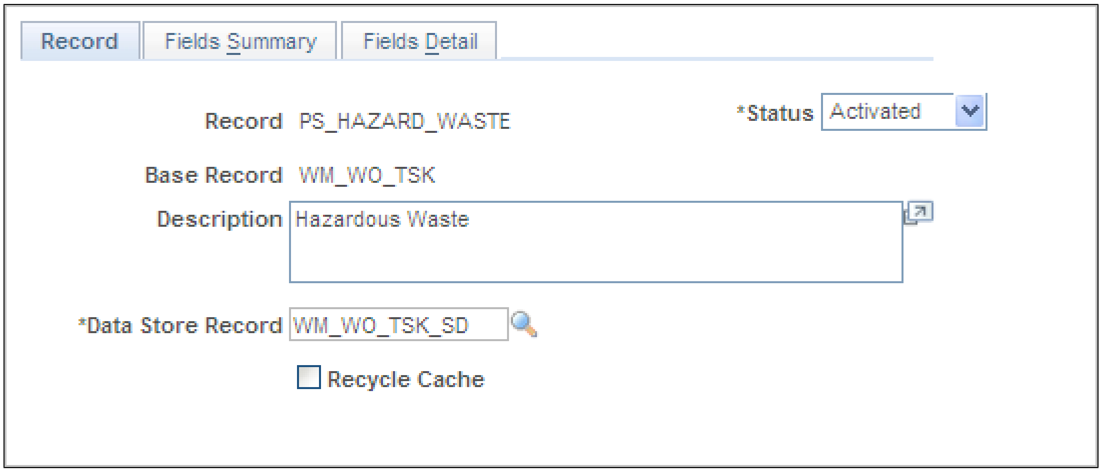
Supplemental Data Record - Record Page

Use the Supplemental Data 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** > **Supplemental Data Record** > **Record**

This example illustrates the fields and controls on the Supplemental Data Record - Record page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
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.

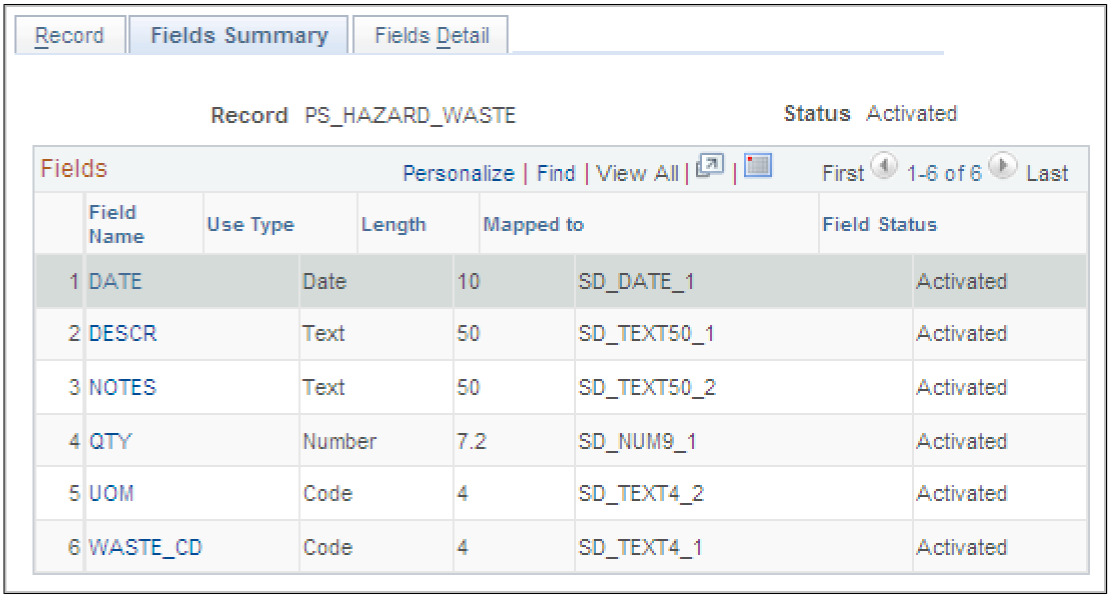
Supplemental Data Record - Fields Summary Page

Use the Supplemental Data Record - Fields Summary page (SD_RECFLD) to maps fields to the data storage fields.

Navigation:

Enterprise Components > **Supplemental Data** > **Supplemental Data Record** > **and select the Fields Summary tab.**

This example illustrates the fields and controls on the Supplemental Data 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 or Control	***Description***
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.

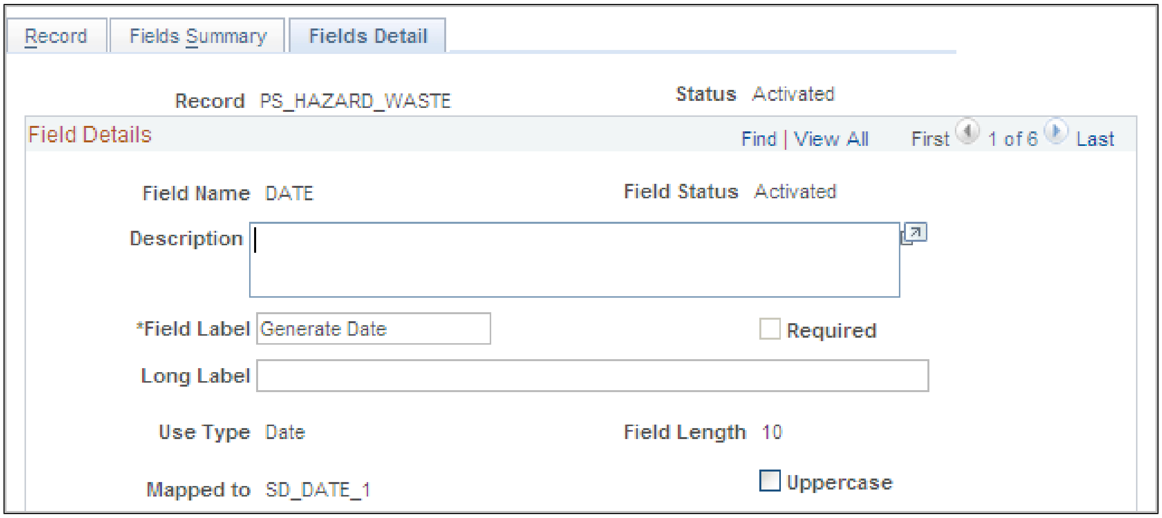
Supplemental Data Record - Fields Detail Page

Use the Supplemental Data Record - Fields Detail page (SD_RECFLD_DTL) to defines a field's detail information.

Navigation:

- **Enterprise Components** > **Supplemental Data** > **Supplemental Data Record** > **Fields Detail**
- Click a field name on the Define Record - Fields Summary page.

This example illustrates the fields and controls on the Supplemental Data Record - Fields Detail page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
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 or Control	*Description*
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.

Field or Control	*Description*
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.

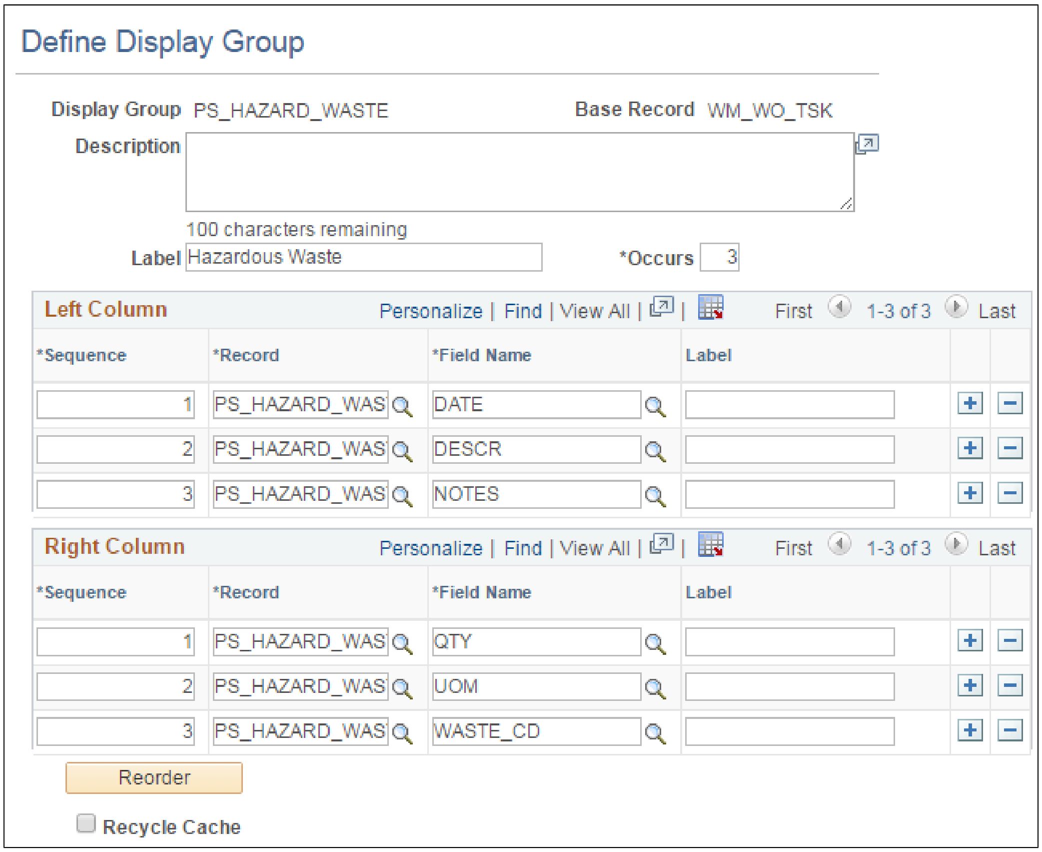
Define Display Group Page

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

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



Field or Control	***Description***
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.

Field or Control	***Description***
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.

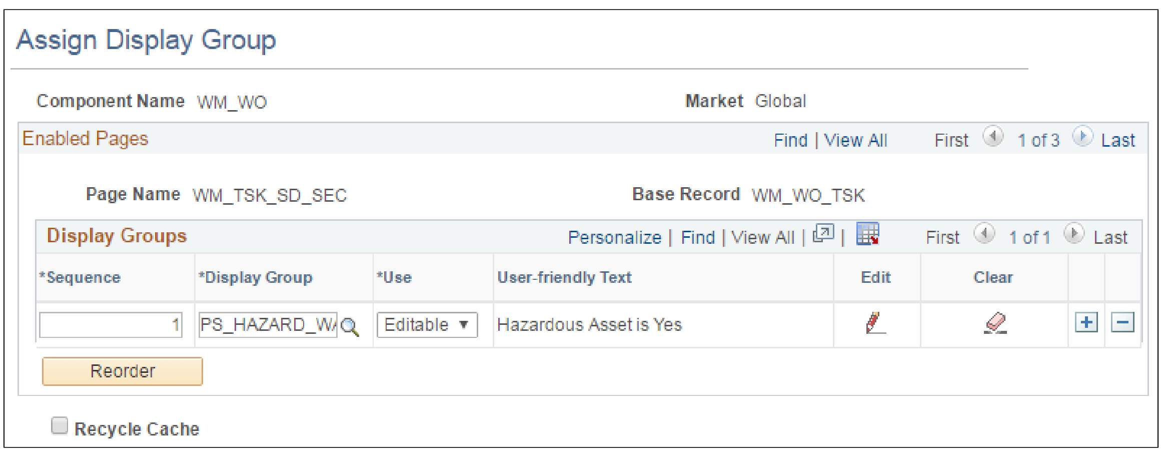
Assign Display Group Page

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

Use the Assign Display Group page (SD_PAGE_GRP) to assigns one or more display groups to a supplemental data-enabled component and page



Field or Control	***Description***
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.

Field or Control	***Description***
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.

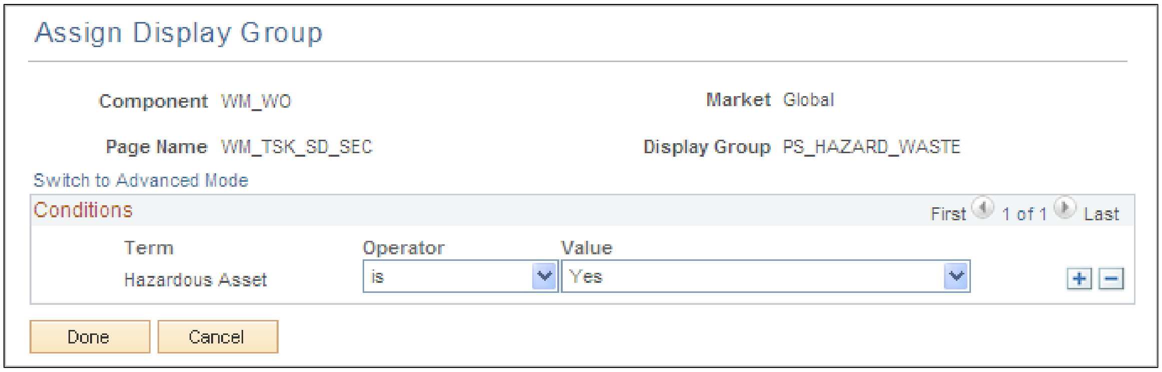
Assign Display Group - Conditions Page

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.

Use the Assign Display Group - Conditions page (SD_PHRASE_SEC) to specify conditions that control when a display group appears



Supplemental data depends on the Active Analytics Framework (AAF) to define and resolve the conditions for a supplemental data display group. AAF is a PeopleSoft Enterprise Component that includes the following components:

- Data Library Framework.
- Rule Evaluation Engine.
- Rule Builder Framework.
- Action Framework.

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.

Field or Control	***Description***
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.

Chapter 17

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:

Term	***Definition***
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.

Term	***Definition***
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.	*#(URL.HOMEPAGE):*returns the URL for the HOMEPAGE URL object.
IMG	Image Object Name	Returns the URL to the image object.	*#{IMG.LOGO}*: returns the URL to the LOGO image.
HTML	HTML Object Name	Returns the HTML content or text of the HTML object.	*#{HTML.COMMON_ HEADER}*: returns the HTML for the COMMON_HEADER HTML object.
MSG	MESSAGE_SET, MESSAGE _NBR	Returns the message catalog text. MESSAGE_SET and MESSAGE_NBR specify the message set and number	*#{MSG.6550,1}:* returns the text for message (6550,1).
MSGE	MESSAGE_SET, MESSAGE _NBR	Similar to MSG but returns the explanation text.	

Factor Type	***Value***	***Description***	***Example***
All others specify record name	Field Name	Returns the values from the specified record field. The value is formatted: • If it is currency controlled, the amount is formatted as a currency. • If it is IMAGE or IMAGEREFERENCE, it returns the URL to the image.	*#{CUSTOMER.NAME1}* returns the value of the NAME1 field in the CUSTOMER record (customer name). *#{CUST_DATA.BAL_AMT}* returns the BAL_AMT amount formatted since the BAL_AMT field in the CUST _DATA record is currency controlled. *#{CUSTOMER.CUST_ LOGO}* returns the URL to the CUST_LOGO image (given that CUST_LOGO is an image field and stores the customer's logo).

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:

Term	***Definition***
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.

Term	***Definition***
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.

Term	***Definition***
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:

Term	***Definition***
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.

Term	***Definition***
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.

Term	Definition
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

Page Name	Definition Name	Usage
Analysis Handler Registry Page	CAF_HANDLER_TBL	Register application classes used as handlers in Configurable Analysis Framework (CAF).
Analysis Configuration Page	CAF_CONFIG_TBL_GEN	Define data analysis.
Entity Configuration Page	CAF_CONFIG_TBL_ENT	Define the entity for the analysis.
Factor Configuration Page	CAF_CONFIG_TBL_FCT	Define the factors for the analysis.
Define Factor Page	CAF_FACTOR_SEC	Add factors to the Factor Analysis page.
Factor List Configuration Page	CAF_CONFIG_TBL_FLS	Create a pre-selected list of factors that are available to all users.
Copy Factor Lists Page	CAF_CNF_FL_SEL_SEC	Copy a factor list from other users.
Related Action Configuration Page	CAF_CONFIG_TBL_ACT	Define configured related actions for different levels of data.
Define Related Action Page	CAF_ACTION_SEC	Add a related action to the Related Action Configuration page.
Miscellaneous Page	CAF_CONFIG_TBL_MSC	Perform administrative tasks.
Analysis Access Control Page	CAF_ACC_CTL_TBL	Set up access control for factors and related actions for an analysis.

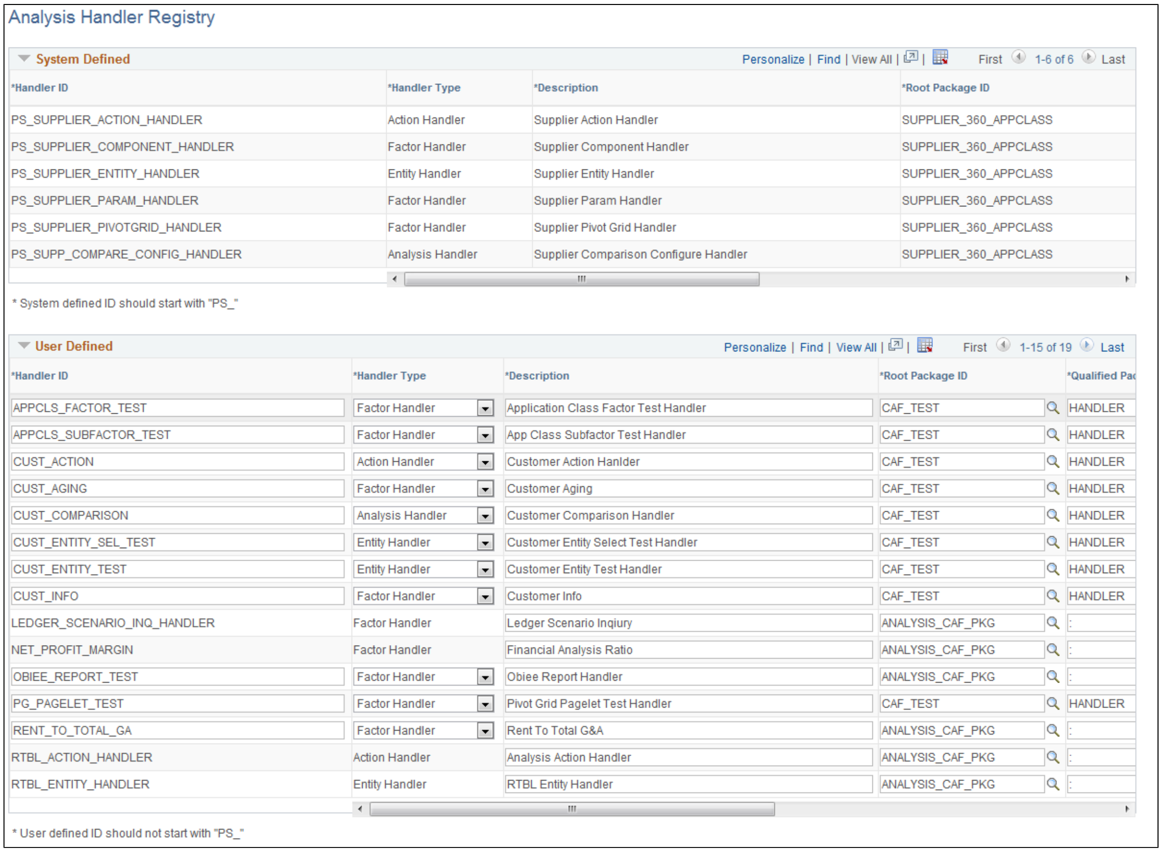
Analysis Handler Registry Page

Use the Analysis Handler Registry page (CAF_HANDLER_TBL) to register application classes used as handlers in Configurable Analysis Framework (CAF).

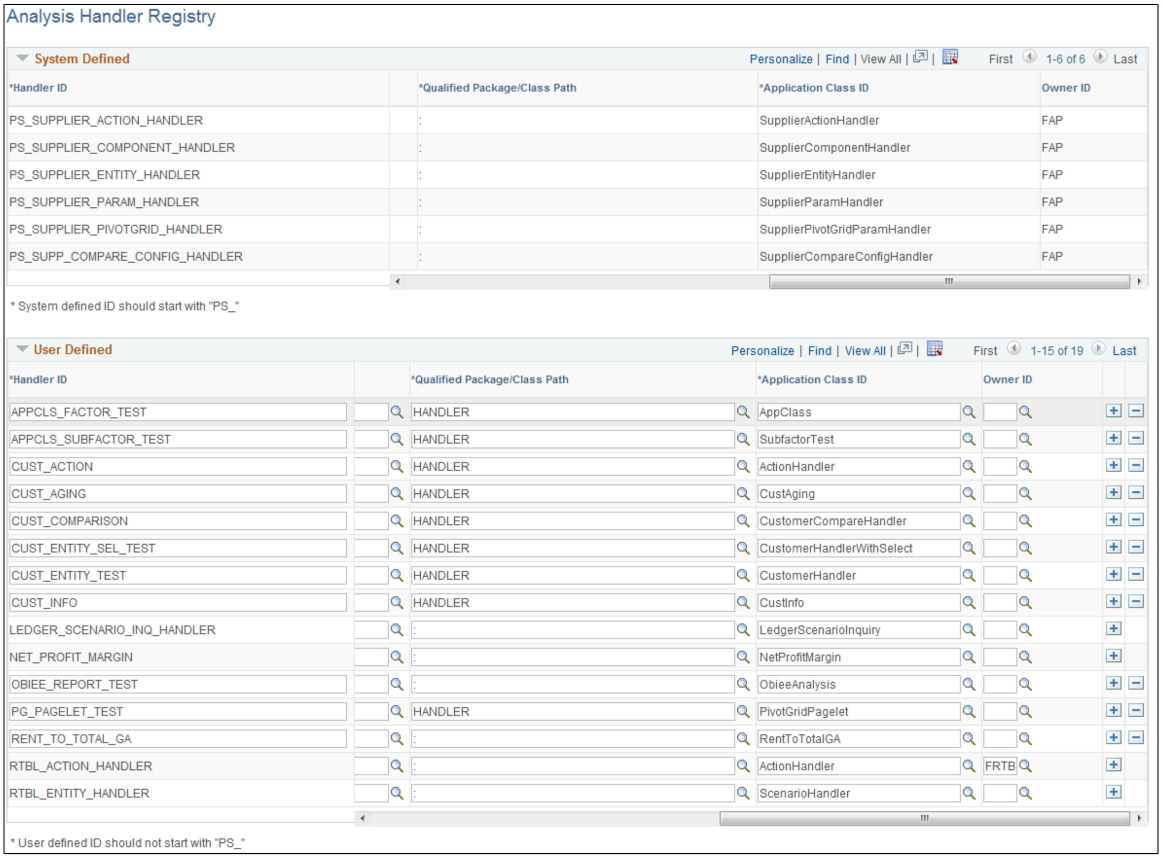
Navigation:

Enterprise Components > **Configurable Analysis** > **Analysis Handler Registry**

This example illustrates the fields and controls on the Analysis Handler Registry page (1 of 2)



This example illustrates the fields and controls on the Analysis Handler Registry page (2 of 2) after scrolling to the right.



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.

Field or Control	***Description***
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_”.

Field or Control	***Description***
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.

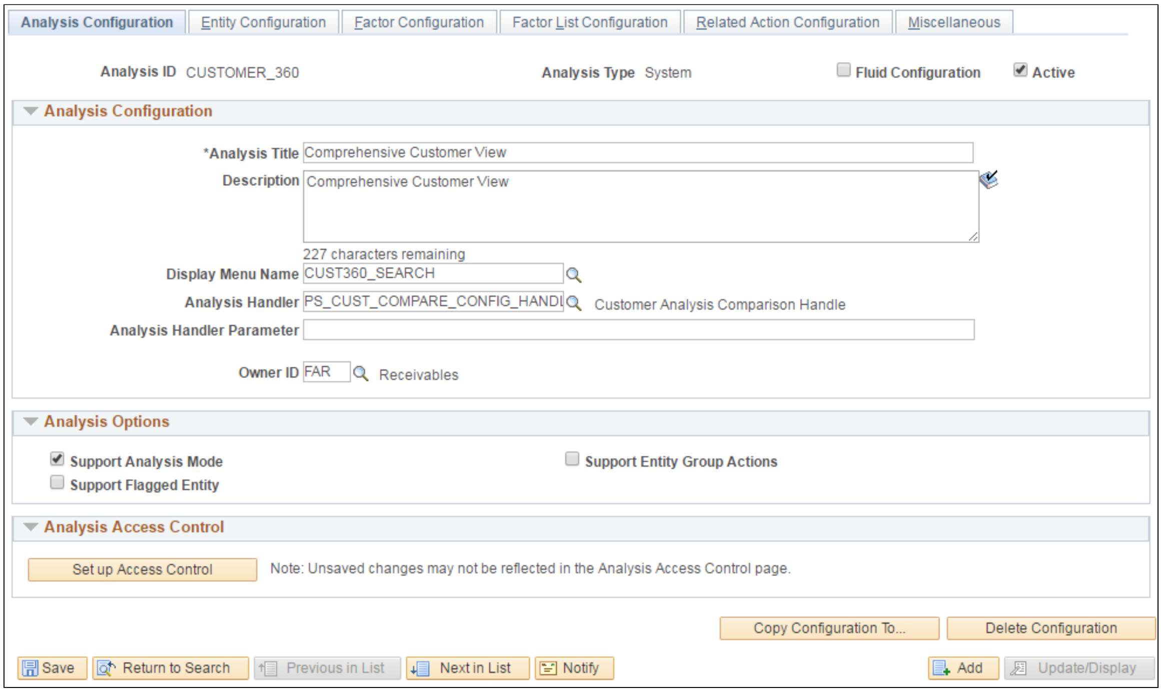
Analysis Configuration Page

Use the Analysis Configuration page (CAF_CONFIG_TBL_GEN) to define data analysis.

Navigation:

Enterprise Components > **Configurable Analysis** > **Analysis Configuration**

This example illustrates the fields and controls on the Analysis Configuration page.



Use this page to set up general information about the analysis.

Field or Control	***Description***
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

Field or Control	***Description***
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.

Field or Control	*Description*
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

Field or Control	*Description*
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.

Field or Control	Description
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.

Field or Control	Description
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.

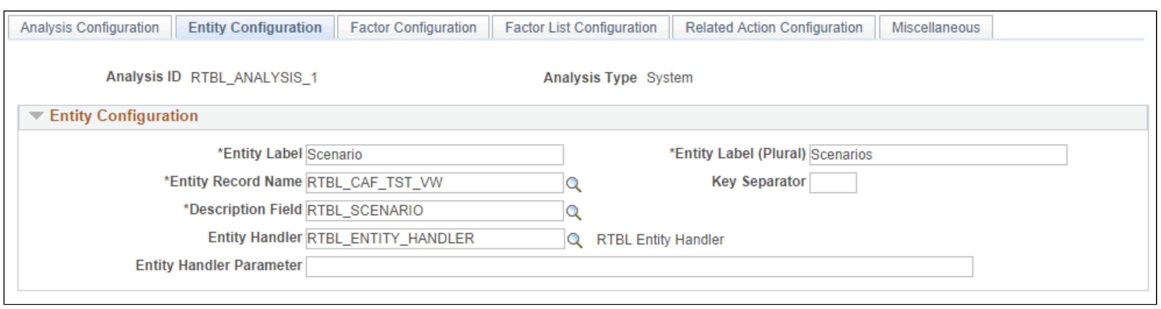
Entity Configuration Page

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**

This example illustrates the fields and controls on the Entity Configuration page.



Field or Control	Description
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”.

Field or Control	*Description*
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, *NAME1* for customer name.
Entity Handler and **Entity Handler Parameter**	Select the handler ID and the parameters if a handler is implemented for the entity.

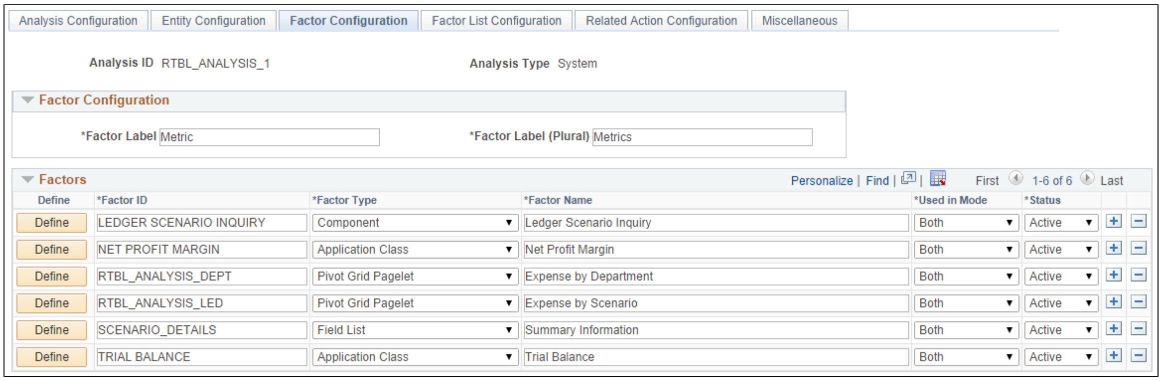
Factor Configuration Page

Use the Factor Configuration page (CAF_CONFIG_TBL_FCT) to define the factors for the analysis.

Navigation:

Common Definitions > **Enterprise Components** > **Analysis Configuration** > **Factor Configuration**

This example illustrates the fields and controls on the Factor Configuration page.



Factor Configuration

Field or Control	***Description***
Factor Label and **Factor Label (Plural)**	Enter a singular and plural description for the factor label. The framework requires singular and plural forms so that CAF can properly display messages. Examples include *Measure* and *Measures*.

Factors

Use this section to add factors that are to be used in the analysis.

Field or Control	***Description***
Define	Click this button to access the Define Factor Page.

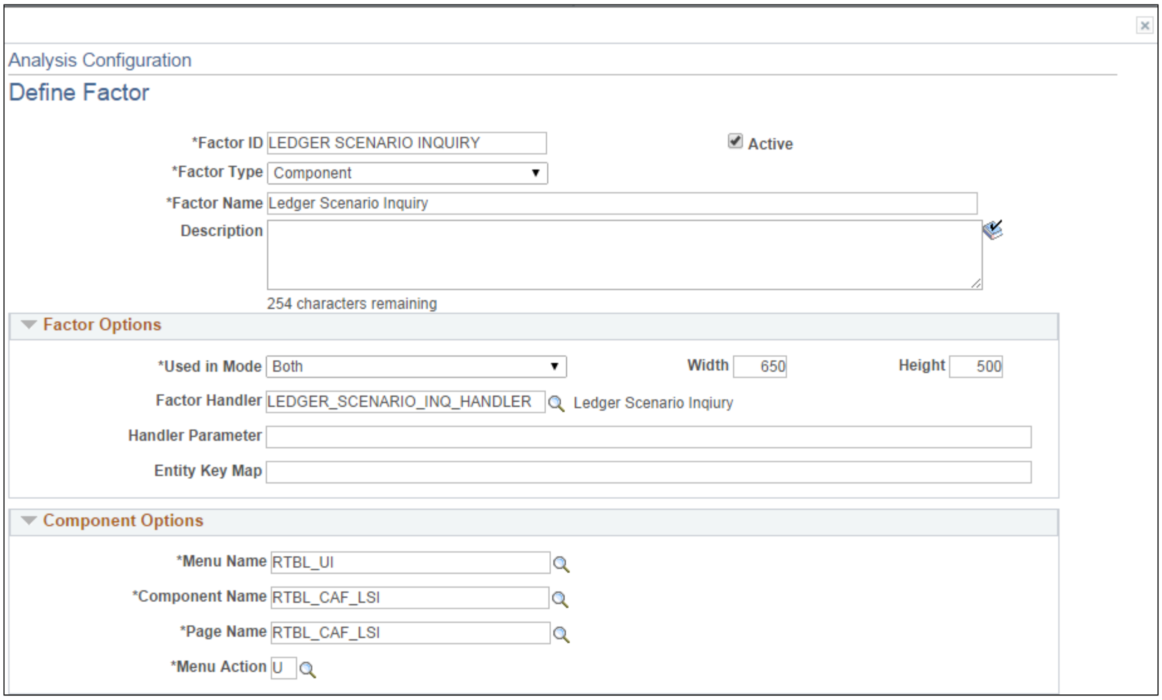
Define Factor Page

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.

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



Field or Control	***Description***
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

Field or Control	*Description*
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.

Field or Control	*Description*
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.

Field or Control	*Description*
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.

Field or Control	*Description*
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.

Field or Control	Description
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.

Field or Control	Description
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.

Field or Control	Description
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.

Field or Control	***Description***
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.

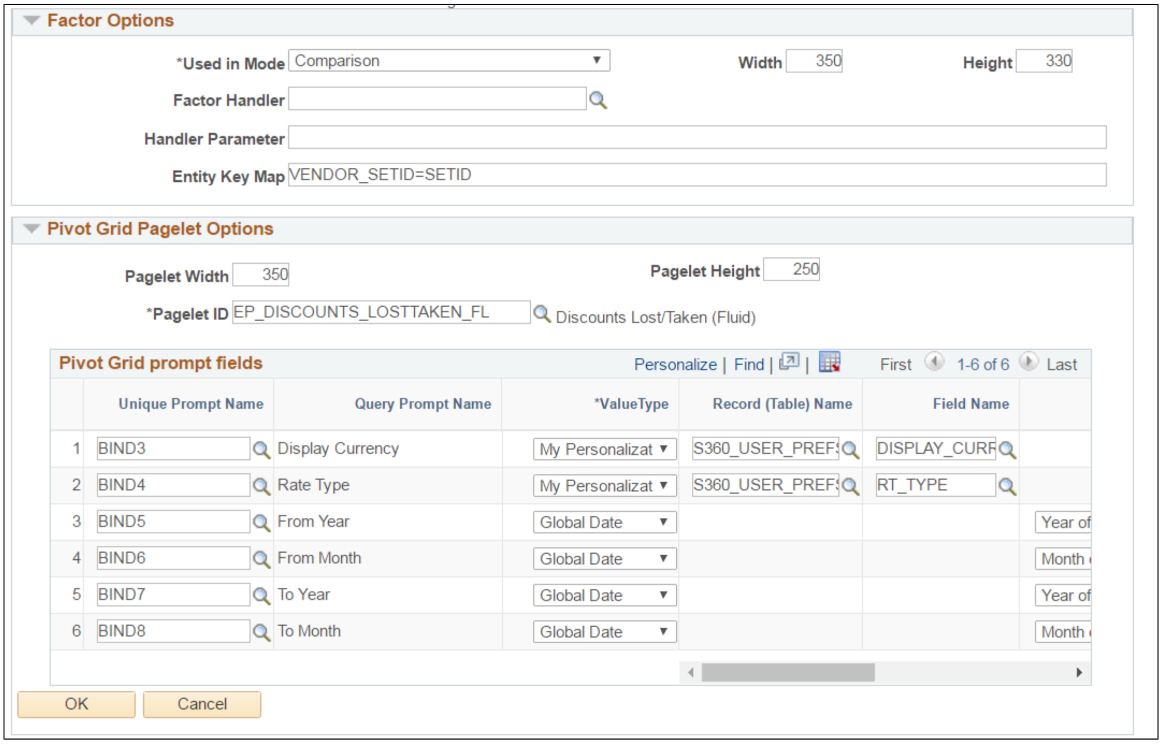
URL Options

Field or Control	***Description***
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.

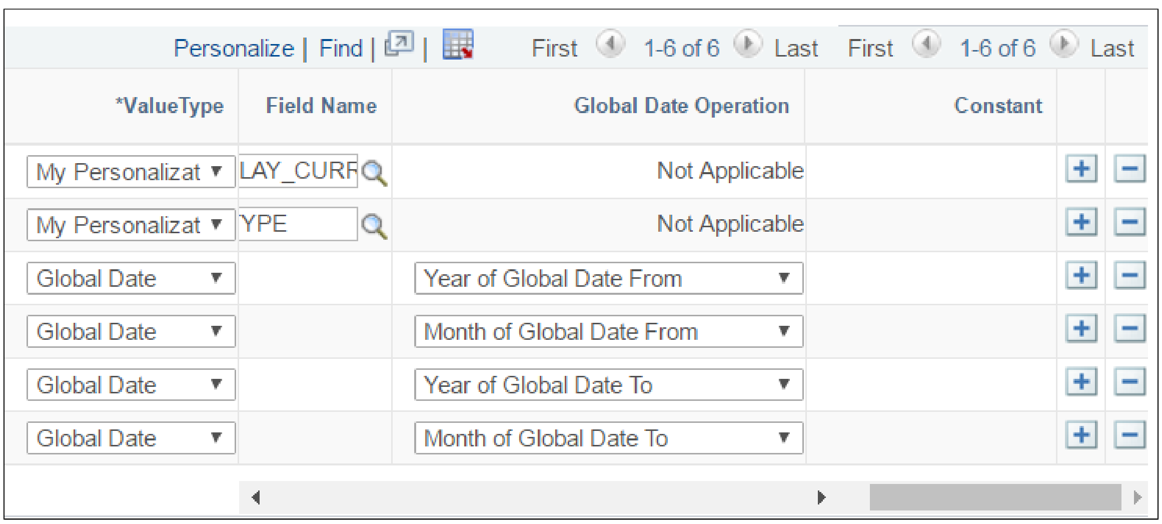
Pivot Grid Pagelet Options for Fluid

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.

Pivot Grid Prompt Fields for Fluid CAF.



Pivot Grid Prompt Fields for Fluid CAF (2 of 2).



Field or Control	***Description***
Unique Prompt Name	The Pivot Grid prompt fields defined in Pivot Grid Wizard.

Field or Control	***Description***
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.

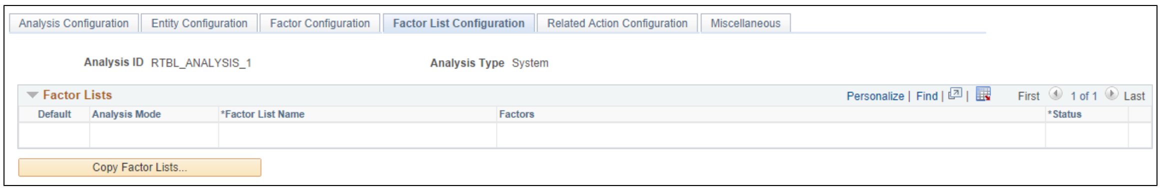
Factor List Configuration Page

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**.

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.

Field or Control	***Description***
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.

Field or Control	Description
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.

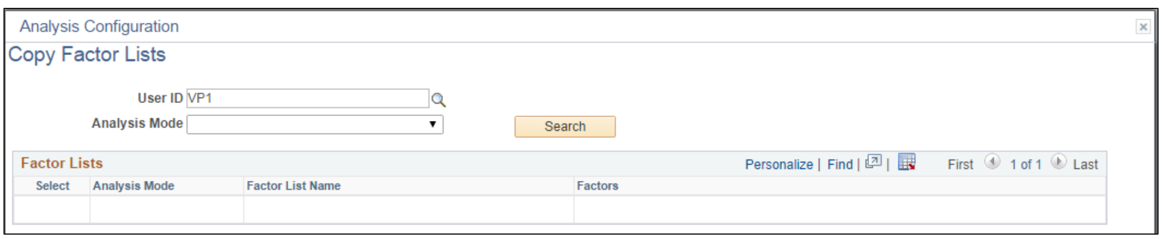
Copy Factor Lists Page

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.

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.

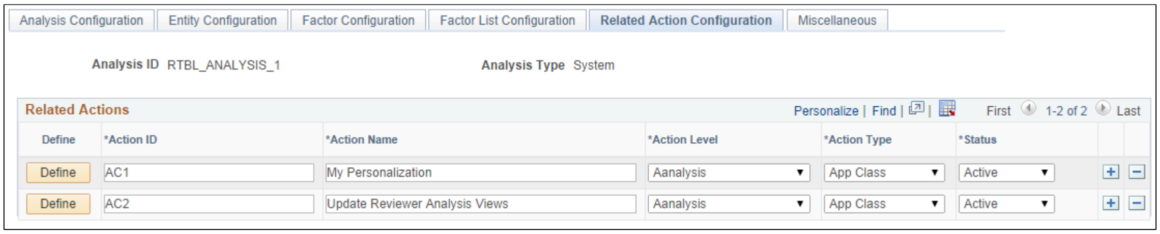
Related Action Configuration Page

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**.

This example illustrates the fields and controls on the Related Action Configuration page.



Field definitions are available below the Define Related Action page.

Field or Control	***Description***
Define	Click this button to access the Define Related Action Page.

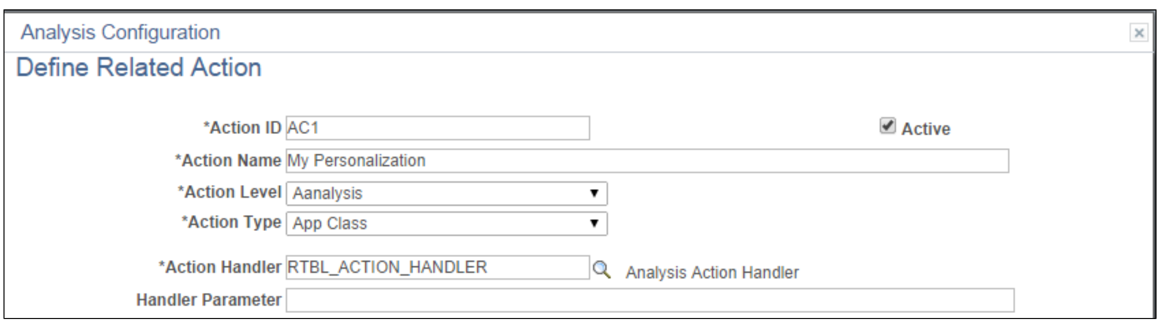
Define Related Action Page

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.

This example illustrates the fields and controls on the Define Related Action page.



Field or Control	***Description***
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.

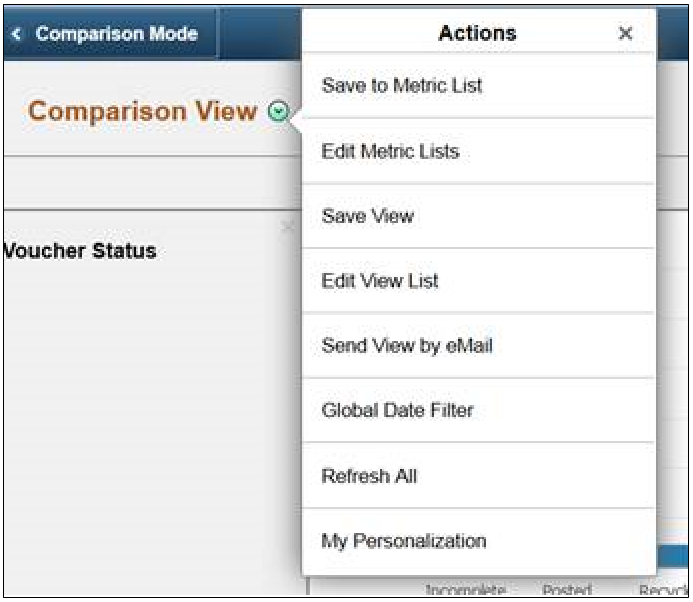
Field or Control	***Description***
Action Level	Select the level to which the related action is associated. Options are: • Analysis • Common Factor • Entity • Factor • Factor Data • Selected Entities
Factor ID	Select the factor to which this action is associated. Or, you can leave this field is blank and it will be applicable to all factors in the analysis. This option is only available when the action level is Factor and Factor Data.
Configure Action	Select to indicate that this is the configuration action for the factor. It is the action that is associated with the Configuration Factor button for the factor. Only one related action can have the this check box selected and it overrides any dynamic configure action from the faction handler. This check box is only available when the action level is Factor.
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.

My Personalization in Related Actions for an analysis



Component Options

This section appears when *Component* is selected as the action type.

Field or Control	***Description***
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.

Field or Control	*Description*
Menu Name, Bar Name, Item Name, Panel Name, and **Menu Action**	Select the path and action of the component.

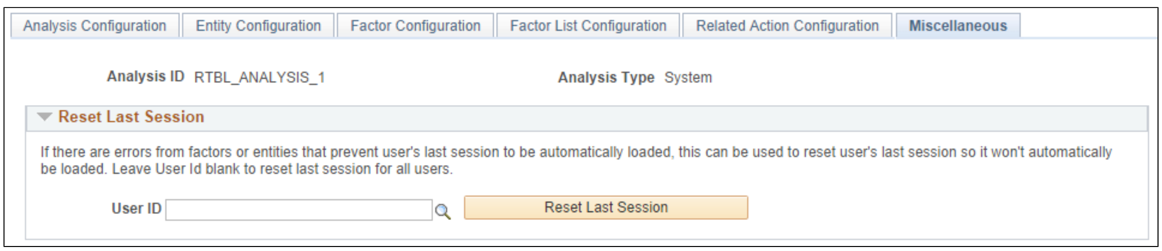
Miscellaneous Page

Use the Miscellaneous page (CAF_CONFIG_TBL_MSC) to perform administrative tasks.

Navigation:

Enterprise Components > **Configurable Analysis** > **Miscellaneous**.

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



Use this page to reset the last session for a specific user or for all users.

Every time a user accesses the CAF_DISPLAY page (for Classic CAF implementations) or the Fluid CAF, a new session is created. When a user makes changes on the page, such as adding, deleting, or rearranging the entities, factors, or both the session data is saved. When the user comes back to the CAF_DISPLAY page for the same analysis, the last session that the user accessed is loaded, unless a specific session is entered by the user. If there is problem with the factors, entities, or both from the last session, during configuration or factor development, the session may not load and the page may not be displayed properly. The Reset Last Session button is provided for an administrator or developer to reset the last session, which loads a blank session instead of the last session that had the issue.

Field or Control	*Description*
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.

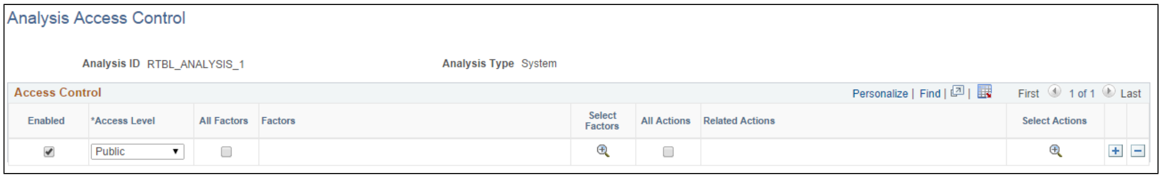
Analysis Access Control Page

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.

This example illustrates the fields and controls on the Analysis Access Control page. This setup page is used by both Classic CAF and Fluid CAF



Use this page to grant access to each analysis.

Field or Control	***Description***
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.

Field or Control	*Description*
Select Actions	Select to access the Select Related Actions page where you can select which related actions are available for the access level. This option is available when the All Actions check box is not selected.

Using Configurable Analysis Framework

Pages Used to Utilize Configurable Analysis Framework

Page Name	*Definition Name*	*Usage*
Analysis Display Page (Comparison Mode)	CAF_DISPLAY	Compare data for multiple entities in a tabular or grid format.
Analysis Display Page (Analysis Mode)	CAF_DISPLAY	Analyze data for one entity.
Fluid Analysis Display Page (Comparison Mode)	CAFNUI_DISPLAY_FL	Compare data for multiple entities in Fluid.
Fluid Analysis Display Page (Analysis Mode)	CAFNUI_360_FL	Analyze data for one entity in Fluid.

Understanding Configurable Analysis Framework

The CAF_DISPLAY page is the page that is used to view and interact with comparison and analysis data. This page supports two modes: comparison mode and analysis mode. Each mode has some similarities and some differences.

When a PeopleSoft application uses CAF, component CAF_DISPLAY should be registered under its own menu. For example, a customer analysis might be accessed from the Customers menu. It is registered under the Analysis menu as Display Analysis, and Display Analysis Test for an administrator to test the configuration only.

The default search record for Component.CAF_DISPLAY is *INSTALLATION*. This bypasses the search dialog and displays the default comparison associated with the menu. However, the search record can be overridden for a menu to provide the search dialog to allow users to select from multiple comparisons, if desirable.

The CAF_DISPLAY page is automatically re-sized when the size of the browser window changes. Users can add, remove, and rearrange entities and factors. There is no built-in limitation on the number of entities and factors that a user can selected at the same time.

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.

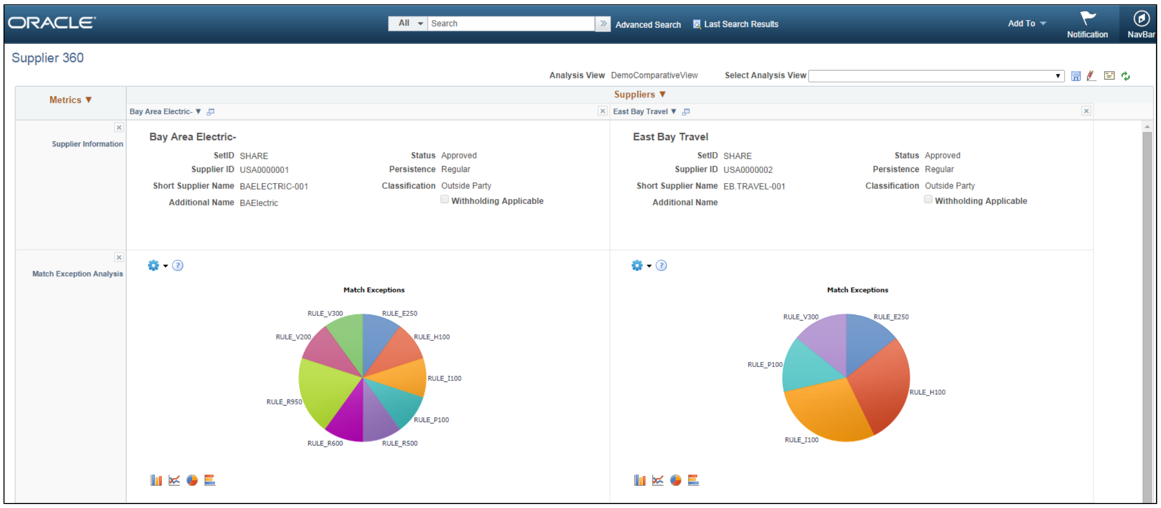
Field or Control	***Description***
Select Analysis View	Select previously saved views that are available for a user. Saved views are created by the user who is signed on or by other users.
Analysis View	Displays the last analysis view selected from the drop down list box. This can be used as a reference 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.

Field or Control	***Description***
(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.

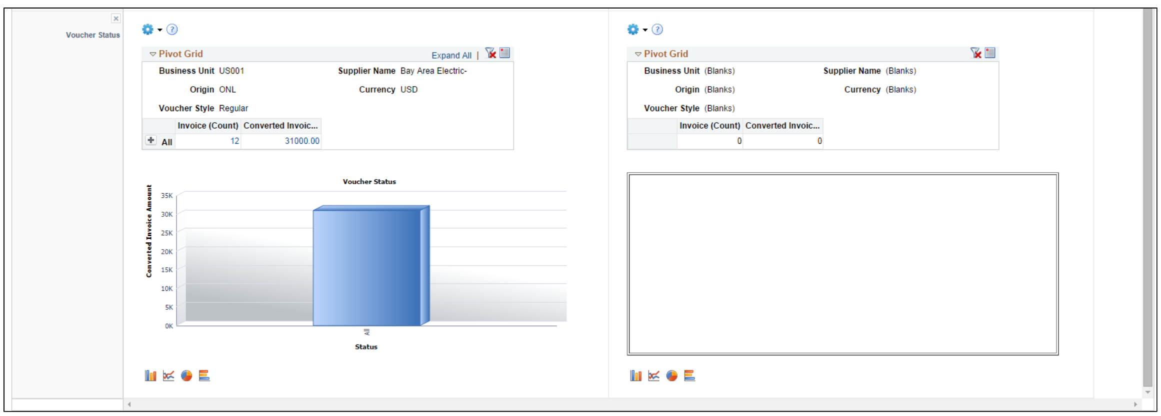
Analysis Display Page (Comparison Mode)

Use the Analysis Display page (Comparison Mode) (CAF_DISPLAY) to compare data for multiple entities in a tabular or grid format.

This example illustrates the fields and controls on the Analysis Display Page (Comparison Mode) (1 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.

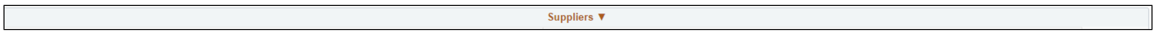
  It shows the data and actions related to the associated entity and factor.

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.

This example illustrates the Entity Header (Comparison Mode - row 1).

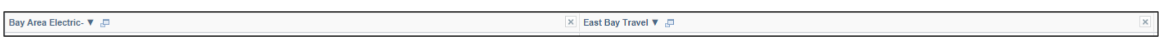


Users can click the drop down arrow next to the entity to select these options:

Field or Control	Description
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:

This example illustrates the Entity Header (Comparison Mode - row 2).



Field or Control	Description
(check box)	Select the entity for the Selected Entities action options. This option is only available if the **Support Entity Group Actions** check box is selected on the Analysis Configuration Page.
 (Selected)	This icon indicates that the entity is selected.

Field or Control	***Description***
(entity name)	Click the entity name to open related actions. • *Flag this <Entity>* and C*lear Flag for this <Entity>*: These option add or remove a check mark from the check box next to the entity name. This option is only available if the **Support Flagged Entity** check box is selected on the Analysis Configuration Page. • Other actions: The actions that are displayed are dynamic, from the handler, or configured at the entity action level on the Related Action Configuration Page.
(remove)	Click the Remove icon to remove the entity from the view.

Users can re-position the entity name columns by using the Entity Chooser option or by dragging the column to the new position.

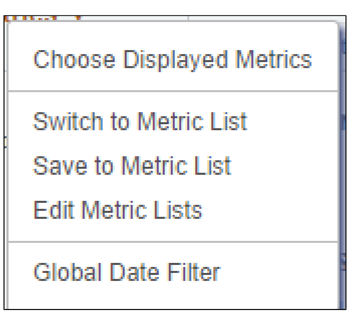
Factor Header Area (comparison mode)

The factor header is located on the left pane of the Comparison Analysis page (CAF_DISPLAY), when in comparison mode.

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.

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:

Field or Control	***Description***
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)

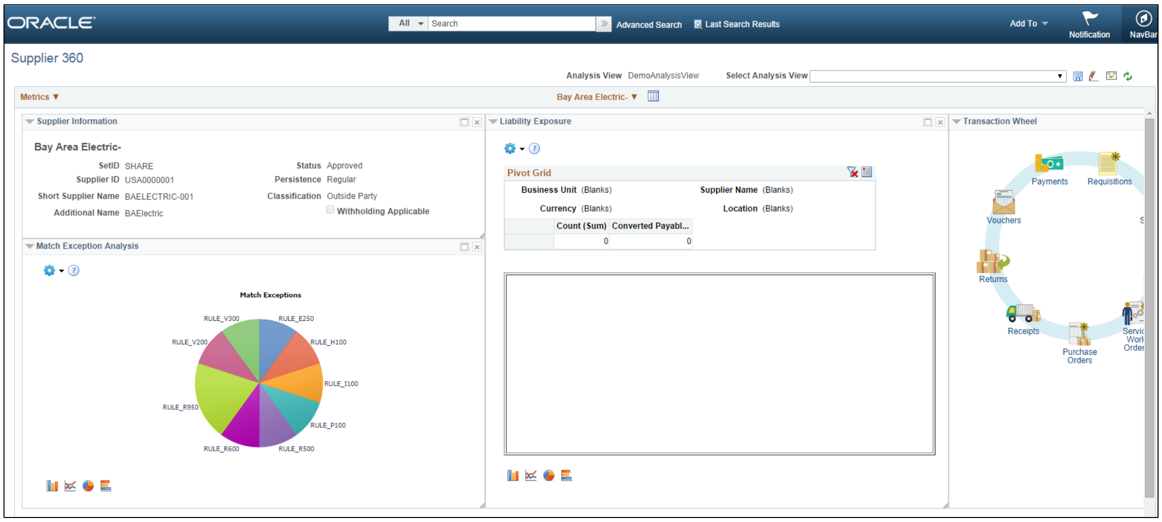
The factor data is located on the center of the Analysis Display page (CAF_DISPLAY), when in comparison mode. The factor data is displayed in a cell, which combines the entity in the Entity Header and the factor in the Factor Header.

Field or Control	***Description***
(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.

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.

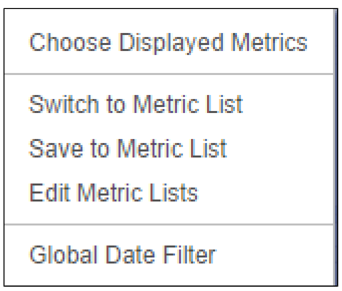
This example illustrates the Entity Header Options when in analysis mode.

Field or Control	***Description***
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.

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

Field or Control	***Description***
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:

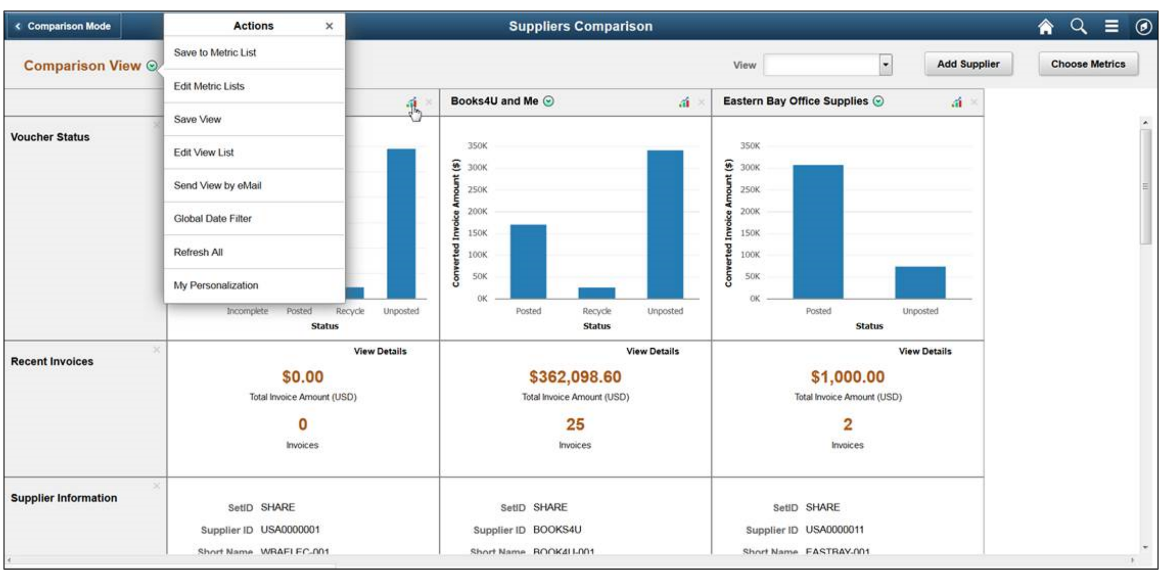
Field or Control	***Description***
View	This drop-down allows user to switch between saved views.
Choose Factors	Allows adding and removing of factors for comparison or analysis.
Choose Metrics	The selector Individual Factor/Factor Group switches between: • Individual Factor(select/remove factorindividually. • 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.

Field or Control	Description
Related Actions (in Analysis)	Lists all the actions defined in the Analysis configuration with Action level = Analyis. It also lists: • Save to <Factor> List. This creates a new Factor List with all the metric currently displayed at the page. This factor list is accessible only to the user that created it. • Edit <Factor> List. It allows to activate/inactivate, make public, delete or edit the user created Metric Lists • Save View. • Edit View List. Allows to make public or delete the created Views. • Global Date Filter. allows users to change the Global Date range and refresh all factors. • 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.

Fluid Analysis Display Page (Comparison Mode)



The items specific to Comparison mode are:

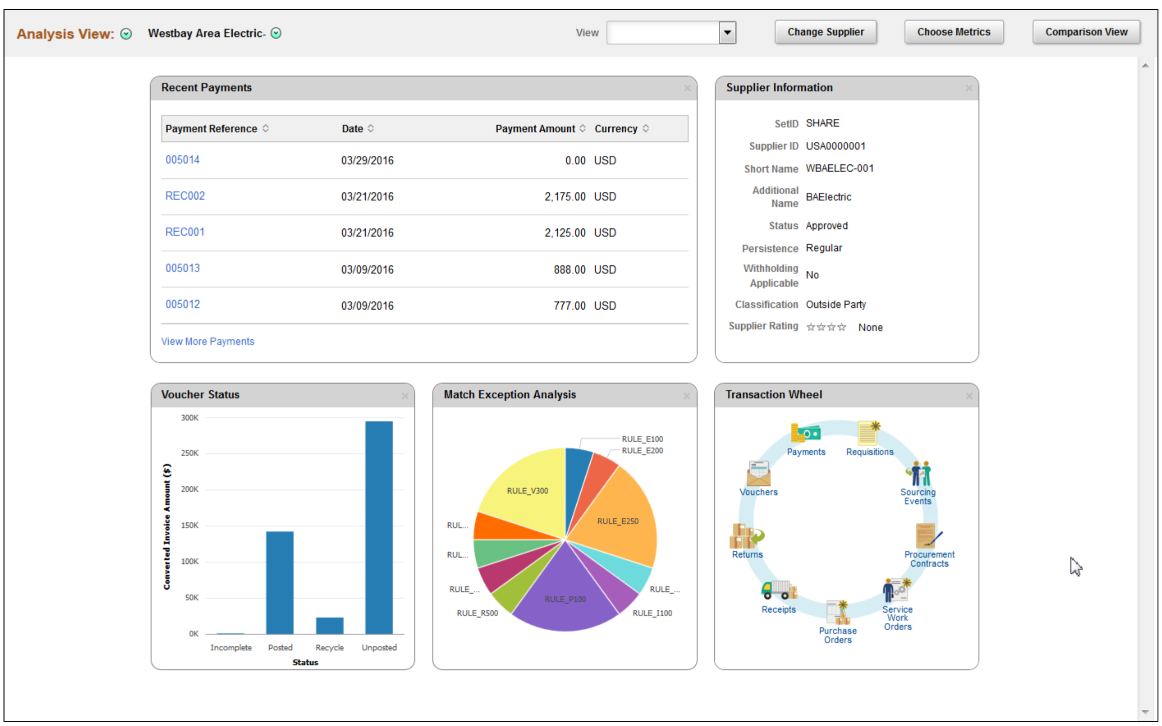
Field or Control	Description
Comparison Title	Name of the comparison.

Field or Control	***Description***
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.

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:

Field or Control	***Description***
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.

Chapter 18

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.

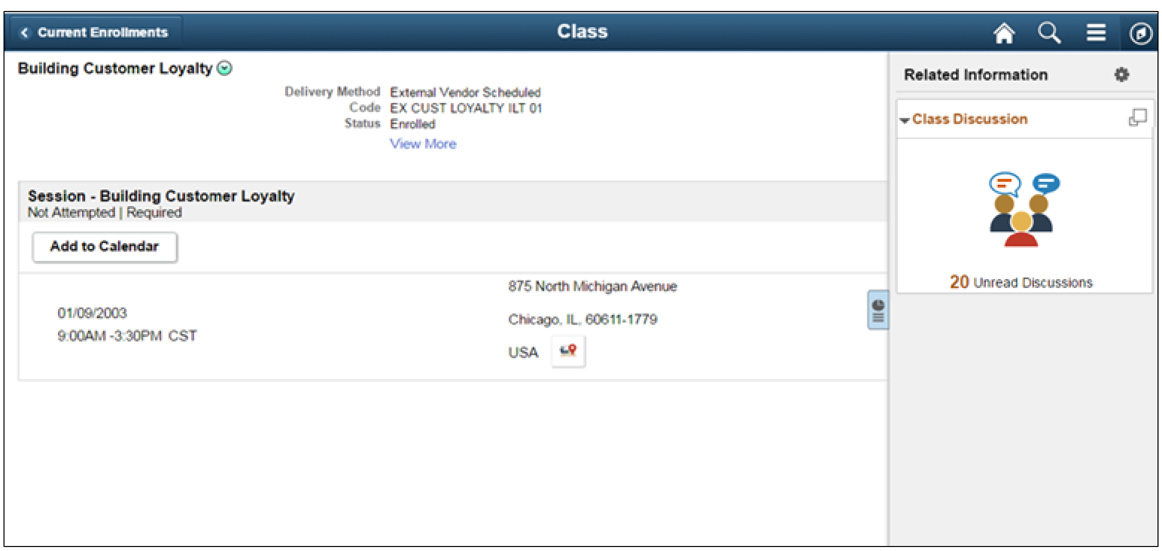
Note: DO NOT update the Default Discussion Configuration and Service.

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.

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



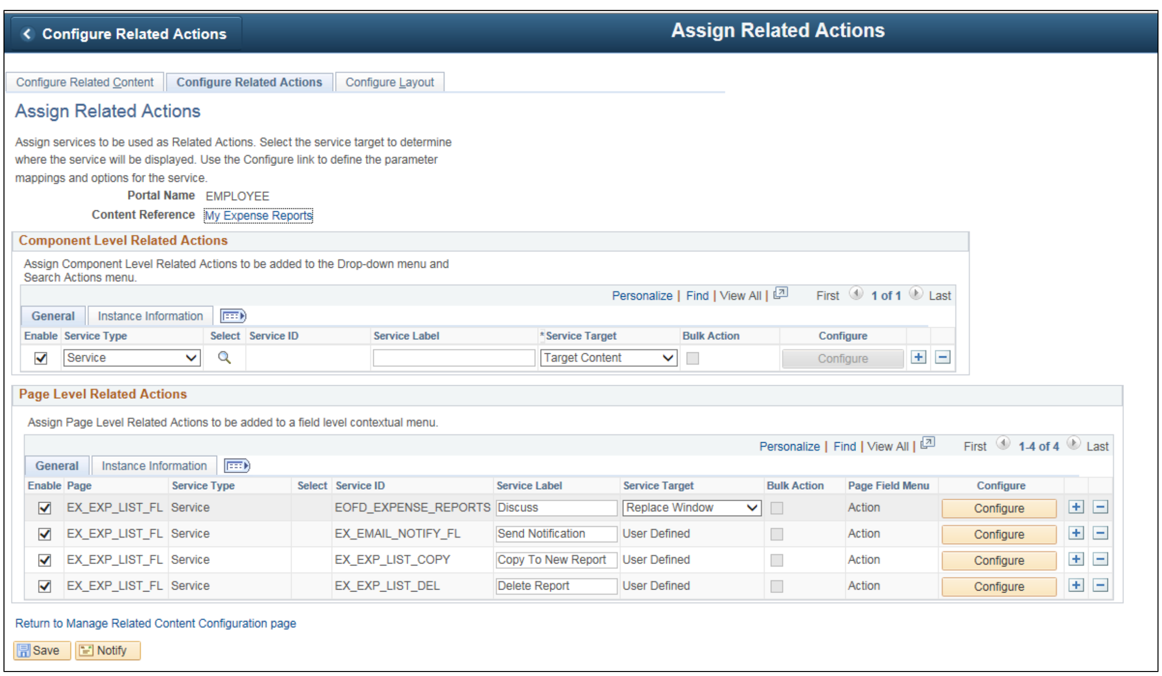
Assigning Default Discussion as a Related Action with Context

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.

   Assign Related Actions Page



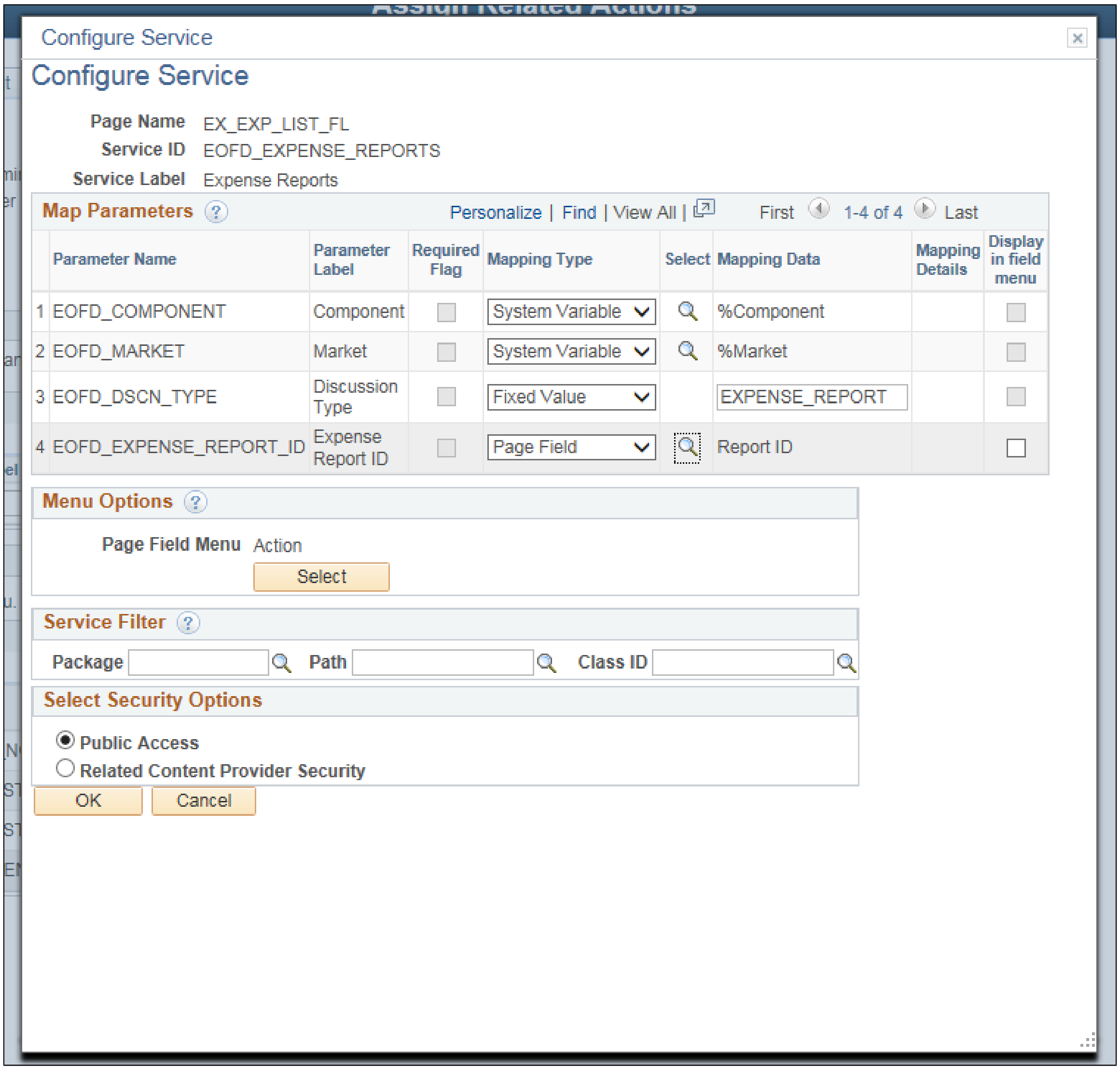
9. Click on Configure button to configure the service to pick the System variables.

a. For parameters EOFD_COMPONENT & EOFD_MARKET, choose Mapping Type as System Variable and Mapping data as %Component and %Market respectively.

b. Assign fields from the page as values for the context 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.

Configure Service Modal Window



11. Select Security Options and Click Ok.

12. Save the details configured in Assign Related Actions page. After performing all the above mentioned steps, the default discussion services appear as a related action in the Discussion list.

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.

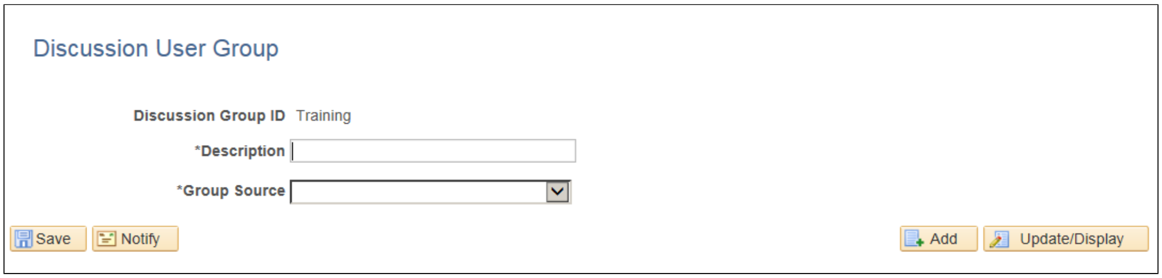
Discussion User Group Page

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**

Discussion User Group page

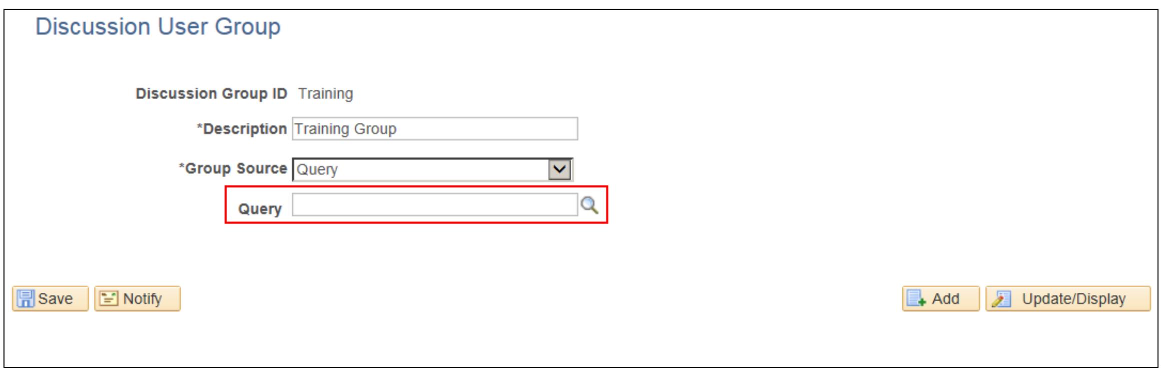


Defining Discussion User Group

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:

   This example illustrates the fields and controls on the Discussion User Group Query Page

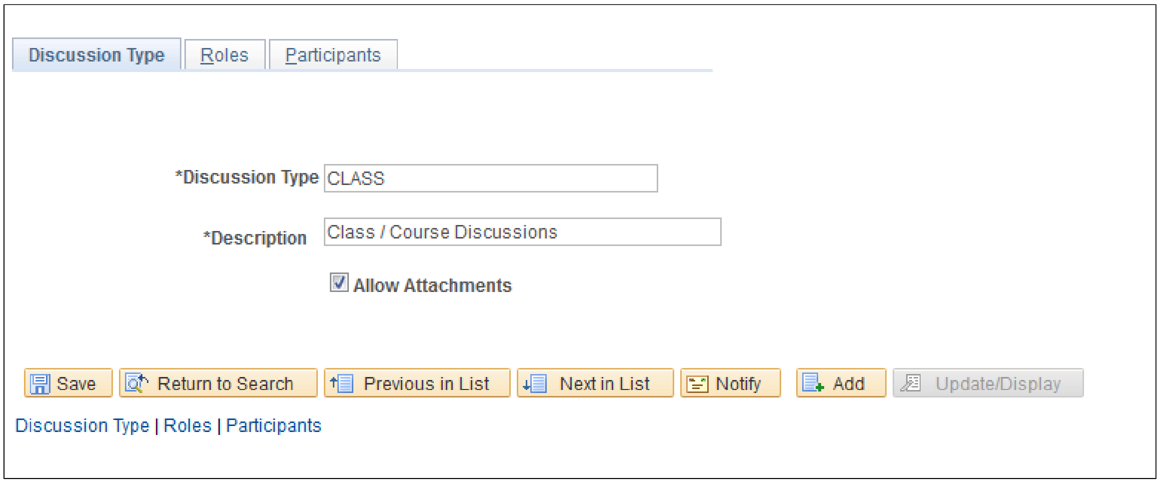


Discussion Type Page

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**

This example illustrates the fields and controls on the Discussion Type page.



Defining Discussion Type

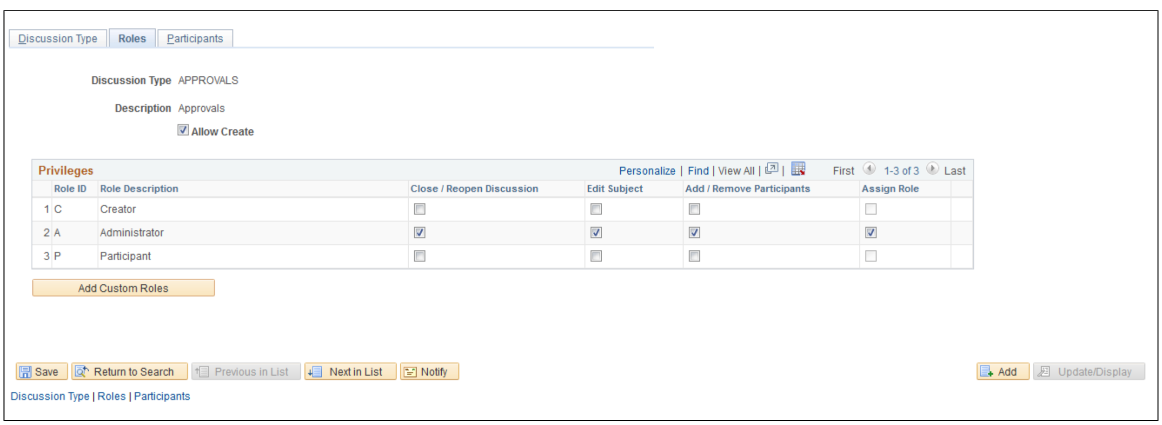
To create a new discussion type:

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:

   This example illustrates the fields and controls on the Discussion Type — Roles page.



2. Select the Allow Create check-box, so that the user can create new discussions.

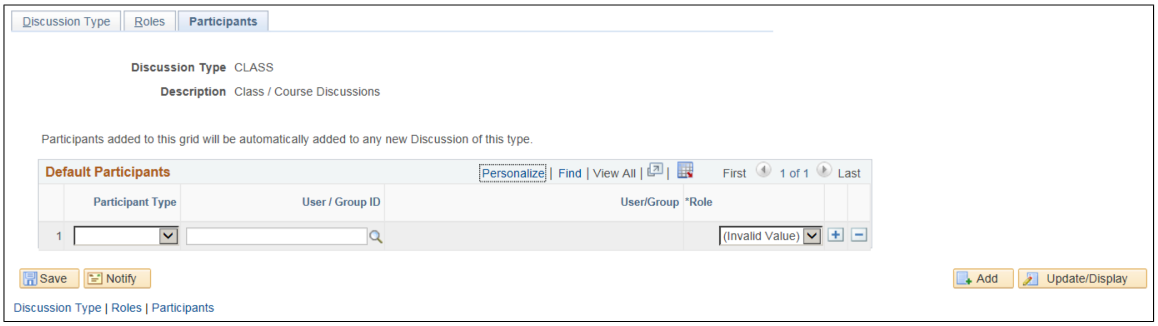
Note: When 'Allow Create' is turned off, Creator role is removed and the users will not be allowed to add new discussions. Add Discussion(+) Button on the Discussion List page will be hidden for users.

Field or Control	***Description***
Add Custom Roles	Click this button to add new roles.

To automatically add users while creating discussions:

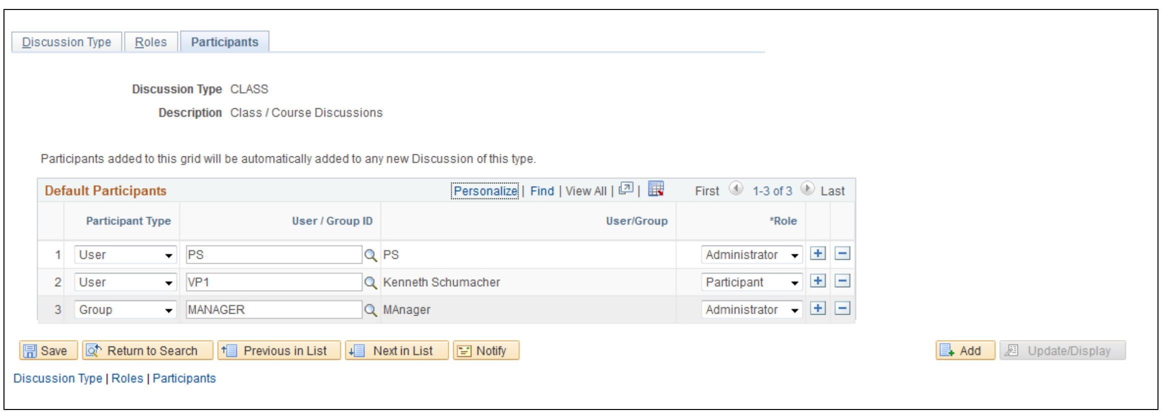
1. Click the Participants tab. The Participants tab is displayed only when you saved the Roles page details.

   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.

   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:

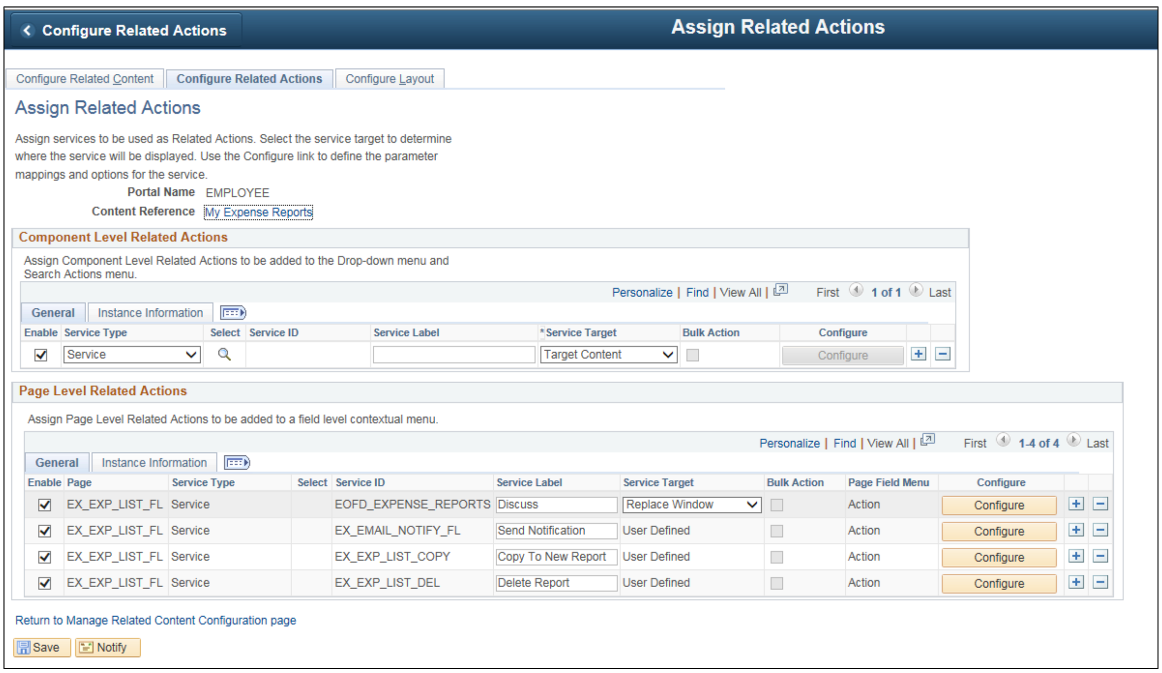
1. Navigate to PeopleTools, Portal, Related Content, Maintain Related Content.
2. Clone the Service: EOFD_DEFAULT_DSCN.
3. Add the context fields to the new service. Add below additional parameters to the service definition:
   a. EOFD_DSCN_TYPE_ID
   b. EOFD_<Context Key Field 1>

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.

Assign Related Actions Page



9. Click on Configure button to configure the service to pick the System variables.

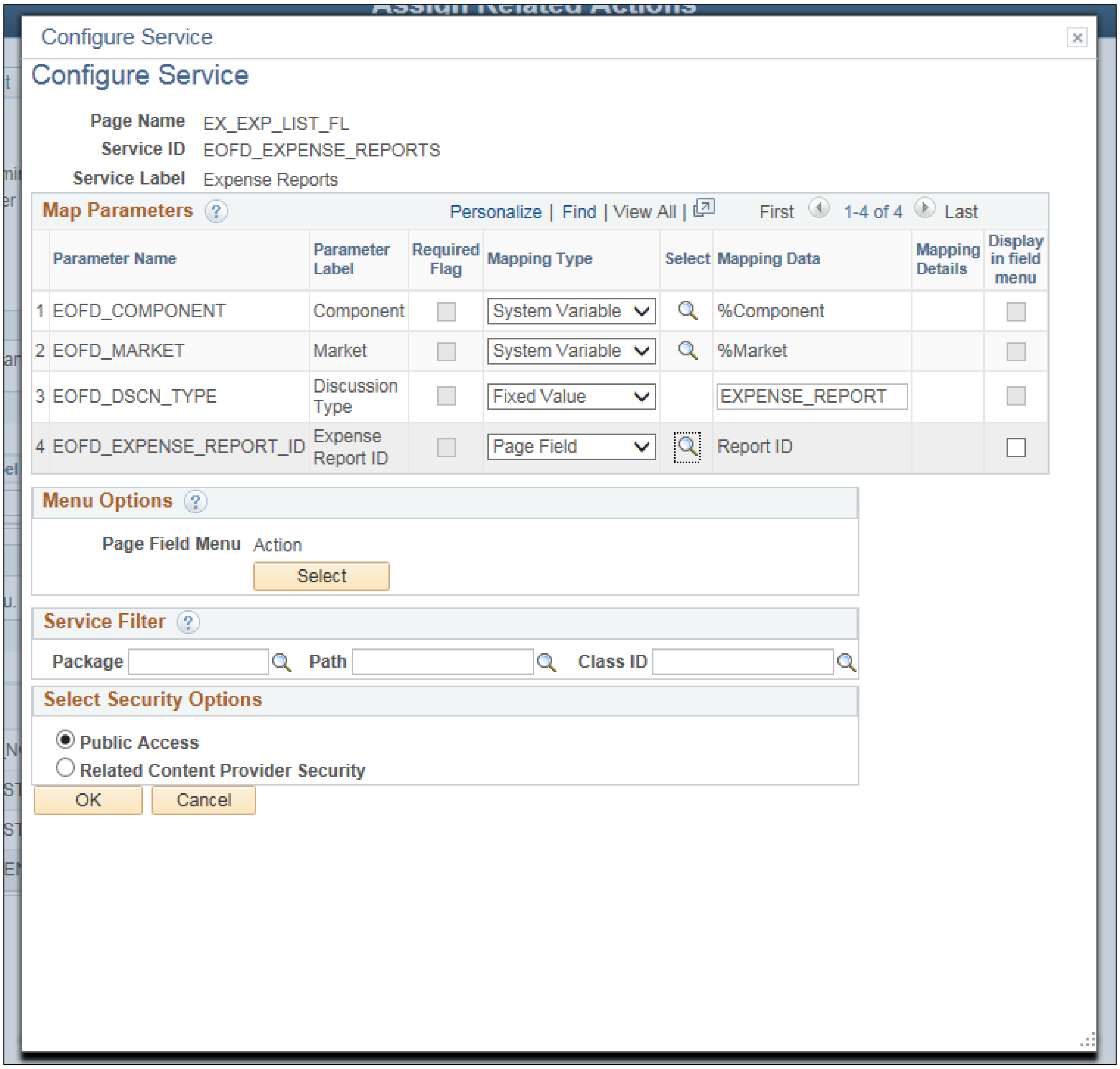
   a. For parameters EOFD_COMPONENT & EOFD_MARKET, choose Mapping Type as System Variable and Mapping data as %Component and %Market respectively.

   b. Assign fields from the page as values for the context fields.

   c. Specify the new Discussion Type ID as fixed value for the parameter: EOFD_DSCN_TYPE_ID.

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.

Configure Service Modal Window



11. Select Security Options and Click Ok.

12. Save the details configured in Assign Related Actions page.

Scheduling Notifications

Certain actions in Fluid Discussion Service send users both an email message and a notification that appears on the RC tile or Discussion List page. On the RC tile, you can view unread messages and active discussions.

Notifications are triggered when the user initiate the following actions:

- User is added to a new/existing conversation.
- New message is posted in a conversation.

- When the subject is changed
- When discussion is closed/reopened

Pages Used to Schedule Notifications

Page Name	***Definition Name***	***Usage***
Discussion Notification Page	EOFD_EML_RUN	To run discussion notifications.

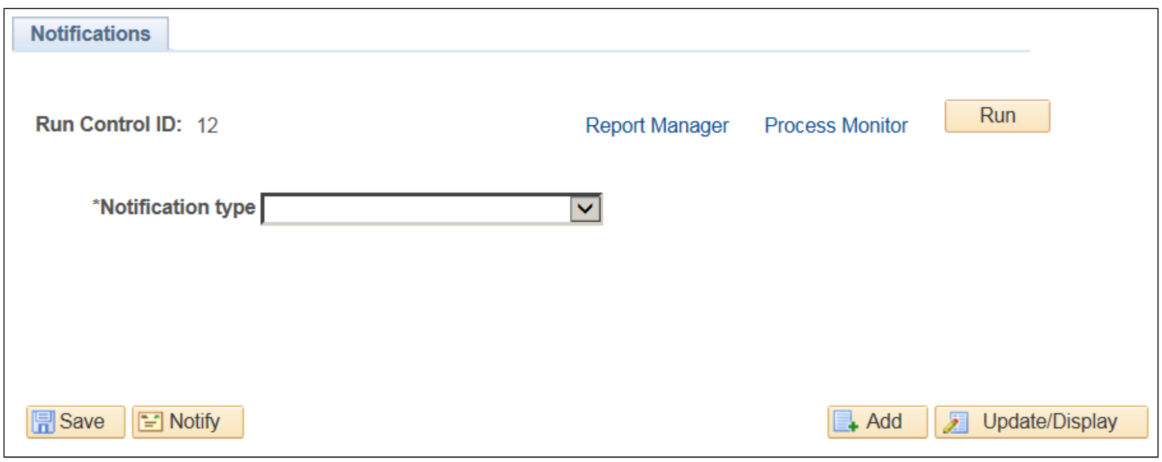
Discussion Notification Page

Use the Discussion Notification page (EOFD_EML_RUN) to schedule notifications.

Navigation:

Enterprise Components > **Discussion Service** > **Run Discussion Notifications**

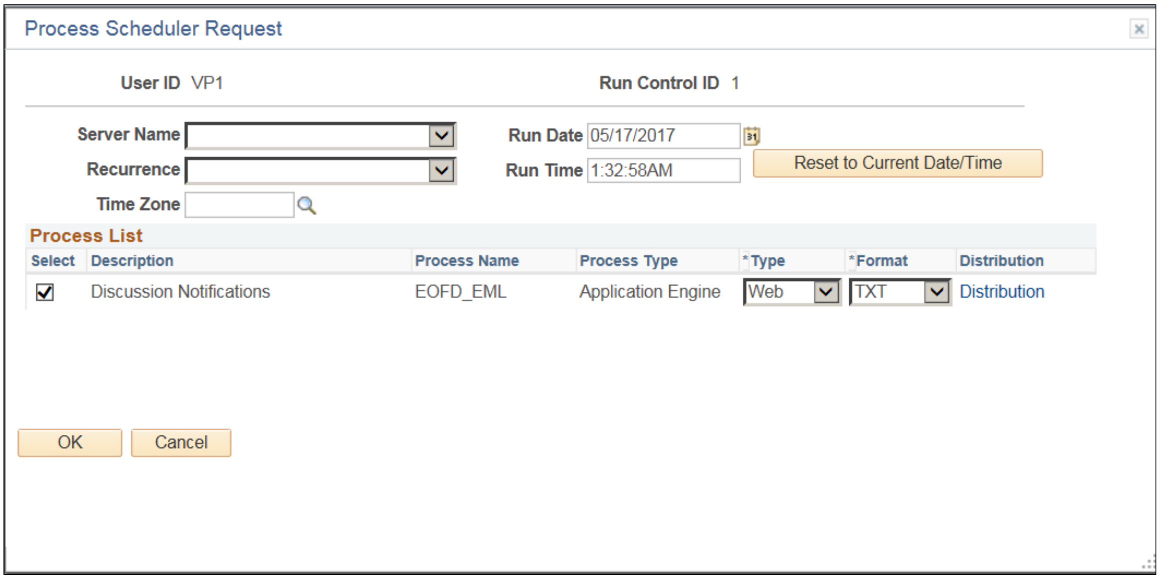
This example illustrates the fields and controls on the Discussion Notification Page.



To schedule discussion notifications, perform the following:

1. Login as an administrator.
2. Access Discussion Notification page.
3. Enter the Run Control ID.
4. Click **Add**. This displays the Discussion Notifications page.
5. Select an appropriate value from the Notification Type field.
6. Click **Run** to process the notification request. This displays the Process Scheduler Request modal window as shown.

Process Scheduler Request modal window



Note: It is recommended to set different frequencies for email and push notifications. For instance, push notifications could be as frequent as every hour or every 5 minutes. Email notifications would be less frequent, say once a day or week.

Viewing All Discussions

This section details the pages used to view discussions.

Pages Used to View Discussions

Page Name	***Definition Name***	***Usage***
Discussions Tile	EOFD_DSCN_LIST_FL_GBL	To view all discussions.
Discussions Page	EOFD_DSCN_LIST_FL	To access a list of discussion types which are having active discussions.

Discussions Tile

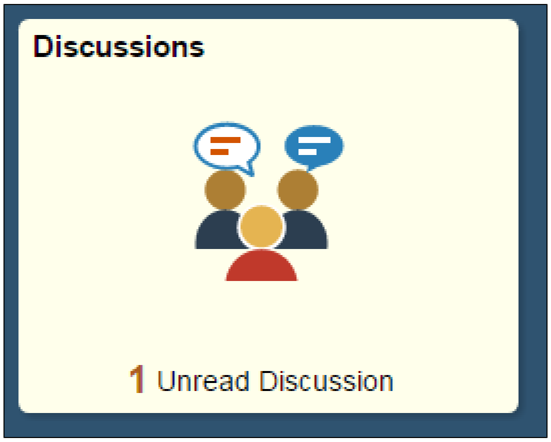
Use the Discussion tile (EOFD_DSCN_LIST_FL_GBL) to view all the discussions.

Navigation:

Select Fluid Home under the main menu. On the page that appears, select Employee Self Service. The Discussions tile is available on the Employee Self Service landing page.

Note: Discussion Tile is not available on the homepage by default. It can be added using Personalize Homepage option.

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.

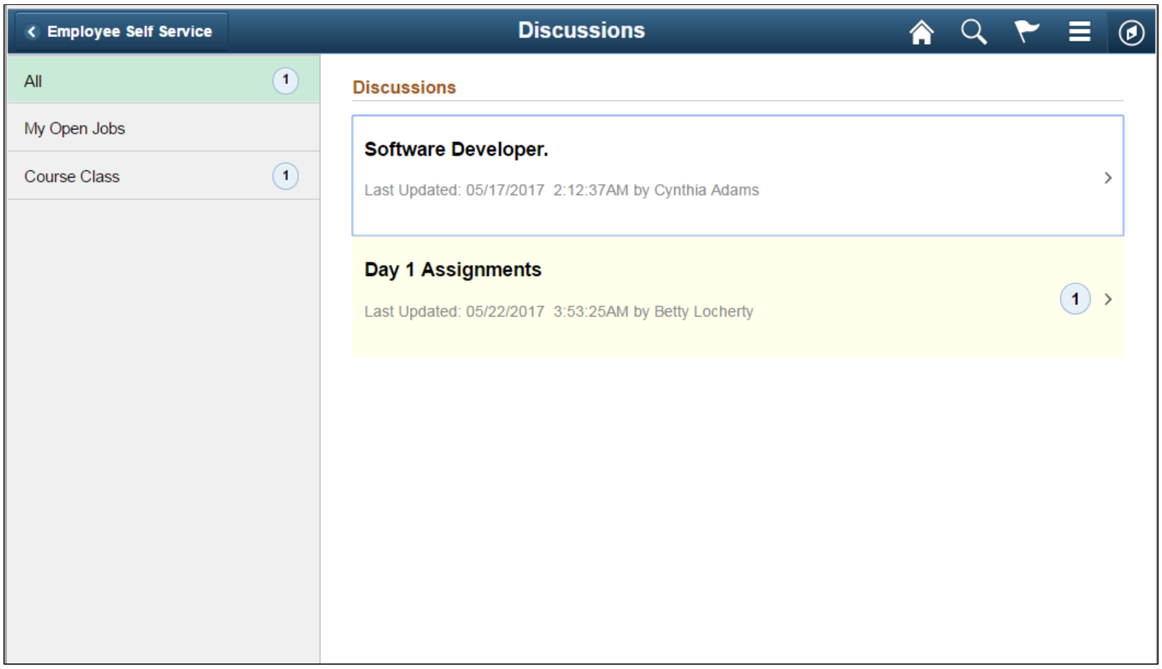
Discussions Page

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.

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

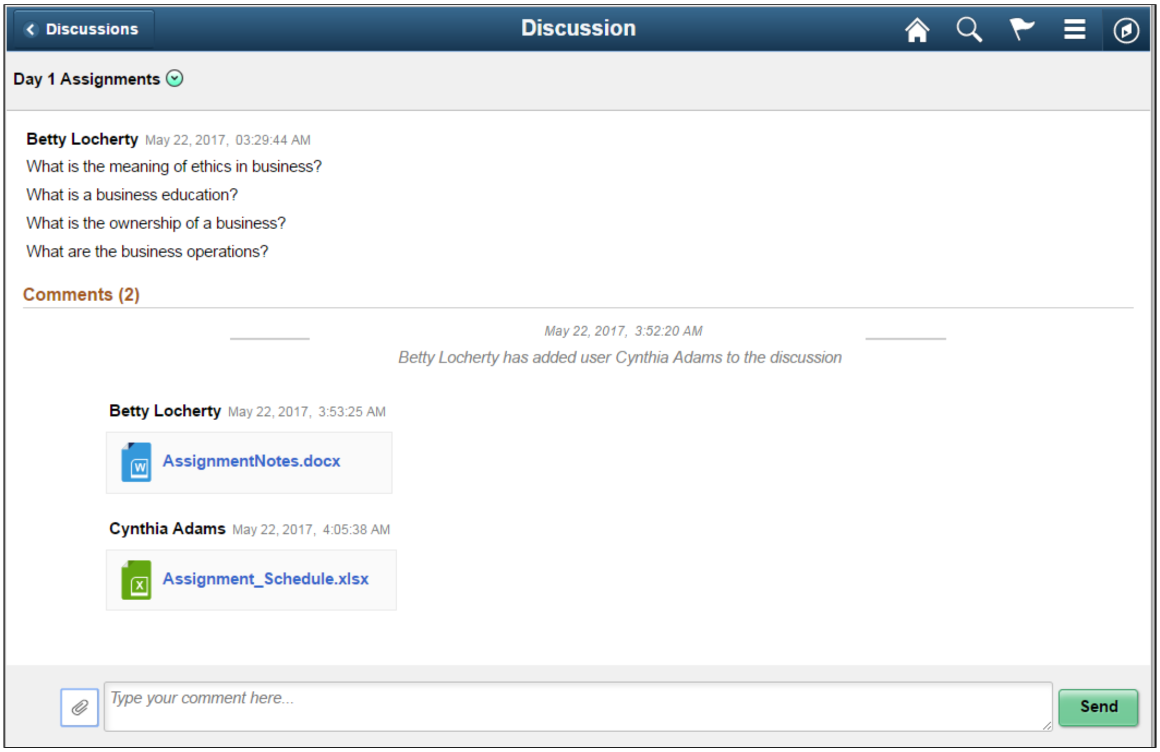


Only top fifty discussions are displayed on selection of any discussion type. To view all the discussions, click the View More link.

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.

Discussion Conversation page



You can enter your comments and attach supporting documents in this page.

Click Send to add your comments.

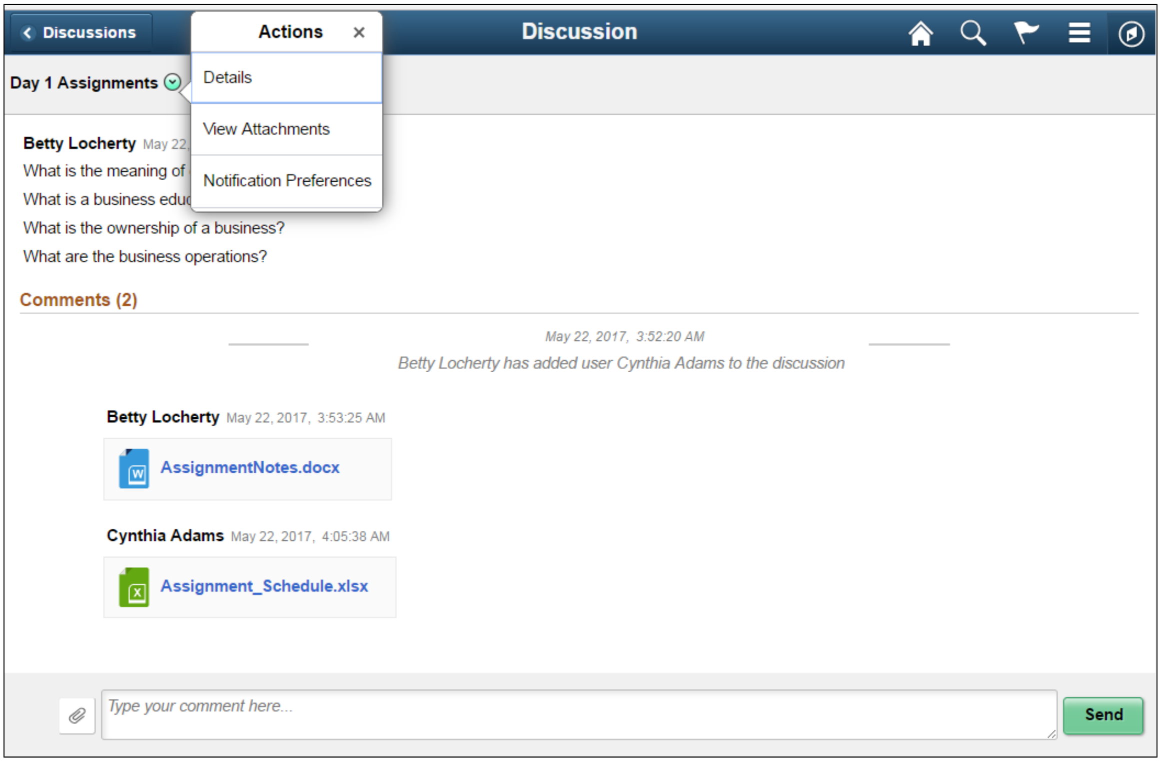
Actions on Discussions Page

In Discussions page, you can perform three actions on any discussions.

- Details
- View Attachements
- Notification Preferences

Click on the Related Action item. You can view the actions on Discussions page as shown.

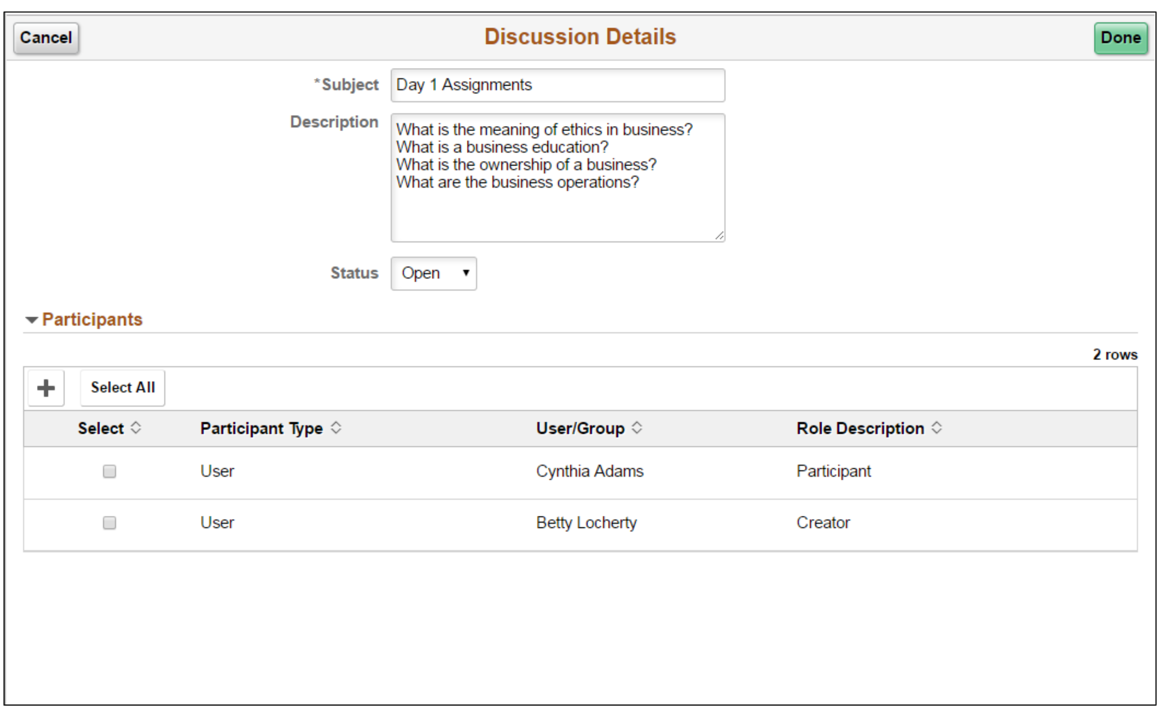
Discussions – Actions Page



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.

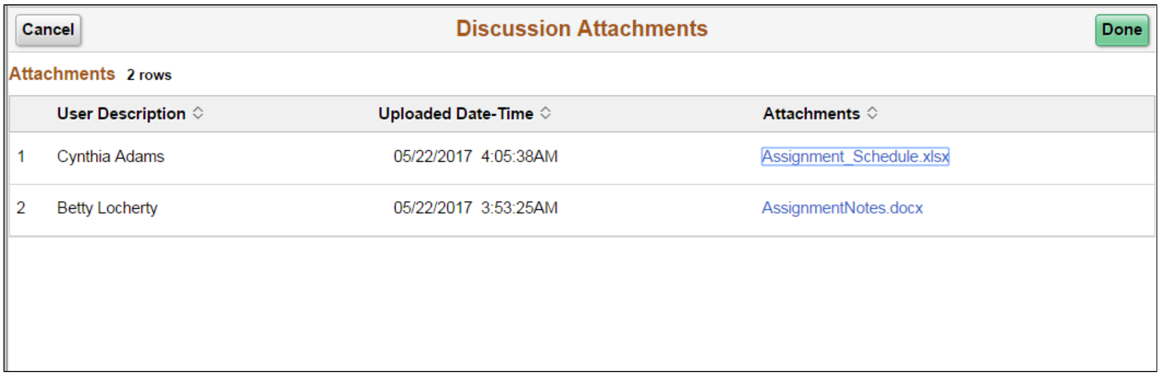
Discussion Details Page



View Attachments Option

Use this action to access Discussion Attachments page which can be used to view all the attachments posted in the Discussion Conversation.

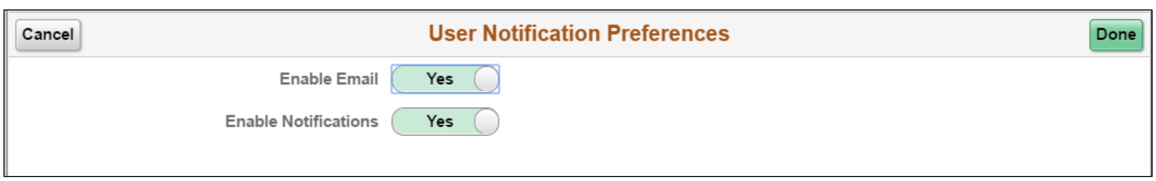
Discussion Attachments Page



Notification Preferences Page

Use this action to access User Notification Preferences page which can be used to enable or disable notifications for the current discussion.

User Notification Preferences Page



Chapter 19

Run Control Management

Updating Dates on Run Controls

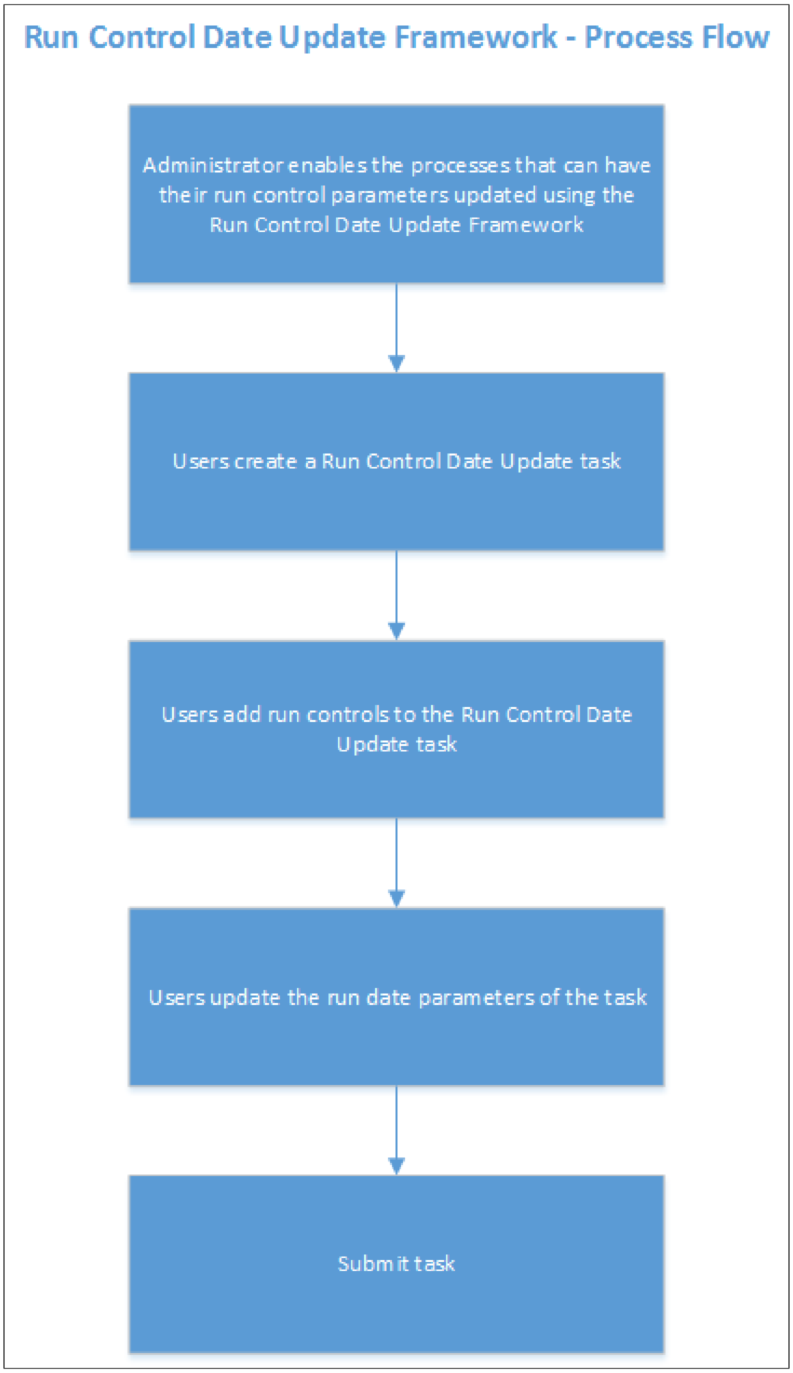
Pages Used to Update Dates on Run Controls

Page Name	***Definition Name***	***Usage***
Run Control Update Registry Page	EORC_RCCMPS	Register the Run Controls and fields for Date Update task.
Edit Run Control Registry Page		Specify the fields in the Run Control that are registered for Run Control Date Update.
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.
Define New Values Page	EORC_UPD_STEP3_FL	Update dates on the Run Control Date Update task.

Understanding the Run Control Date Update Framework

The Run Control Date Update Framework allows you to update parameters for multiple run controls in a single step; instead of manually updating the parameters for each run control by accessing each individual page. The framework enables organizations who have a large list of run controls that need to be updated, to perform this task efficiently when the business need arises. Administrators can access the registry page to enable the processes that can have their run controls edited. Then, 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.

This diagram illustrates the Run Control Date Update process flow.



FSCM Products that use this Feature

These FSCM products utilize this feature:

- Asset Management
- Billing
- Contracts

- Grants
- Global Components
- General Ledger
- Lease Administration
- Maintenance Management
- Project Costing
- Receivables
- Payables
- Treasury

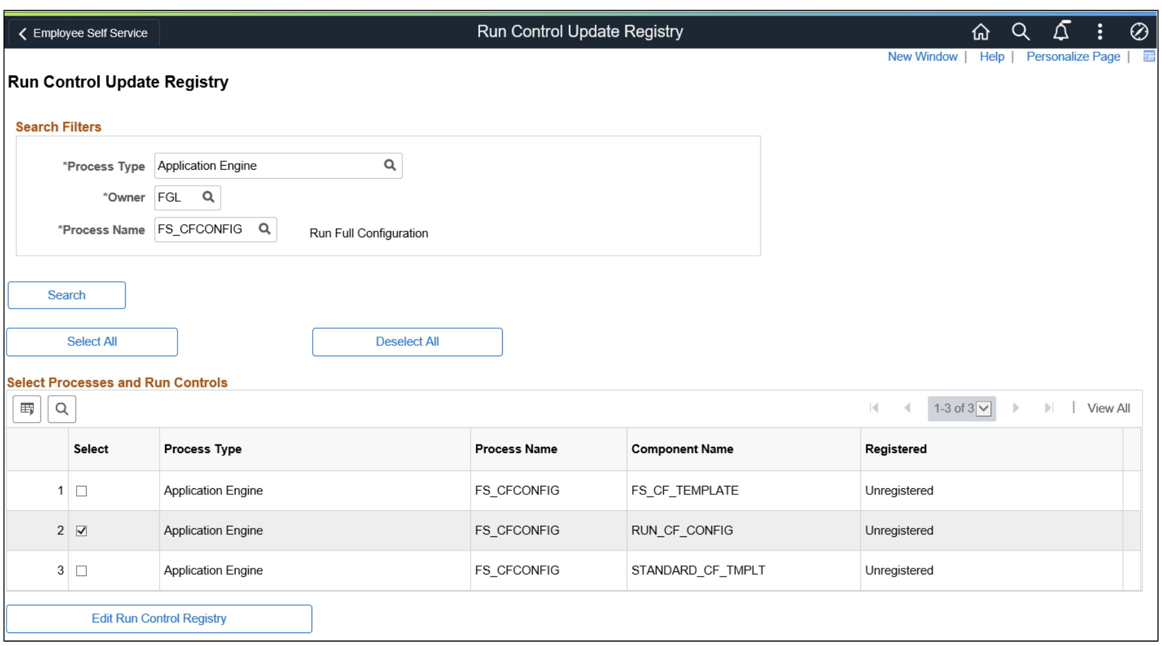
Run Control Update Registry Page

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**

This example illustrates the fields and controls on the Run Control Update Registry page.



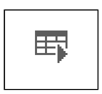
Field or Control	***Description***
Search Filters	

Use the search filters to find the required run controls that you want to register for the Run Control Date Update task.

Field or Control	***Description***
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.

Field or Control	***Description***
Select Processes and Run Controls	

Field or Control	***Description***
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.

Field or Control	*Description*
Registered	Indicates whether the Run Control has been registered for the date update task.

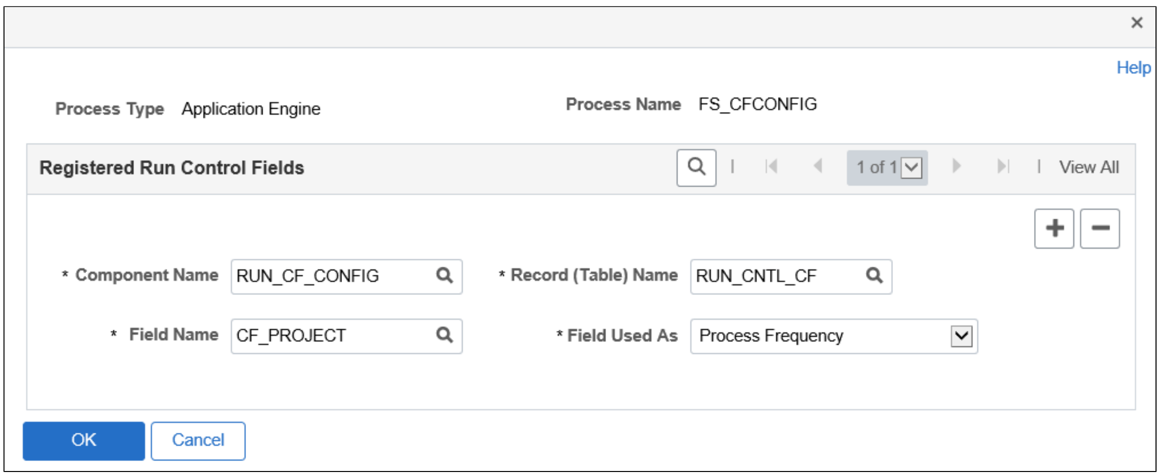
Edit Run Control Registry Page

Use the Edit Run Control Registry page to specify the fields in the Run Control that are registered for Run Control Date Update.

Navigation:

On the Run Control Update Registry page, select the Edit Run Control Registry button.

This example illustrates the fields and controls on the Edit Run Control Registry page.



Field or Control	*Description*
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.
Records that are owned by PeopleTools are not available to register.

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.

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.

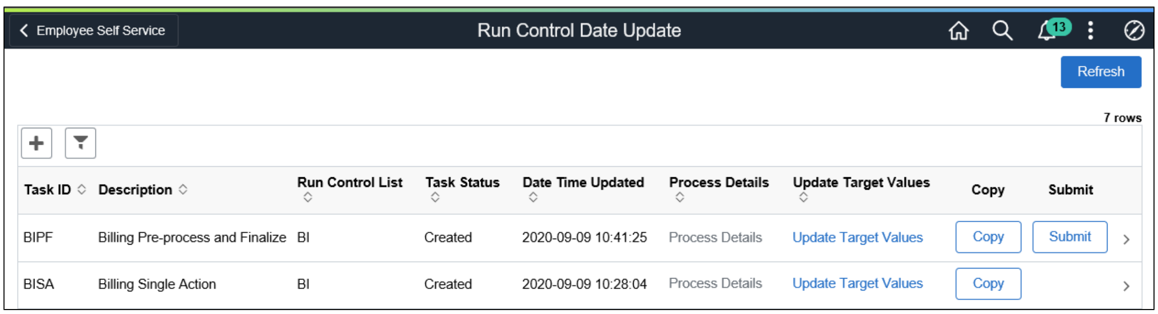
Navigation:

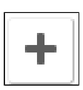
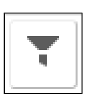
The Run Control Date Update page is delivered as a tile that can be added to a home page or dashboard. To access the tile, browse to:

Personalize Homepage > Add Tile> Run Control management> Run Control Date Upd.

Once the tile is available on the home page, click the tile to access the Run Control Date Update page.

This example illustrates the fields and controls on the Run Control Date Update page.



Field or Control	***Description***
	Click the Add button to add a new Run Control Date Update task.
	Click the filter button to filter the existing task list.
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.

Field or Control	Description
Update Target Field Values	This link delivers a pop-up page where the run control dates for the task can be updated. See also Define New Values Page.

Field or Control	Description
Copy	Copy an existing Task ID to create a new task.
Submit	Submit the task for processing.

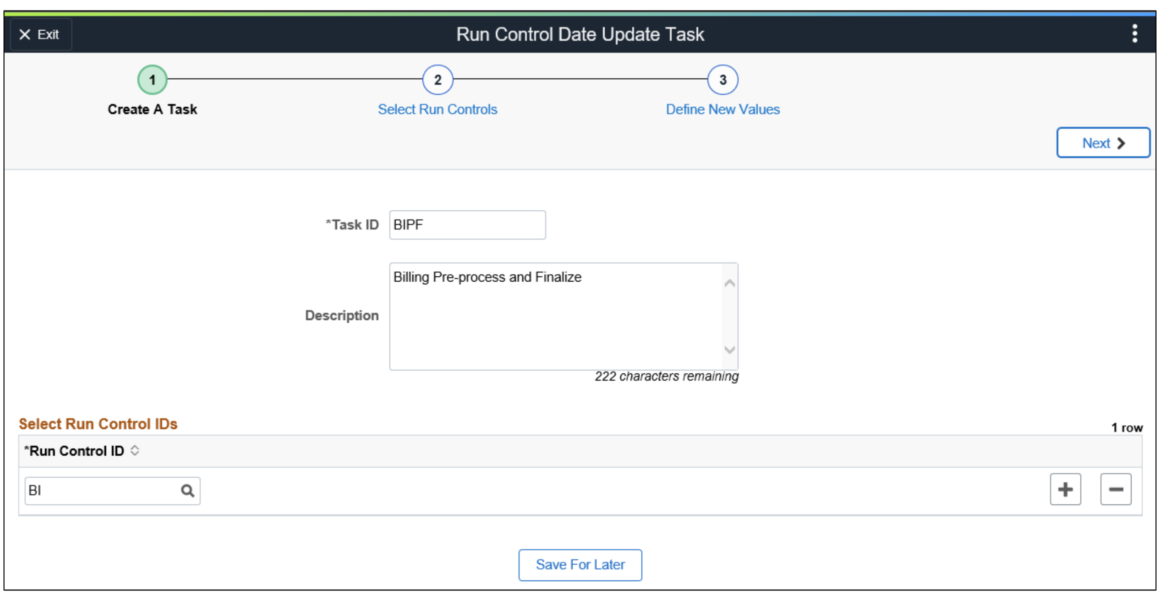
Create A Task Page

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.

This example illustrates the fields and controls on the Create A Task page.



Field or Control	Description
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.

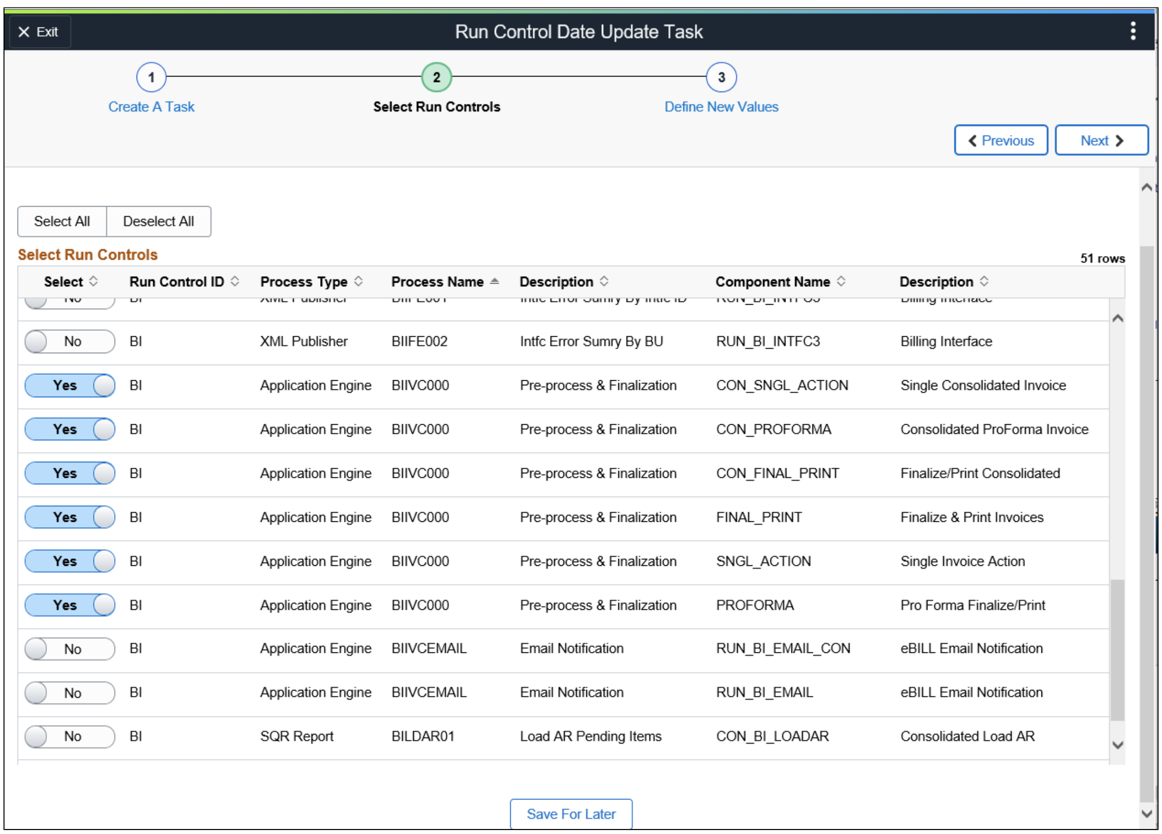
Field or Control	***Description***
Select Run Control IDs	Select all the Run Control IDs that need to be grouped under this task. Only run controls that were registered using the Run Control Update Registry Page are available for selection.
Save For Later	Save the task as draft. The user can revisit the this page to 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.

This example illustrates the fields and controls on the Select Run Controls page.



Field or Control	***Description***
Select All	Select all the components for the update task.
Deselect All	Deselect all the components for the update task.

Field or Control	*Description*
Select	Select the required components from the list for the update task.
Save For Later	Save the task as draft.

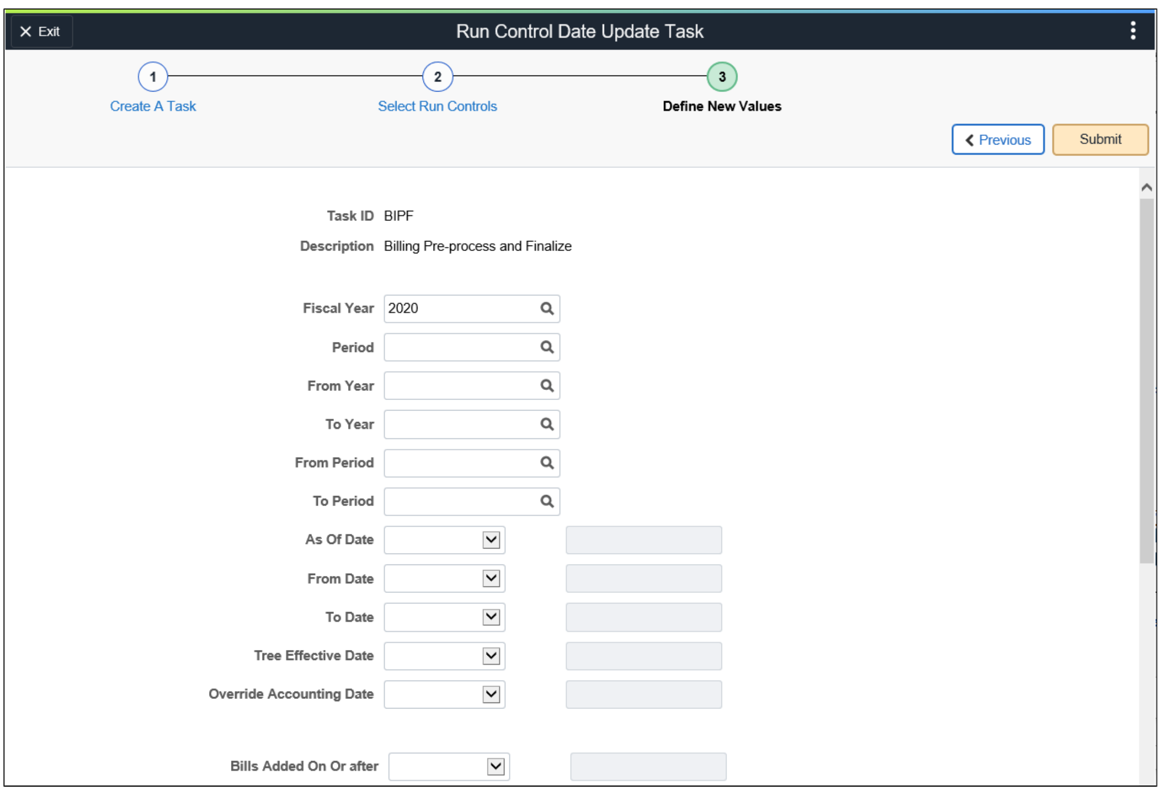
Click the Next button to proceed to the next page in the activity guide. Click Previous to go to the previous step in the activity guide.

Note: If a run control record is shared between components, then the updated values are reflected in all components that share the common record.

Define New Values Page

Use the Define New values page (EORC_UPD_STEP3_FL) to define the new run control for the task.

This example illustrates the fields and controls on the Define New Values page.



Use the Submit button to submit the task for processing.

Using Run Control Delete

Run Control data that is no longer used or processes that are no longer executed can be deleted through simple configuration. An activity guide is provided to review and delete run control data.

Note: Currently the Run Control Delete functionality is available only for the FSCM and HCM products.

Understanding Run Control Delete

End users can delete their own run controls, whereas administrators can delete run controls created by all users. An end user is a user without the *Administrator* role. For more information about setting up user permissions, see *PeopleTools: Defining Permissions*.

Custom run control pages and processes can be registered for run control deletion. For this, you must identify the list of records used in the custom run control page and process, which saves the run control data. These records should have *RUN_CNTL_ID* and *OPRID* as the key fields.

Prerequisite for Run Control Delete

Run control data can be deleted only when it is purged by running the system purge process. Run Control IDs for processes that are run, and for which the system purge process has been executed, are eligible for deletion, see PeopleTools: Submitting Process Requests for more information.

Run Control Delete Exceptions

System created run controls cannot be deleted. Following is a list of run controls that are not available for deletion:

Product	***Process***
Assets	• ARO Measurement En Masse • Update AM ChartFields • Load Budgeting Asset Catalog
General Ledger	nVision processes and reports
PeopleTools	Archiving

Note: Run control data that is not saved in PRCSRUNCNTL table is not available for deletion.

Pages Used to Register Run Control Tables and Create Run Control Delete Request

Page Name	***Definition Name***	***Usage***
Run Control Delete Metadata Page	EORD_METADATA	Review and register run control tables for the Run Control Delete process.
Run Control Settings Page	EORD_DAYS	Set the delete lag days for the Run Control Delete process.
Run Control Delete Page	EORD_TASKMAIN_FL	View existing run control delete requests and take appropriate action.
Delete Request Summary Page	EORD_DS_SUM_FL	View run control details for the selected delete request.
Enter Details Page	EORD_DSET_FL	Enter details for the run control delete request.
Select Run Control Page	EORD_DSET2_FL	Select run control components for which the run control data needs to be deleted.
Review and Delete Page	EORD_DSET3_FL	Review and delete selected run control data.
Processing Details Page	EORD_PRCD_FL_SCF	Review processing details for the deleted run control data.

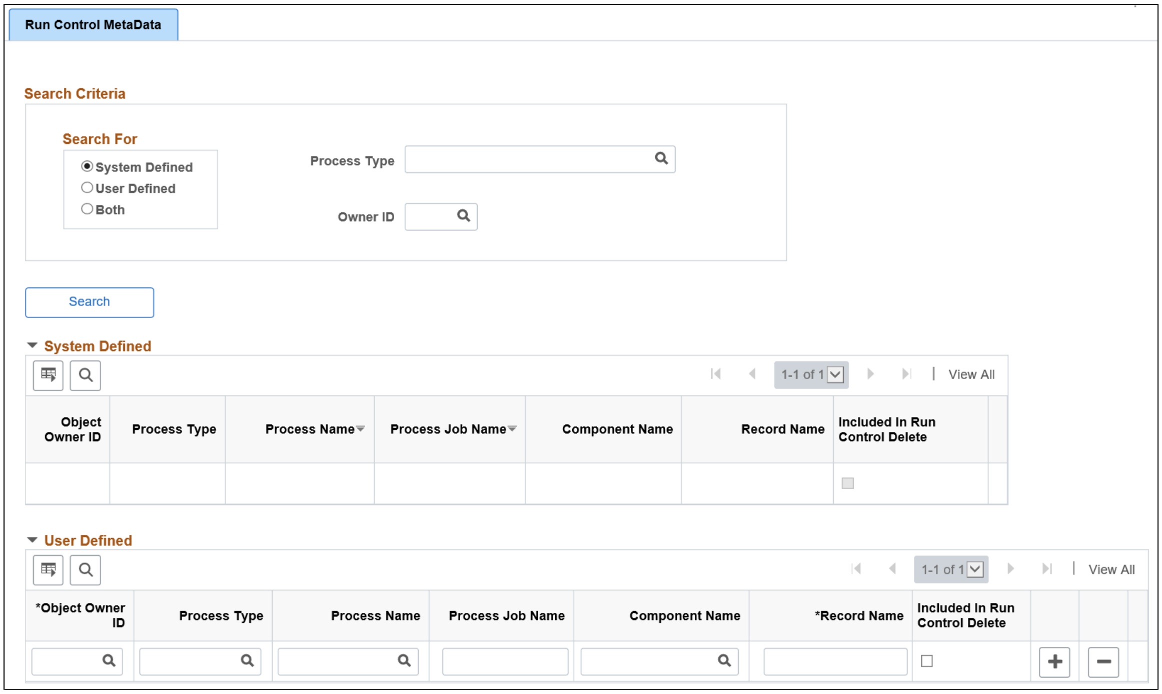
Run Control Delete Metadata Page

Use the Run Control Delete Metadata page (EORD_METADATA) to review and register run control tables for the Run Control Delete process.

Navigation:

Enterprise Components > **Run Control Management** > **Run Control Delete Metadata**

This example illustrates the fields and controls on the Run Control Delete Metadata Page. You can find definitions for the fields and controls later on this page.



Oracle PeopleSoft delivers all applicable run control tables as system data. You can register any custom process/run control pages in the User Defined section on this page. You can also search for system-defined or user-defined run control metadata. System data can only be reviewed, but not deleted on this page.

Field or Control	*Description*
Search For	Select from the given three options to search the metadata: • System Defined • User Defined • Both
Process Type	Select required Process type from the prompt to search for system defined or user defined run control data.
Owner ID	Select Owner ID to search based on the Owner ID/Product ID.
Included In Run Control Delete	Select to include the record in the Run Control Delete process.

Run Control Settings Page

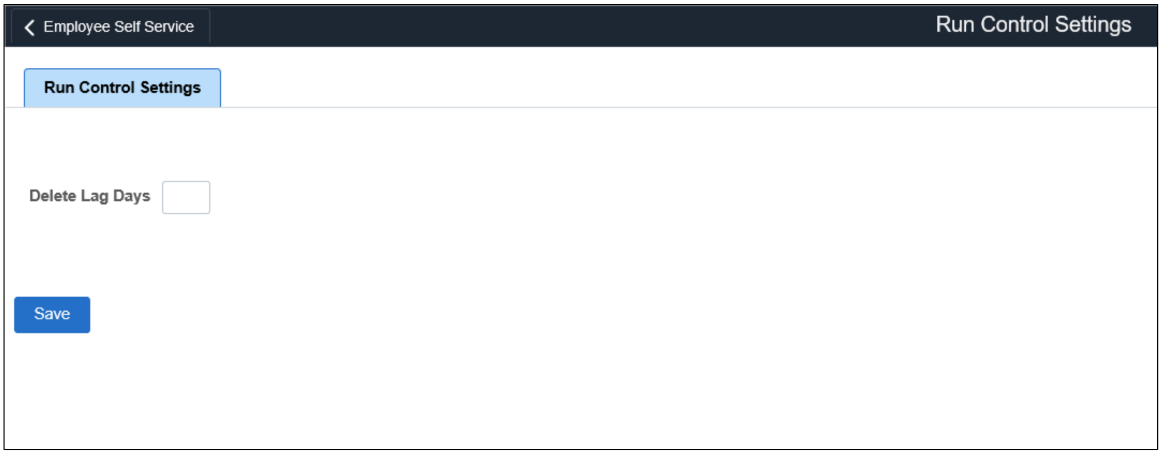
Use the Run Control Settings page (EORD_DAYS) to set the delete lag days for the Run Control Delete process.

Based on the value given in this field, the run control data will be available for deletion.

Navigation:

Enterprise Components > **Run Control Registry** > **Run Control Settings**

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



Field or Control	***Description***
Delete Lag Days	Enter the number of days based on which the run control data will be available for deletion. For example, if this field is set to a value of 30 then only those run control IDs, which are atleast 30 days old will be eligible for deletion. If this field is left blank, or zero is entered as the value then all run control data will be eligible for deletion.

Run Control Delete Page

Use the Run Control Delete page (EORD_TASKMAIN_FL) to view existing run control delete requests and take appropriate action.

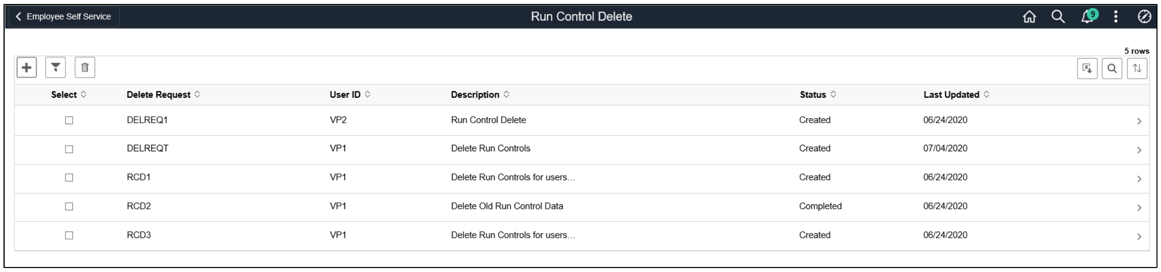
Navigation:

Personalize Homepage > **Add Tile** > **Run Control Management** > **Run Control Delete**

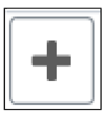
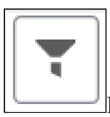
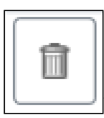
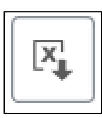
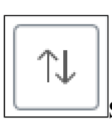
Tile can be placed on any PeopleSoft Fluid Home page. For additional information about how to add a tile to a PeopleSoft Fluid Home page, see PeopleTools: Application User's Guide, "Working With PeopleSoft Fluid User Interface", Working With Fluid Homepages, Managing Tiles, Adding Tiles to a Fluid Homepage.

Select the Run Control Delete tile.

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



Users can add new requests. They can review/update delete requests created only by them. Users can click individual rows displayed on the page to view summary of the selected delete request in the Delete Request Summary page. Administrators can view delete requests submitted by all users, and filter displayed data.

Field or Control	***Description***
**Add**	Click to select User IDs to delete corresponding run control data.
**Filter**	Click to select criteria for filtering the displayed run control delete requests. Results can be filtered by Delete Request, User ID, or Status.
**Delete**	Click to delete selected run control delete requests.
**Download to Excel Delete Requests**	Click to download the displayed delete requests in to an Excel file.
**Search**	Select to search for specific delete requests.
**Sort**	Select to sort the displayed delete requests.
Select	Select the check box to delete required run control delete requests.

Field or Control	***Description***
Delete Request	Displays the unique delete request name.
User ID	Displays the User IDs of all users who have created delete requests. This column is visible only to the administrator.
Description	Displays the delete request details.
Status	Displays the status of the delete requests. Status values are: • Created — created delete request. • Submitted — submitted for processing. • Completed — completed processing.
Last Updated	Displays the date when the delete request was last updated.

Delete Request Summary Page

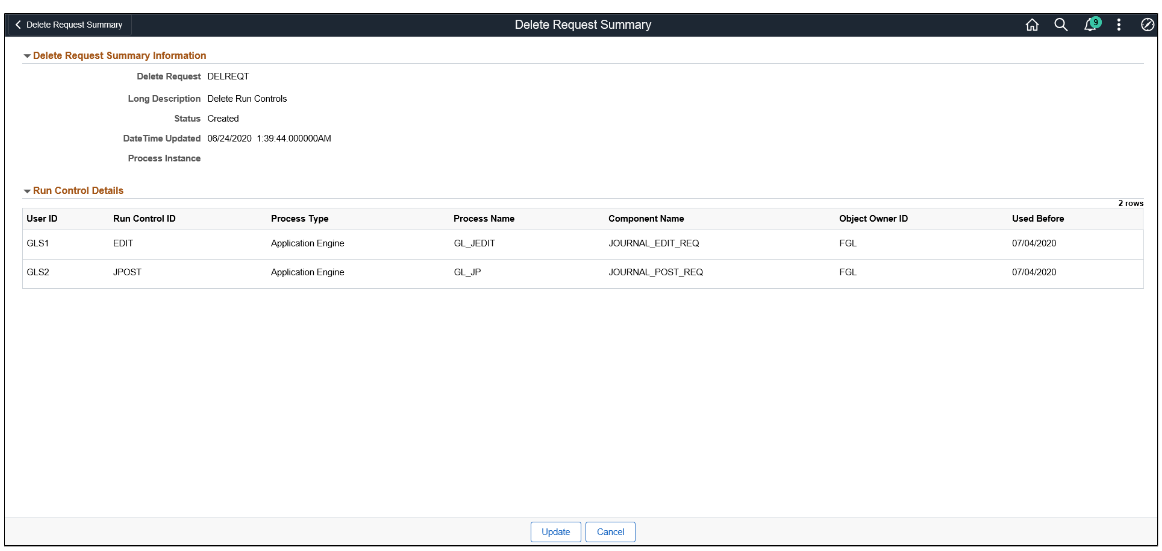
Use the Delete Request Summary page (EORD_DS_SUM_FL) to view run control details for the selected delete request.

Navigation:

Select the Run Control Delete tile.

Select any delete request to view its summary information.

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



Field or Control	Description
Update	Click to update the selected delete request details. This link is applicable only when the delete request is created. It does not appear when the request is submitted for processing or completed.
Cancel	Click to cancel and return to the Run Control Delete page.

Enter Details Page

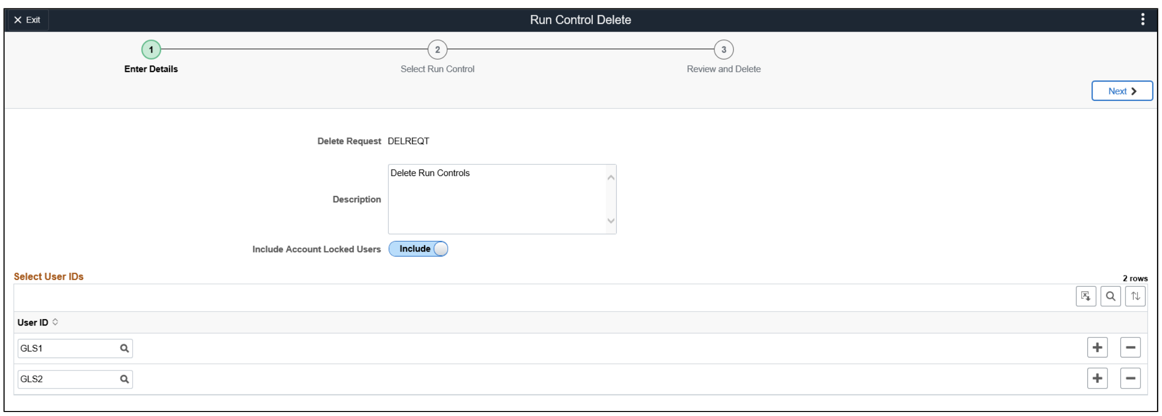
Use the Enter Details page (EORD_DSET_FL) to enter details for the run control delete request.

You can add User IDs for which the run control data needs to be deleted.

Navigation:

Click the Run Control Delete Tile. Select the Add icon.

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



Field or Control	Description
Delete Request	Enter an unique delete request name.
Include Account Locked Users	Select *Include* to include locked users in the delete run control data process. Select *Exclude* to exclude locked users. This field is visible only for administrators.
User ID	Select User IDs to include for deleting run control data. This field is available only for administrators. Only five users can be added.
Next	Click to navigate to the next step in the activity guide.

Select Run Control Page

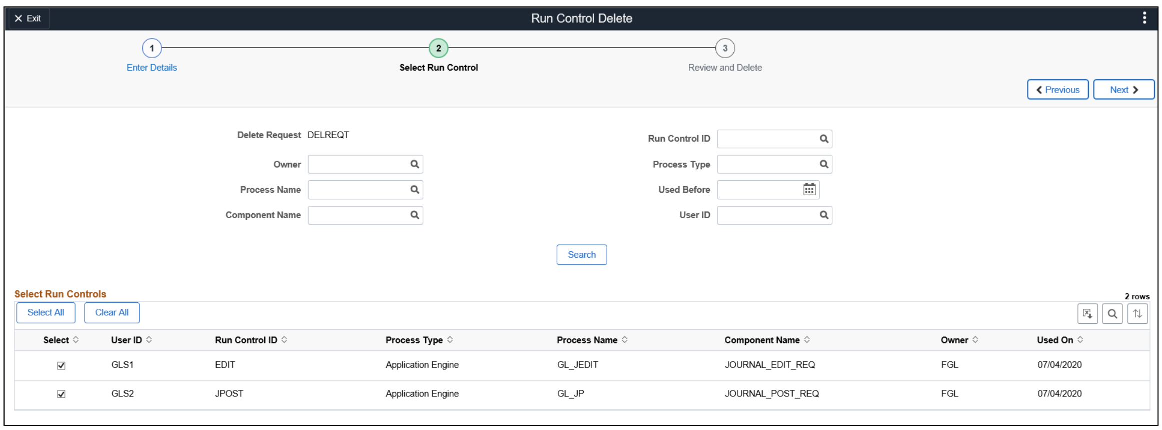
Use the Select Run Control page (EORD_DSET2_FL) to select run control components for which the run control data needs to be deleted.

For better performance, the number of distinct run control IDs fetched for a delete request is limited to 300.

Navigation:

From the Enter Details page, select the Next button.

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



Field or Control	*Description*
Run Control ID	Select Run Control IDs that are applicable to the selected User ID (in case of administrator) or User ID of the current user.
Process Type	Select process types.
Process Name	Select process names that are applicable to the selected *Process Type*. Process Name can be selected only after selecting a Process Type.
User ID	Select an User ID for which the run control has to be deleted. This field is visible only to administrators.
Search	Click to search for required run control data after entering details in any of the search fields.
Select	Select run control components for deletion. **Note:** Based on the value set in the Run Control Settings page, the run control data is selected for deletion. If no value is specified then all the run control data is deleted.

Field or Control	Description
Next	Click to navigate to the next step in the activity guide. You have to select at least one row from the displayed run control data to proceed to the next step.

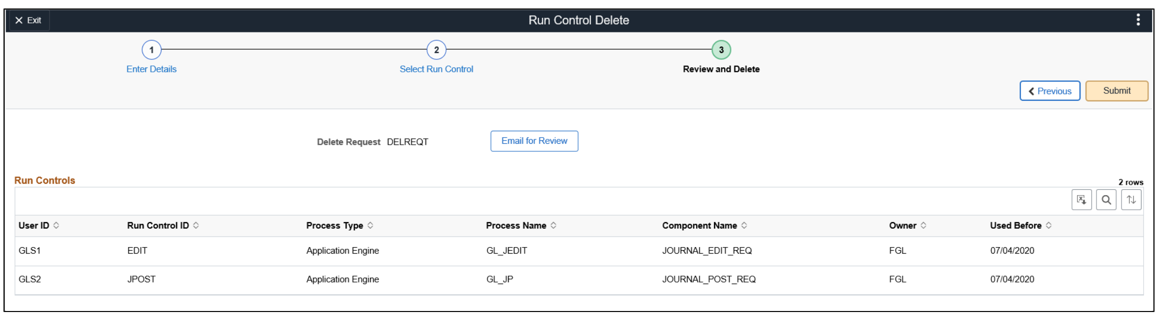
Review and Delete Page

Use the Review and Delete page (EORD_DSET3_FL) to review and delete selected run control data.

Navigation:

From the Run Control Delete: Select Run Control page, select the Next button.

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



Field or Control	Description
Email for Review	Click to open the Send Email page to send email to intended recipients. The email can be sent to any user. This feature is available only to administrators.
Submit	Click to submit all the displayed run control data for deletion.

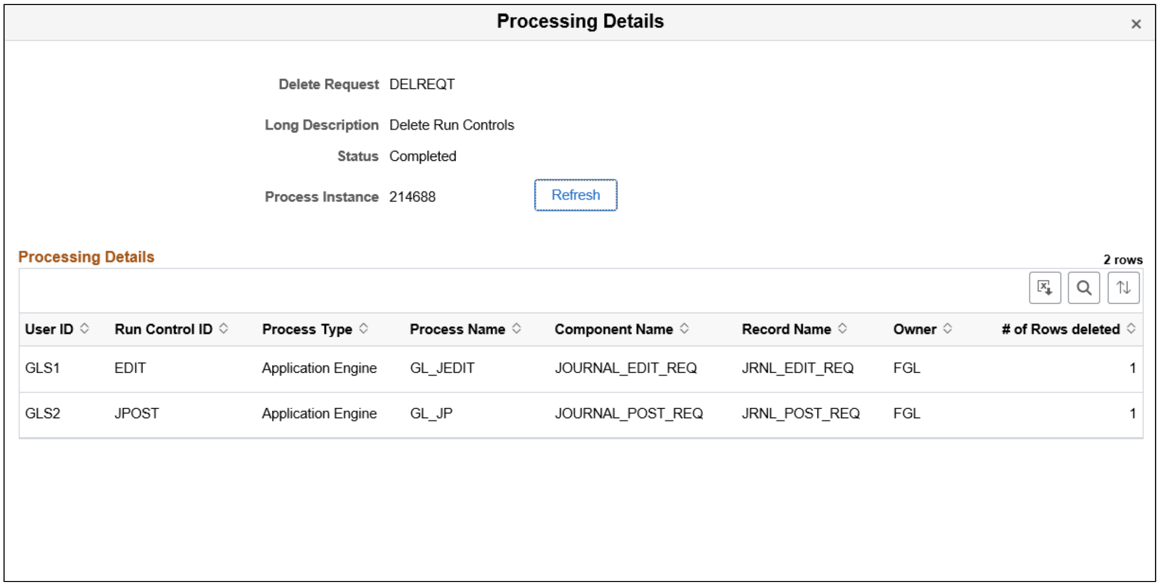
Processing Details Page

Use the Processing Details page (EORD_PRCD_FL_SCF) to review processing details for the deleted run control data.

Navigation:

From the Run Control Delete: Review and Delete page, select the Submit button.

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



Field or Control	***Description***
Refresh	Click to view the updated status of the delete request once the request is submitted for processing.

If the number of rows selected for deletion are less than or equal to150 then the processing is performed online, and user can review the processing details once it is submitted. If the number of rows are greater than150 then the processing is performed in batch mode. The delete request is in *Submitted* status until the processing is complete.

When closing this page, the system exits the activity guide and navigates to the Run Control Delete page.

Chapter 20

Working with Acknowledgement Framework

Understanding the 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.

Video: PeopleSoft Acknowledgement Framework

Setting Up the Acknowledgement Framework

This topic discusses how to set up the Acknowledgement Framework.

Pages Used to Set Up Acknowledgement Framework

Page Name	***Definition Name***	***Usage***
Acknowledgement Category Page	ESIGN_CATEGORY	Create the Acknowledgement category and configure its user security.
Acknowledgement Configuration Page	ESIGN_DTL	Create an Acknowledgement Configuration.
Review Acknowledgements Page	ESIGN_ADMIN_SUM_FL	Review the Acknowledgements.

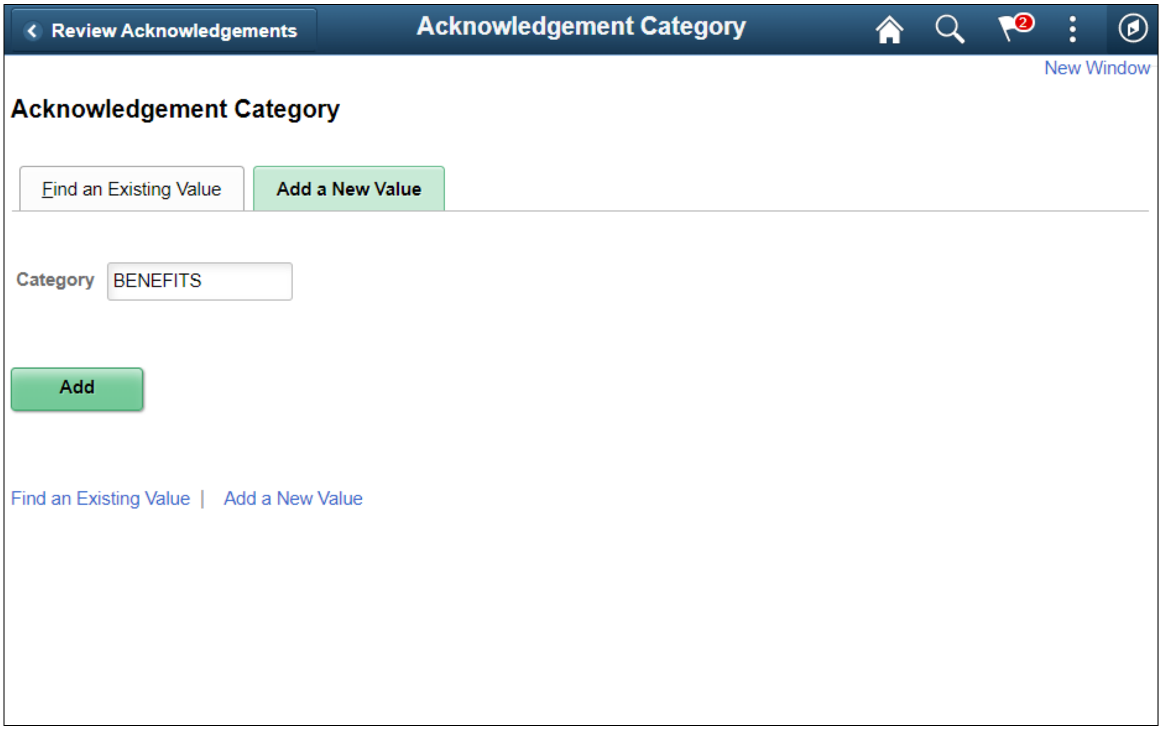
Acknowledgement Category Page

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.

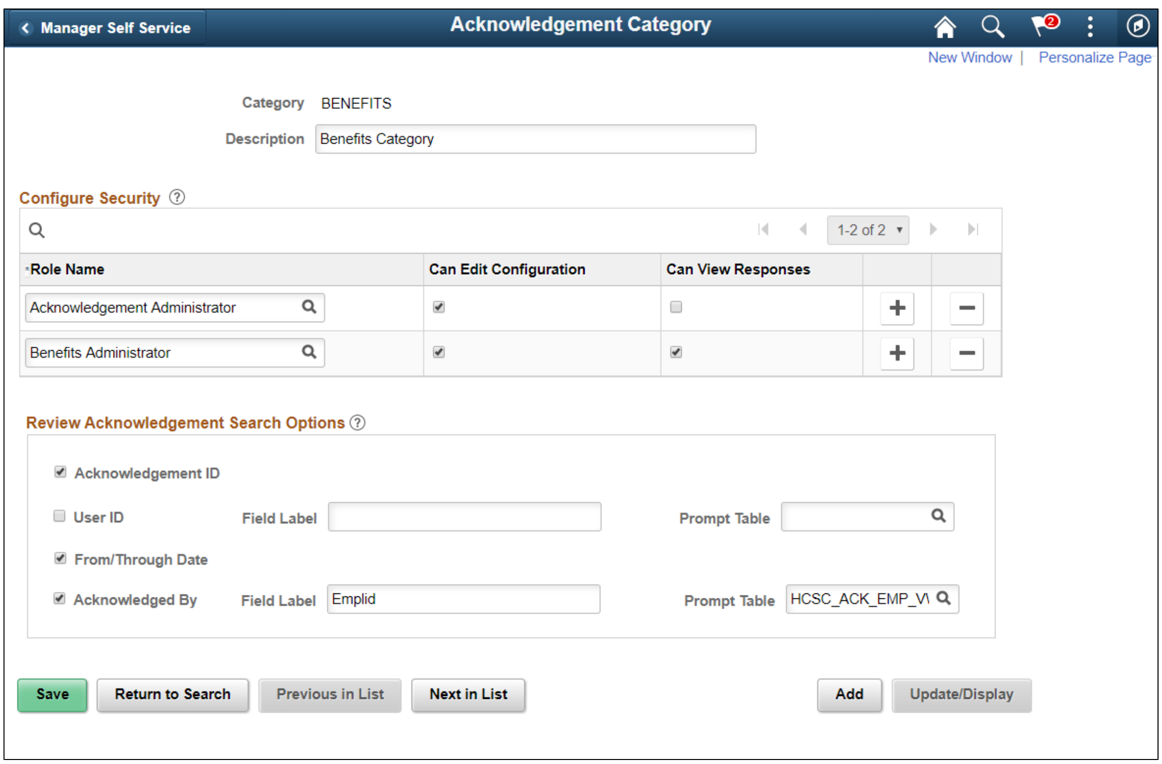
Navigation:

Enterprise Components > Acknowledgement > Acknowledgement Category

Add Acknowledgement Category page.



Acknowledgement Category page



To add a new acknowledgement category, use the Add New value tab in the Acknowledgement Category search page.

Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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

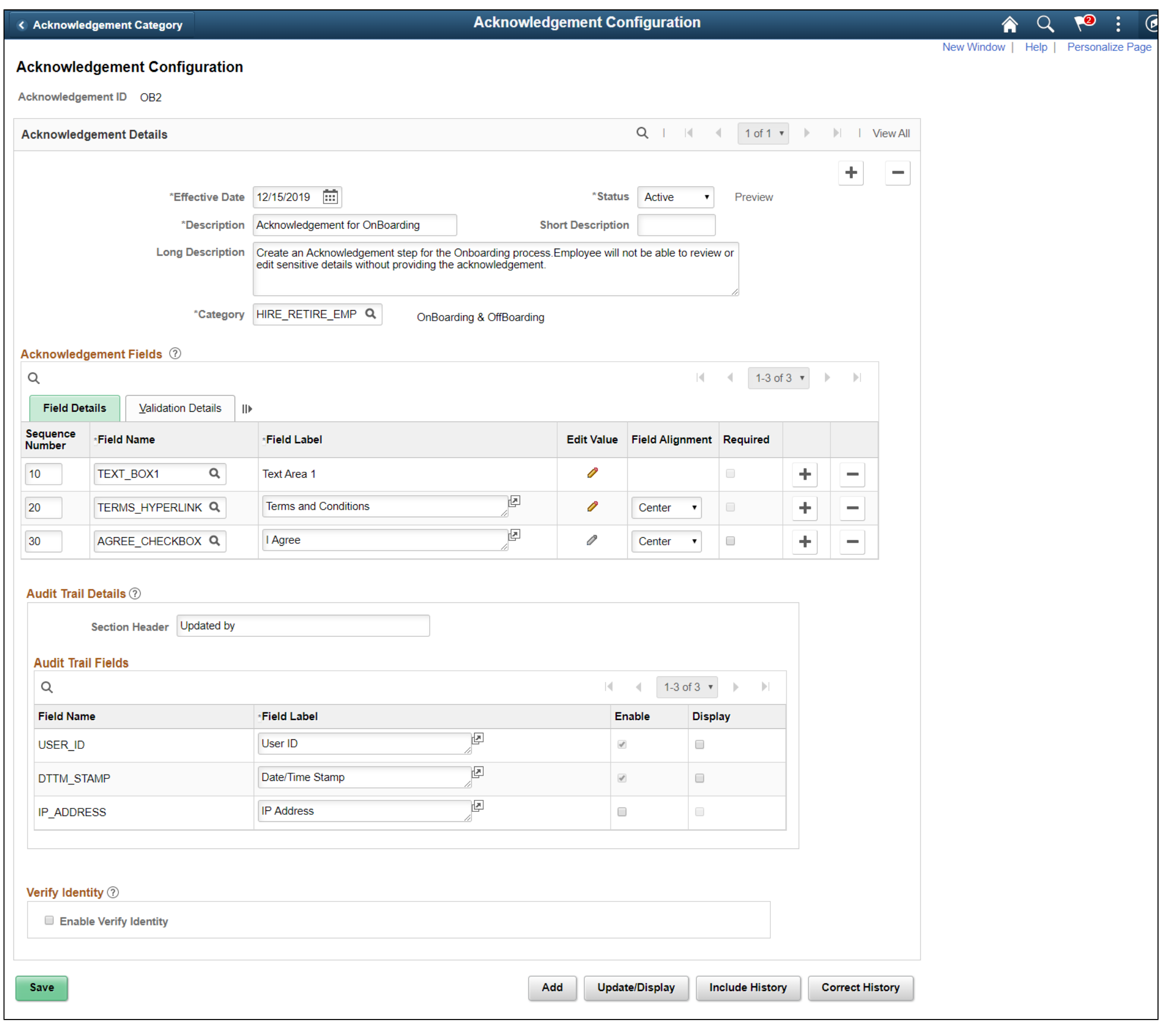
Use the Acknowledgement Configuration page (ESIGN_DTL) to create an Acknowledgement Configuration.

Navigation:

Enterprise Components > **Acknowledgement** > **Acknowledgment Configuration**

Note: Users with the ‘Acknowledgement Administrator’ role will have access to the Acknowledgment Configuration page.

Acknowledgement Configuration page.



Acknowledgement Details

Field or Control	***Description***
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.

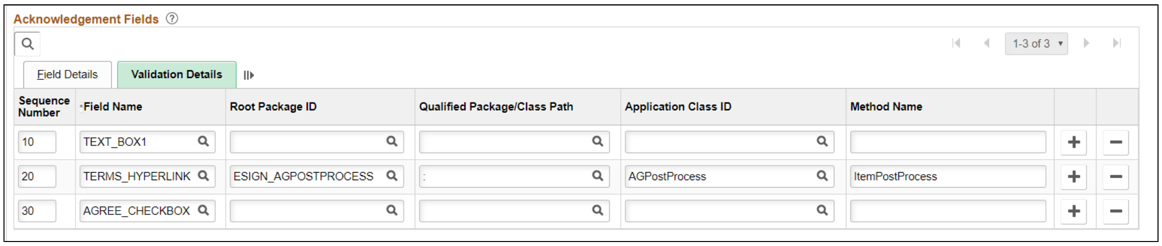
Acknowledgement Fields - Field Details

Field or Control	***Description***
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 or Control	***Description***
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

Acknowledgement Fields Validation Details.



Field or Control	*Description*
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

Field or Control	*Description*
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 or Control	*Description*
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.

Field or Control	*Description*
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

Field or Control	*Description*
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.

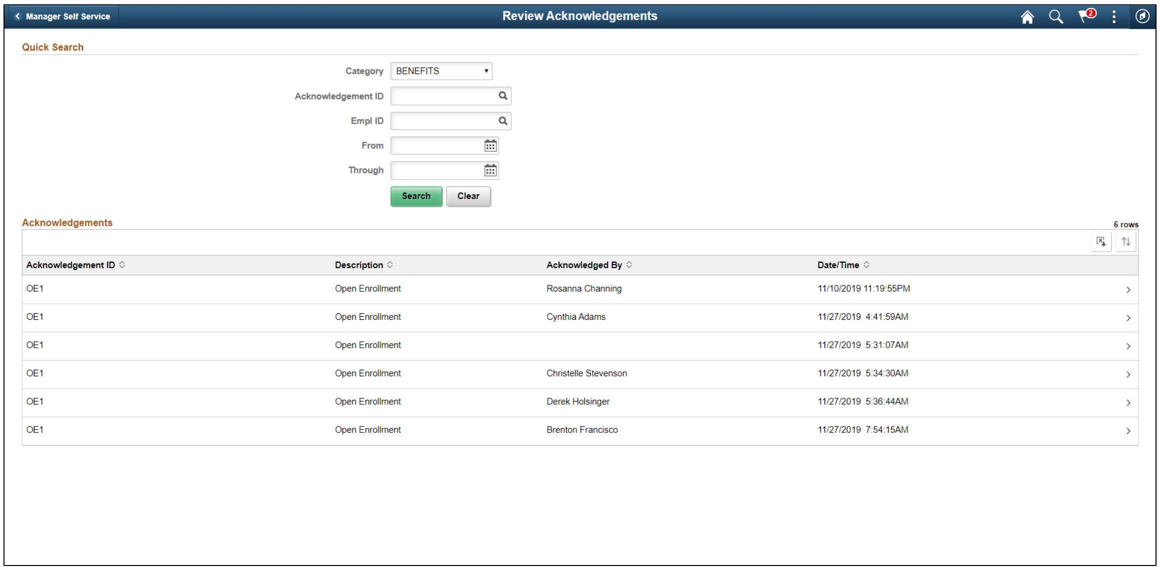
Review Acknowledgements Page

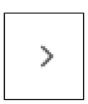
Use the Review Acknowledgements page (ESIGN_ADMIN_SUM_FL) to search for and review the acknowledgements.

Navigation:

Enterprise Components > **Acknowledgement** > **Review Acknowledgements**

Review Acknowledgements page for Admin user.



Field or Control	***Description***
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.

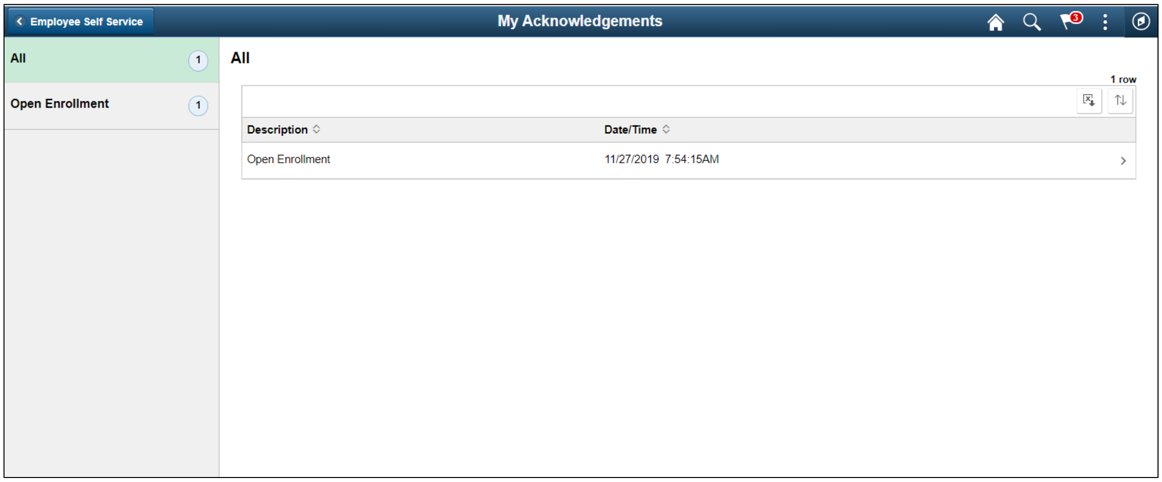
For more information, see the image highlights video on Acknowledge Framework Summary page.

Video: Image Highlights, PeopleSoft HCM Update Image 33: Acknowledgement Framework - Summary Review Pages

My Acknowledgements

Employees can use the My Acknowledgements tile in the Employe Self-Service home page to review acknowledgements that they did in the past.

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.

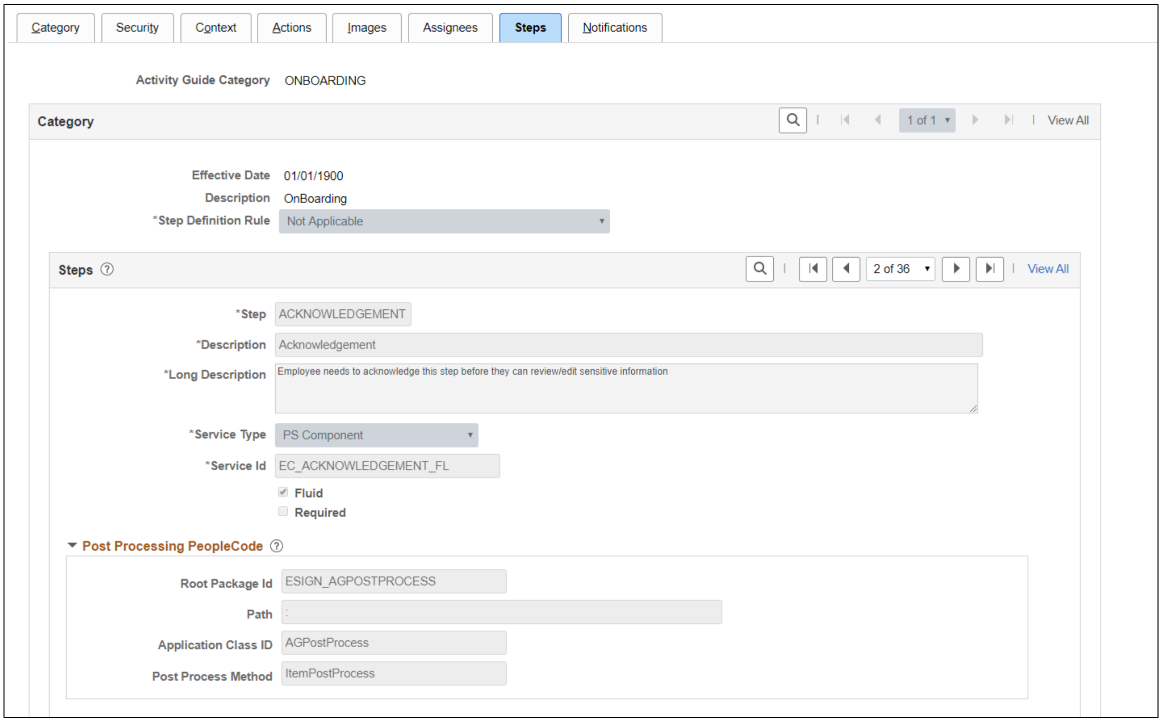
Categories - Steps Page

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**

This example illustrates the fields and controls on the Categories - Steps page (1 of 2).



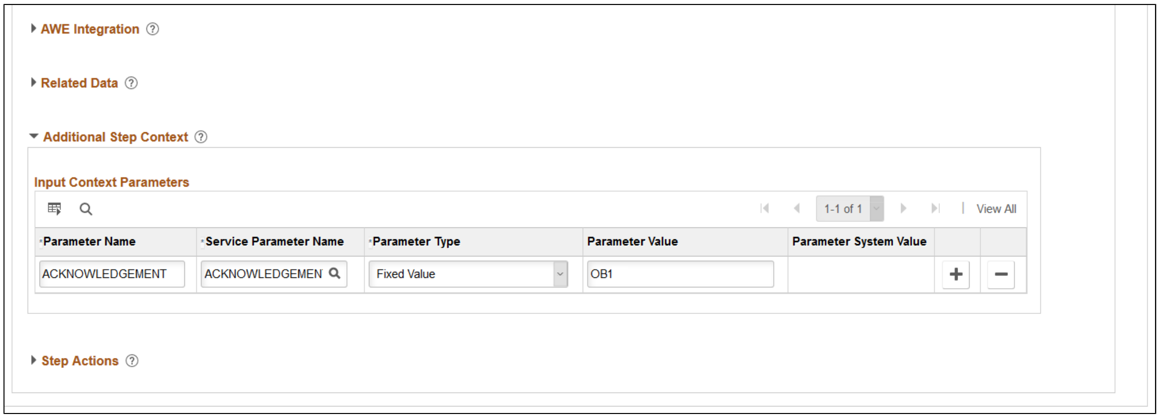
Field or Control	***Description***
Service Type	Select PS Component to associate with the Acknowledgement step.
Service ID	EC_ACKNOWLEDGEMENT_FL
Fluid	Select the **Fluid** check box, to load the fluid page in the activity guide.

Post Processing PeopleCode

Field or Control	***Description***
Root Package Id	Select **ESIGN_AGPOSTPROCESS**.
Path	Select **:**
Application Class ID	Select **AGPostProcess.**.

Field or Control	Description
Post Process Method	Enter **ItemPostProcess**.

This example illustrates the fields and controls on the Categories - Steps Page (2 of 2).



Field or Control	Description
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

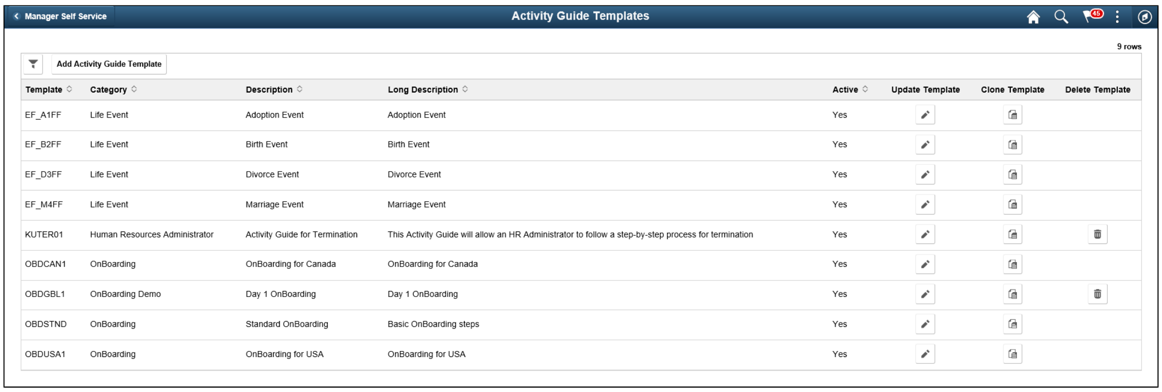
Use the Activity Guide Templates page (AGC_TMPL_SRCH_FL) to create a new activity guide template or update a template to include the Acknowledgement step.

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**

This example illustrates the fields and controls on the Activity Guide Templates Page.



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.

Field or Control	***Description***
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.

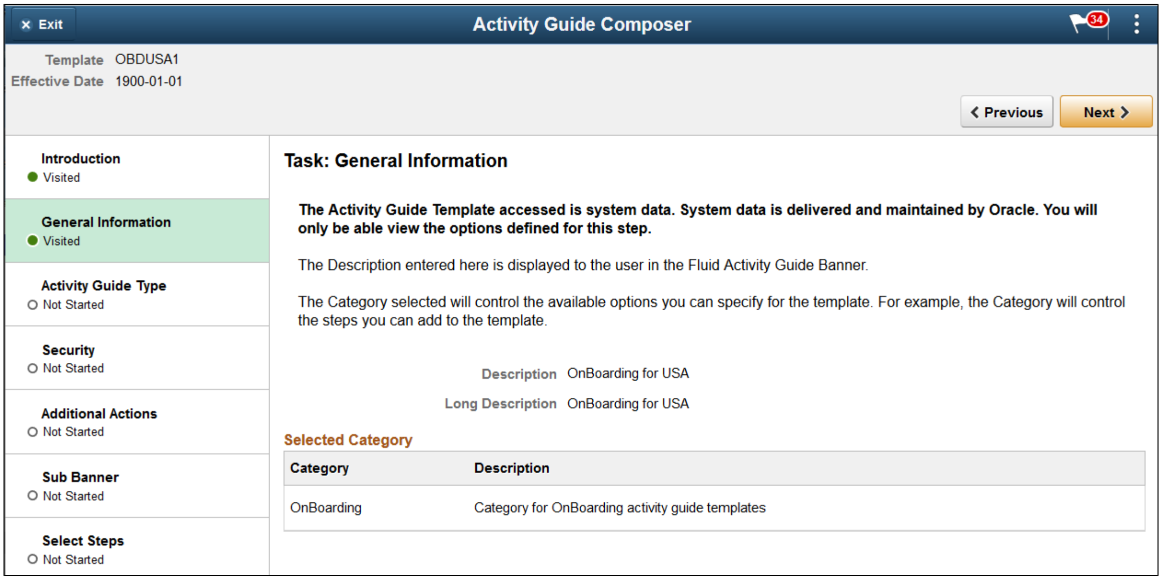
Navigation:

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.

This example illustrates the fields and controls on the Activity Guide Composer - General Information page.



Note: This example shows a template cloned from a delivered template with a new effective dated row inserted. The fields for the original effective dated row of a delivered template are not available for edit. You must insert a new row or clone a delivered template to make changes to the description, but you cannot change the Activity Guide Category value.

Field or Control	***Description***
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.

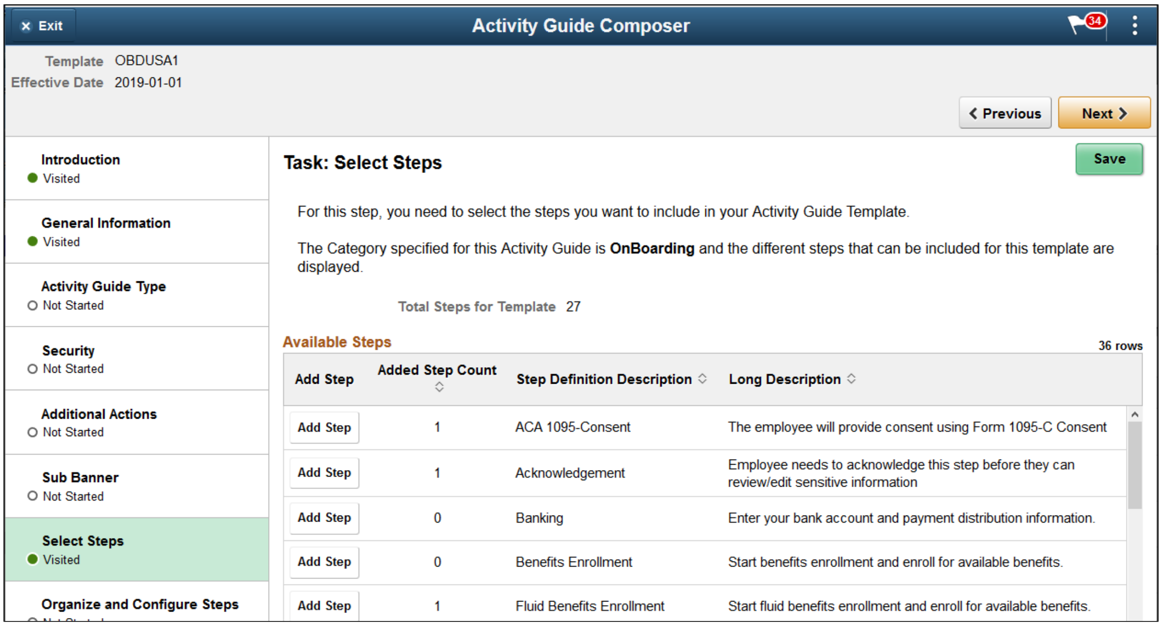
Navigation:

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.

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 AG Composer Categories - Steps Page.

Field or Control	***Description***
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:

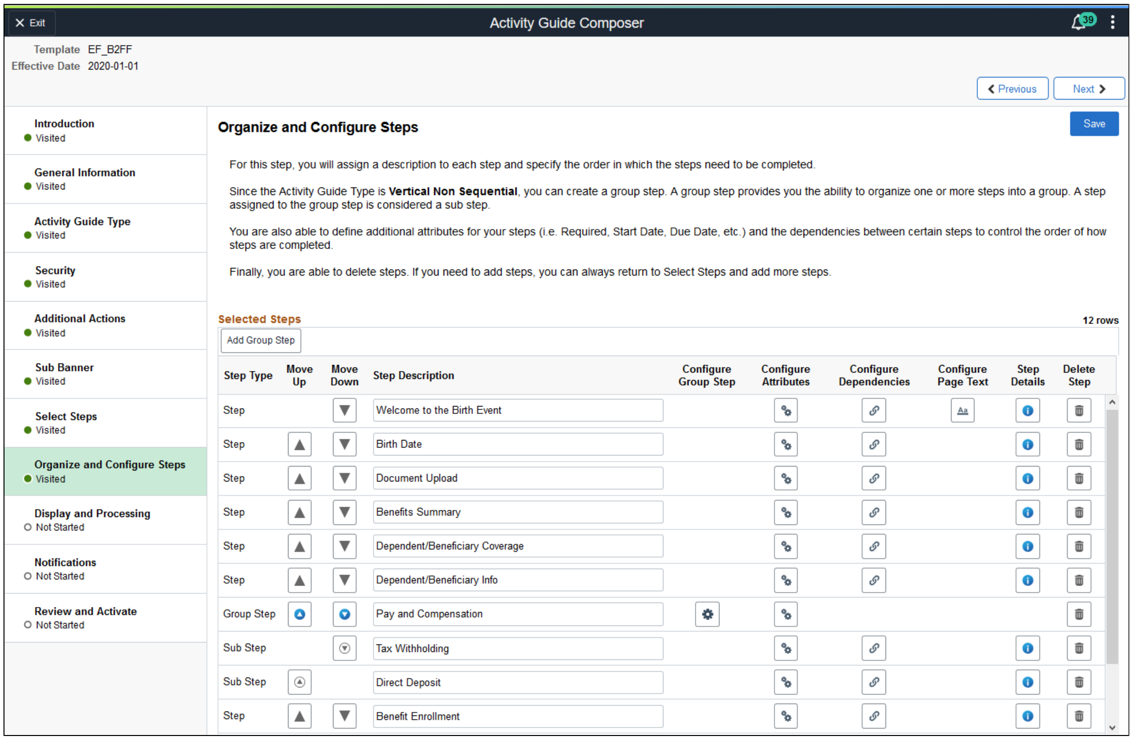
Enterprise Components > **Activity Guide Composer** > **Templates** > **Activity Guide Template**

- 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.

This example illustrates the fields and controls on the Activity Guide Composer - Organize and Configure Steps page.



Note: You must first identify the security roles and select step for this template before you can configure steps.

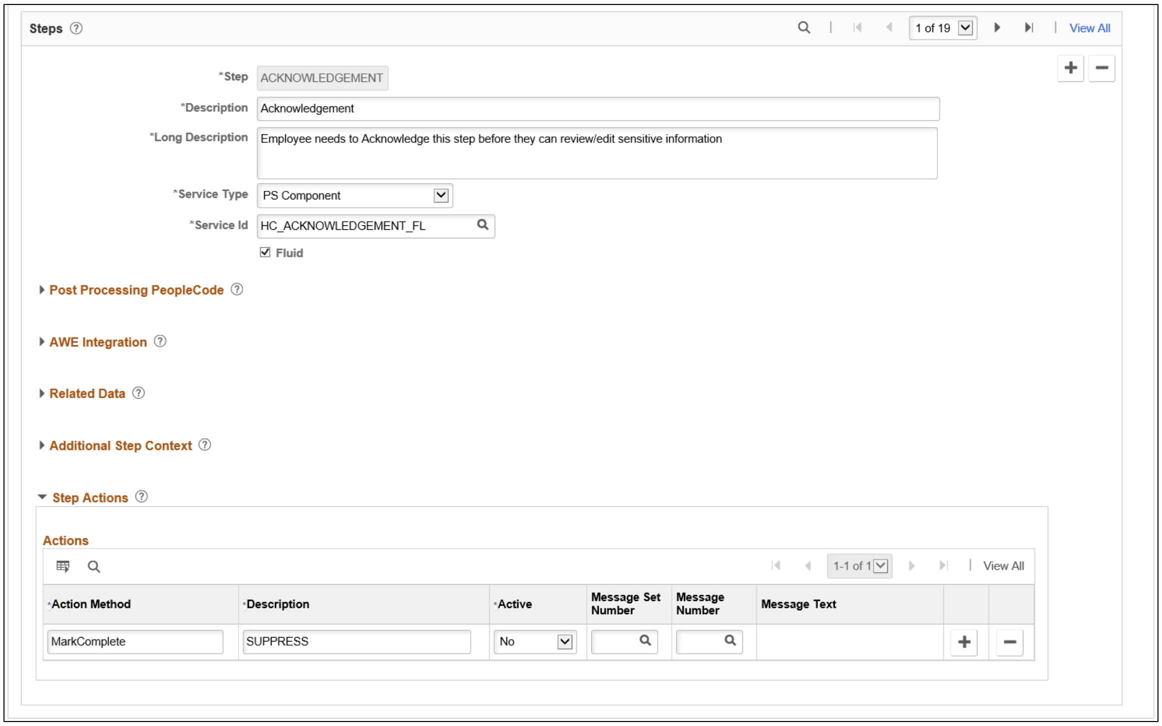
You can determine the step order by moving the steps up and down in the list. Here, we position the Acknowledgement step right after the Welcome Video.

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.

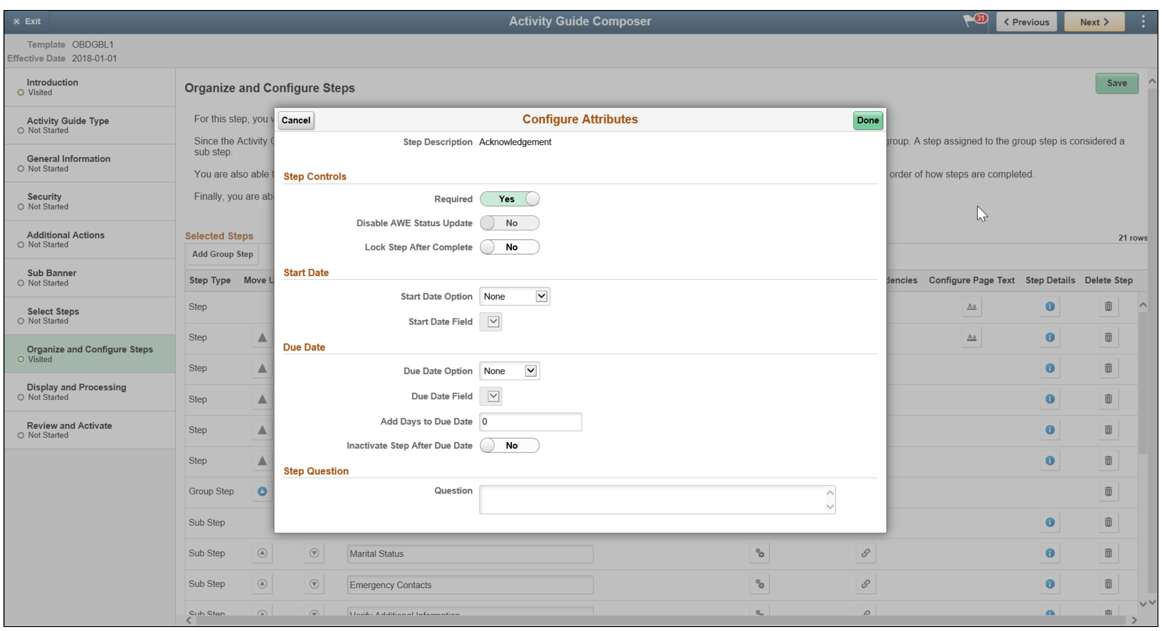
- **Suppressing the Mark Complete action:** If your activity guide has a Mark Complete action, then suppressing that action for the Acknowledgement step ensures that the Mark Complete button is not available to the activity guide user for that step. This can be set at the Category level using the Categories - Steps page.

This example illustrates the Categories - Steps page displaying the setting for suppressing the Mark Complete action.



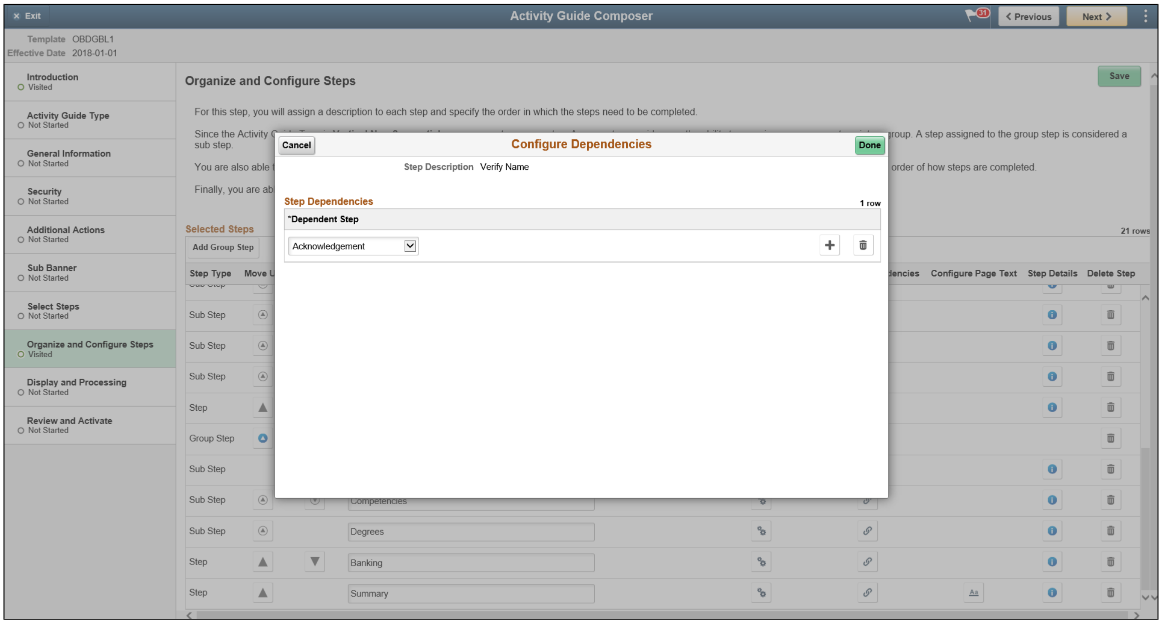
- **Making the Acknowledgment step as Required**: If Acknowledgement is made a Required step, then the user cannot complete the activity guide without executing this step. This can be set at the Template level using the Configure Attributes page.

This example illustrates the Configure Attributes page displaying the setting to make the Acknowledgement step as Required.



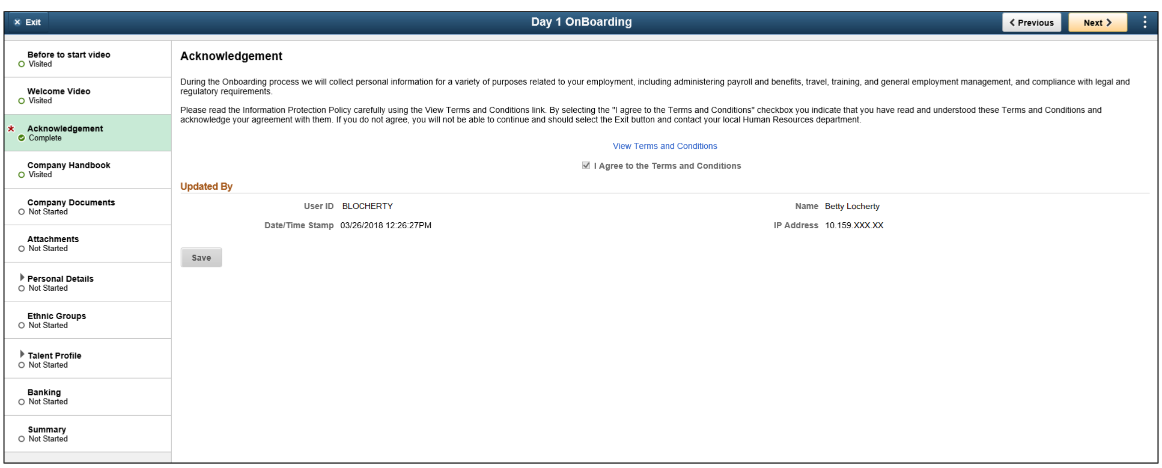
- **Making the subsequent steps as Dependent:** If subsequent steps are made dependent on the Acknowledgement step, then the activity guide user cannot move to the next step without completing the Acknowledgement step.This can be set at the Template level using the Configure Dependencies page.

  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

This example illustrates the Acknowledgement step as displayed in an Activity Guide.



Chapter 21

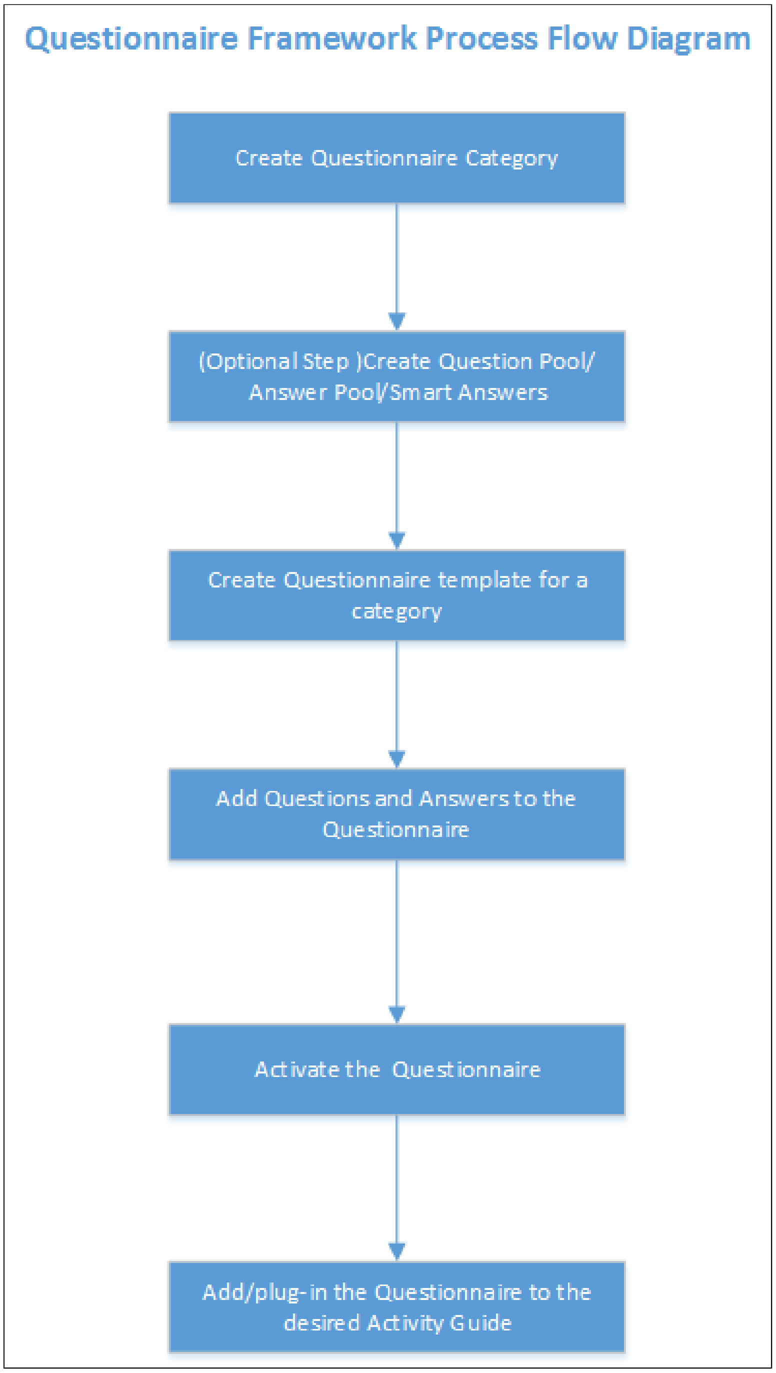
Working with Questionnaire Framework

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:

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

Page Name	***Definition Name***	***Usage***
Questionnaire Category Page	EOQF_CATEGORY_FL	Create Questionnaire Category and set permissions to provide access to the users to be able to create questionnaires using existing question/answer or able to create new question and answers and be able to add them to the pool.
Question Pool Page	EOQF_QUESTION_FL	Create or Update questions. While creating a questionnaire, you can add existing questions that were created as part of the question pool.

Page Name	***Definition Name***	***Usage***
Answer Pool Page	EOQF_ANSWER_FL	Create or Update answers. While creating a questionnaire, you can add existing answers that were created as part of the answer pool.
Smart Answers Page	EOQF_SANS_FL	Group of pre-defined answers form Smart Answer. While creating a questionnaire, use Smart Answer to pre-fill the answers in the questionnaire.
Manage Questionnaires Page	EOQF_TMPL_SRCH_FL	Manage the list of existing questionnaires like update, delete, clone, preview or create new questionnaires.
Define Questionnaire Page	EOQF_QSTNR_DEFN_FL	Define a new questionnaire and provide access level to it.
User Instructions Page	EOQF_INSTRUCTN_FL	Set instructions for the audience of the questionnaire.
Add Question Page	EOQF_ADD_QSTN_FL	Ability to add a question and link an answer based on permissions set at the questionnaire category level.
Format Questionnaire - Organize Question Page	EOQF_QSTNGRPDEF_FL	Organize and group the questions.
Format Questionnaire - Organize Question Groups Page	EOQF_QSTNGRPSEQ_FL	Organize the question groups.
Preview Questionnaire Page	EOQF_QSTNR_PRVW_FL	Preview the Questionnaire.
Questionnaire Options Page	EOQF_QSTNR_OPTN_FL	Set the questionnaire options.
Update Question Answer Pool Page	EOQF_QSTNR_POOL_FL	Based on permission set at the questionnaire category level, user will be able to add any new question and answers to the pool that was created as part of this questionnaire.
Activate Questionnaire Page	EOQF_QSTNR_STS_FL	Activate the Questionnaire.

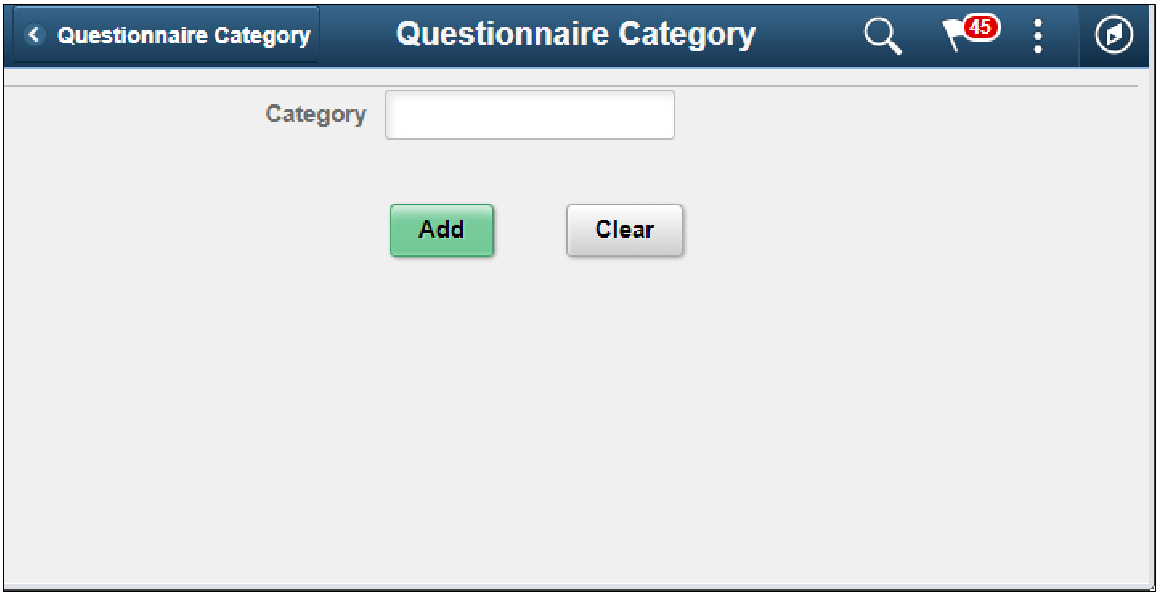
Questionnaire Category Page

Use the Questionnaire Category page (EOQF_CATEGORY_FL) to create questionnaire categories.

Navigation:

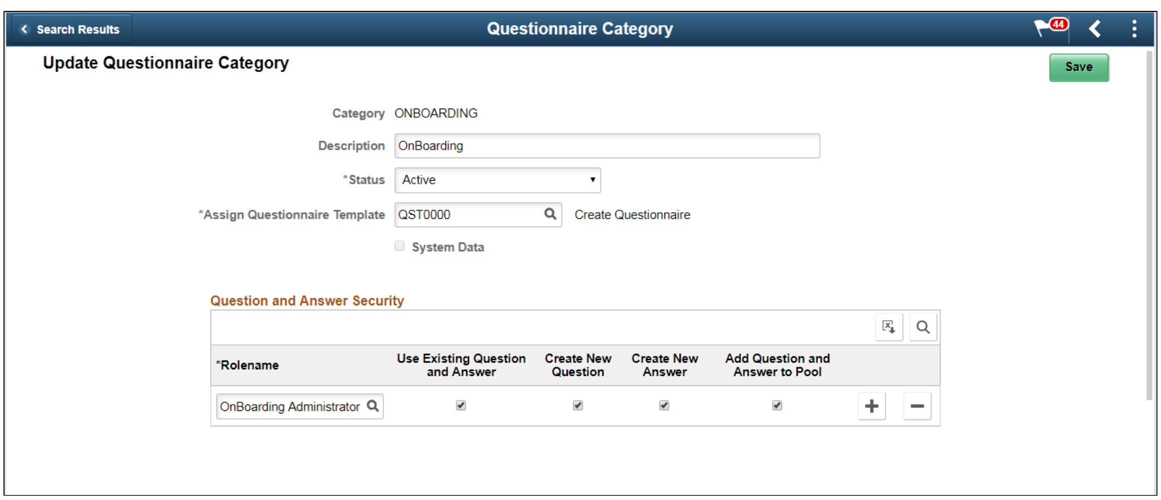
Enterprise Components > Questionnaire Framework > Questionnaire Categories

Questionnaire Category page.



Field or Control	***Description***
Category	Enter a meaningful name as the category name and click add. **Note:** Once a category is created, it cannot be deleted.

Create Questionnaire Category page.



Field or Control	***Description***
Description	Provide a description for the category.

Field or Control	*Description*
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.

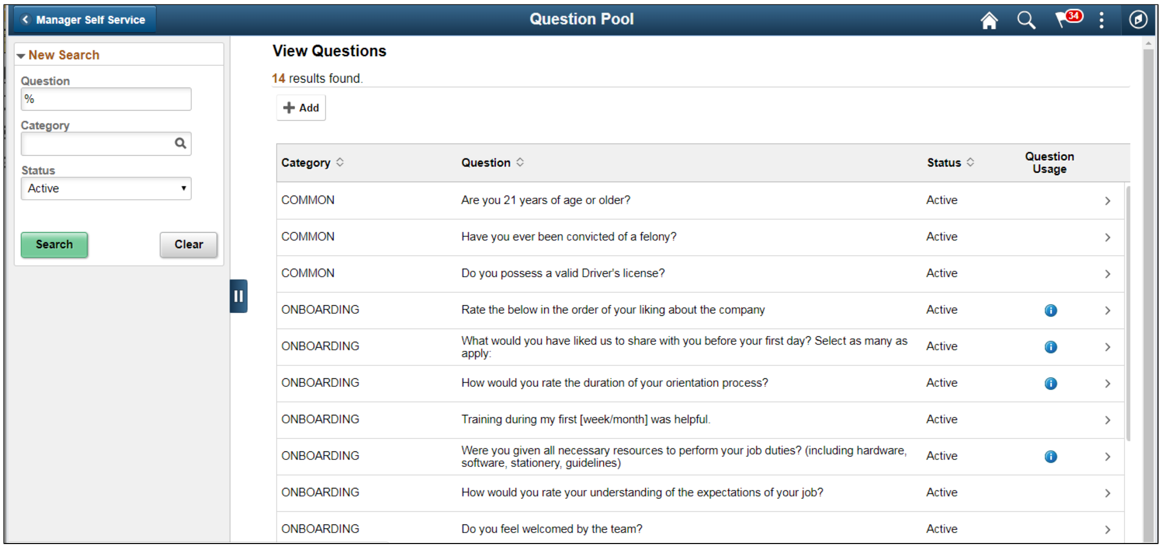
Question Pool Page

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** > **Questionnaire Question Pool**

Question Pool page.

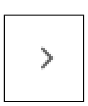


The Question Pool page lists the questions that have been created and added to the pool.

Users can use the filter options on the left pane to search for questions.

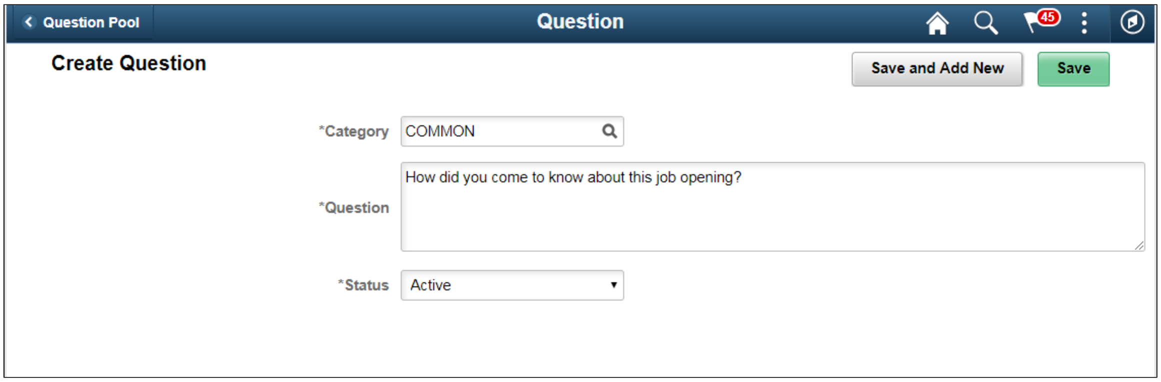
Use the left search filter panel of the page to enter search or filter criteria to find a question. To enter partial searches, use the % wildcard character.

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

Field or Control	***Description***
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.

Add Question page.



Field or Control	***Description***
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.

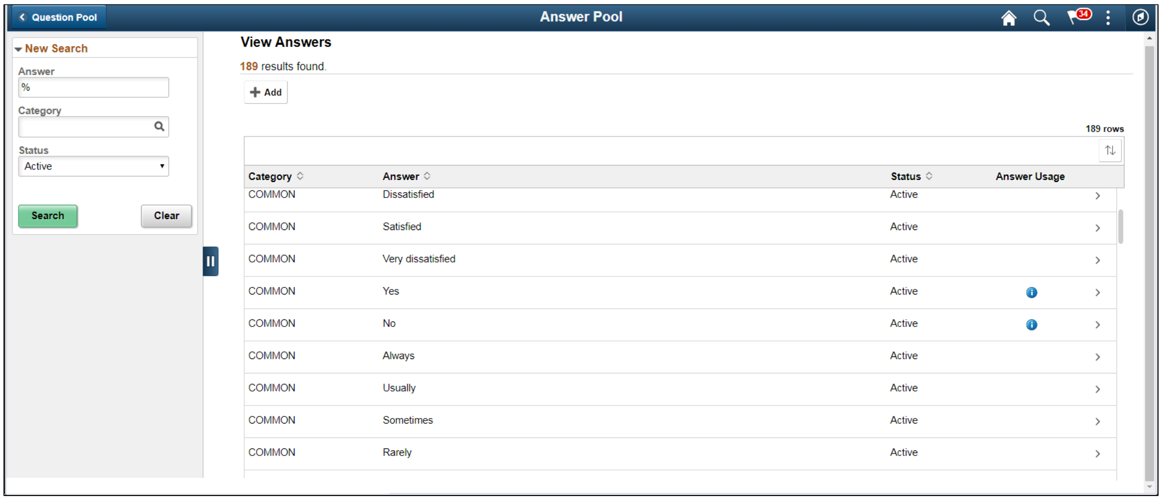
Answer Pool Page

Use the Answer Pool page (EOQF_ANSWER_FL) to add answers which can be later added to the questionnaire.

Navigation:

Enterprise Components > **Questionnaire Framework** > **Questionnaire Answer Pool**

Answer Pool page.

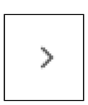


The Answer Pool page lists the answers that have been created and added to the pool.

Users can use the filter options on the left pane to search for answers.

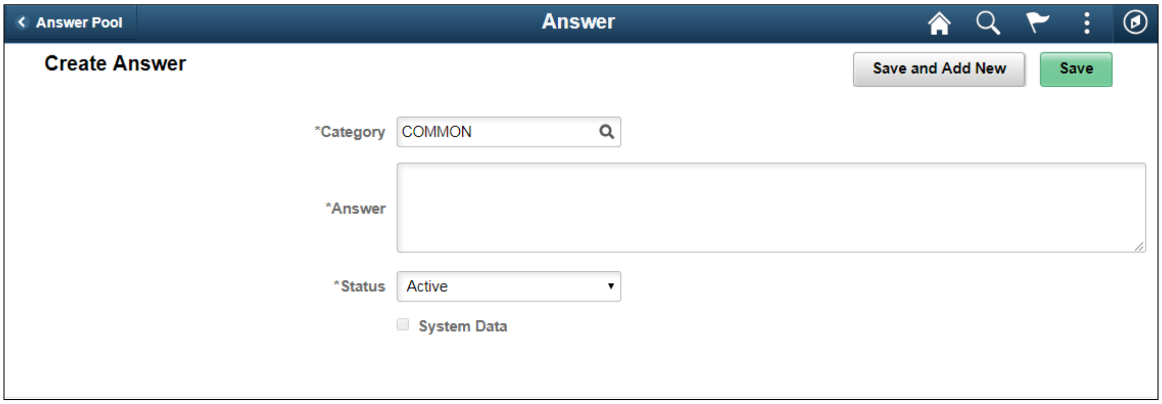
Use the left search filter panel of the page to enter search or filter criteria to find an answer. To enter partial searches, use the % wildcard character.

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.

Field or Control	***Description***
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.

Create Answer page.



Field or Control	*Description*
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.

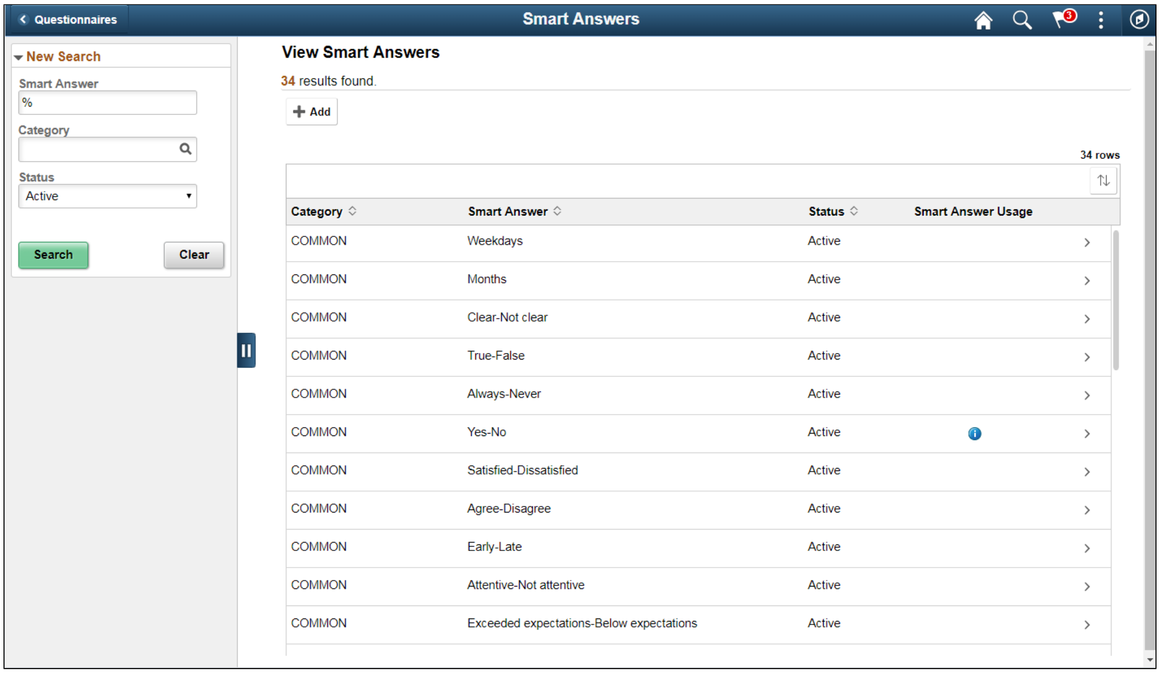
Smart Answers Page

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** > **Questionnaire Smart Answers**

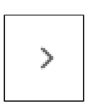
Smart Answers page.



Users can use the filter options on the left pane to search for smart answers.

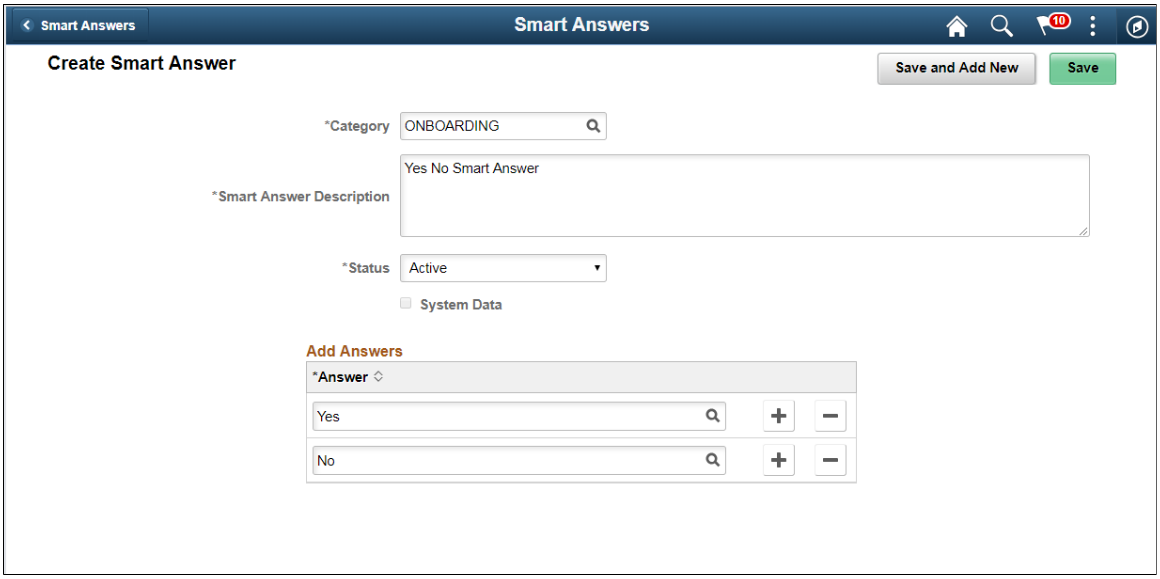
Use the left search filter panel of the page to enter search or filter criteria to find a smart answer. To enter partial searches, use the % wildcard character.

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.

Field or Control	***Description***
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.

Create Smart Answer page.



Field or Control	***Description***
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.

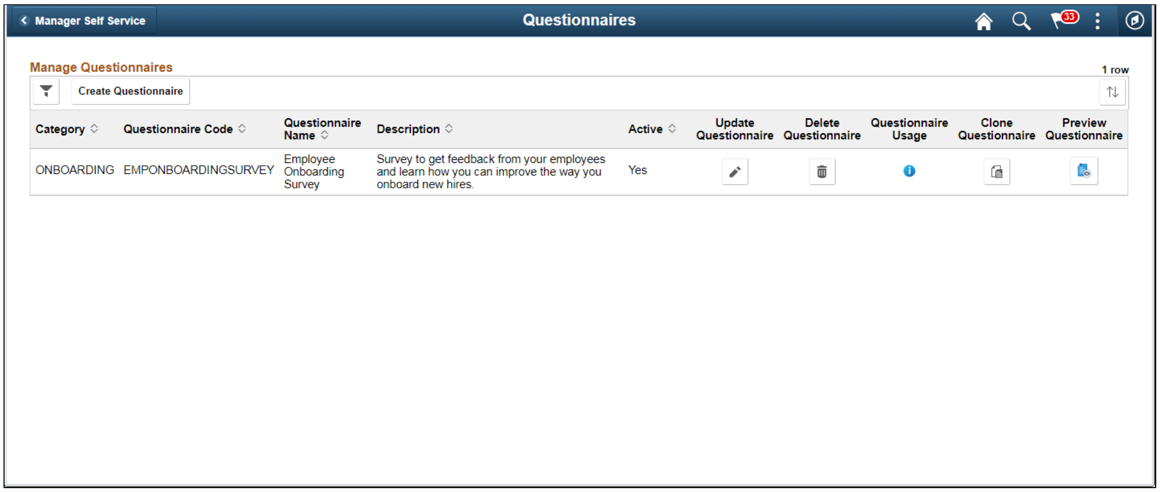
Manage Questionnaires Page

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** > **Manage Questionnaires**

Manage Questionnaires page.



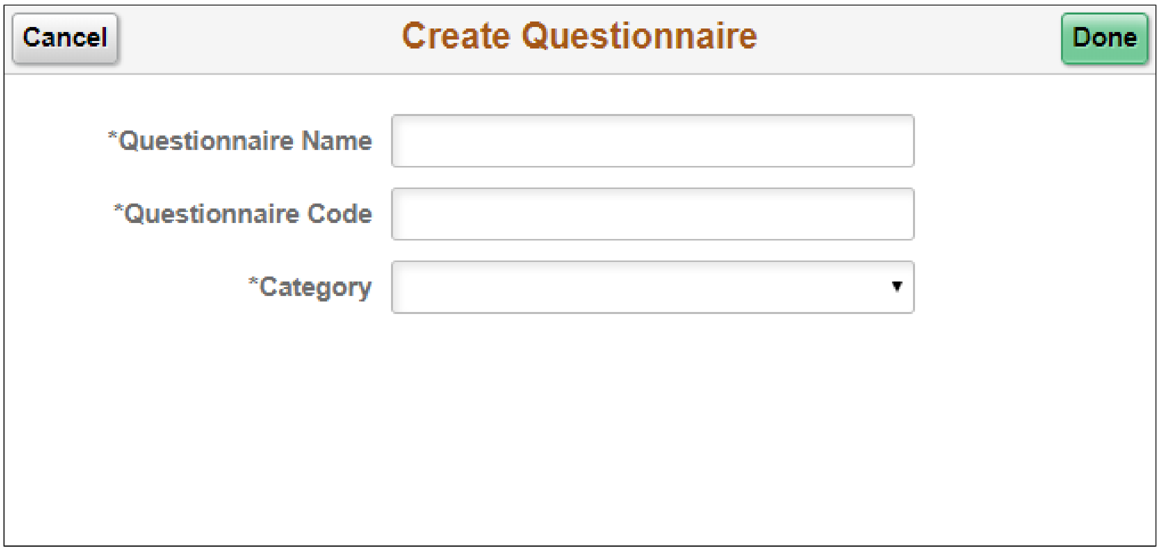
The manage Questionnaires page lists all the questionnaires created by users based on your security. You can use the filter option on this page to filter your search for a specific questionnaire.

Field or Control	***Description***
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.

Field or Control	*Description*
Preview Questionnaire	Preview the questionnaire.

Click the Create Questionnaire button to create a new questionnaire.

Create Questionnaire page



Field or Control	*Description*
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.

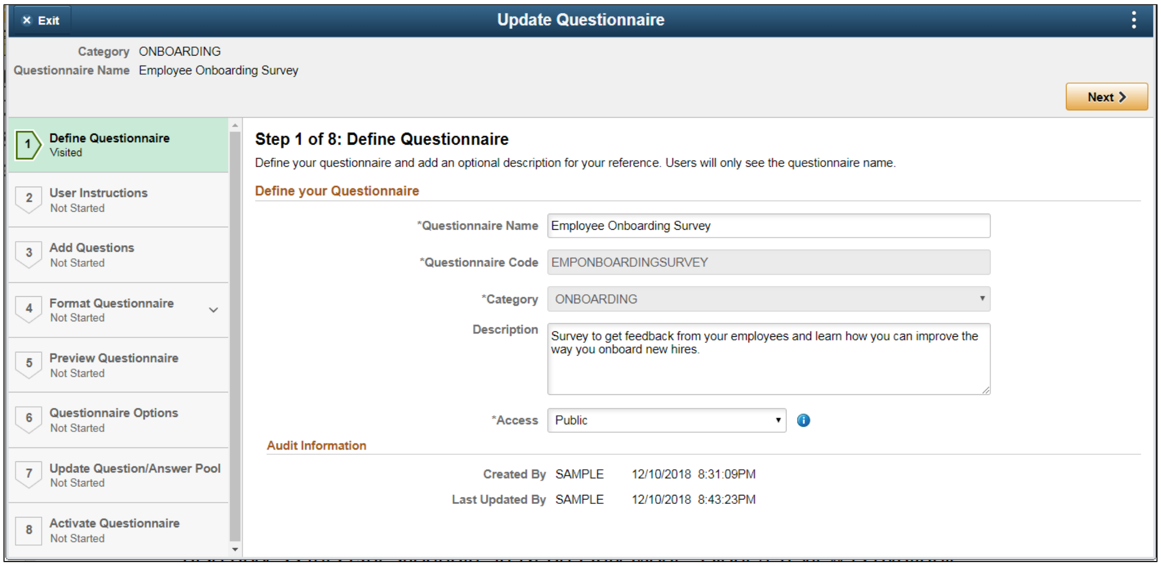
Define Questionnaire Page

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** > **Manage Questionnaires**, then, click the Update Questionnaire option for the relevant Questionnaire Name or click Create Questionnaire button.

Define Questionnaire page.



Field or Control	***Description***
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.

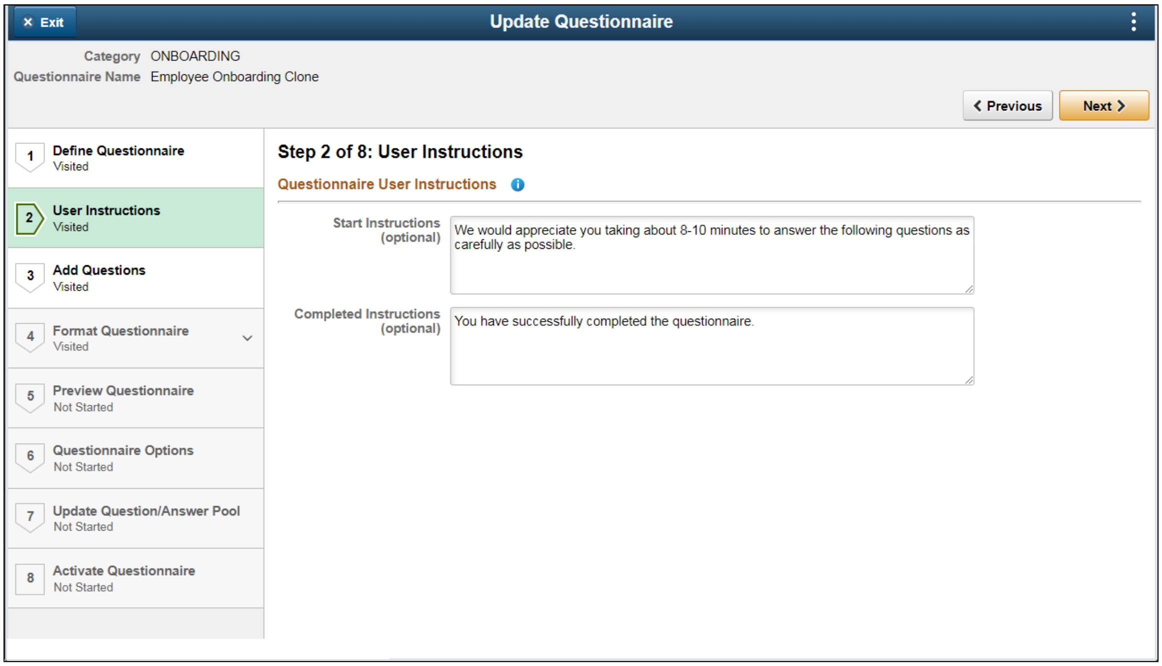
Click the Next button to proceed to the next step in the create questionnaire guided process.

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.

User Instructions page.

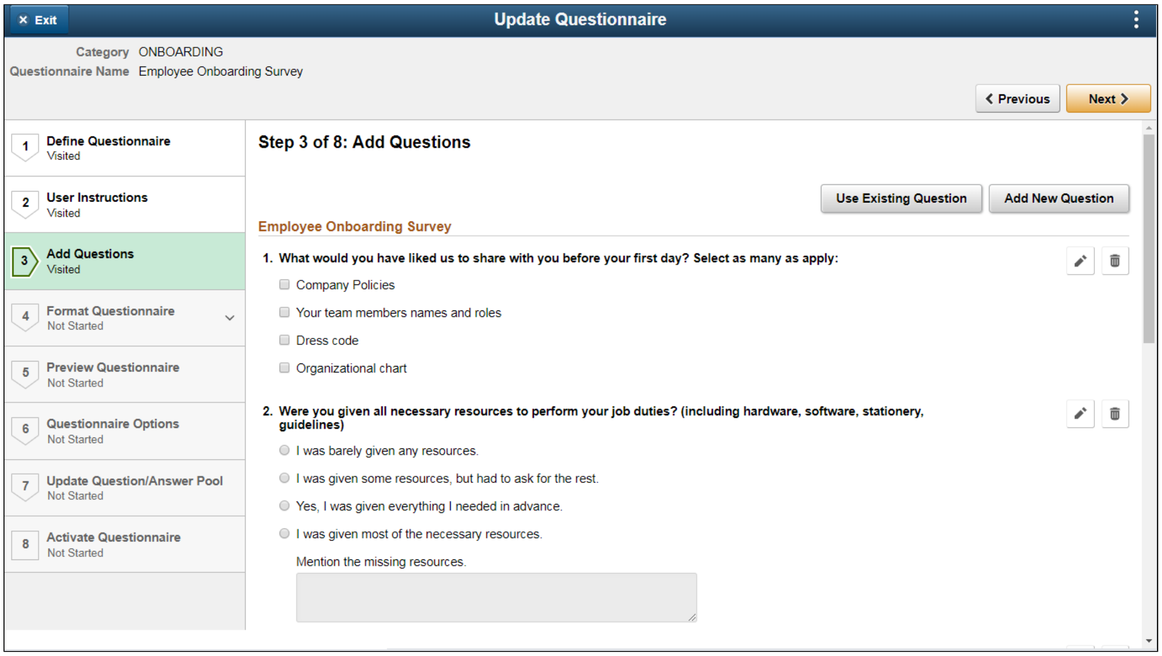


Field or Control	*Description*
Start Instructions	The instructions or message entered here will be displayed to the users at the start of the questionnaire.
Completed Instructions	The instructions or message displayed here will be visible at the end of the questionnaire as a pop up screen once the user 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.

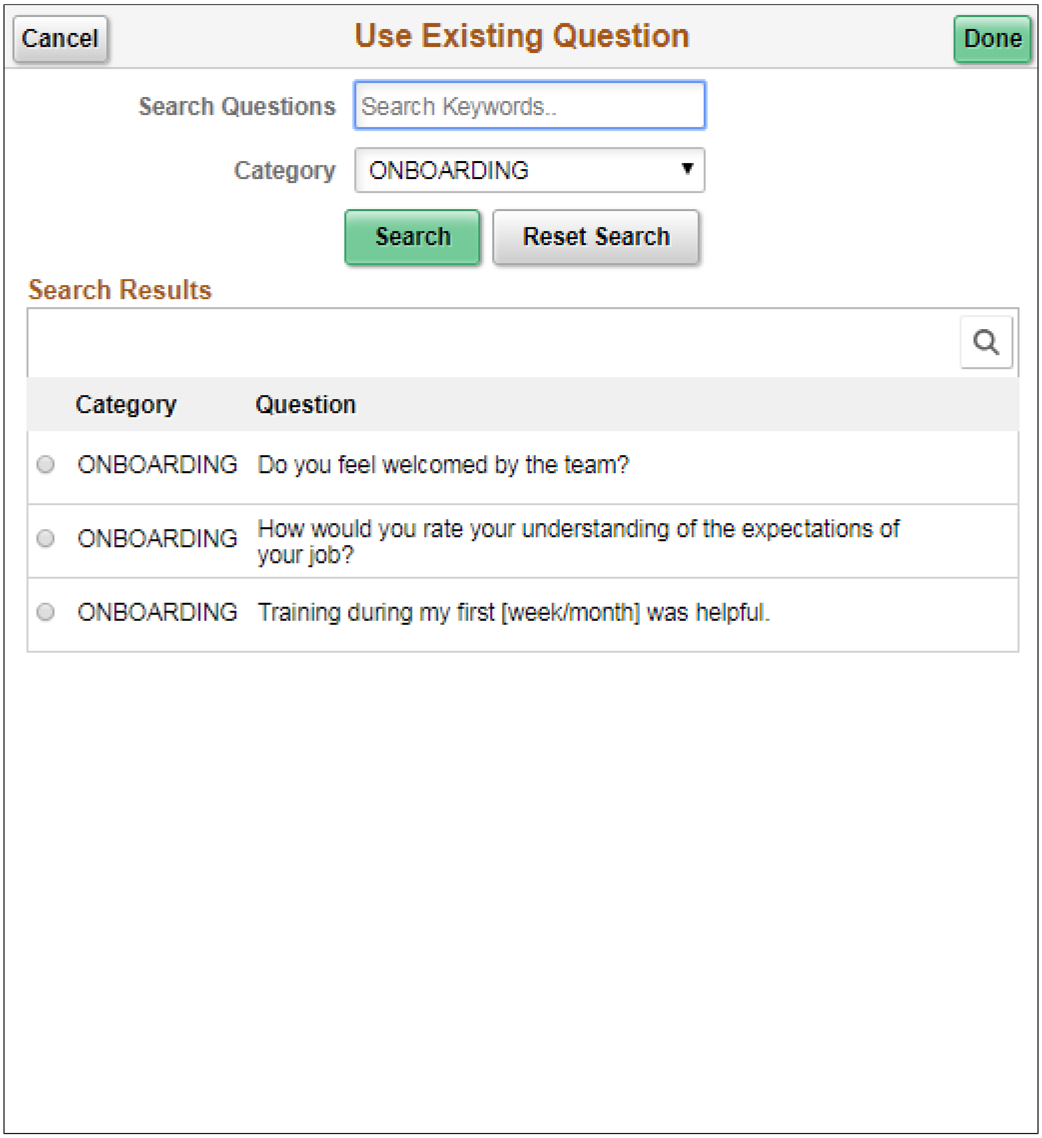
Add Questions page.



Click the Use Existing Question button to add questions that exist in the question pool.

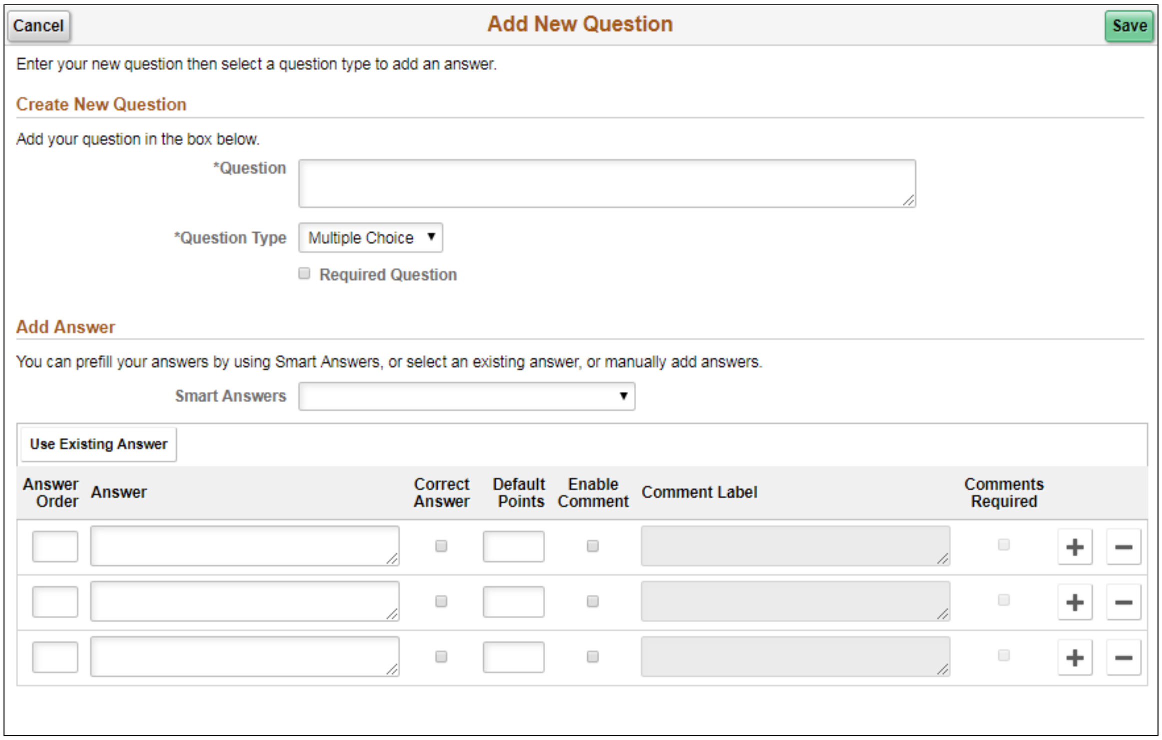
In the Use Existing Questions page, enter search keywords in the Search Questions field, choose the relevant category and click Search. From the list of search results, choose the appropriate question to add it to the questionnaire.

Use Existing Question page



Click the Create New Question button to add a new question to the questionnaire. This opens up the Add New Question page.

Add new Question page.



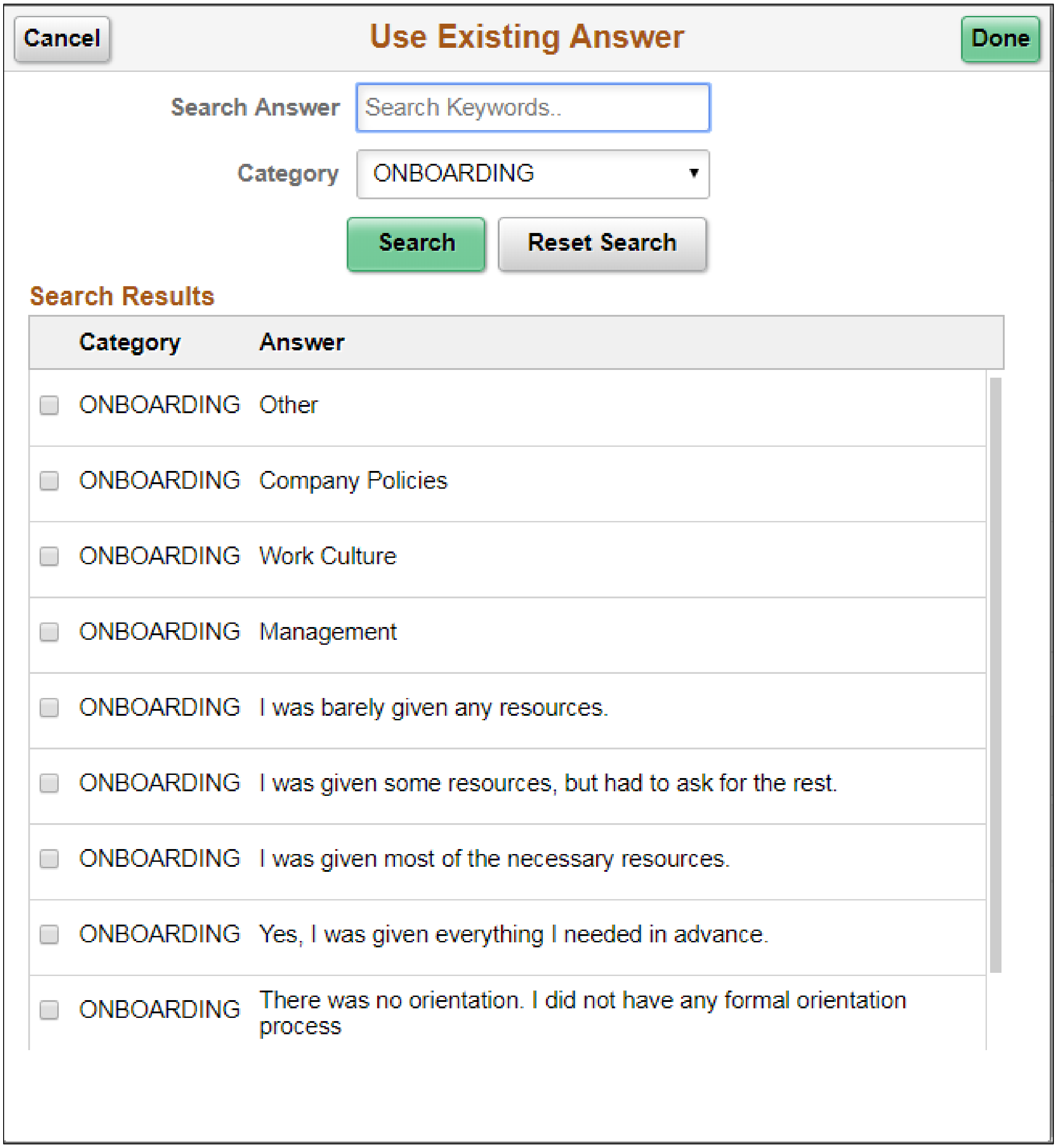
Field or Control	*Description*
Question	Enter the question that you want to add.
Question Type	Select the question type. Available options are: • Multiple choice • Single choice • Drop Down • Number • Date • Open Ended • Ranking
Required Question	Choose this option if you want to make this question compulsory 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.

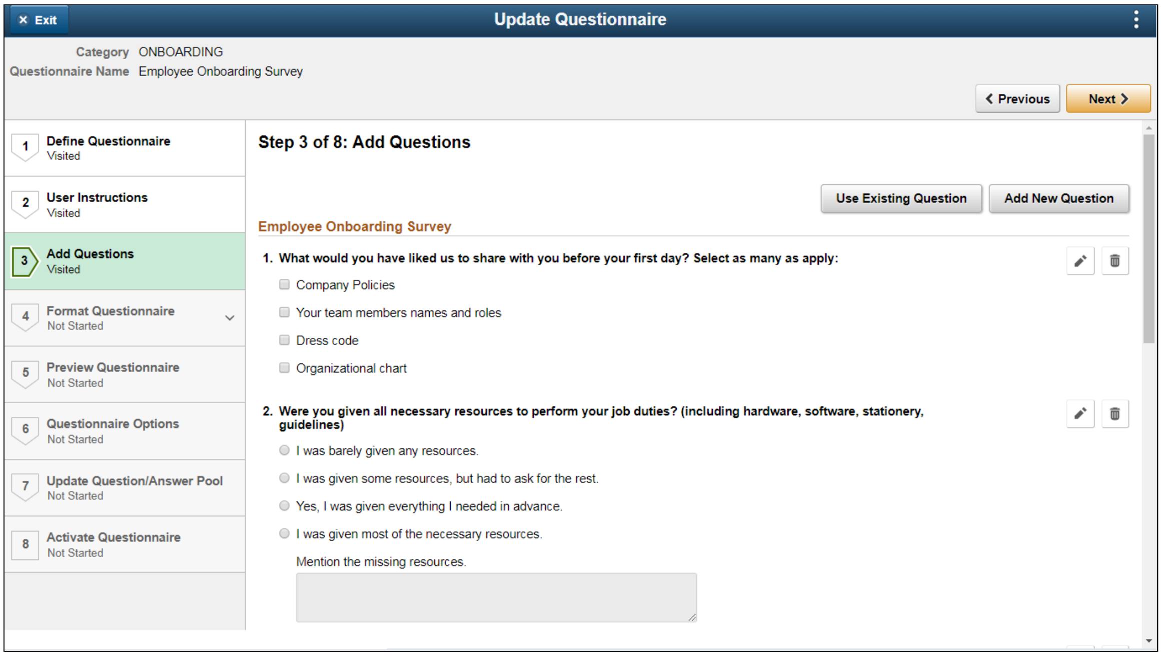
Use Existing Answer page.



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.

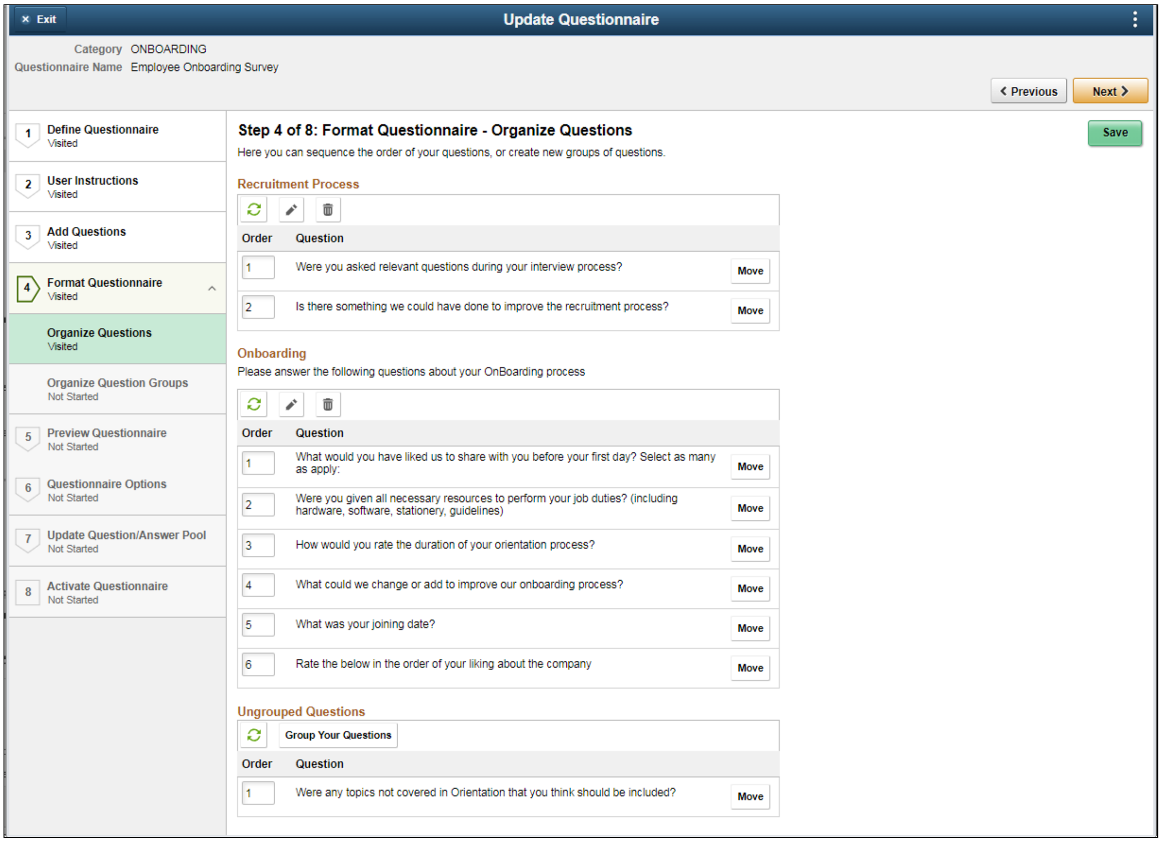
Edit and Delete options for each question.



Format Questionnaire - Organize Question Page

Use the Format Questionnaire – Organize Questions page (EOQF_QSTNGRPDEF_FL) to set the order of the questions for your questionnaire and create question groups.

Organize Questions page.

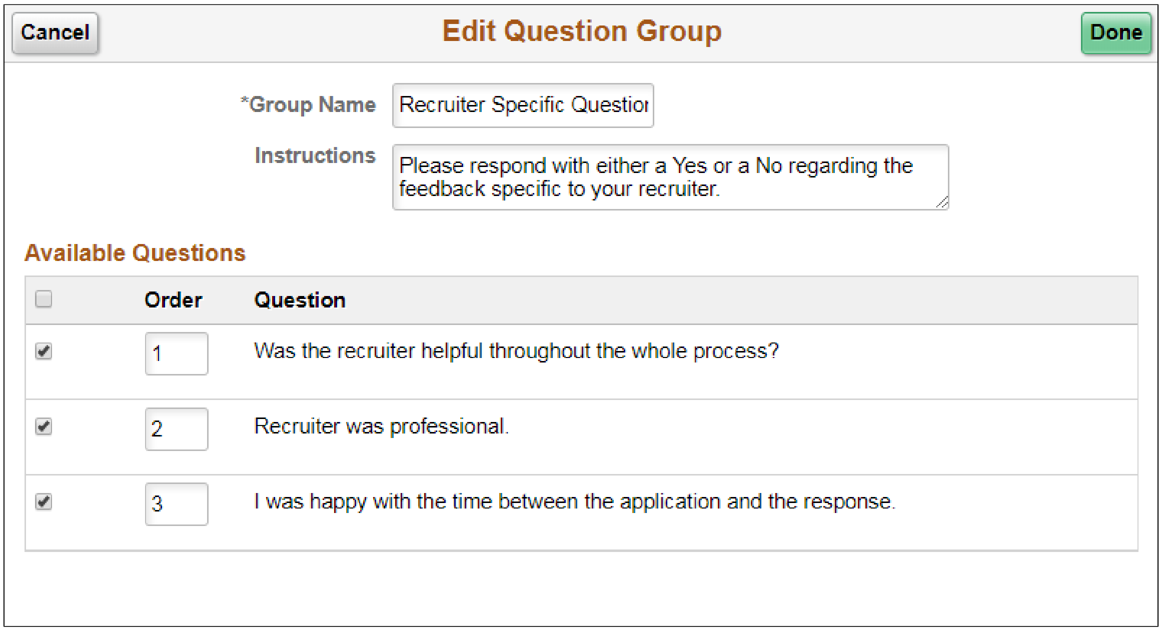


Use the Order column to specify the order in which you want the questions to appear within the question group. Once done, use the Refresh icon to arrange the questions in the order specified.

To create section or group of questions, use the Group Your Questions button. This is optional.

Use the Edit button to edit the questions in a question group.

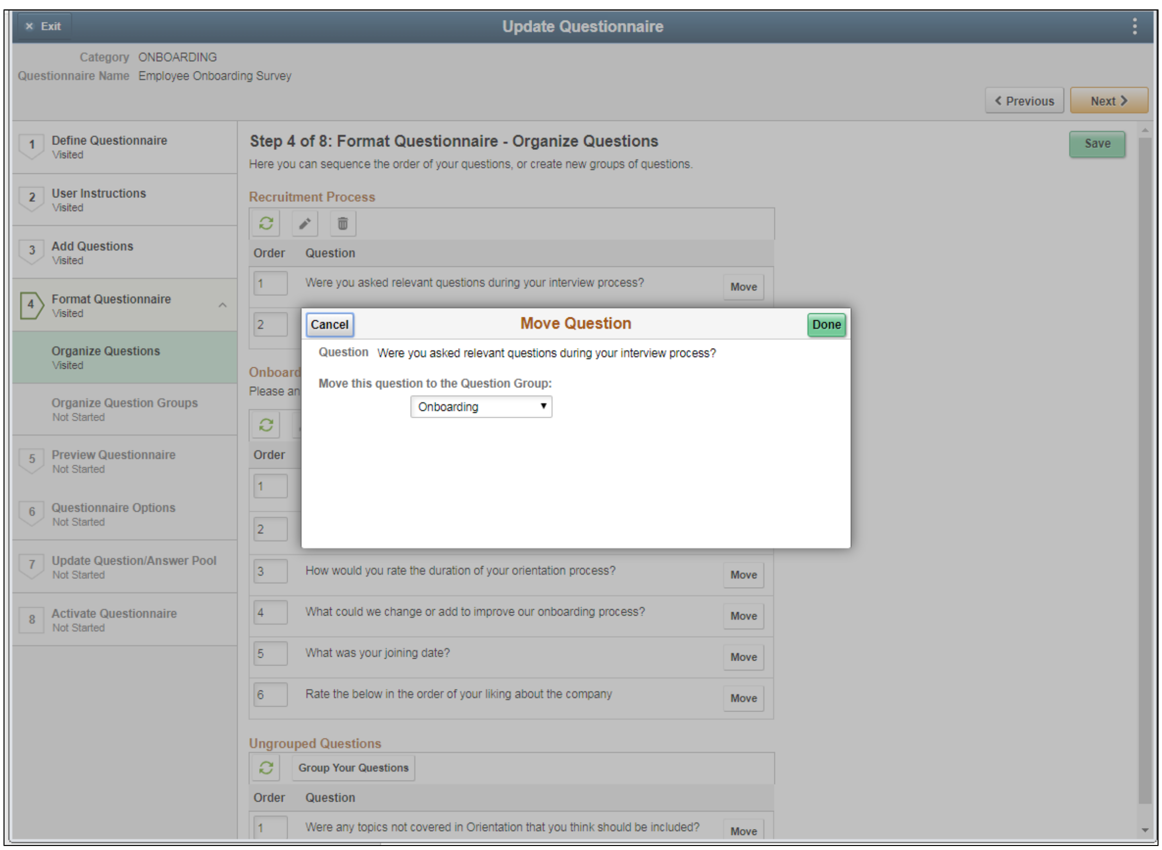
Edit Question Group page.



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

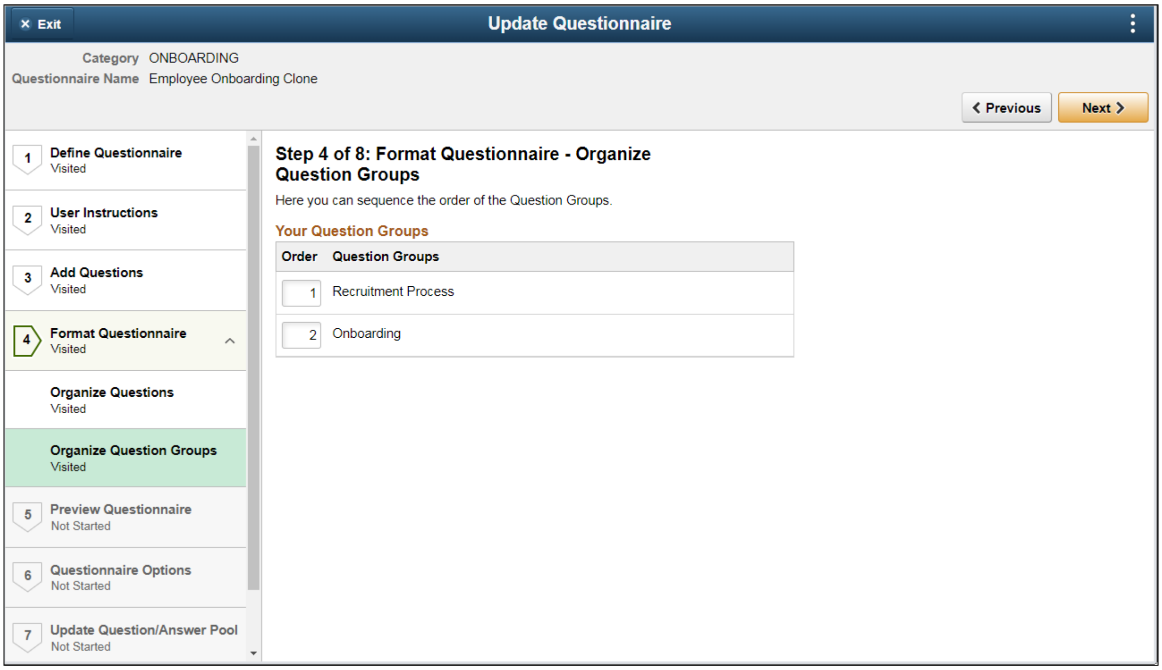
Move Question page.



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

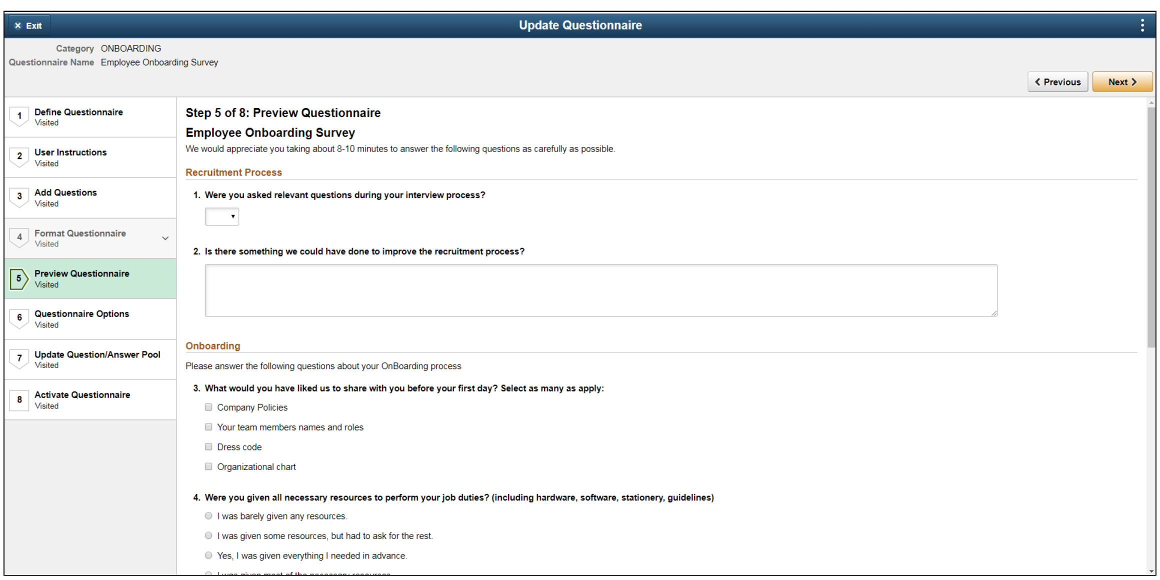
Organize Question Groups page.



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.

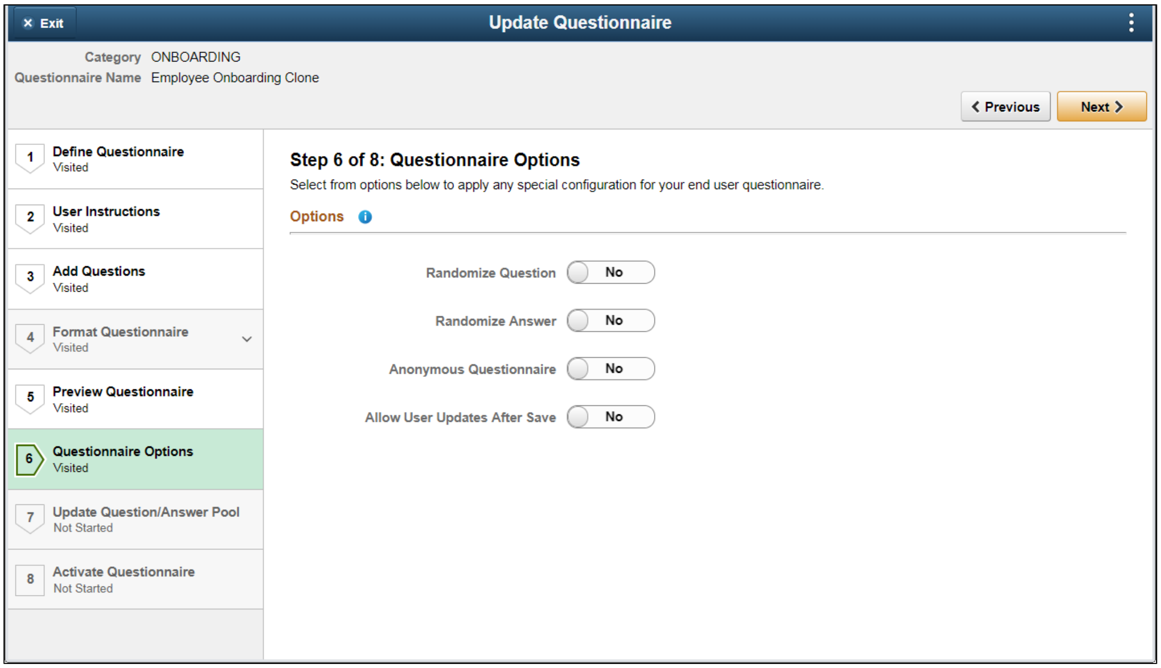
Preview Questionnaire page.



Questionnaire Options Page

Use the Questionnaire Options page (EOQF_QSTNR_OPTN_FL) to set additional options for the questionnaire.

Questionnaire Options page.

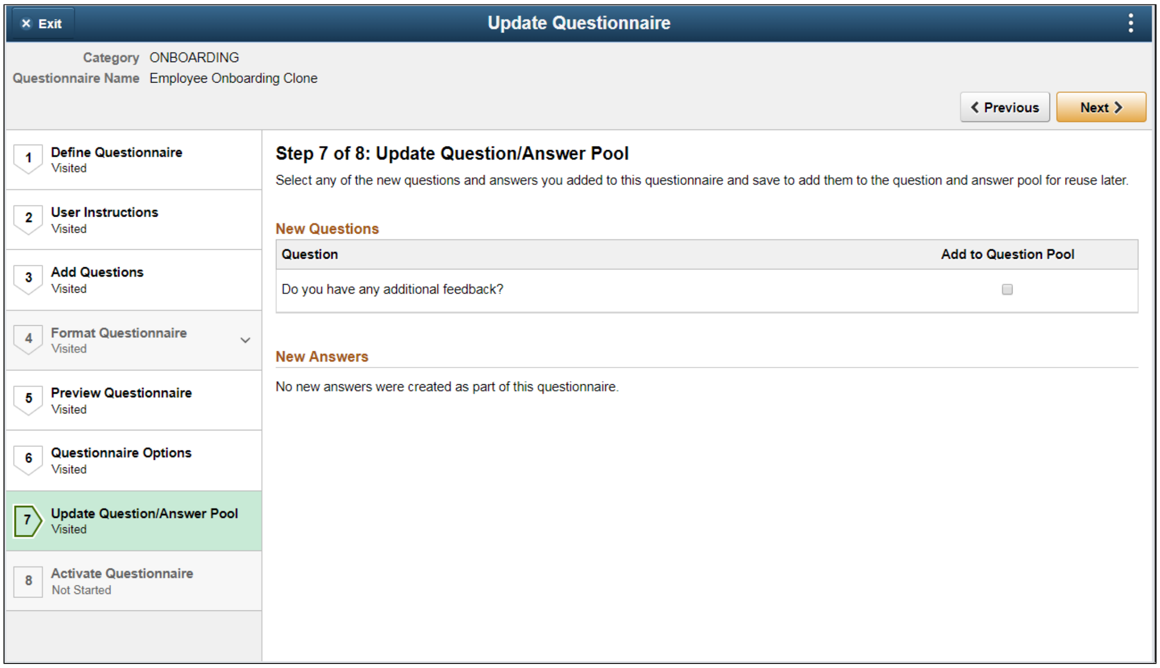


Field or Control	*Description*
Randomize Question	Randomize the order of the questions within any question group in the questionnaire.**If there is no question group , then randomize the questions within the questionnaire.**
Randomize Answer	Randomize the order of answers within a question.
Anonymous 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.

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

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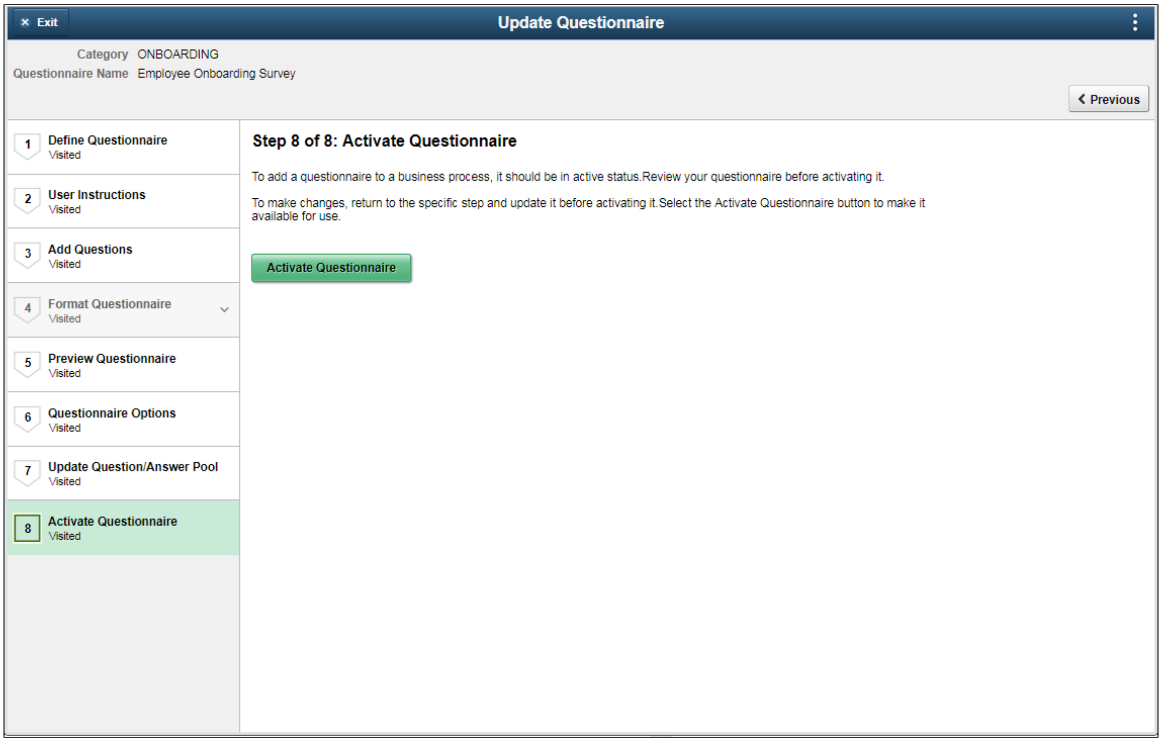
Activate Questionnaire Page

Use the Activate Questionnaire page (EOQF_QSTNR_STS_FL) to activate the questionnaire.

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***
Categories - Steps Page	AGC_CAT_TBL5	Modify an existing category to include the Questionnaire step.
Activity Guide Templates Page	AGC_TMPL_SRCH_FL	Update a template to include the Questionnaire step.
Activity Guide Composer - General Information Page	AGC_TMPL_GNRL_FL	Enter the activity guide template category into which the Questionnaire step is added.

Page Name	Definition Name	Usage
Activity Guide Composer - Select Steps Page	AGC_TMPL_STEP1_FL	Select the Questionnaire step to be included in an activity guide.
Activity Guide Composer - Organize and Configure Steps Page	AGC_TMPL_STEP2_FL	Position the Questionnaire step in the activity guide template.

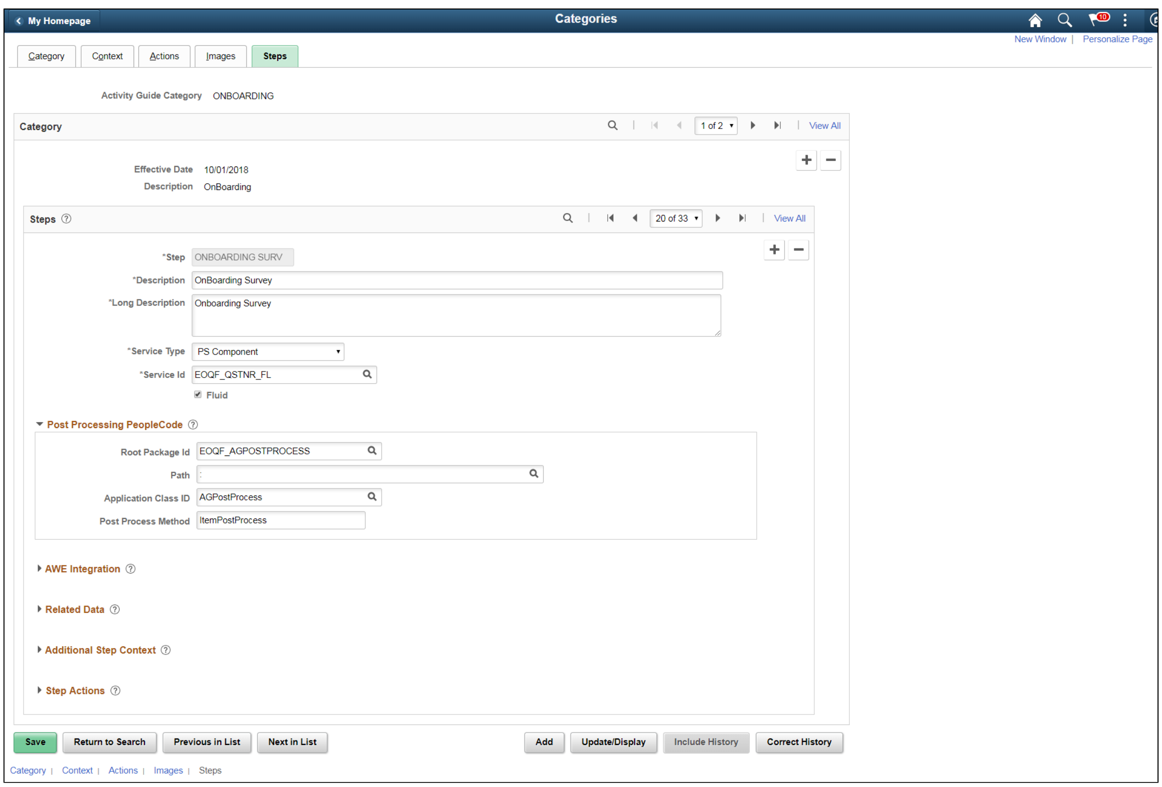
Categories - Steps Page

Use the Categories - Steps page (AGC_CAT_TBL5) to modify an existing category to include the Questionnaire step.

Navigation:

Enterprise Components > **Activity Guide Composer** > **Categories** > **Steps**

This example illustrates the fields and controls on the Categories - Steps page.



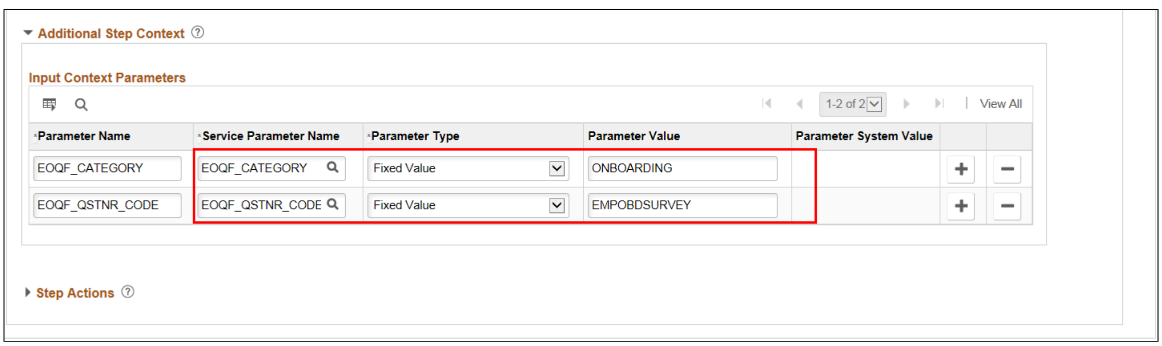
Field or Control	Description
Service Type	Select PS Component to associate with the Questionnaire step.
Service ID	Select EOQF_QSTNR_FL.

Field or Control	*Description*
Fluid	Select the **Fluid** check box, to load the fluid page in the activity guide.

Post Processing PeopleCode

Field or Control	*Description*
Root Package Id	Select **EOQF_AGPOSTPROCESS.**
Path	Select **:.**
Application Class ID	Select **AGPostProcess.**
Post Process Method	Enter **ItemPostProcess**.

This example illustrates the fields and controls in the Additional Step Context section of the Categories - Steps page.



Field or Control	*Description*
Parameter Name	Select EOQF_CATEGORY.
Service Parameter Name	Select EOQF_CATEGORY.
Parameter Type	Select Fixed Value.

Field or Control	***Description***
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

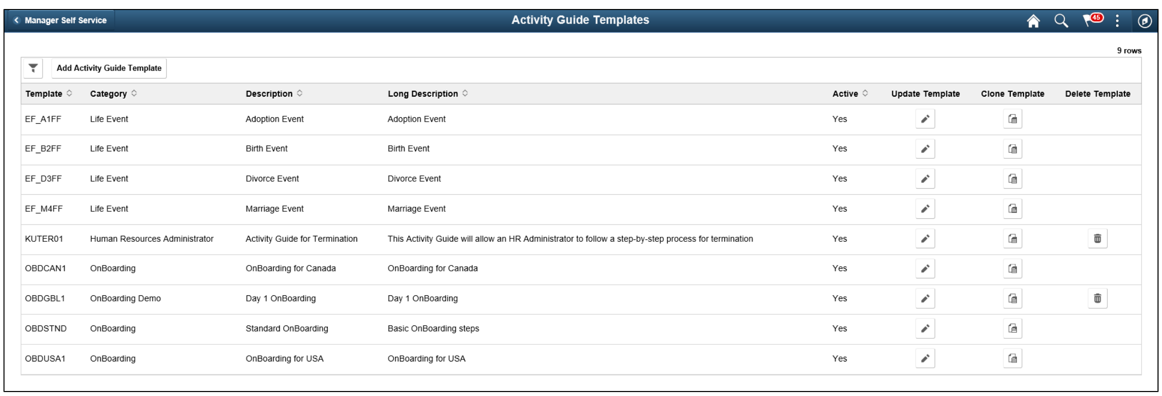
Use the Activity Guide Templates page (AGC_TMPL_SRCH_FL) to create a new activity guide template or update a template to include the step.

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**

This example illustrates the fields and controls on the Activity Guide Templates Page.



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.

Field or Control	***Description***
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.

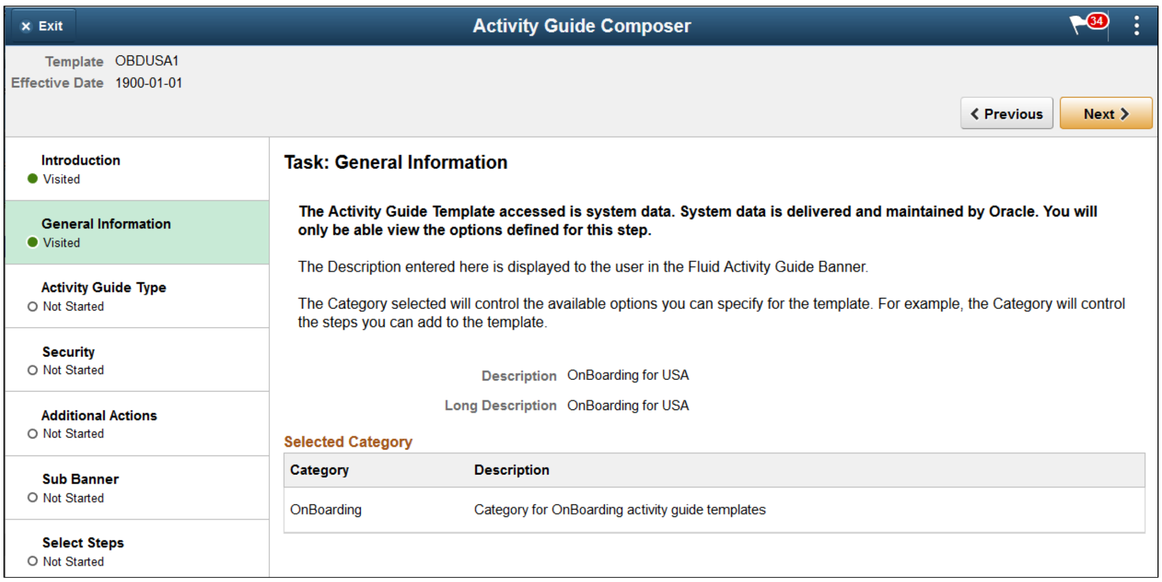
Navigation:

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.

This example illustrates the fields and controls on the Activity Guide Composer - General Information page.



Note: This example shows a template cloned from a delivered template with a new effective dated row inserted. The fields for the original effective dated row of a delivered template are not available for edit. You must insert a new row or clone a delivered template to make changes to the description, but you cannot change the Activity Guide Category value.

Field or Control	Description
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.

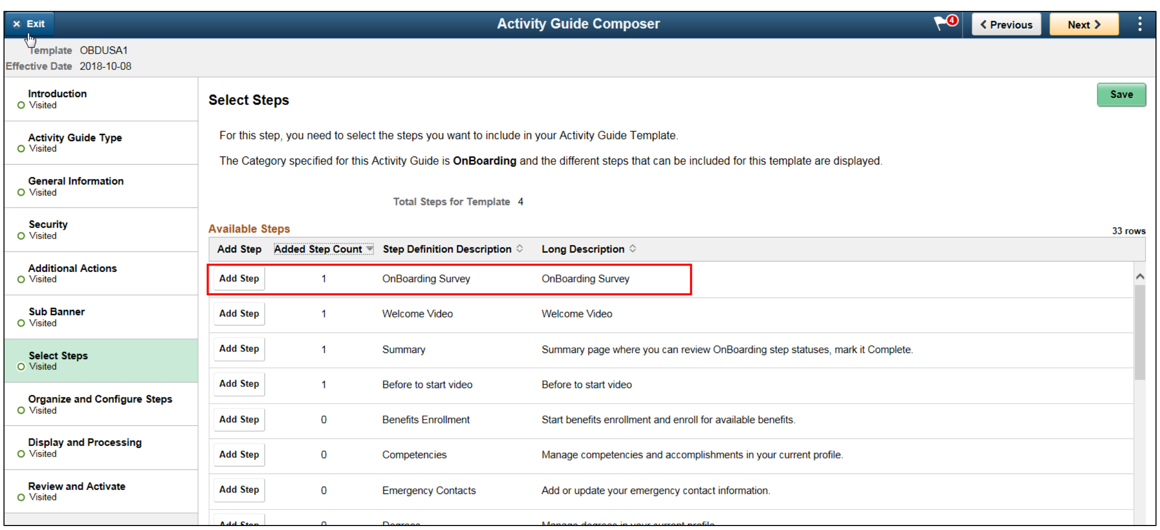
Navigation:

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.

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.

Field or Control	*Description*
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.

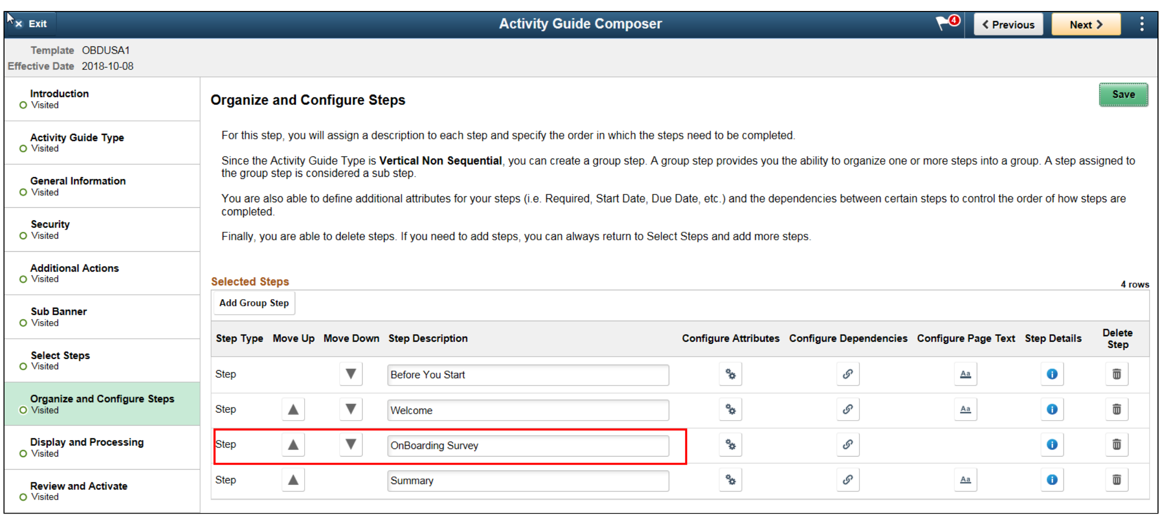
Navigation:

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

This example illustrates the fields and controls on the Activity Guide Composer - Organize and Configure Steps page.



Note: You must first identify the security roles and select step for this template before you can configure steps.

You can determine the step order by moving the steps up and down in the list. Here, we position the questionnaire step right after the Welcome Video.

Configuring and Creating Questionnaire Event

PeopleSoft Questionnaire Events enables you to provide questionnaires outside of an activity guide through email or online notifications. This feature works with the existing Questionnaire Framework, which is used to create the questionnaire.

These topics discuss configuring and creating questionnaire events using the Questionnaire Framework.

Note: This feature is currently only used by the HCM and FSCM products.

Pages Used to Configure and Create a Questionnaire Event

Page Name	***Definition Name***	***Usage***
Recipient List Page	EOQF_RECIPIENT_FL	Add or edit a recipient list for the questionnaire event.
Notification Template Page	EOQF_NOTIF_FL	Add or edit notification message text for questionnaire events.
Text Placeholder Definition Page	EOQF_SUBST_FL	Create text placeholders for questionnaire event notifications.
Manage Questionnaire Events Page	EOQF_EVENT_ADMN_FL	View, update, add, delete, and copy questionnaire events.
Create Questionnaire Event Page	EOQF_EVENT_ADD_SCF	Create a new questionnaire event and define basic event information.
Define Event Configuration Page	EOQF_EVENT_CNFG_FL	Specify questionnaire event details and recipients.
Define Notification Settings Page	EOQF_EVENT_NOTF_FL	Associate one or more notifications with the questionnaire event.
Notification Designer Page	EOQF_NOTF_DSGN_SCF	Create a notification for the questionnaire event.
Process Questionnaire Event Page	EOQF_EVENT_PRCS_FL	Activate or Deactivate the Questionnaire Event.
Statistics Page	EOQF_EVNT_STAT_SCF	View data related to the questionnaire event, such as response status and processing history.
Clone Questionnaire Event Page	EOQF_CLONE_EVN_SCF	Copy an existing questionnaire event.

Page Name	Definition Name	Usage
Adhoc Notification Execution Page	EOQF_EVENT_RUNCNTL	Run an adhoc notification process for a specific questionnaire event.

Understanding Questionnaire Event

A Questionnaire event allows you to share questionnaires with recipients outside of an activity guide, using email and push notifications.

The questionnaire event feature enables you to:

- Define parameters for the event, such as start date and frequency of the event.
- Associate a questionnaire with the event.
- Specify recipients and associate them with the event.
- Define notifications and associate them with the event.
- Initiate an adhoc notification process for an event.
- View statistical data for the event.

Follow these steps to create a questionnaire event:

1. Create questionnaire event using the Create Questionnaire Event Page.
2. Specify event details using the Define Event Configuration Page.
3. Associate notifications with the event using the Define Notification Settings Page.
4. Activate the questionnaire event using the Process Questionnaire Event Page.

Recipient List Page

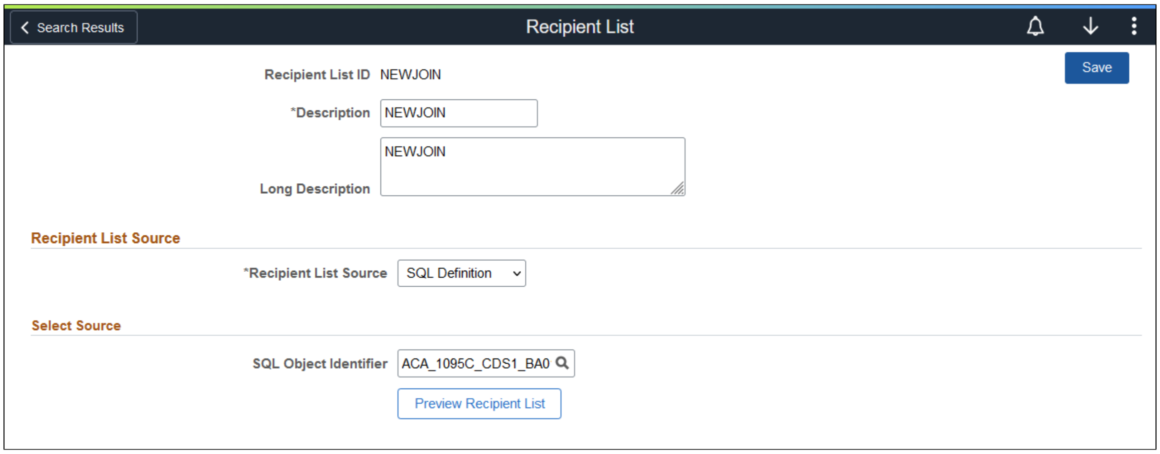
Use the Recipient List page (EOQF_RECIPIENT_FL) to add or edit a recipient list for questionnaire event.

Navigation:

Enterprise Components > Questionnaire Framework > Questionnaire Event > Questionnaire Event Setup > Recipient List > View Recipient List > Select Add button > Recipient List

Enterprise Components > Questionnaire Framework > Questionnaire Event > Questionnaire Event Setup > Recipient List > View Recipient List > Select Recipient List row > Recipient List

This example illustrates the Recipient List page.



Field or Control	***Description***
Recipient List ID	Displays the recipient list ID you entered prior to accessing this page.
Description and **Long Description**	Enter a meaningful short and long description for the recipient list.
Recipient List Source	Select a source for the recipient list. Available values are: • *Application Class:* Select this value to use a PeopleTools application class (PeopleCode program) as a source for the recipient list. When you select this value, the **Root Package ID, Qualified Package/Class Path, Application Class ID,** and **Method** fields appear in the Select Source section of the page. • *Query:* Select this value to use a PeopleSoft query as a source for the recipient list. When you select this value, the **Query Name** field appears in the Select Source section of the page. • *Role:* Select this value to use a role as a source for the recipient list. When you select this value, the **Role Name** field appears in the Select Source section of the page. • *SQL Definition:* Select this value to use a SQL definition as a source for the recipient list. When you select this value, the **SQL Object Identifier** field appears in the Select Source section of the page.

Field or Control	Description
Root Package ID	Select the Root package associated with the PeopleTools Application Class that acts as the source for the recipient list. This field appears only when 'Application Class' is selected as the Recipient List Source.
Qualified Package/Class Path	Select the path that defines the location of the PeopleTools Application Class to be used as a source for the recipient list. This field appears only when 'Application Class' is selected as the Recipient List Source.
Application Class ID	Select the PeopleTools Application Class to be used as a source for the recipient list. This field appears only when 'Application Class' is selected as the Recipient List Source.
Method	Select the method associated with the PeopleTools Application Class to be used as a source for the recipient list. This field appears only when 'Application Class' is selected as the Recipient List Source.
Query Name	Select the PeopleSoft query to be used as a source for the recipient list. This field appears only when 'Query' is selected as the Recipient List Source.
Role Name	Select a role to be used as a source for the recipient list. This field appears only when 'Role' is selected as the Recipient List Source.
SQL Object Identifier	Select the SQL Object to be used as a source for the recipient list. This field appears only when 'SQL Definition' is selected as the Recipient List Source.
Preview Recipient List	Select to access the Preview Recipient List page and view recipient list details, such as user ID and email address.

Notification Template Page

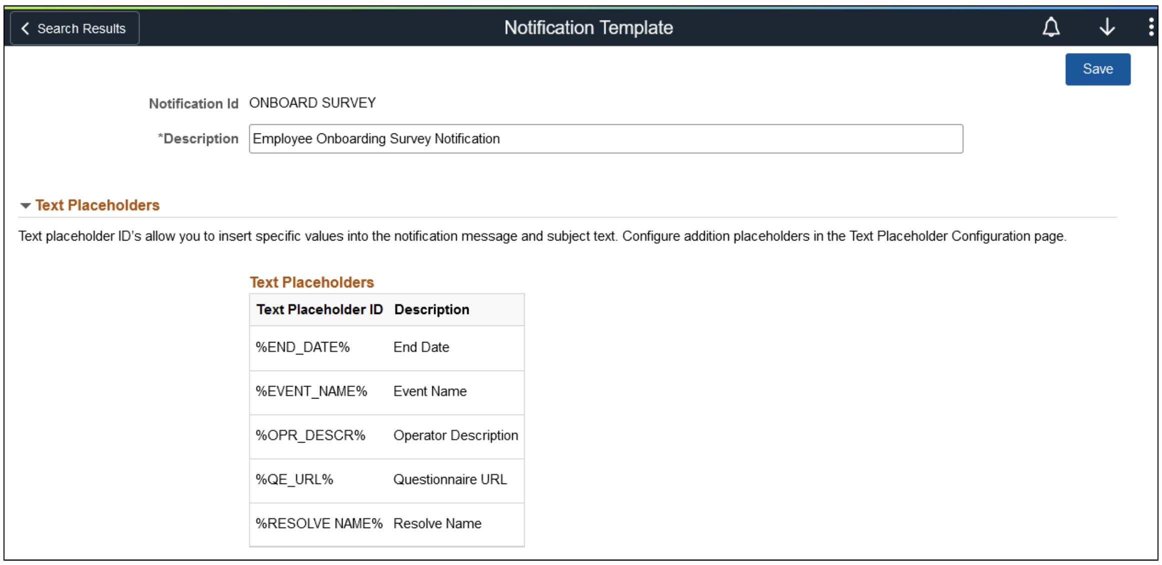
Use the Notification Template page (EOQF_NOTIF_FL) to add or edit notification message text for questionnaire events.

Navigation:

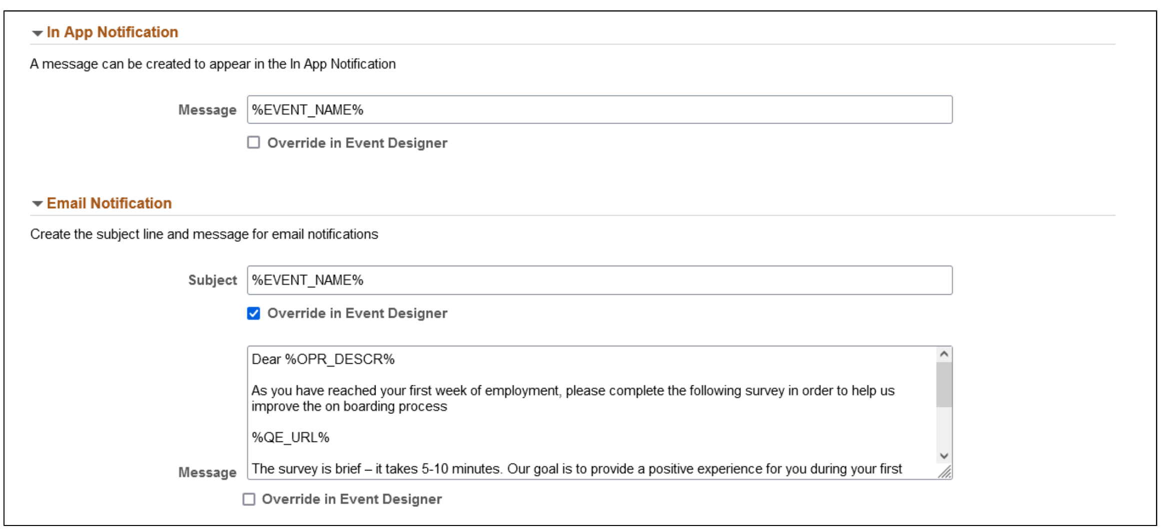
Enterprise Components > Questionnaire Framework > Questionnaire Event > Questionnaire Event Setup > Notification Template > View Notification Template > Select Add button > Notification Template

Enterprise Components > Questionnaire Framework > Questionnaire Event > Questionnaire Event Setup > Notification Template > View Notification Template > Select Notification row > Notification Template

This example illustrates the Notification Template page (1 of 2).



This example illustrates the Notification Template page (2 of 2).



Field or Control	***Description***
Notification ID	Displays the notification ID you entered prior to accessing this page.
Description	Enter a meaningful description.

Text Placeholders

Use this section to review text placeholders available for the notification. Text placeholders enable you to insert variable text into the notification message and subject text. For example, you can add a text placeholder for employee name within the subject text. When the notification is sent to a group of employees, each employee has their own name in the subject.

Use the Text Placeholder Definition Page to add new text placeholders.

Field or Control	***Description***
Text Placeholder ID	Displays the ID of the text placeholder.
Description	Displays a description of the text placeholder.

In App Notification

Use this section to create online notification message content.

Field or Control	***Description***
Message	Enter the message text for the online notification. You can use text placeholders here.
Override in Event Designer	Select this check box if you want to make this message text editable in the Event designer.

Email Notification

Use this section to create email notification message content.

Field or Control	***Description***
Subject	Enter the subject. This text will be the subject line of the e-mail notification. You can use text placeholders here.
Override in Event Designer (Subject)	Select this check box if you want to make this subject text editable in the Event designer.
Message	Enter the message text for the e-mail notification. You can use text placeholders here.

Field or Control	*Description*
Override in Event Designer (Message)	Select this check box if you want to make this message text editable in the Event designer.

Text Placeholder Definition Page

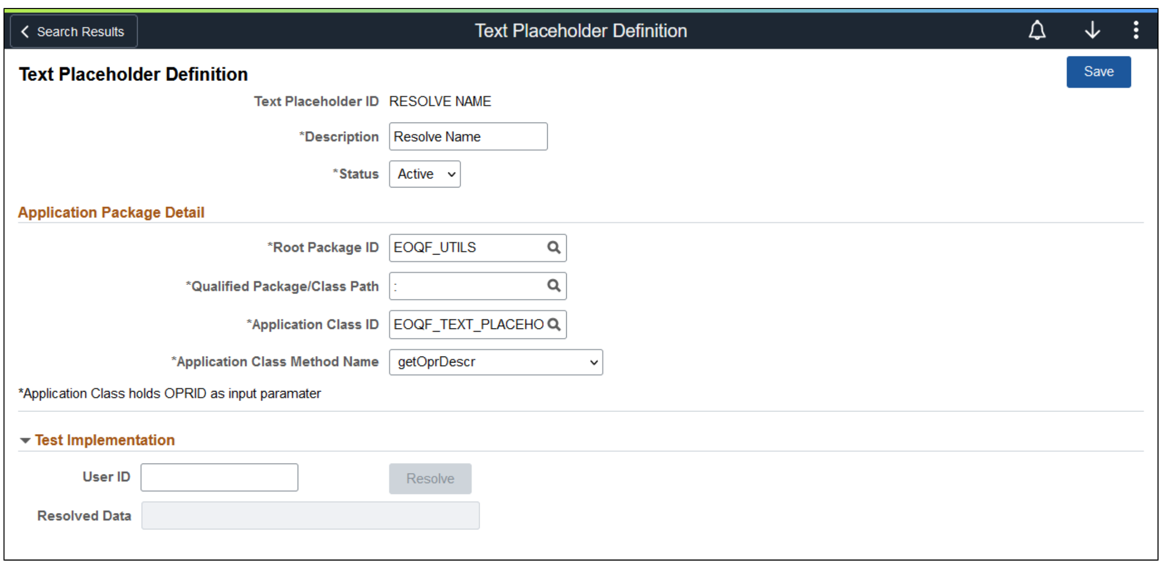
Use the Text Placeholder Definition page (EOQF_SUBST_FL) to create text placeholders for questionnaire event notifications.

Navigation:

Enterprise Components > Questionnaire Framework > Questionnaire Event > Questionnaire Event Setup > Text Placeholder Definition > View Text Placeholder Definition > Select Add button > Text Placeholder Definition

Enterprise Components > Questionnaire Framework > Questionnaire Event > Questionnaire Event Setup > Text Placeholder Definition > View Text Placeholder Definition > Select Text Placeholder row > Text Placeholder Definition

This example illustrates the Text Placeholder Definition page.



Field or Control	*Description*
Text Placeholder ID	Displays the text placeholder ID you entered prior to accessing this page.
Description	Enter a meaningful description for the text placeholder.
Status	Select a status for the text placeholder.

Field or Control	***Description***
Root Package ID	Select the root package associated with the PeopleTools Application Class that acts as the source for the text placeholder.
Qualified Package/Class Path	Select the path that defines the location of the PeopleTools Application Class that acts as the source for the text placeholder. Options listed are based on the selected Root Package.
Application Class ID	Select the PeopleTools Application Class that acts as the source for the text placeholder.
Application Class Method Name	Select the required PeopleTools Application Class Method to invoke.
User ID and **Resolve**	Select the ID of the user and click the Resolve button.
Resolved Data	The name of the user based on the selected ID is displayed.

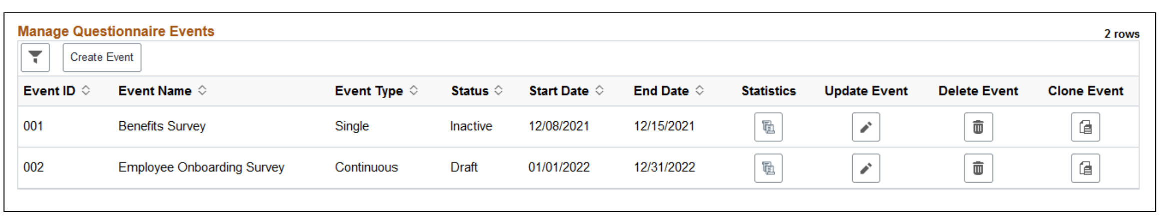
Manage Questionnaire Events Page

Use the Manage Questionnaire Events page (EOQF_EVENT_ADMN_FL) to view, update, add, delete, and copy questionnaire events.

Navigation:

Enterprise Components > **Questionnaire Framework** > **Questionnaire Event** > **Manage Questionnaire Events** > **Manage Questionnaire Events**

This example illustrates the Manage Questionnaire Events page.



Term	***Definition***
Filter	Filter event results displayed in the grid.

Term	***Definition***
Create Event	Select this button to access the Create Questionnaire Event Page and create a new questionnaire event. There are four pages required to create a new questionnaire event: • Create Questionnaire Event Page • Define Event Configuration Page • Define Notification Settings Page • Process Questionnaire Event Page
Event ID	Displays the questionnaire event ID.
Event Name	Displays the questionnaire event name.
Event Type	Displays the questionnaire event type. Values are *Single* or *Continuous.*
Status	Displays the questionnaire event status.Values are: • *Active* • *Draft* • *Canceled* • *Expired* • *Inactive* Deactivate or activate a questionnaire event using the Process Questionnaire Event Page.
Start Date	The date on which the questionnaire event link is active.
End Date	The date on which the questionnaire event link expires.
Statistics	Select to access the Statistics Page and view data related to the questionnaire, such as response status and processing history.
Update Event	Select to access the Define Event Configuration Page and view or edit the questionnaire event.
Delete Event	Select to delete the questionnaire event.
Clone Event	Select access the Clone Questionnaire Event Page and copy the questionnaire event.

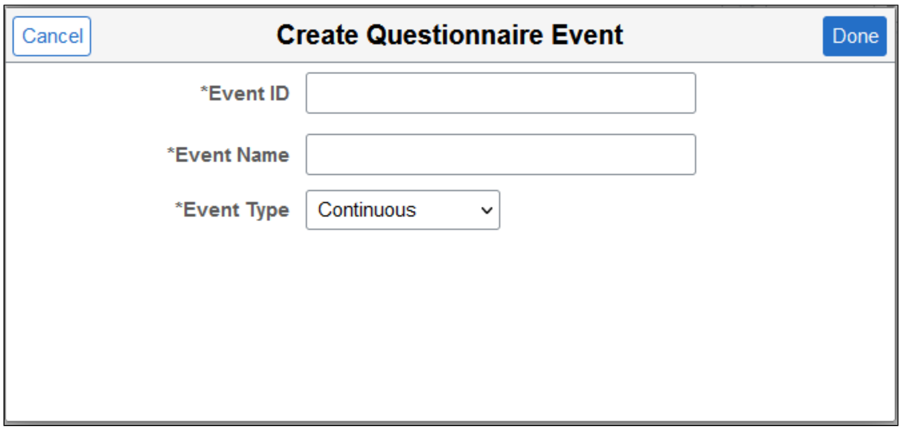
Create Questionnaire Event Page

Use the Create Questionnaire Event page (EOQF_EVENT_ADD_SCF) to create a new questionnaire event and define basic event information.

Navigation:

Enterprise Components > **Questionnaire Framework** > **Questionnaire Event** > **Manage Questionnaire Events** > **Manage Questionnaire Events** > **Select Create Event**

This example illustrates the Questionnaire Event Designer page.



Term	***Definition***
Event Name	Enter a name for the questionnaire event.
Event ID	Enter an event ID for the questionnaire event.
Event Type	Select the event type. Values are: • *Single*: Select this value if the questionnaire event is a one-time activity. • *Continuous:* Select this value if the questionnaire event is an ongoing activity.
Done	Select this button to access the Create Questionnaire Event activity guide and the Define Event Configuration Page.

Define Event Configuration Page

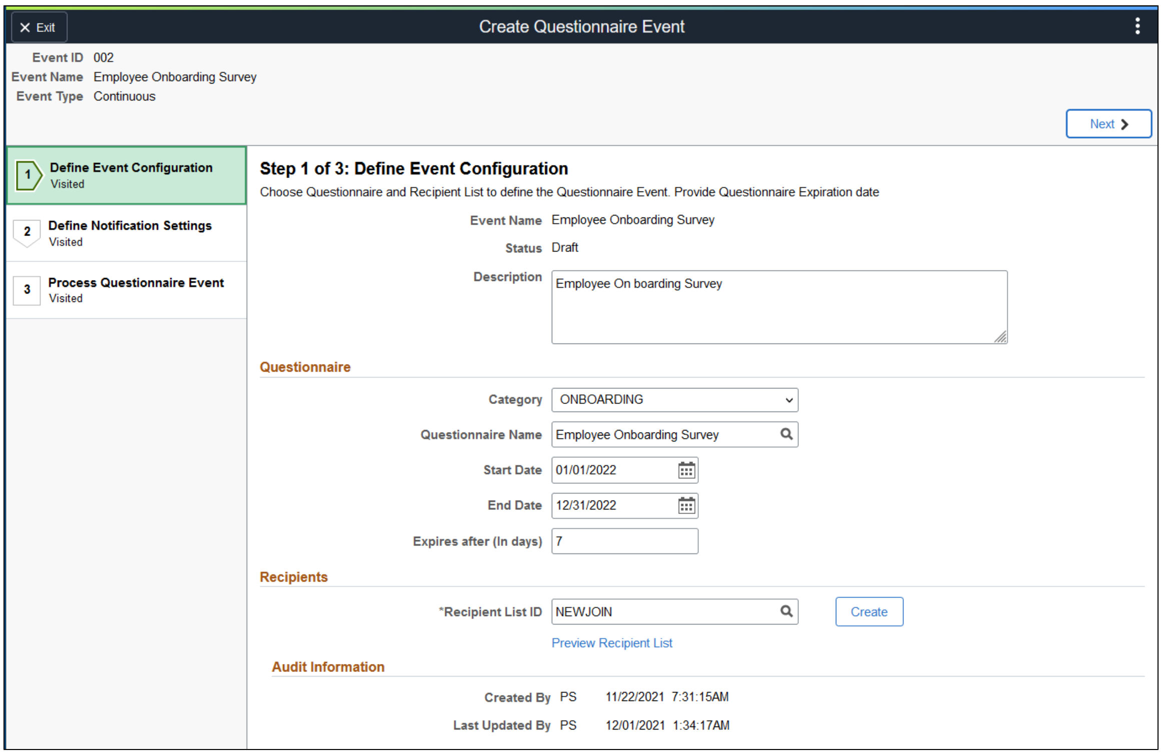
Use the Define Event Configuration page (EOQF_EVENT_CNFG_FL) to specify questionnaire event details and recipients.

Navigation:

Enterprise Components > Questionnaire Framework > Questionnaire Event > Manage Questionnaire Events > Manage Questionnaire Events > Select Create Event > Define Event Configuration

Enterprise Components > Questionnaire Framework > Questionnaire Event > Manage Questionnaire Events > Manage Questionnaire Events > Select Update Event > Define Event Configuration

This example illustrates the Define Event Configuration page.



Click the Next button to proceed to the next step in the create questionnaire event guided process. You can click any of the steps on the left-hand pane to access that particular step in the guided process if you had already visited that step.

Field or Control	***Description***
Event Name	Displays the event name, which you entered on the Create Questionnaire Event page.
Status	Displays the event status, which you entered on the Create Questionnaire Event page.
Description	Enter a meaningful description that explains the questionnaire event.

Questionnaire

Field or Control	*Description*
Category	Select the questionnaire category to which this questionnaire event belongs. Values are: • *BENEFITS* • *COMMON* • *OFFBOARDING* • *ONBOARDING* • *REMOTE WORKER* Questionnaire categories are defined in the Questionnaire Category Page.
Questionnaire Name	Select the questionnaire for the questionnaire event. Available options are based on the questionnaire category you select. Questionnaires are defined in the Define Questionnaire Page.
Start Date and **End Date**	Define the period in which the questionnaire is available to recipients using the Start Date and End Date fields.

Recipients

Field or Control	*Description*
Recipient List ID	Select a recipient list for the questionnaire event, based on your target audience.
Create	Select this button to access the Recipient List Page and create a new Recipient List.
Preview Recipient List	Select this link to view users associated with the recipient list. You can also view email address for each user.

Audit Information

This section displays the user ID and time-stamp associated with the creation and update of this questionnaire event.

Define Notification Settings Page

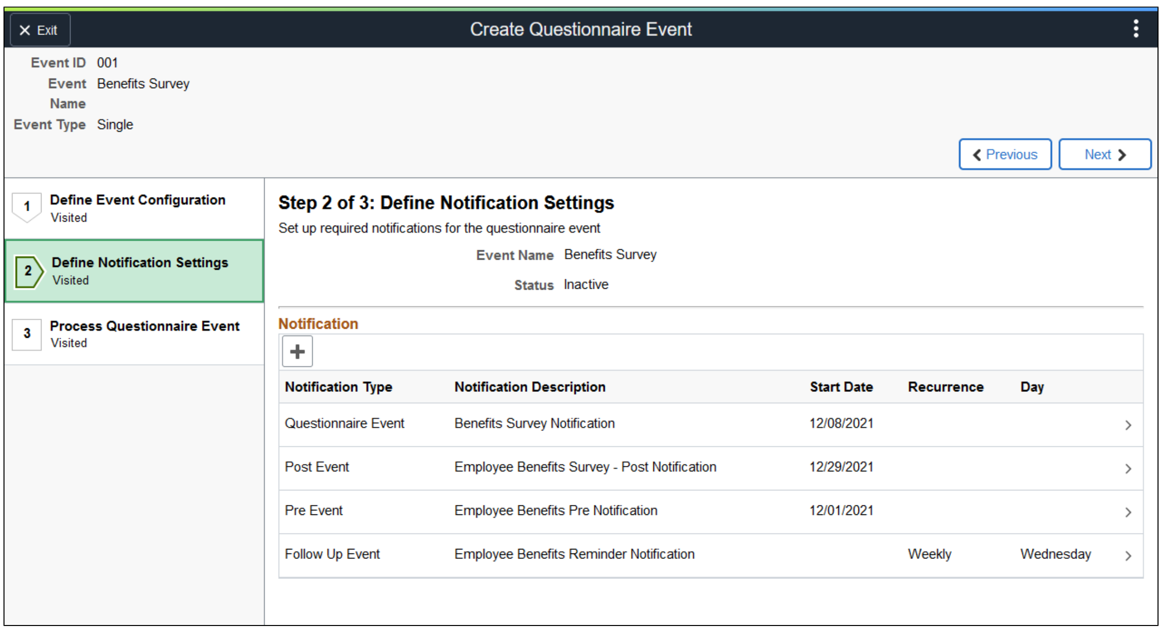
Use the Define Notification Settings page (EOQF_EVENT_NOTF_FL) to associate one or more notifications with the questionnaire event.

Navigation:

Enterprise Components > **Questionnaire Framework** > **Questionnaire Event** > **Manage Questionnaire Events** > **Manage Questionnaire Events** > **Select Create Event** > **Define Event Configuration** > **Define Notification Settings**

Enterprise Components > **Questionnaire Framework** > **Questionnaire Event** > **Manage Questionnaire Events** > **Manage Questionnaire Events** > **Select Update Event** > **Define Event Configuration** > **Define Notification Settings**

This example illustrates the Define Notification Settings page.



Select a notification row to view notification details in the Notification Designer Page.

Field or Control	***Description***
Add a New Value	Select this button to access the Notification Designer Page and create a new notification for the questionnaire event.
Notification Type	Displays the notification type associated with the notification.
Notification Description	Displays the description associated with the notification.

Field or Control	***Description***
Start Date	Displays the date on which the questionnaire event is available to recipients. **Note:** This field appears only when you select 'Post Event', Questionnaire Event or 'Pre Event' as the Notification Type. For Questionnaire Event, the date defaults from the date given in the Define Event Configuration page.
Recurrence	Displays recurring notification information. This field only appears for '*Follow Up Event*' notification type.

Notification Designer Page

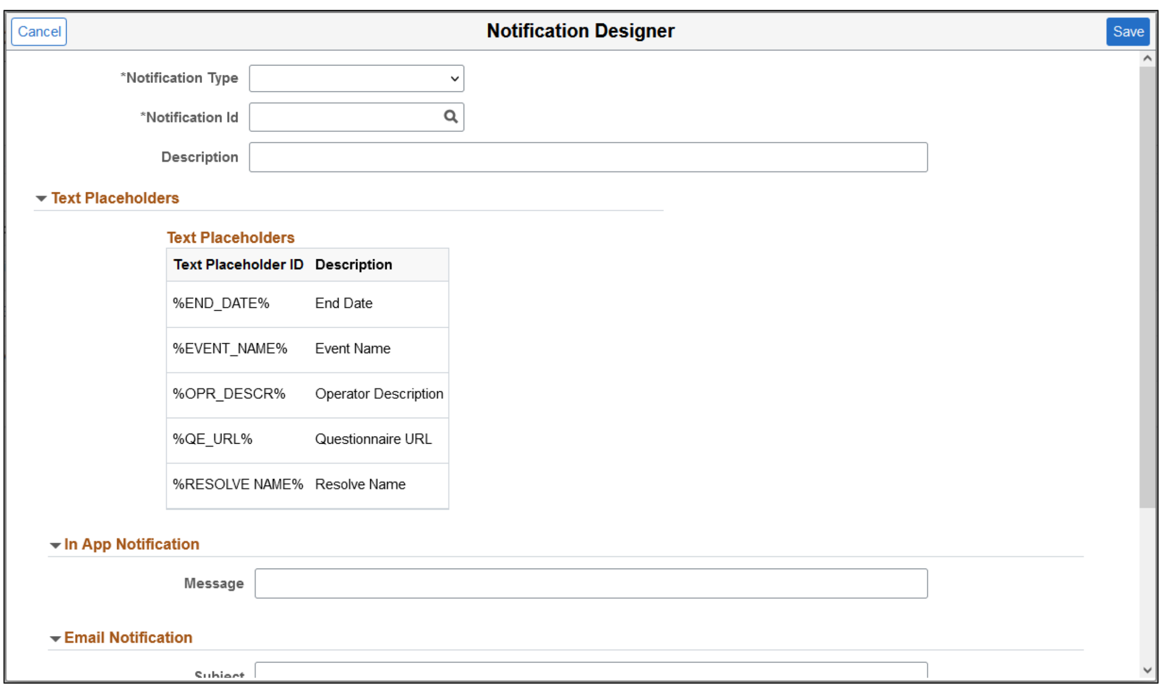
Use the Notification Designer page (EOQF_NOTF_DSGN_SCF) to create a notification for the questionnaire event. This page is only accessible within the Create Questionnaire Event activity guide.

Navigation:

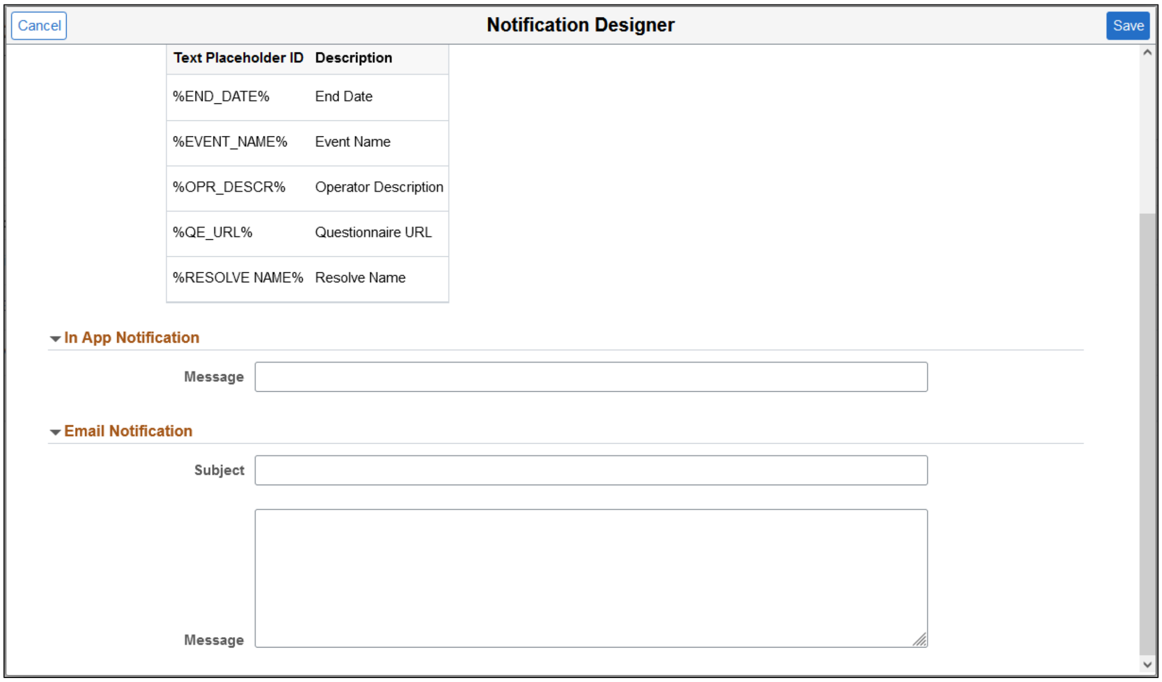
Enterprise Components > **Questionnaire Framework** > **Questionnaire Event** > **Manage Questionnaire Events** > **Manage Questionnaire Events** > **Select Create Event** > **Define Event Configuration** > **Define Notification Settings** > **Select Add a New Value** > **Notification Designer**

Enterprise Components > **Questionnaire Framework** > **Questionnaire Event** > **Manage Questionnaire Events** > **Manage Questionnaire Events** > **Select Update Event** > **Define Event Configuration** > **Define Notification Settings** > **Select Add a New Value** > **Notification Designer**

This example illustrates the Notification Designer page (1 of 2).



This example illustrates the Notification Designer page (2 of 2).



Field or Control	***Description***
Notification Type	Specify the type of event associated with this notification. Available values are: • *Adhoc* • *Follow Up Event* • *Post Event* • *Pre Event* • *Questionnaire Event*
Recurrence	Specify whether the notification is recurring. Available values are: • *Daily:* Select this option if you want to send the notification daily. • *Weekly:* Select this option if you want to send the notification every week. If you select this option, you need to specify the day on which you want to send the notification. **Note:** This field only appears for '*Follow Up Event*' notification type.

Note: The remaining fields on this page are identical to those found on the Notification Template Page. Please refer to the page for more information.

Process Questionnaire Event Page

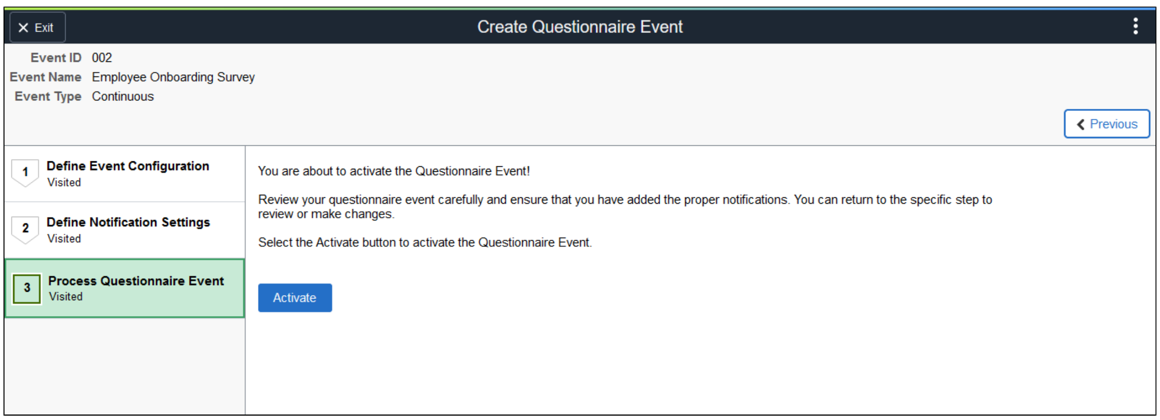
Use the Process Questionnaire Event page (EOQF_EVENT_PRCS_FL) to activate or deactivate a Questionnaire Event.

Navigation:

Enterprise Components > Questionnaire Framework > Questionnaire Event > Manage Questionnaire Events > Manage Questionnaire Events > Select Create Event > Define Event Configuration > Define Notification Settings > Process Questionnaire Event

Enterprise Components > Questionnaire Framework > Questionnaire Event > Manage Questionnaire Events > Manage Questionnaire Events > Select Update Event > Define Event Configuration > Define Notification Settings > Process Questionnaire Event

This example illustrates the Process Questionnaire Event page.



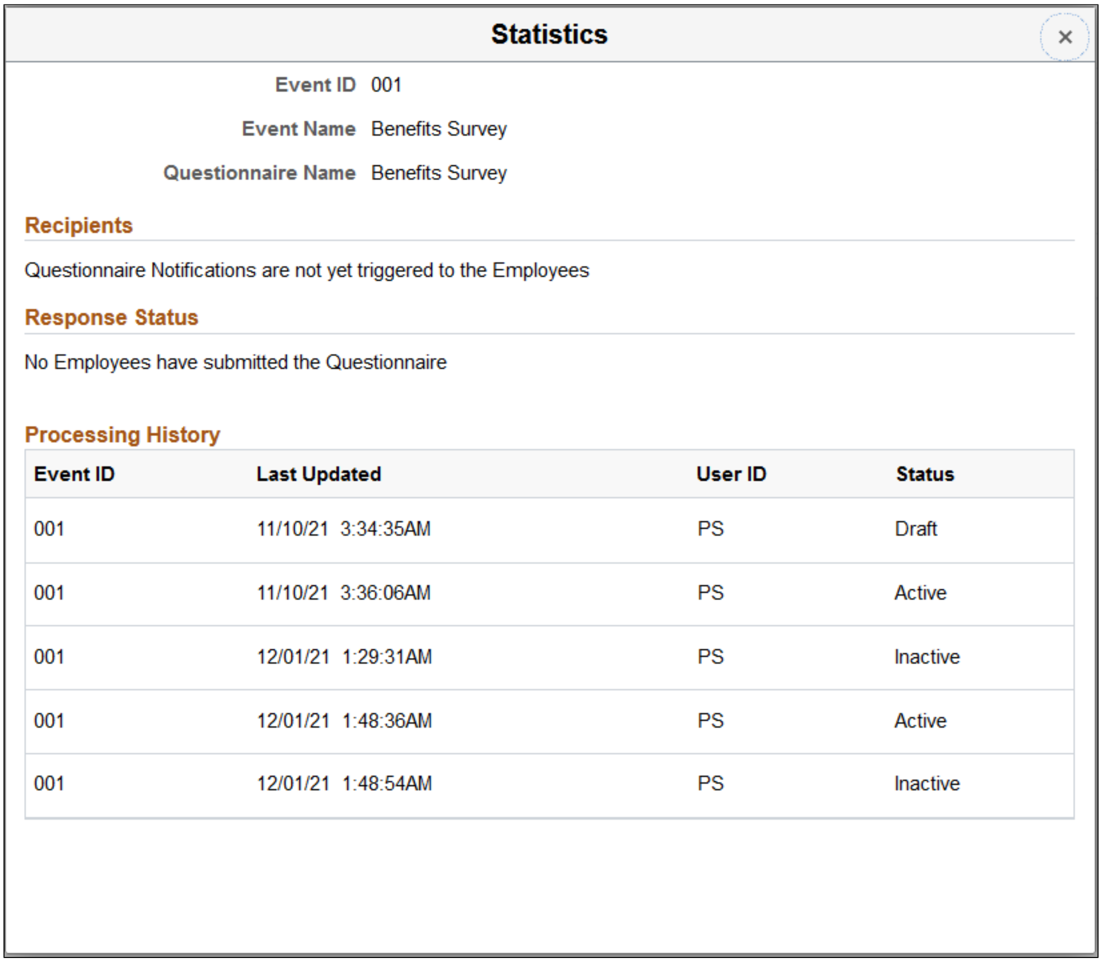
Statistics Page

Use the Statistics page (EOQF_EVNT_STAT_SCF) to view data related to the questionnaire event, such as response status and processing history.

Navigation:

Enterprise Components > Questionnaire Framework > Questionnaire Event > Manage Questionnaire Events > Manage Questionnaire Events > Select Statistics icon

This example illustrates the Statistics page.



Statistics

Event ID 001

Event Name Benefits Survey

Questionnaire Name Benefits Survey

Recipients

Questionnaire Notifications are not yet triggered to the Employees

Response Status

No Employees have submitted the Questionnaire

Processing History

Event ID	Last Updated	User ID	Status
001	11/10/21 3:34:35AM	PS	Draft
001	11/10/21 3:36:06AM	PS	Active
001	12/01/21 1:29:31AM	PS	Inactive
001	12/01/21 1:48:36AM	PS	Active
001	12/01/21 1:48:54AM	PS	Inactive

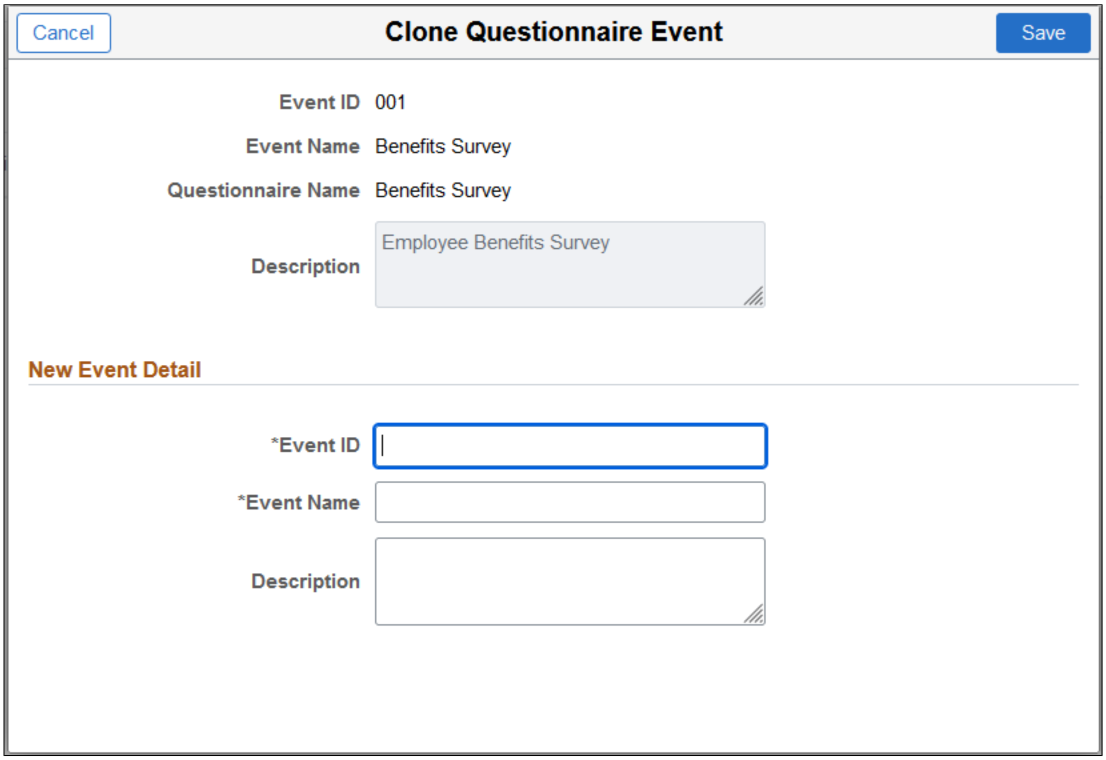
Clone Questionnaire Event Page

Use the Clone Questionnaire Event page (EOQF_CLONE_EVN_SCF) to copy an existing questionnaire event.

Navigation:

Enterprise Components > Questionnaire Framework > Questionnaire Event > Manage Questionnaire Events > Manage Questionnaire Events > Select Clone Event icon

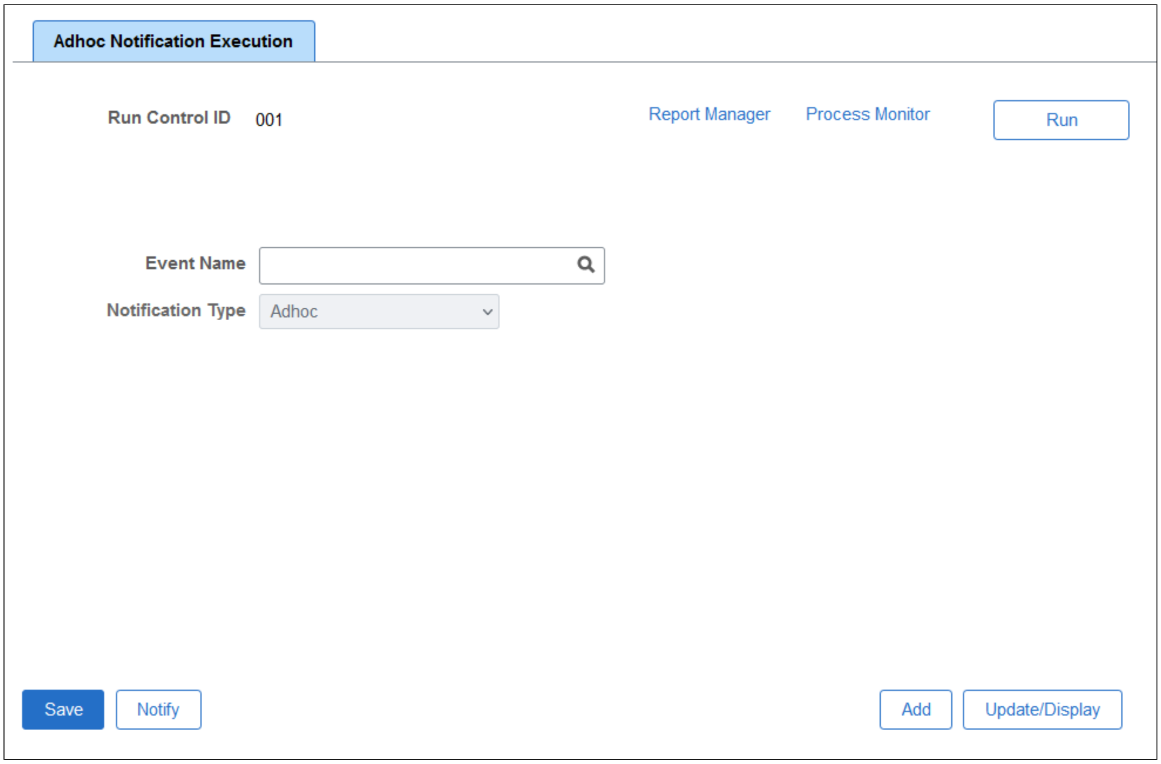
This example illustrates the Clone Questionnaire Event page.



Adhoc Notification Execution Page

Use the Adhoc Notification Execution page (EOQF_EVENT_RUNCNTL) to run an adhoc notification process for a specific questionnaire event.

This example illustrates the Run control page for Adhoc Notification.



Field or Control	***Description***
Event Name	Select the questionnaire event for which you need to initiate the Adhoc notification process.
Notification Type	Displays the *Adhoc* Notification Type. You cannot alter this value.

Chapter 22

Working with 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.

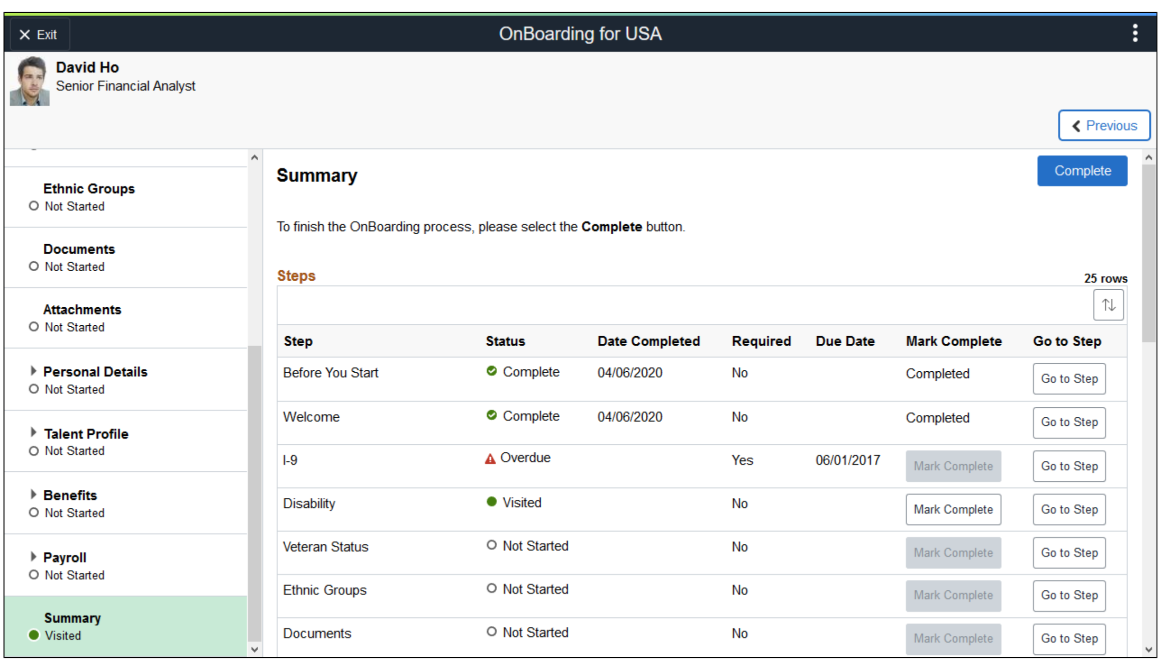
The following videos provide demonstrations of features and how to use the Activity Guide Composer:

Video: PeopleSoft Activity Guide Composer

Video: Image Highlights, PeopleSoft HCM Update Image 23: Activity Guide Composer

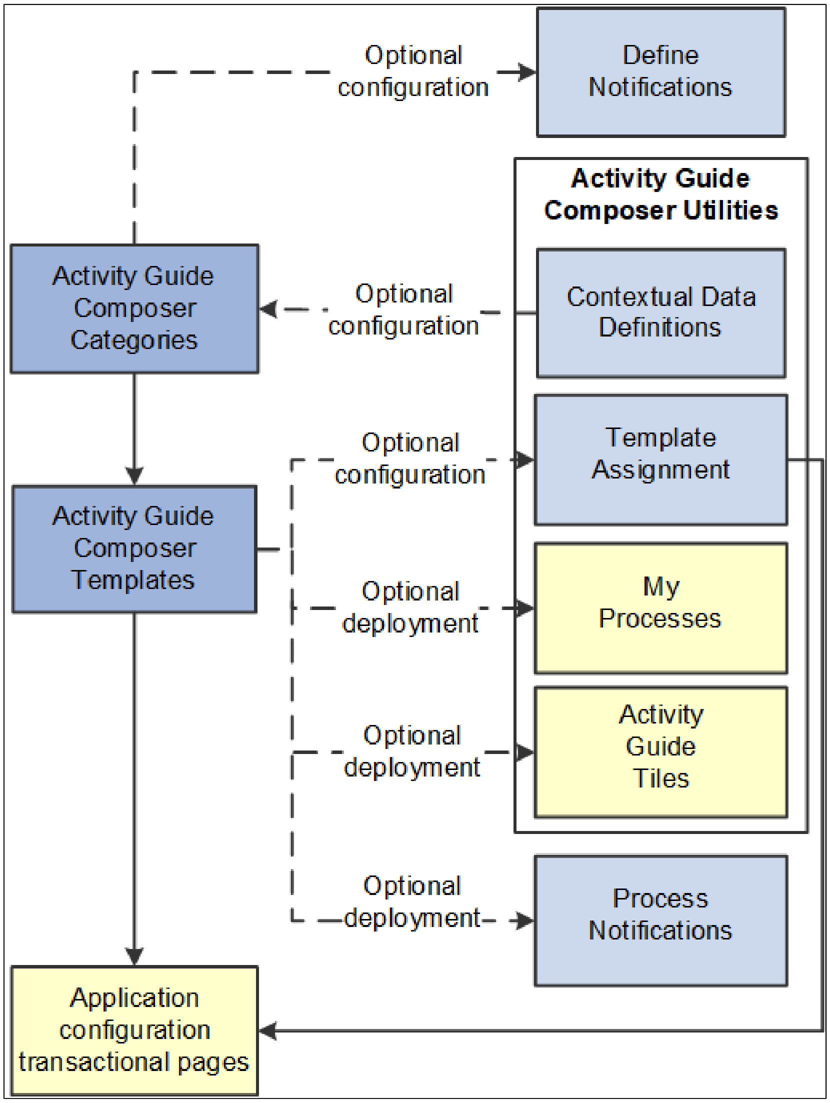
Video: Image Highlights, PeopleSoft HCM Update Image 31: Activity Guide Composer-Multi User Guides

This example illustrates one of the layouts of an activity guide using the OnBoarding feature.



Setting Up Activity Guides

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 sent 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)

    Identity 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 AG Composer 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.

Delivered FSCM Activity Guides

This section lists the delivered Financials and Supply Chain activity guides.

Although you can create your own activity guides using the Activity Guide Composer, PeopleSoft FSCM has delivered activity guides in these product applications:

Product or Application	***Activity Guide***	***Book, Chapter, Topic***
Contracts	Contracts Activity Guide	*PeopleSoft Contracts*, "Managing Contracts", Using the Contracts Activity Guide.
eBill Payment	Payment Cart Activity Guide	*PeopleSoft eBill Payment*, "Making Payments Using Fluid eBill Payment", Using the Payment Cart in Fluid eBill Payment

Product or Application	***Activity Guide***	***Book, Chapter, Topic***
Expenses	Hotel Activity Guide	*PeopleSoft Expenses*, "Creating and Modifying Expense Reports Using PeopleSoft Fluid", Itemizing Hotel Bills using Hotel Wizard in PeopleSoft Fluid
General Ledger Payables	Business Unit Management Activity Guide	*PeopleSoft General Ledger*, "Defining Your Operational Structure", Managing Business Units
Lease Administration	Lease Migration and Transition Activity Guide	*PeopleSoft Lease Administration*, "Lease Migration and Transition", Using the Activity Guide
Payables	Payment Request Activity Guide	*PeopleSoft Payables*, "Using Additional Payment Processing Options", Creating Payment Requests Using PeopleSoft Fluid User Interface
Supplier Scorecard	Evaluations Activity Guide	*PeopleSoft Source to Settle Common Information*, "Using Supplier Scorecarding", Creating Evaluations
Treasury	Bank Account Transfer Activity Guide	*PeopleSoft Cash Management*, "Transferring Funds", Working with Bank Transfers on the PeopleSoft Fluid User Interface
Project Costing	Project Request Activity Guide	*PeopleSoft Project Costing*, "Creating and Maintaining Projects", Creating Project Requests Using PeopleSoft Fluid User Interface

Delivered HCM Activity Guides

This section lists the delivered Human Capital Management activity guides.

Although you can create your own activity guides using the Activity Guide Composer, PeopleSoft HCM has delivered activity guides in these product applications:

Product (Business Process)	***Activity Guide***	***Book, Chapter, Topic***
Enterprise Components	Create Questionnaire	Understanding Questionnaire Framework
Absence Management	Extended Absence Request	*PeopleSoft Global Payroll*, "Using the PeopleSoft Fluid User Interface to Work with Absences"

Product (Business Process)	***Activity Guide***	***Book, Chapter, Topic***
Absence Management	Extended Absence Request (without configurable section)	*PeopleSoft Global Payroll*, "Using the PeopleSoft Fluid User Interface to Work with Absences"
Benefits (Life Events)	Adoption Event	*PeopleSoft Benefits Administration* or *PeopleSoft eBenefits*, "Managing Life Events", Using the PeopleSoft Fluid User Interface to Enter Life Events *PeopleSoft Benefits Administration* or *PeopleSoft eBenefits*, "Managing Life Events", Processing the Adoption Event
Benefits (Life Events)	Birth Event	*PeopleSoft Benefits Administration* or *PeopleSoft eBenefits*, "Managing Life Events", Using the PeopleSoft Fluid User Interface to Enter Life Events *PeopleSoft Benefits Administration* or *PeopleSoft eBenefits*, "Managing Life Events", Processing the Child Birth Event
Benefits (Life Events)	Divorce Event	*PeopleSoft Benefits Administration* or *PeopleSoft eBenefits*, "Managing Life Events", Using the PeopleSoft Fluid User Interface to Enter Life Events *PeopleSoft Benefits Administration* or *PeopleSoft eBenefits*, "Managing Life Events", Processing the Divorce Event
Benefits (Life Events)	Marriage Event	*PeopleSoft Benefits Administration* or *PeopleSoft eBenefits*, "Managing Life Events", Using the PeopleSoft Fluid User Interface to Enter Life Events *PeopleSoft Benefits Administration* or *PeopleSoft eBenefits*, "Managing Life Events", Processing the Marriage Event
Benefits Administration	Open Enrollment	*PeopleSoft Benefits Administration*, "Using the PeopleSoft Fluid User Interface to Manage Benefits Administration", Using the PeopleSoft Fluid User Interface to Manage Benefits Enrollment as an Employee
Human Resources (Health and Safety)	Report Incident	*PeopleSoft Human Resources Monitor Health and Safety*, "Working with Health and Safety Using Fluid", Reporting Incidents as Employees

Product (Business Process)	***Activity Guide***	***Book, Chapter, Topic***
Human Resources (Job Data)	Job Data	*PeopleSoft Human Resources Administer Workforce*, "Using the PeopleSoft Fluid User Interface to Manage Job Data", Updating Job Data Using Fluid
Human Resources: (OnBoarding)	OnBoarding for Canada	*PeopleSoft Human Resources Administer Workforce*, "Working with OnBoarding", Using OnBoarding Pages *PeopleSoft Human Resources Administer Workforce*, "Working with OnBoarding", (CAN) Completing OnBoarding Activity Guides for Canadian Workers
Human Resources: (OnBoarding)	OnBoarding for USA	*PeopleSoft Human Resources Administer Workforce*, "Working with OnBoarding", Using OnBoarding Pages *PeopleSoft Human Resources Administer Workforce*, "Working with OnBoarding", (USA) Completing OnBoarding Activity Guides for US Workers
Human Resources: (OnBoarding)	Standard OnBoarding	*PeopleSoft Human Resources Administer Workforce*, "Working with OnBoarding", Using OnBoarding Pages *PeopleSoft Human Resources Administer Workforce*, "Working with OnBoarding", Completing the Standard OnBoarding Activity Guide
Human Resources: (OffBoarding)	Involuntary OffBoarding	*PeopleSoft Human Resources Administer Workforce*, "Working with OffBoarding", Using OffBoarding Pages *PeopleSoft Human Resources Administer Workforce*, "Working with OffBoarding", Completing the Involuntary OffBoarding Activity Guide
Human Resources: (OffBoarding)	Voluntary OffBoarding	*PeopleSoft Human Resources Administer Workforce*, "Working with OffBoarding", Using OffBoarding Pages *PeopleSoft Human Resources Administer Workforce*, "Working with OffBoarding", Completing the Voluntary OffBoarding Activity Guide

Product (Business Process)	***Activity Guide***	***Book, Chapter, Topic***
Human Resources (Position Management)	Manage Position	*PeopleSoft Human Resources Manage Positions*, "Using the PeopleSoft Fluid User Interface to Manage Positions", Creating Positions Using Fluid
Human Resources (Remote Worker)	Remote Worker Request (Employee)	*PeopleSoft eProfile*, "Using eProfile", Managing Remote Worker Requests as an Employee using Fluid
Human Resources (Remote Worker)	Remote Worker Request (Admin)	*PeopleSoft Human Resources Administer Workforce*, "Entering Additional Data in Human Resources Records", (Fluid) Managing Remote Worker Information

Delivered CS Activity Guides

This section lists the delivered Campus Solutions activity guides.

Although you can create your own activity guides using the Activity Guide Composer, PeopleSoft Campus Solutions (CS) has delivered activity guides in these product applications:

Product or Application	***Activity Guide***	***Book, Chapter, Topic***
Student Records	Class Search and Enroll	*PeopleSoft Campus Solutions: Campus Self-Service*, "Using Self Service Enrollment".
Student Records	Drop Classes	*PeopleSoft Campus Solutions: Campus Self-Service*, "Using Self-Service Enrollment", Dropping Classes.
Student Records	Swap Classes	*PeopleSoft Campus Solutions: Campus Self-Service*, "Using Self-Service Enrollment", Swapping Classes.
Student Records	Update Classes	*PeopleSoft Campus Solutions: Campus Self-Service*, "Using Self-Service Enrollment", Editing Classes.
Student Financials	Make a Payment	*PeopleSoft Campus Solutions: Campus Self-Service*, "Using Student Financials Self-Service", Making Self-Service Payments.

Product or Application	***Activity Guide***	***Book, Chapter, Topic***
Student Records	Apply for Graduation	*PeopleSoft Campus Solutions: Student Records*, "Graduating Students", Managing Fluid Applications for Graduation.

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 (AG) categories, use the AG Composer 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***
AG Composer Categories - Category Page	AGC_CAT_TBL1	Create an activity guide category and enter an effective date, description, and long description.
AG Composer Categories - Security Page	AGC_CAT_TBL6	Determine who has access to maintain and use the activity guide category.
AG Composer Categories - Context Page	AGC_CAT_TBL2	Define the context for the activity guide category.
AG Composer Categories - Actions Page	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
AG Composer Categories - Images Page	AGC_CAT_TBL4	Identify images that can be displayed in the sub banner of the fluid activity guide.
AG Composer Categories - Assignees Page	AGC_CAT_TBL7	Identify assignees that will be assigned to the steps.

Page Name	Definition Name	Usage
AG Composer Categories - Steps Page	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.
AG Composer Categories - Notifications Page	AGC_CAT_TBL8	Configure the notification settings for the category
Preview Notification Page	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 AG Composer 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.

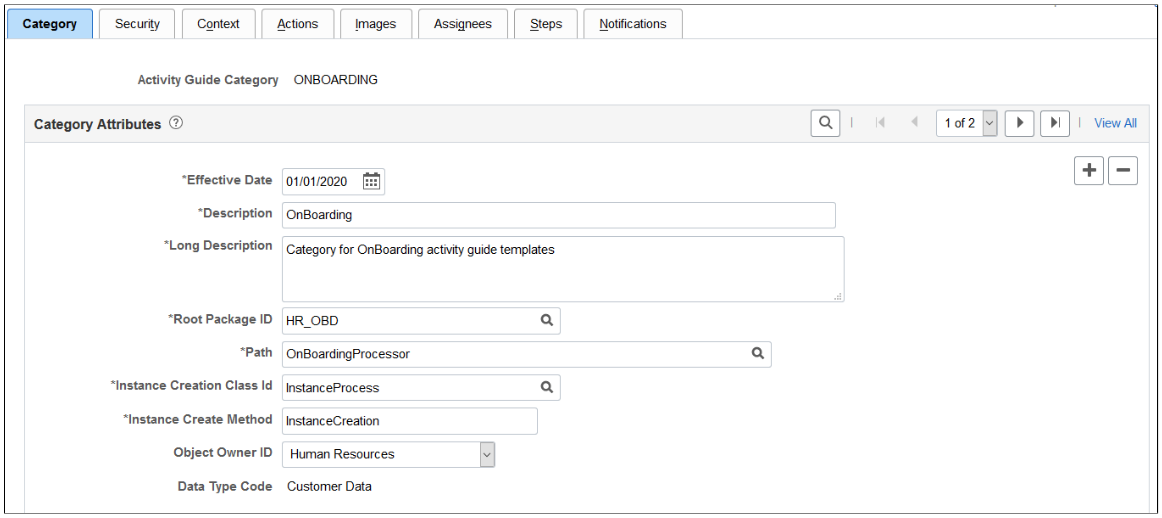
AG Composer Categories - Category Page

Use the AG Composer 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** > **AG Composer Categories** > **Category**

This example illustrates the fields and controls on the AG Composer Categories - Category 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.

Field or Control	***Description***
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 *ActivityGuideCreation* instance creation method that you can utilize and extend for your category.

Field or Control	Description
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 *InstanceCreation* 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, *PeopleTools: Portal Technology*, “Developing and Deploying Activity Guides”.

Field or Control	Description
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 *PeopleTools: Application Designer Developer's Guide.*
Data Type Code	Displays that this is either delivered *System Data* or your own *Customer Data*.

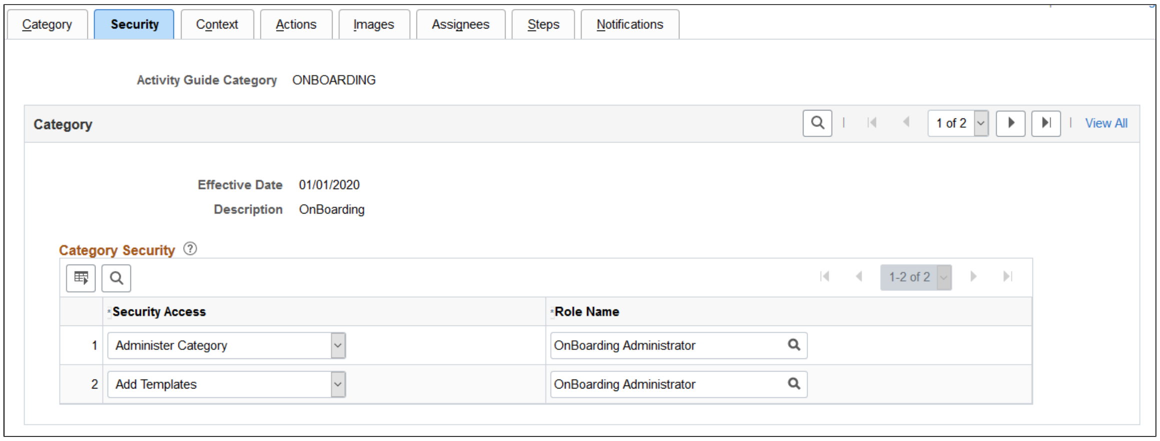
AG Composer Categories - Security Page

Use the AG Composer 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** > **AG Composer Categories** > **Security**

This example illustrates the fields and controls on the AG Composer Categories - Security page.



Define your category security by associating security access to a security role.

Field or Control	***Description***
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.

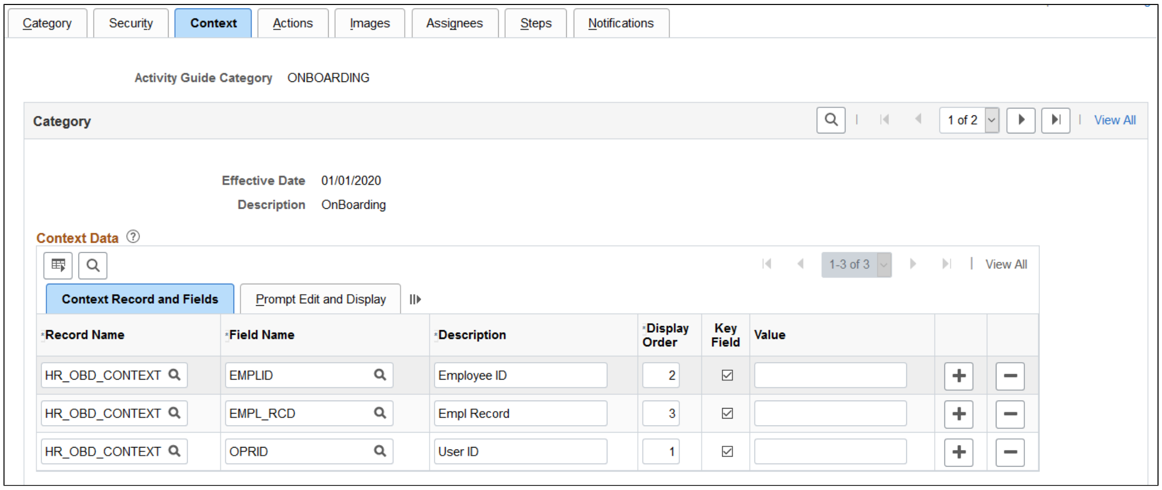
AG Composer Categories - Context Page

Use the AG Composer Categories - Context page (AGC_CAT_TBL2) to define the context for the activity guide category.

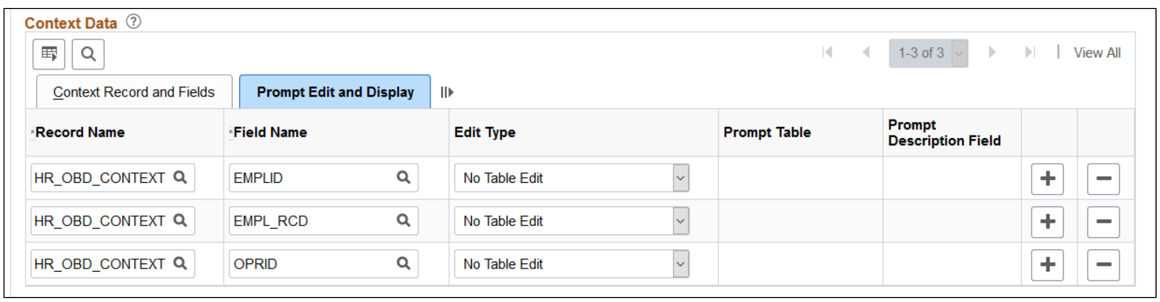
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Categories** > **Context**

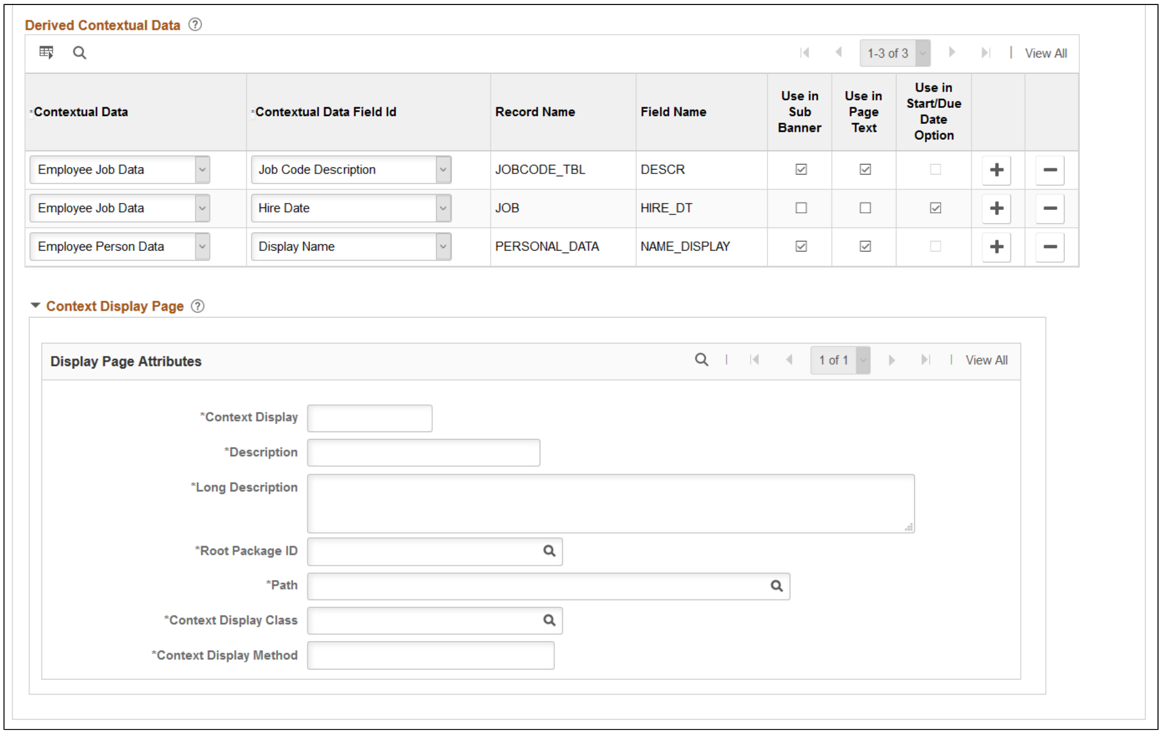
This example illustrates the fields and controls on the AG Composer Categories - Context page showing the Context Record and Fields tab.



This example illustrates the fields and controls showing the Prompt Edit and Display tab on the Categories - Context page.



This example illustrates the fields and controls on the AG Composer Categories - Context page, Derived Contextual Data and Context Display Page sections.



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.

Field or Control	***Description***
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

Field or Control	***Description***
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 AG Composer 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).

Field or Control	***Description***
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.

Field or Control	***Description***
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.

Field or Control	***Description***
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

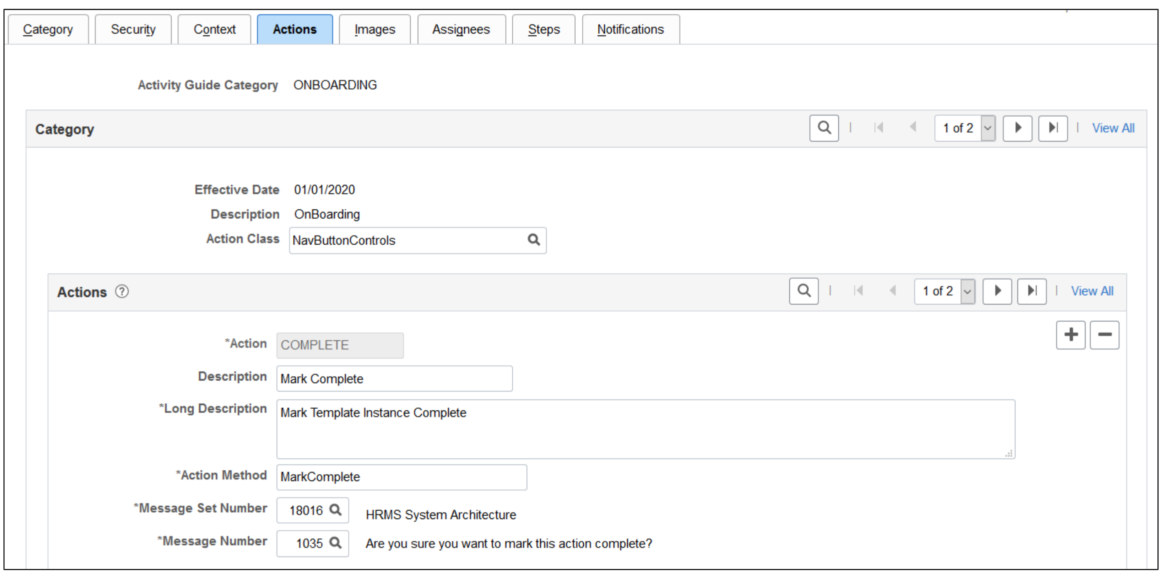
AG Composer Categories - Actions Page

Use the AG Composer 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** > **AG Composer Categories** > **Actions**

This example illustrates the fields and controls on the AG Composer 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.

Field or Control	Description
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 AG Composer 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 AG Composer 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.

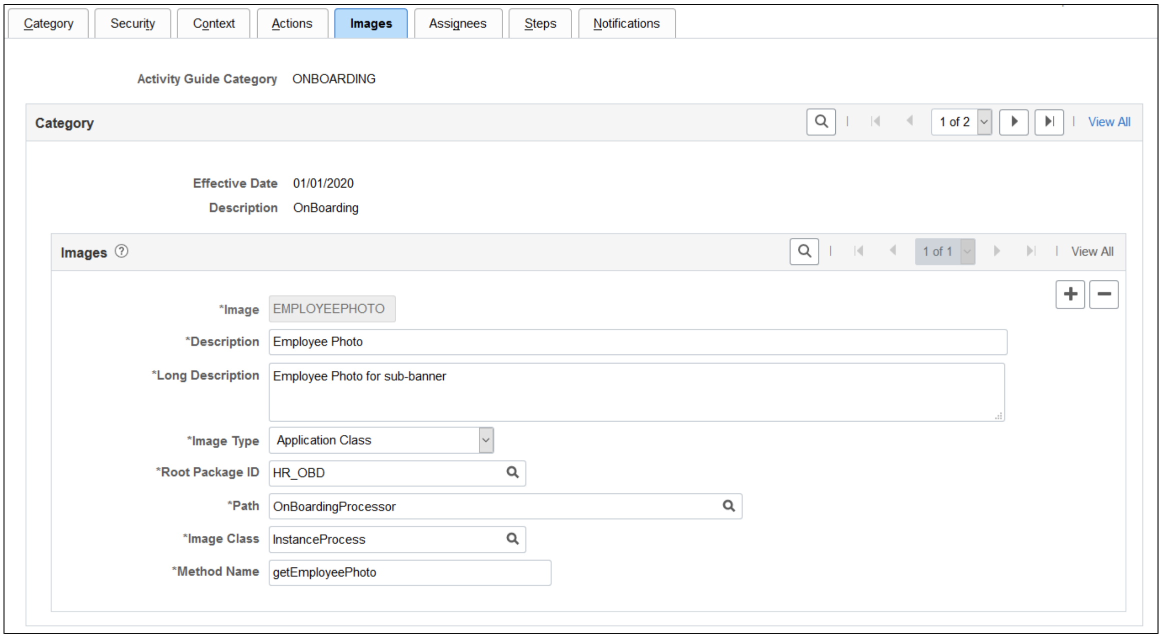
AG Composer Categories - Images Page

Use the AG Composer 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** > **AG Composer Categories** > **Images**

This example illustrates the fields and controls on the AG Composer 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.

Field or Control	***Description***
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:

Field or Control	*Description*
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:

Field or Control	*Description*
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:

Field or Control	*Description*
URL Identifier	Select the URL identifier that defines where you store the image.

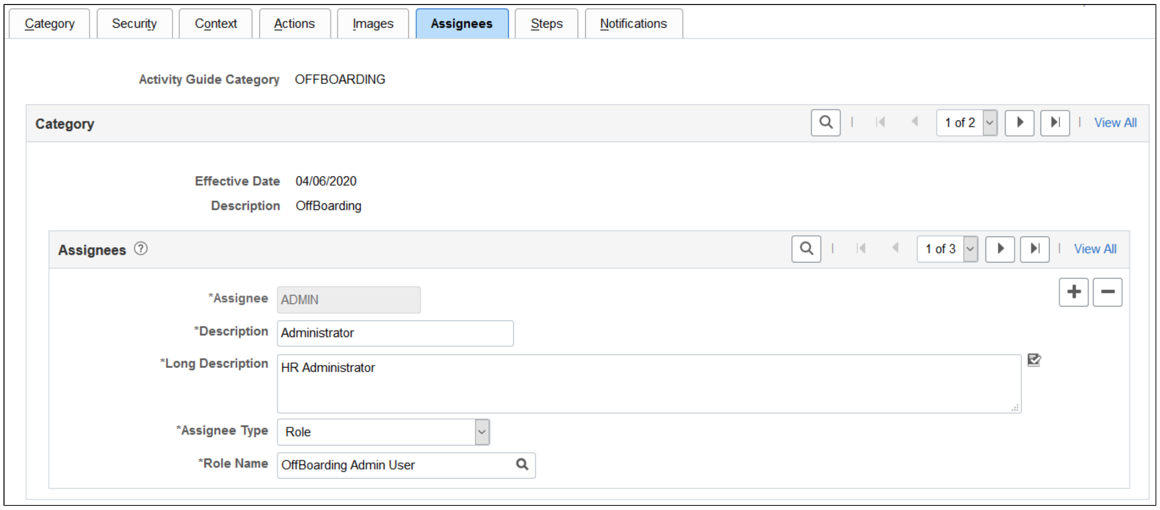
AG Composer Categories - Assignees Page

Use the AG Composer Categories - Assignees page (AGC_CAT_TBL7) to identify assignees that will be assigned to the steps.

Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Categories** > **Assignees**

This example illustrates the fields and controls on the AG Composer Categories - Assignees page.



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:

- AG Composer 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.

Field or Control	***Description***
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.

Field or Control	*Description*
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:

Video: Image Highlights, PeopleSoft HCM Update Image 31: Activity Guide Composer-Multi User Guides

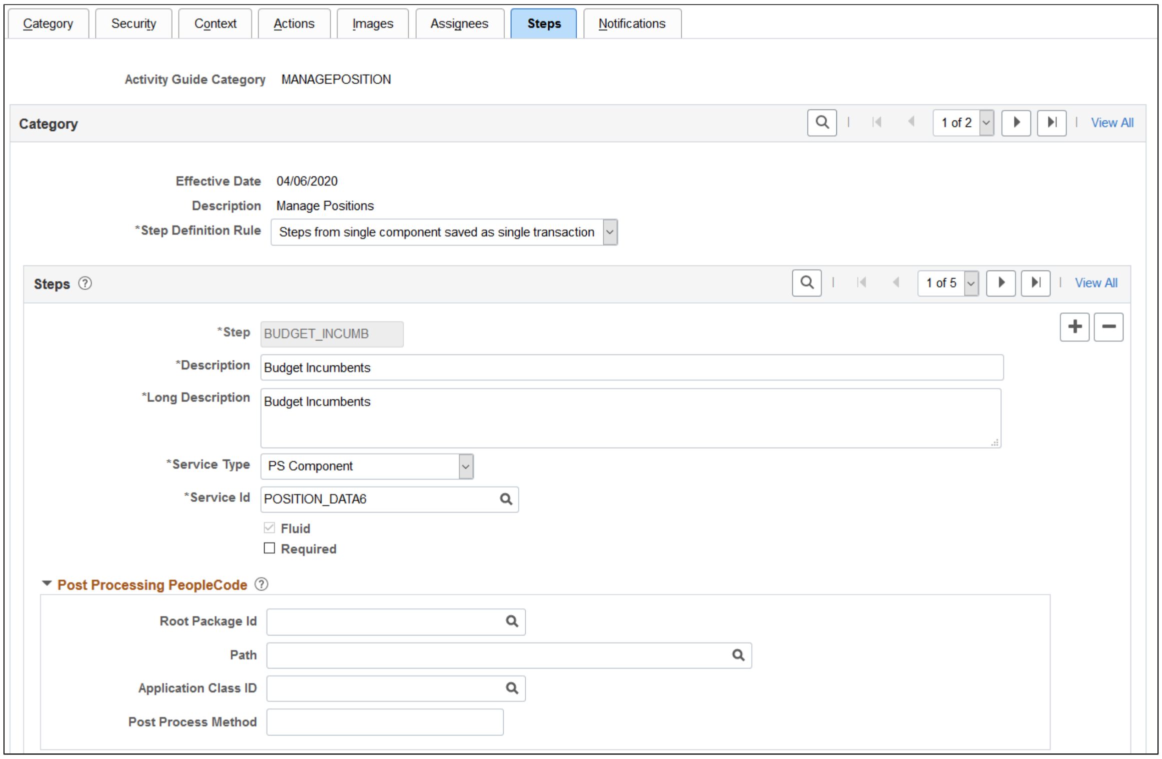
AG Composer Categories - Steps Page

Use the AG Composer 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.

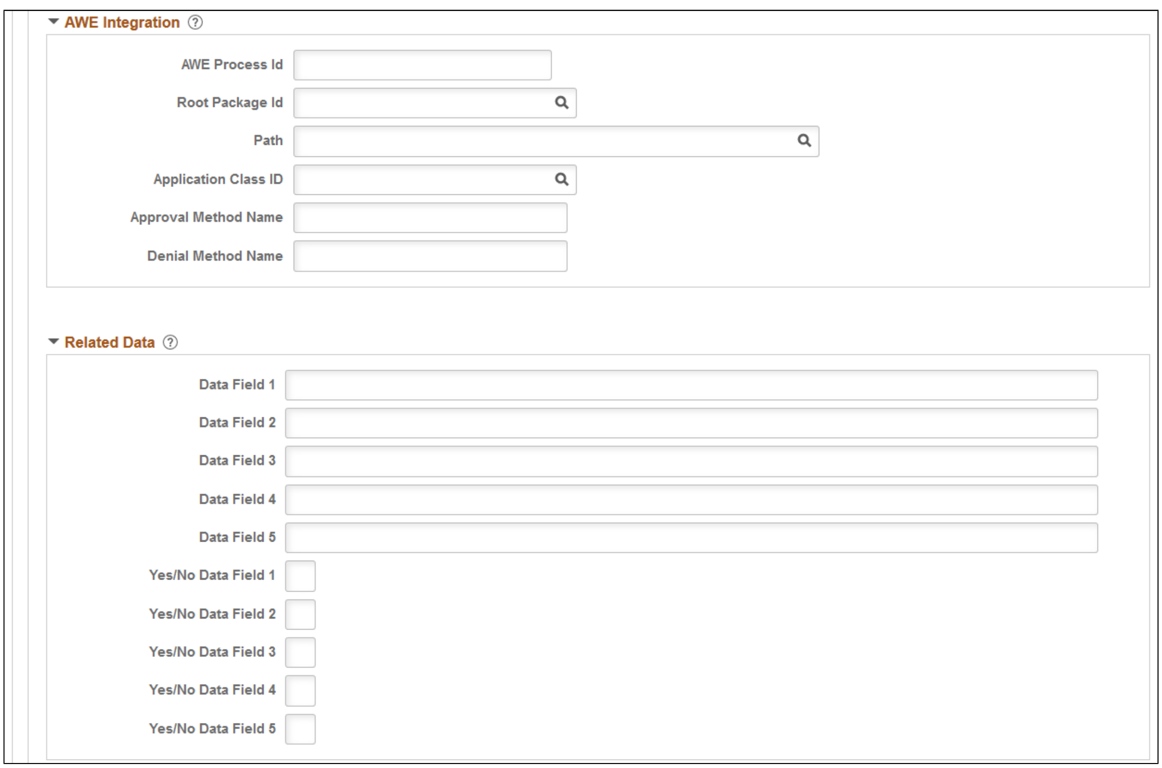
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Categories** > **Steps**

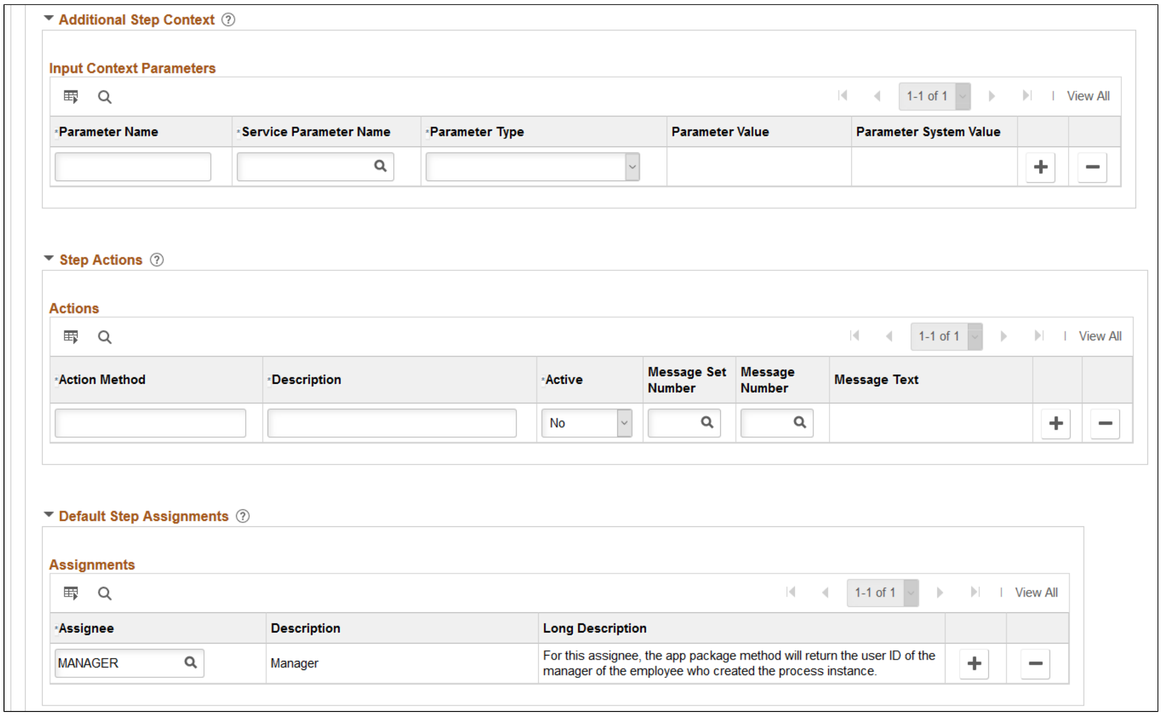
This example illustrates the fields and controls on the AG Composer Categories - Steps page (1 of 3).



This example illustrates the fields and controls on the AG Composer Categories - Steps page (2 of 3).



This example illustrates the fields and controls on the AG Composer Categories - Steps page (3 of 3).



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.

Field or Control	*Description*
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 us 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*.

Field or Control	***Description***
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:

Video: 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 AG Composer 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 AG Composer 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:

Video: 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*

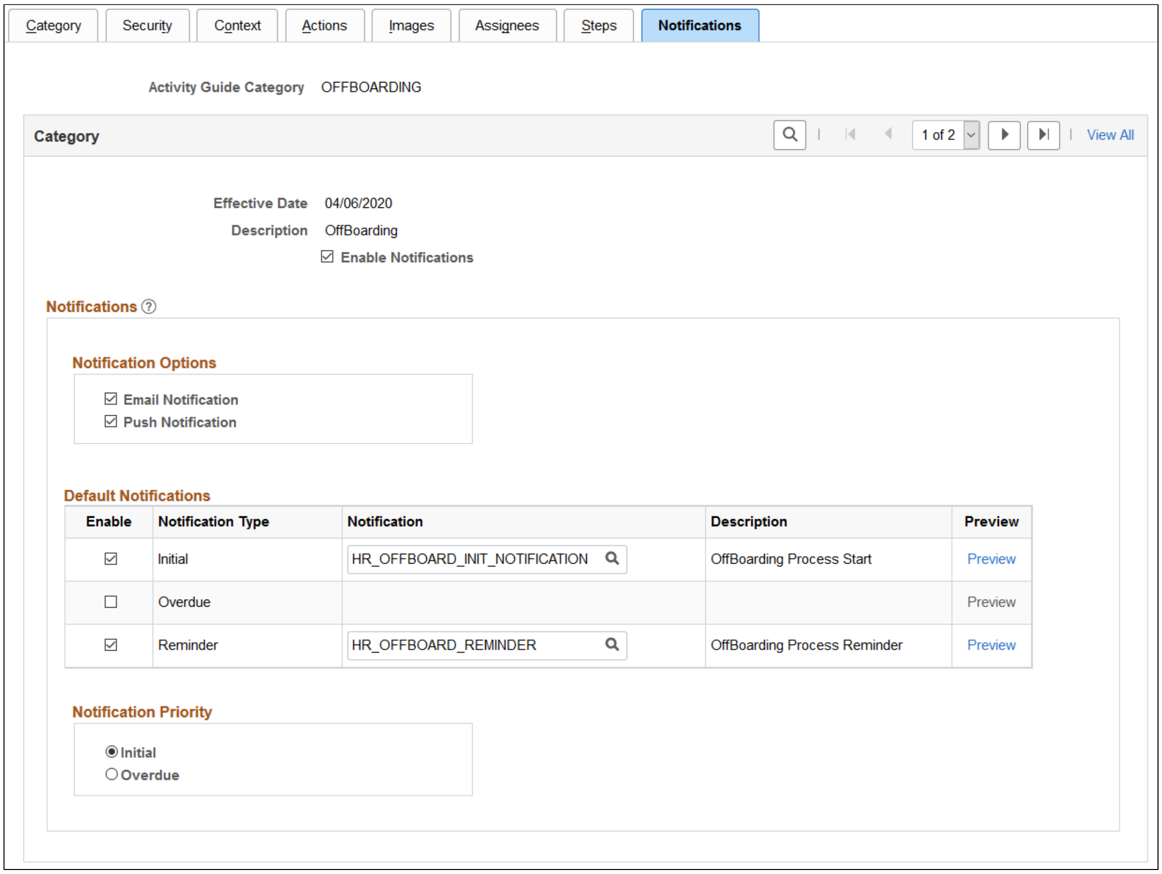
AG Composer Categories - Notifications Page

Use the AG Composer Categories - Notifications page (AGC_CAT_TBL8) to configure the notification settings for the category.

Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Categories** > **Notifications**

This example illustrates the fields and controls on the AG Composer Categories - Notifications page.



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.

Field or Control	***Description***
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:

Field or Control	***Description***
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.

Field or Control	***Description***
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:

Field or Control	Description
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.

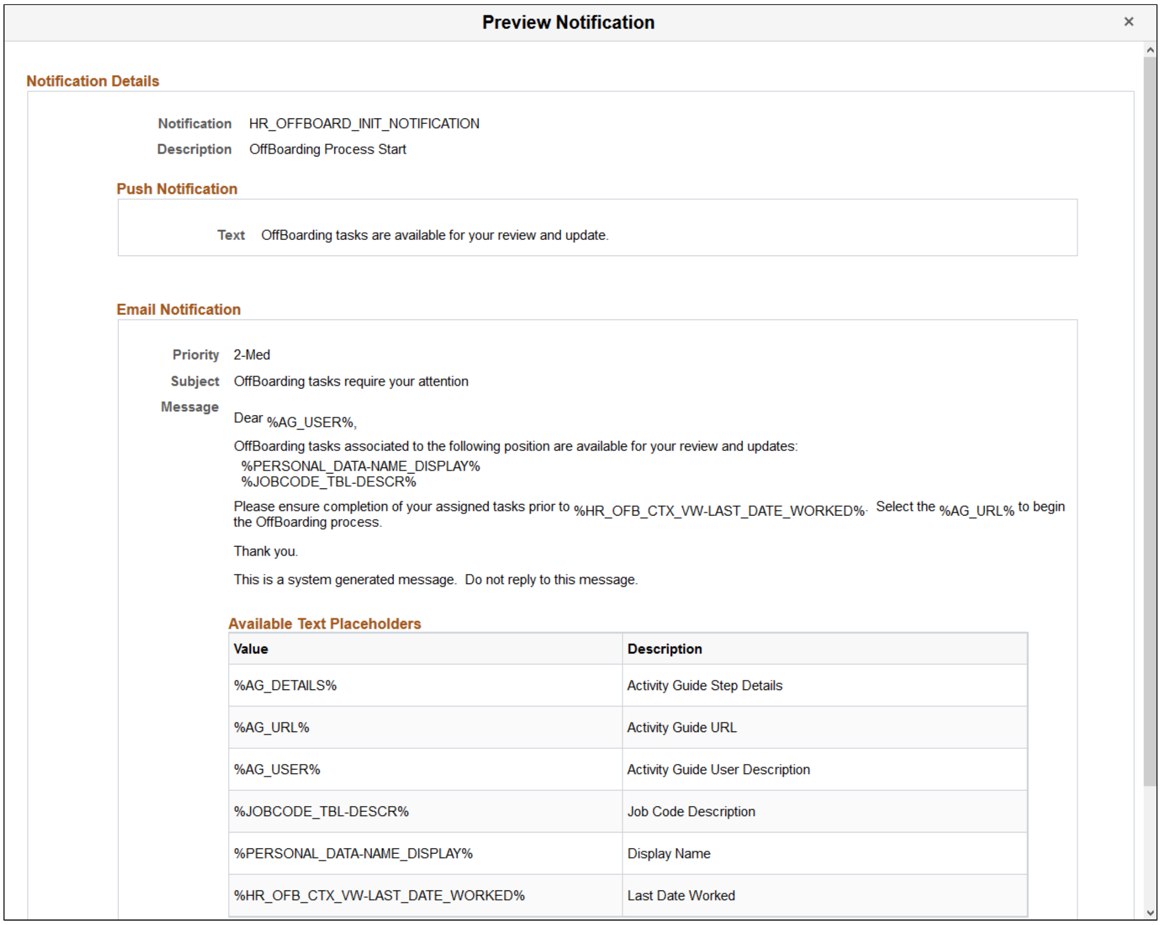
Preview Notification Page

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.

This example illustrates the fields and controls on the Preview Notification page.



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 AG Composer 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.

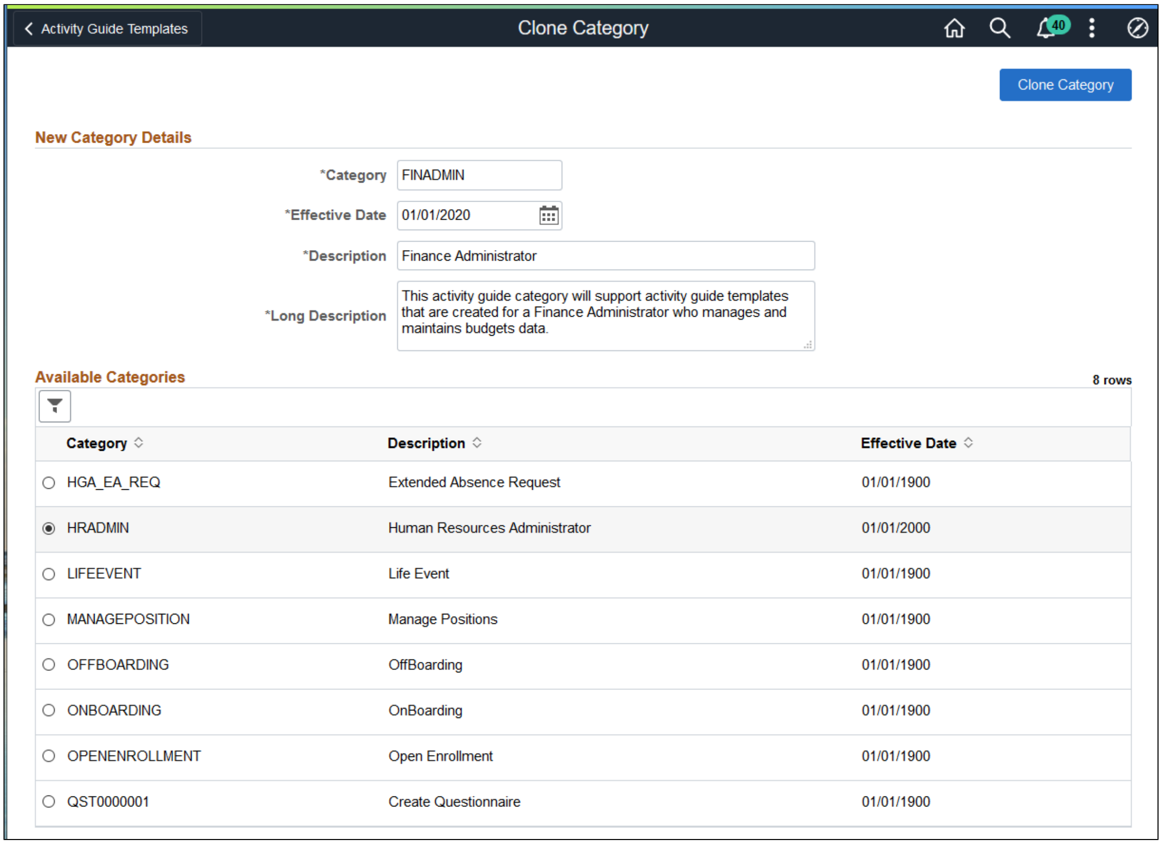
Clone Category Page

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 AG Composer Category** > **Clone Category**

This example illustrates the fields and controls on the Clone Category page.

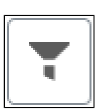


Enter the category ID, effective date, short and long description.

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 AG Composer - Categories component (**Enterprise Components** > **Activity Guide Composer** > **AG Composer Categories**).

Field or Control	***Description***
 Filters icon or  Filter icon with filters applied	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:

Video: PeopleSoft Activity Guide Composer

Video: Image Highlights, PeopleSoft HCM Update Image 23: Activity Guide Composer

Video: 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.
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.

Page Name	***Definition Name***	***Usage***
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
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.

Page Name	***Definition Name***	***Usage***
Activity Guide Composer - Review and Activate Page	AGC_TMPL_ACTIVE_FL	Activate or deactivate an activity guide template.

Activity Guide Templates Page

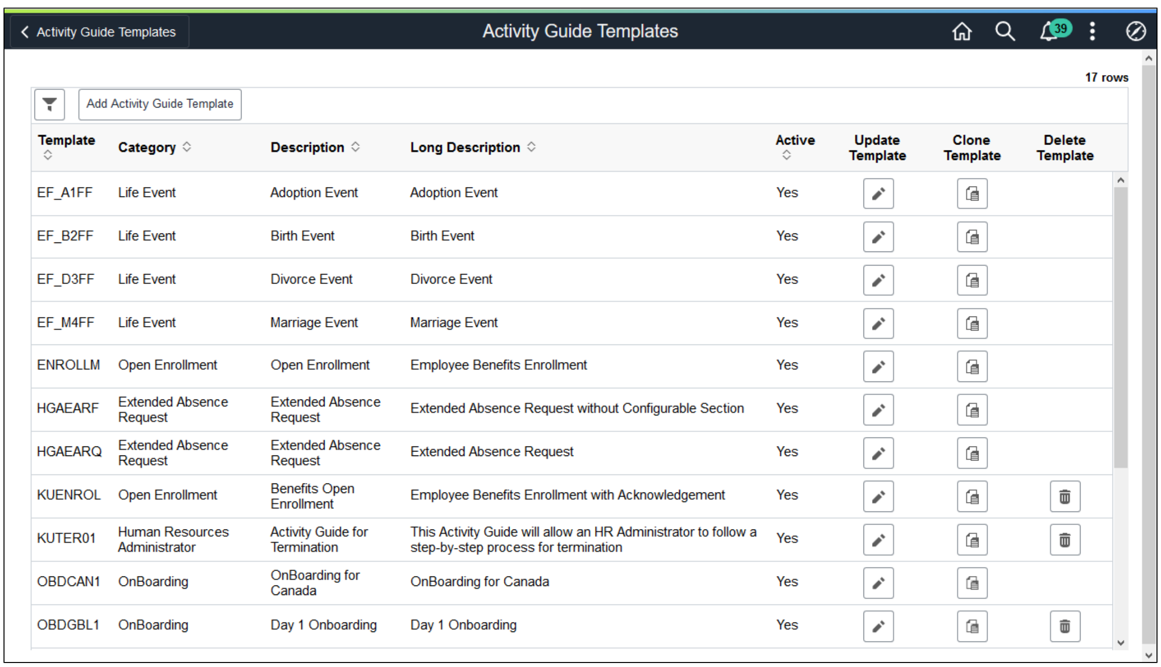
Use the Activity Guide Templates page (AGC_TMPL_SRCH_FL) to view a list of existing activity guide templates or initiate the action to add, update, delete, or clone a template.

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** > **AG Composer Templates** > **Activity Guide Templates**

This example illustrates the fields and controls on the Activity Guide Templates page.



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, an 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.

Field or Control	***Description***
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.

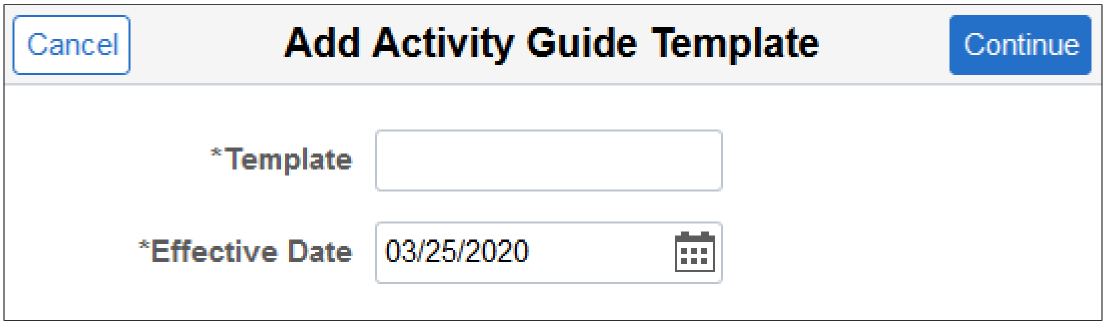
Add Activity Guide Template Page

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.

This example illustrates the fields and controls on the Add Activity Guide Template page.



Enter the ID for the new template and an effective date. Template IDs must be seven characters in length.

Field or Control	***Description***
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.

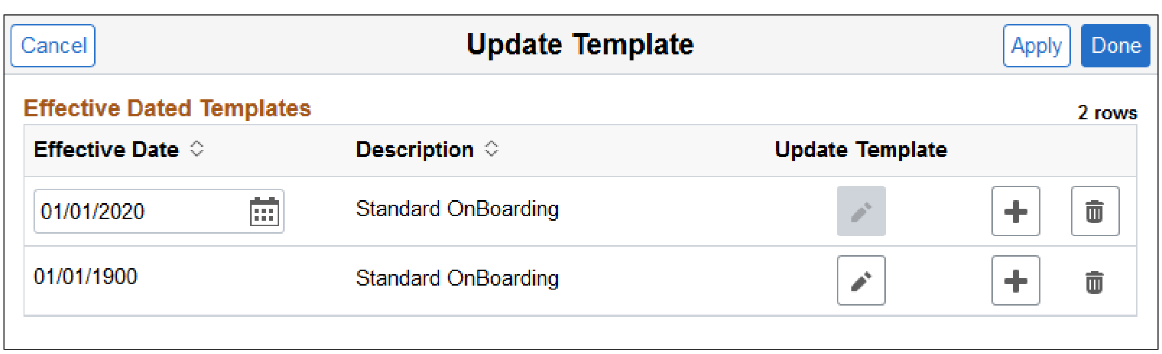
Update Template Page

Use the Update Template page (AGC_TMPL_UPDT_FL) to manage effective dated rows for an activity guide template.

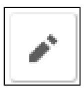
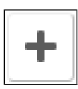
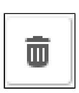
Navigation:

Click the **Update Template** button from the Activity Guide Templates Page.

This example illustrates the fields and controls on the Update Activity Guide Template page.



Use this page to view, select to update, insert a new row, or delete an effective dated rows for a template.

Field or Control	***Description***
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.

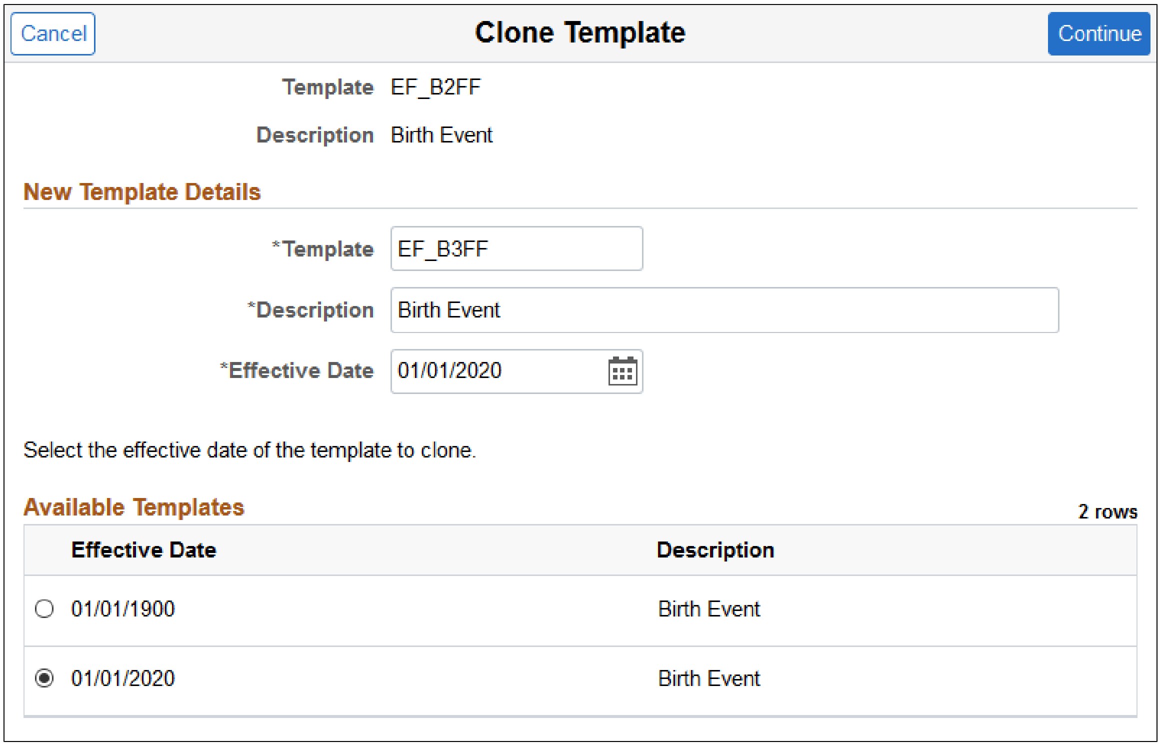
Clone Template Page

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.

This example illustrates the fields and controls on the Clone Template page.



Enter the seven character template ID, description, and effective date for the new template.

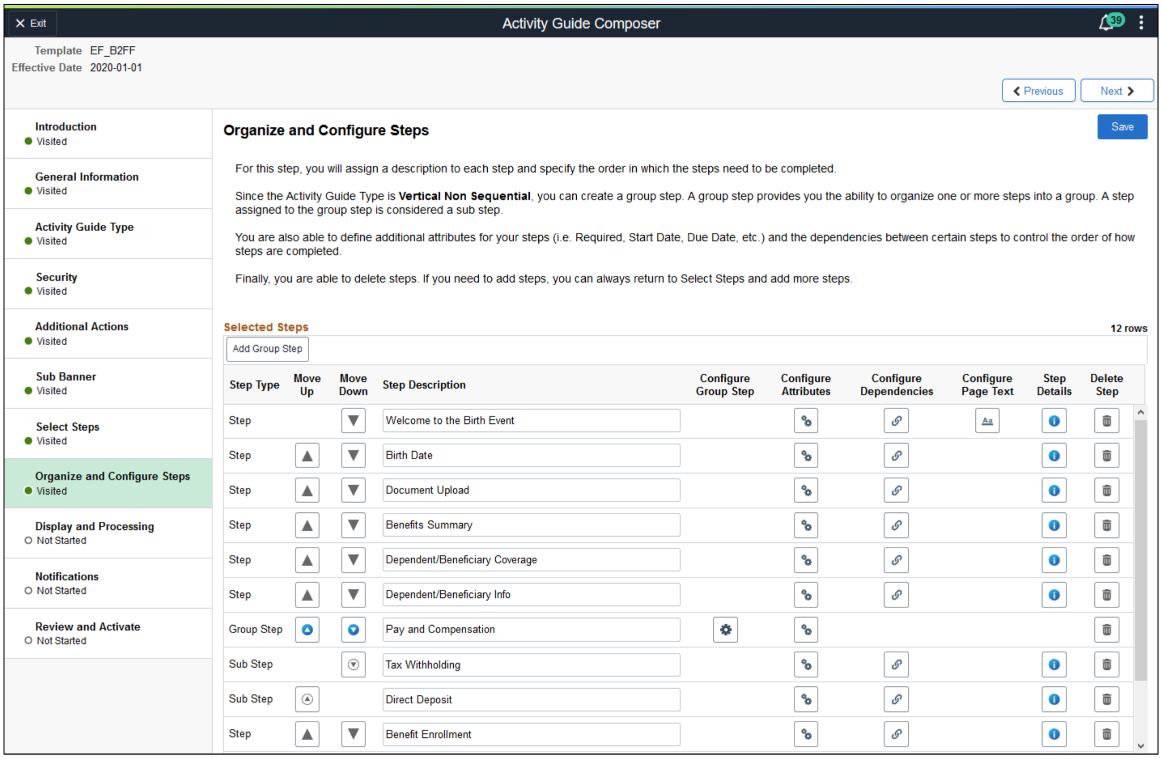
Note: Some delivered activity guide templates have specific naming conventions. For example, Life Event templates must begin with either *EF_A* (for Adoption) , *EF_B* (for Birth), *EF_D* (for Divorce), or *EF_M* (for Marriage) , to ensure correct processing of the Life Event transactions.

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.

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

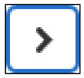
The top of PeopleSoft pages is called the page banner.

On most pages, users see the standard set of banner icon buttons.

Field or Control	***Description***
 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.

Field or Control	***Description***
 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.
 or  Next button	Click this button to navigate to the next step. If you have not saved the page, the system prompt 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 activity or inactivate this template.
 Save button	Though this button does not appear in the sub banner, it does appears 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.

Field or Control	***Description***
<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.

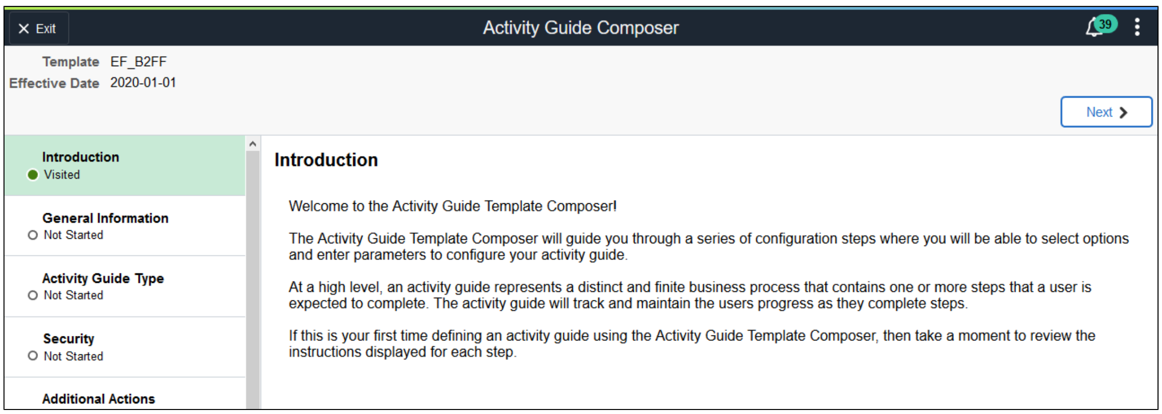
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Templates**, then perform one of the following from the Activity Guide Templates Page:

- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**
- Click the **Update Template** button, then select either to update or add a row 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.

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.

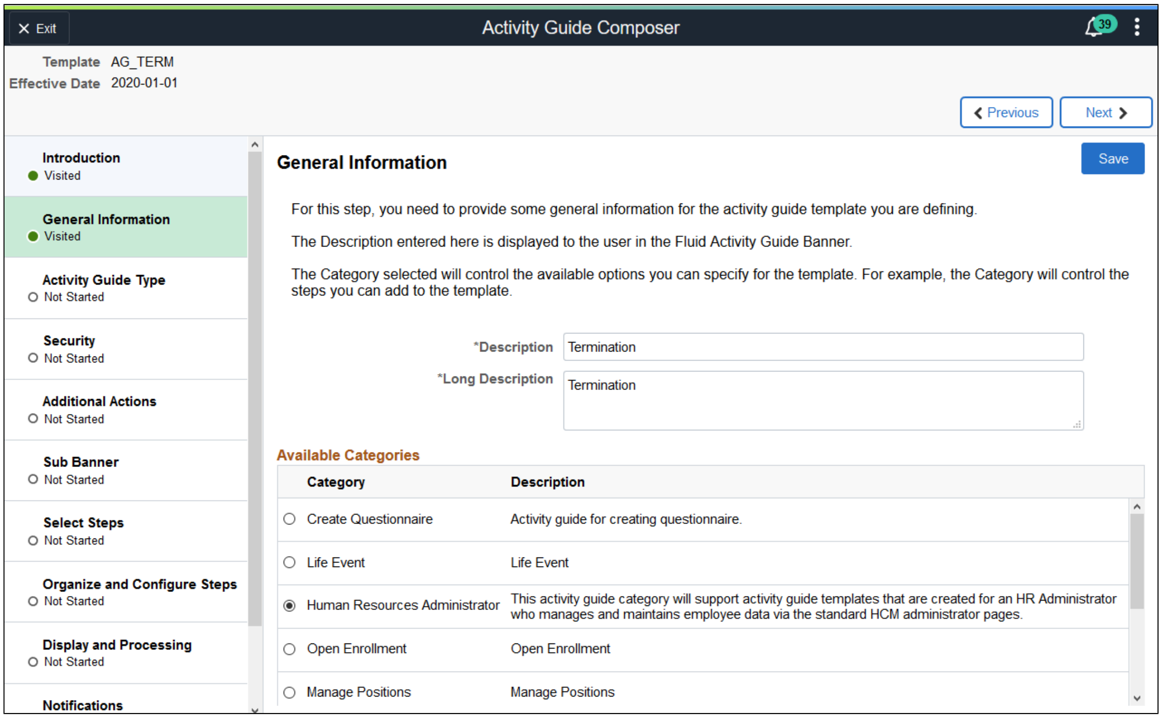
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Template**, then perform one of the following from the Activity Guide Templates Page:

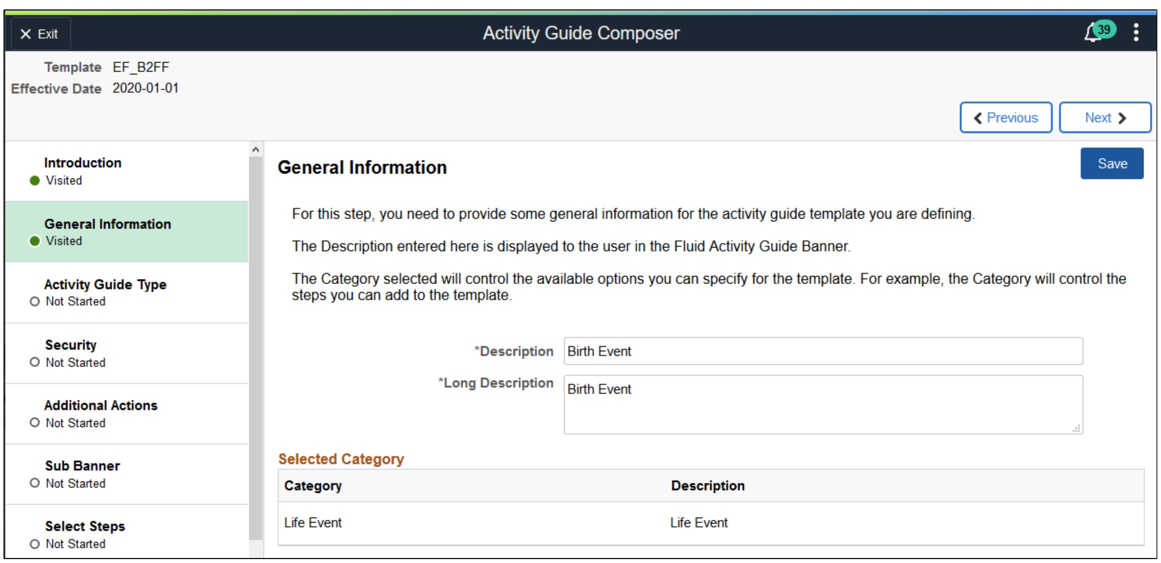
- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**
- Click the **Update Template** button, then select either to update or add a row from the Update Template Page.

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.

This example illustrates the fields and controls on the Activity Guide Composer - General Information page when creating a new template.



This example illustrates the fields and controls on the Activity Guide Composer - General Information page when updating or viewing an existing template.



Field or Control	Description
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.

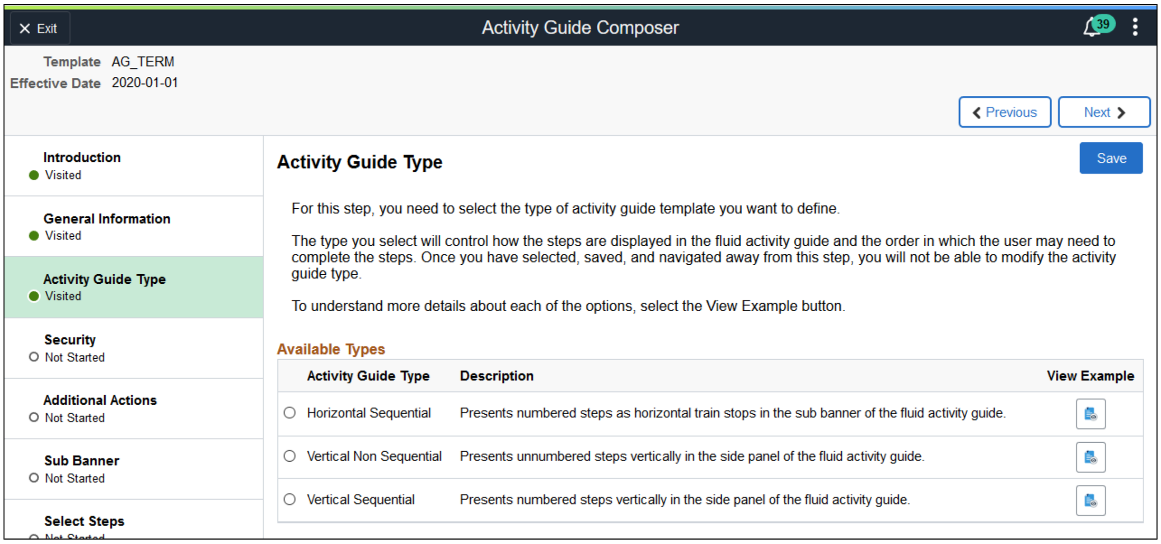
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Template**, then perform one of the following from the Activity Guide Templates Page:

- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue**.
- Click the **Update Template** button, then select either to update or add a row 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.

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.

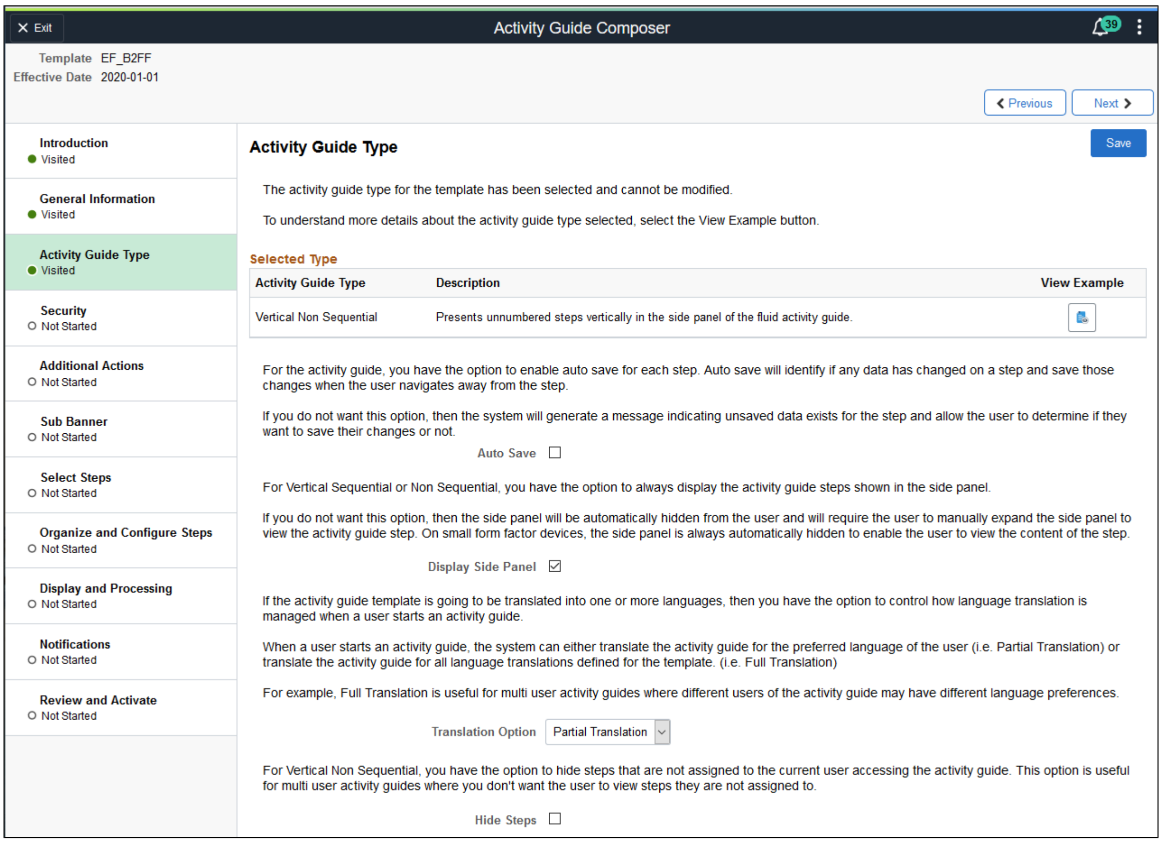
The delivered activity guide composer templates use the Vertical Non Sequential type with the left panel that lists the steps in the process. For this configuration, the panel appears on the left of larger devices. On a small form factor such as phone, the panel is initially hidden. Users would click 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.

Field or Control	***Description***
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.

Field or Control	***Description***
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.

This example illustrates the fields and controls on the Activity Guide Composer - Activity Guide Type page after you have saved the type.



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.

Field or Control	***Description***
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.

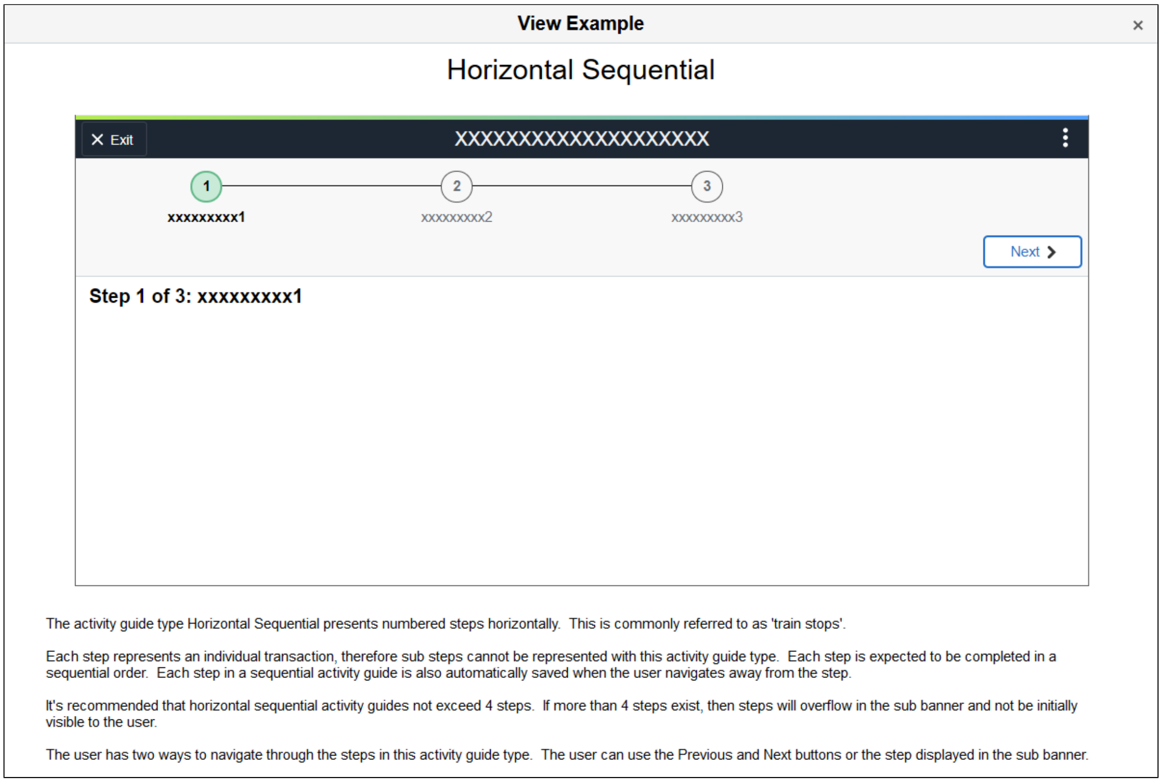
View Example (Activity Guide Types) Page

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.

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.

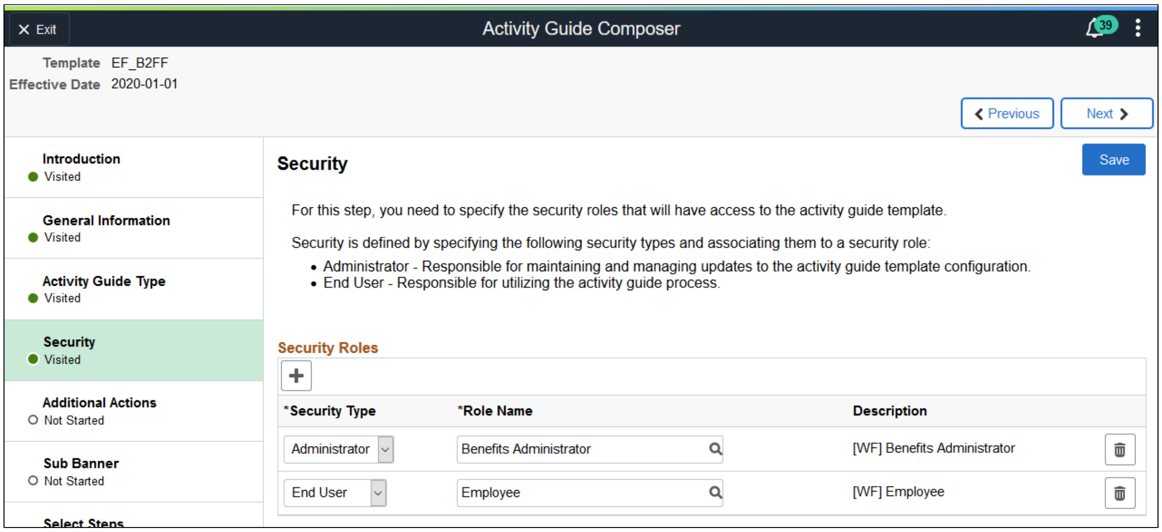
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Template**, then perform one of the following from the Activity Guide Templates Page:

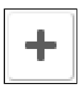
- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**
- Click the **Update Template** button, then select either to update or add a row from the Update Template Page.

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.

This example illustrates the fields and controls on the Activity Guide Composer - Security page.



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.

Field or Control	***Description***
 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:

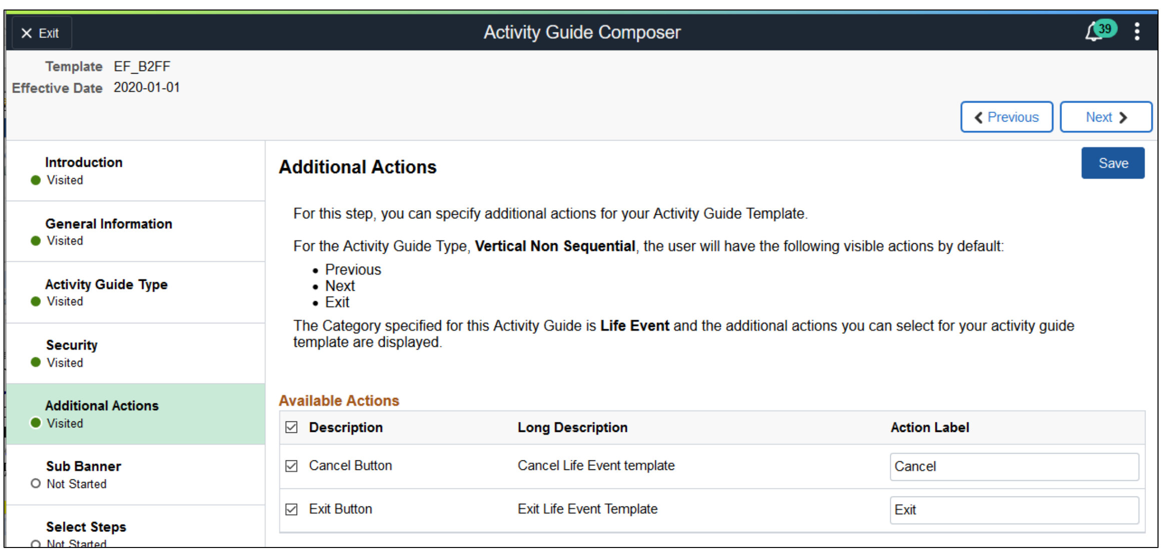
Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Template**, then perform one of the following from the Activity Guide Templates Page:

- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**
- Click the **Update Template** button, then select either to update or add a row 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.

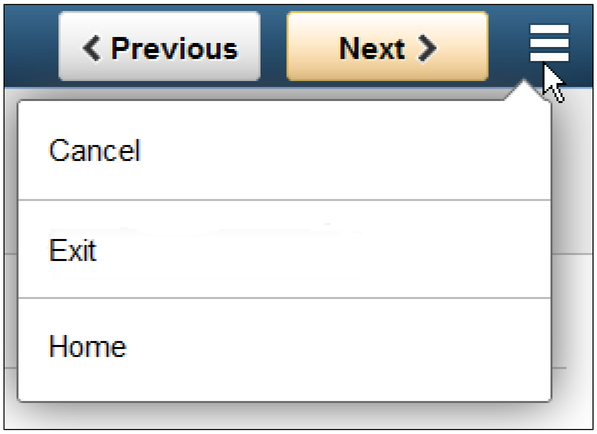
This example illustrates the fields and controls on the Activity Guide Composer - Additional Actions page.



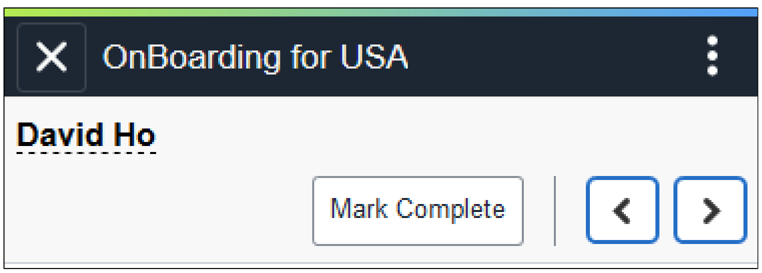
Note: You must first identify the security roles for this template before you can configure actions.

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.

This example illustrates the action items available from the activity guide Actions List menu prior to PeopleTools 8.75.



This example illustrates the Mark Complete action item button available from the activity guide sub banner with PeopleTools 8.57 and higher.



Field or Control	*Description*
(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 AG Composer 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.

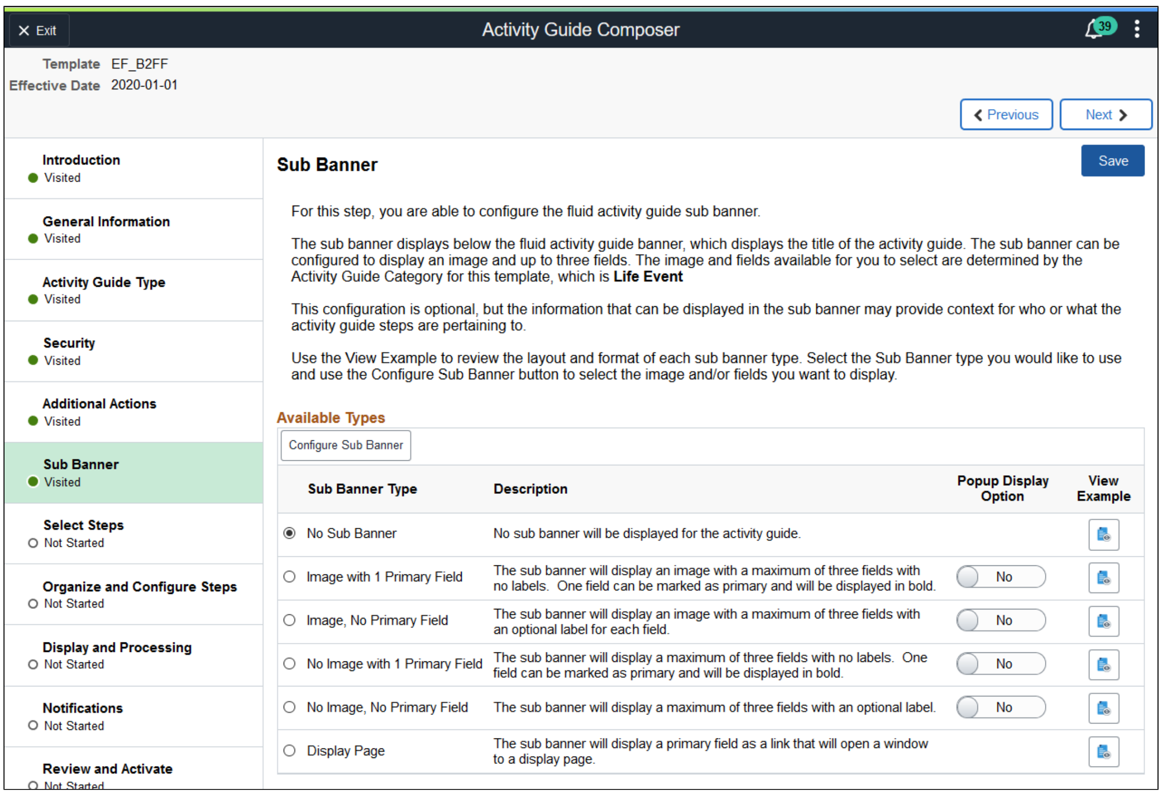
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Template**, then perform one of the following from the Activity Guide Templates Page:

- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**
- Click the **Update Template** button, then select either to update or add a row 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.

This example illustrates the fields and controls on the Activity Guide Composer - Sub Banner page.



Note: You must first identify the security roles for this template before you can select a sub banner.

Field or Control	***Description***
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.

Field or Control	***Description***
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.

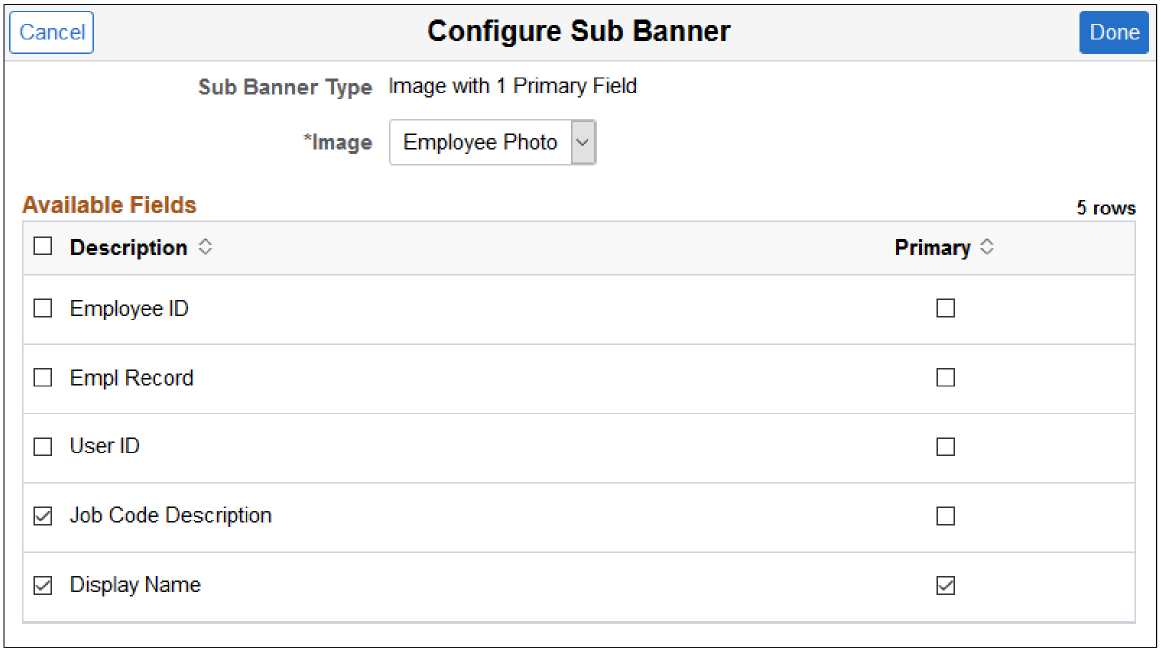
Configure Sub Banner Page

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.

This example illustrates the fields and controls on the Configure Sub Banner page.



Field or Control	***Description***
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 AG Composer 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 AG Composer 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.

Field or Control	*Description*
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 AG Composer Categories - Context Page.

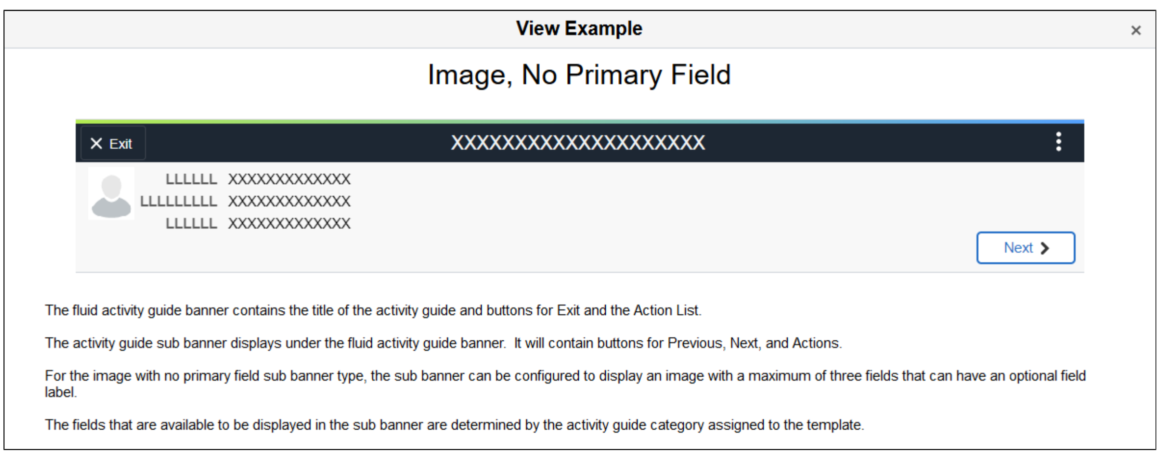
View Example (Sub Banner) Page

Use the View Example (Sub Banner page (AGC_TMPL_SBNR2_SCF) to view examples of sub banners.

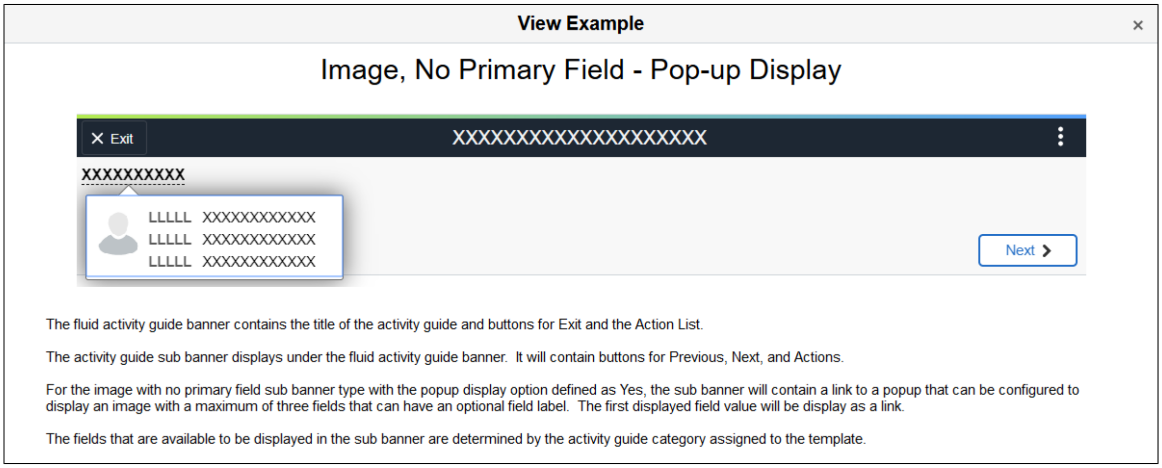
Navigation:

Click a **View Example** button on the Activity Guide Composer - Sub Banner Page.

This example illustrates the View Example page showing a sub banner example.



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.

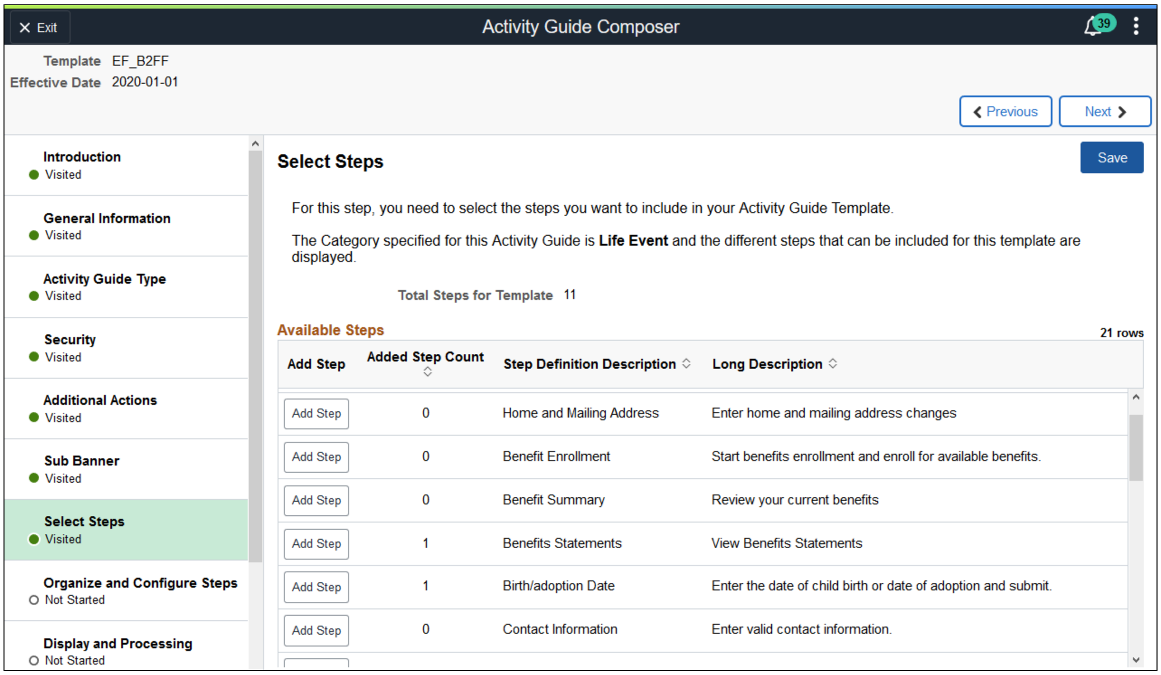
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Templates**, then perform one of the following from the Activity Guide Templates Page:

- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**
- Click the **Update Template** button, then select either to update or add a row from the Update Template Page.

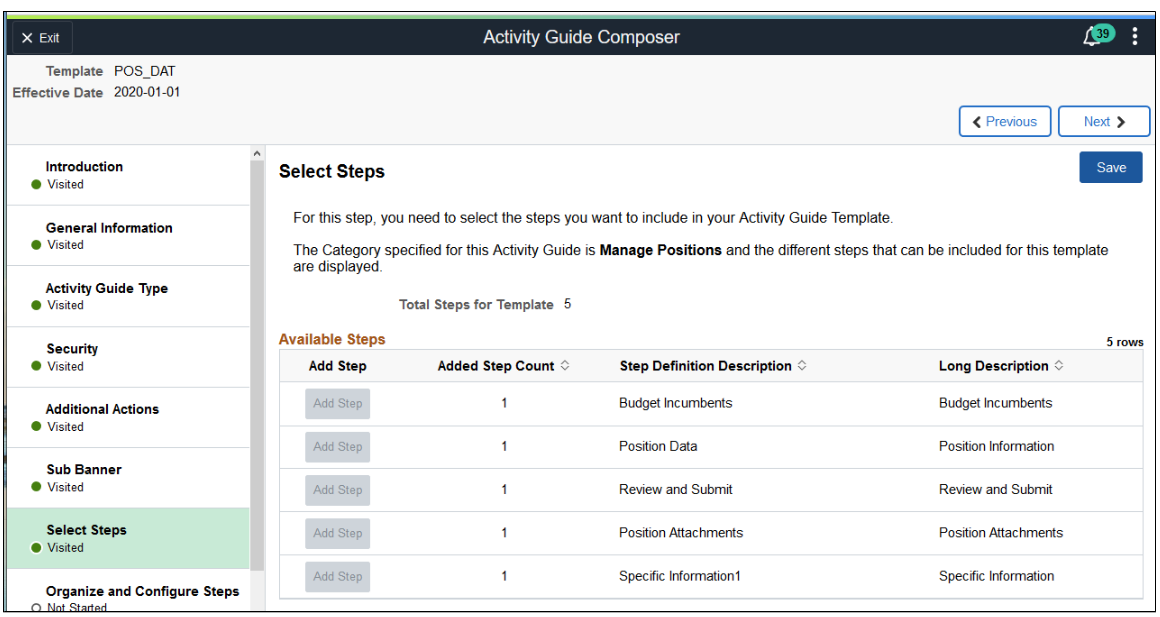
From within the Activity Guide Composer, select the **Select Steps** tab from the left panel category list, or click the **Next** or **Previous** buttons to navigate to the page.

This example illustrates the fields and controls on the Activity Guide Composer - Select Steps page.



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 AG Composer 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.



The following video provides an overview of Activity Guide Composer - Single Component.

Video: 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 AG Composer Categories - Steps Page.

Field or Control	***Description***
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 AG Composer 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.

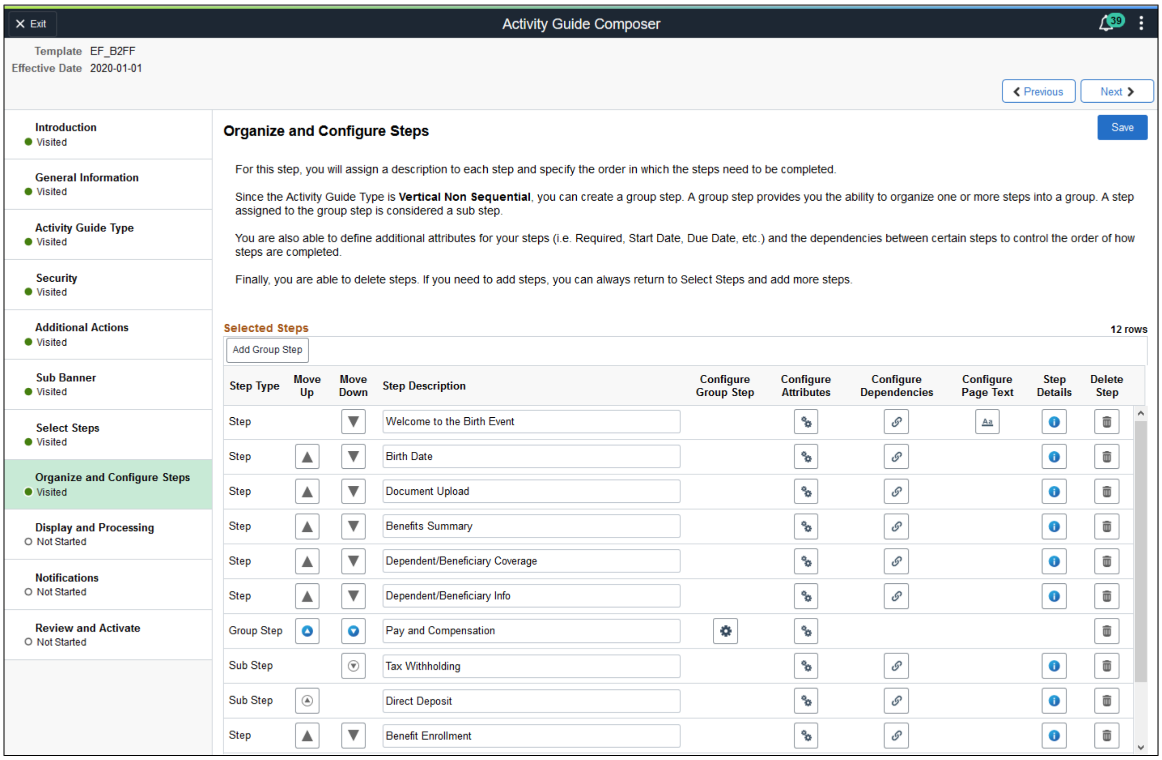
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Templates**, then perform one of the following from the Activity Guide Templates Page:

- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**
- Click the **Update Template** button, then select either to update or add a row 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.

This example illustrates the fields and controls on the Activity Guide Composer - Organize and Configure Steps page.



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.

Field or Control	***Description***
Add Group Step button	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 it's 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 it's 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 AG Composer 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.

Field or Control	*Description*
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 AG Composer 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.

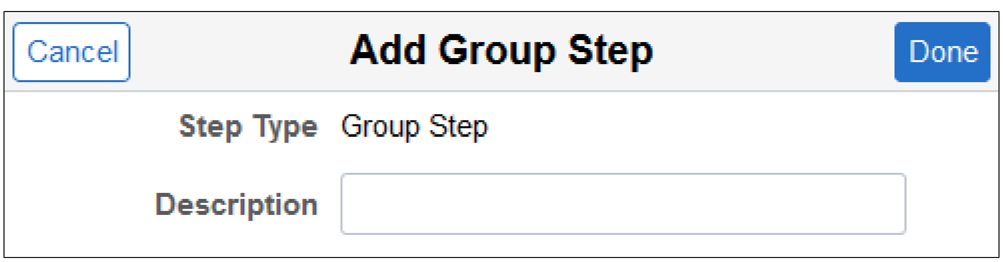
Add Group Step Page

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.

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.

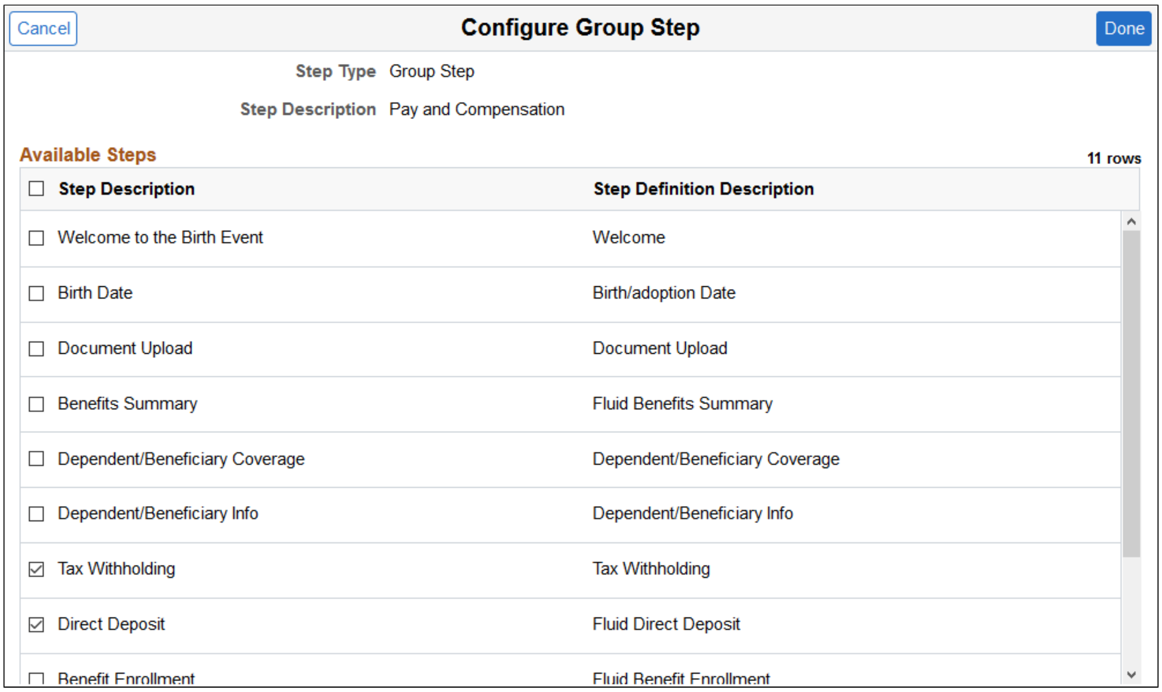
Configure Group Step Page

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.

This example illustrates the fields and controls on the Configure Group Step page.



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.

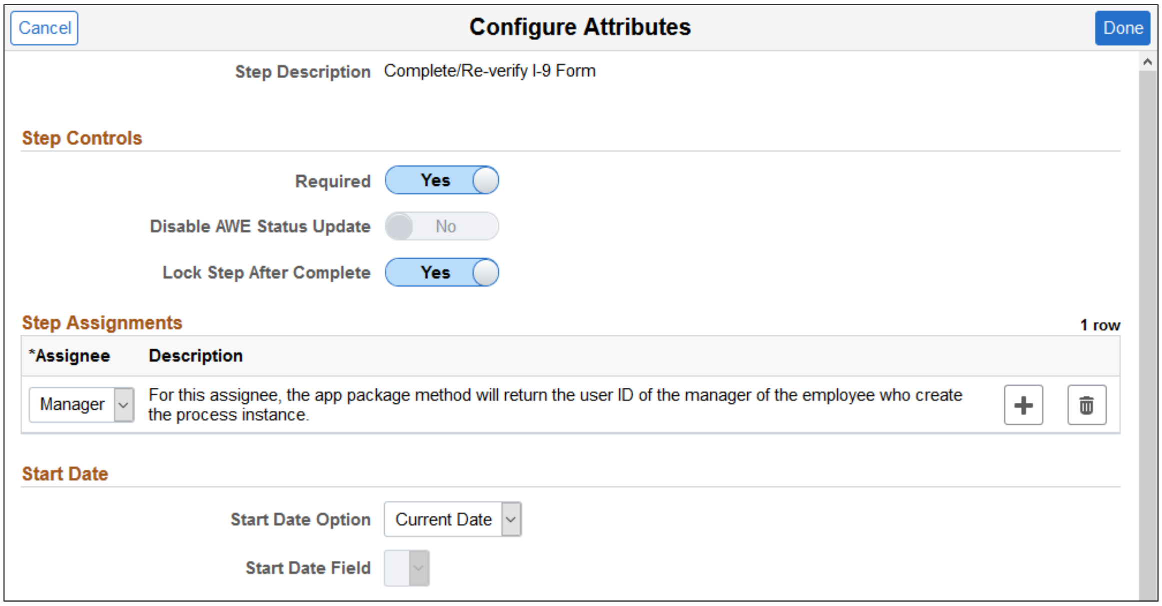
Configure Attributes Page

Use the Configure Attributes page (AGC_TMPL_STPEA_SCF) to configure the rules for a step.

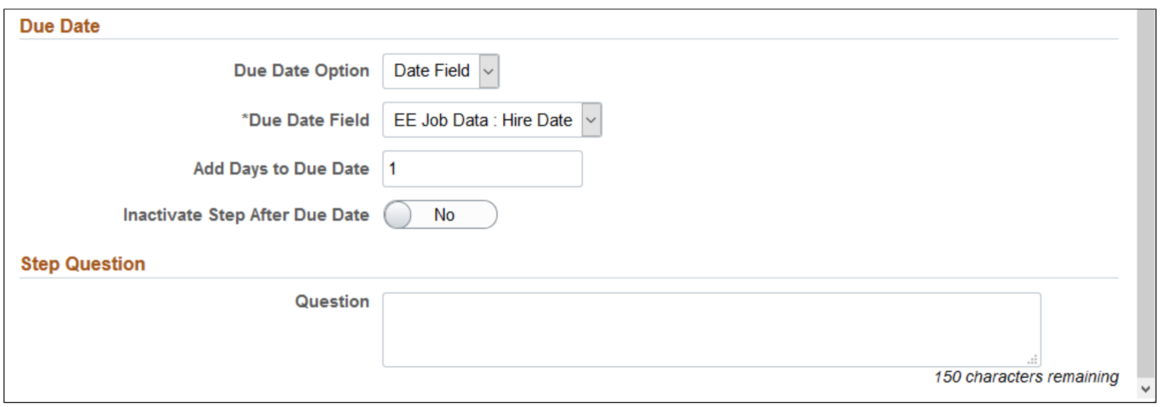
Navigation:

Click the **Configure Attributes** button from the Activity Guide Composer - Organize and Configure Steps Page.

This example illustrates the fields and controls on the Configure Attributes page (1 of 2).



This example illustrates the fields and controls on the Configure Attributes page (2 of 2).



Step Controls

Field or Control	***Description***
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 AG Composer 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.

Field or Control	***Description***
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 AG Composer Categories - Assignees Page.

Field or Control	Description
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 AG Composer 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:

Video: 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.

Field or Control	***Description***
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 AG Composer 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.

Field or Control	***Description***
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 AG Composer 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.

Field or Control	*Description*
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.

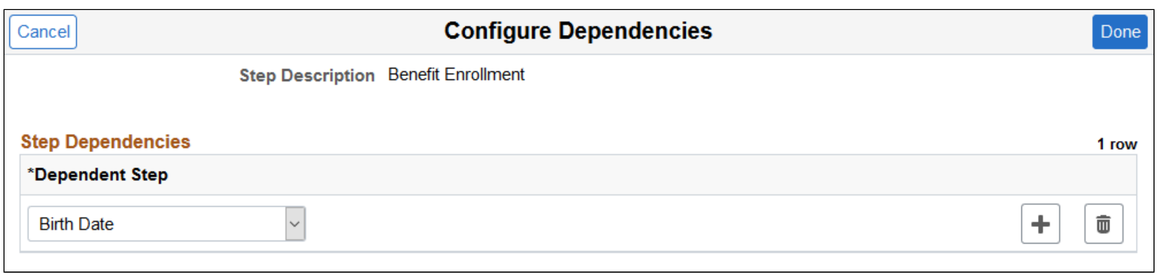
Configure Dependencies Page

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.

This example illustrates the fields and controls on the Configure Dependencies page.



Field or Control	*Description*
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

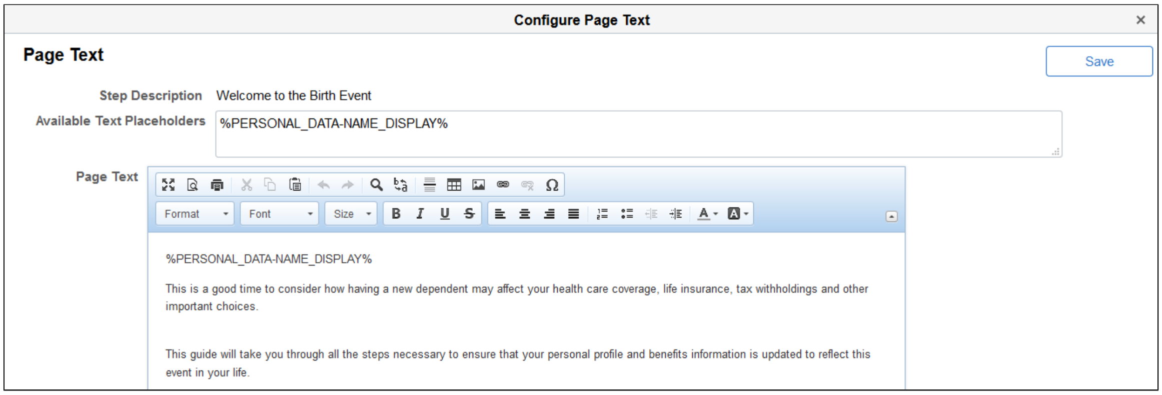
Use the Configure Page Text page (AGC_TMPL_PGTEXT) to enter page text when a step is page text enabled, such as the Welcome, Video, and Summary page steps.

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.

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.

Field or Control	***Description***
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 AG Composer Categories - Context Page.

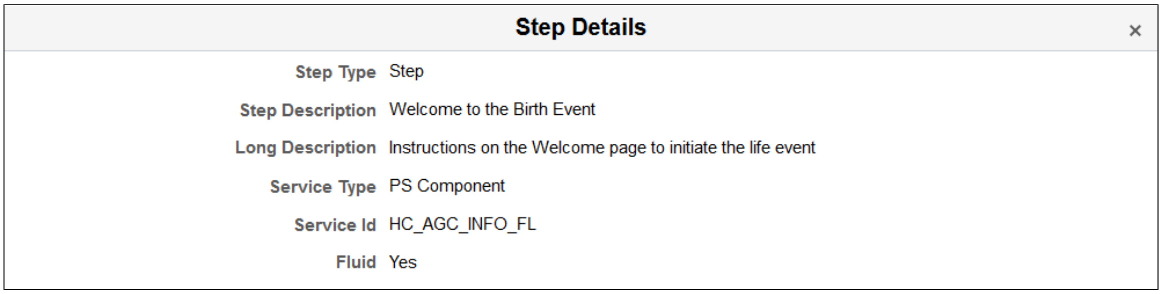
Step Details Page

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.

This example illustrates the fields and controls on the Step Details page.



Field or Control	***Description***
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 AG Composer 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.

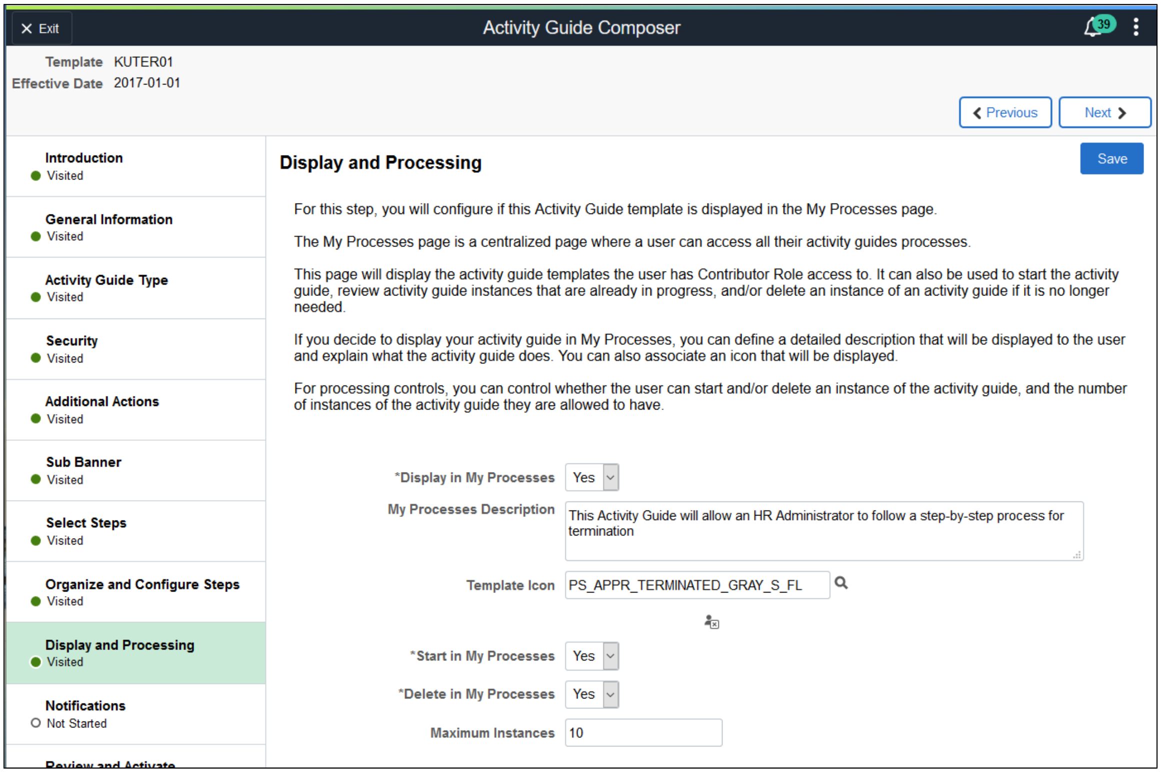
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Templates**, then perform one of the following from the Activity Guide Templates Page:

- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**
- Click the **Update Template** button, then select either to update or add a row 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.

This example illustrates the fields and controls on the Activity Guide Composer - Display and Processing page.



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.

Field or Control	***Description***
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.

Field or Control	*Description*
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 *Yes* to enable the user to initiate an activity guide instance from the My Processes page.
Delete in My Processes	Select *Yes* 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.

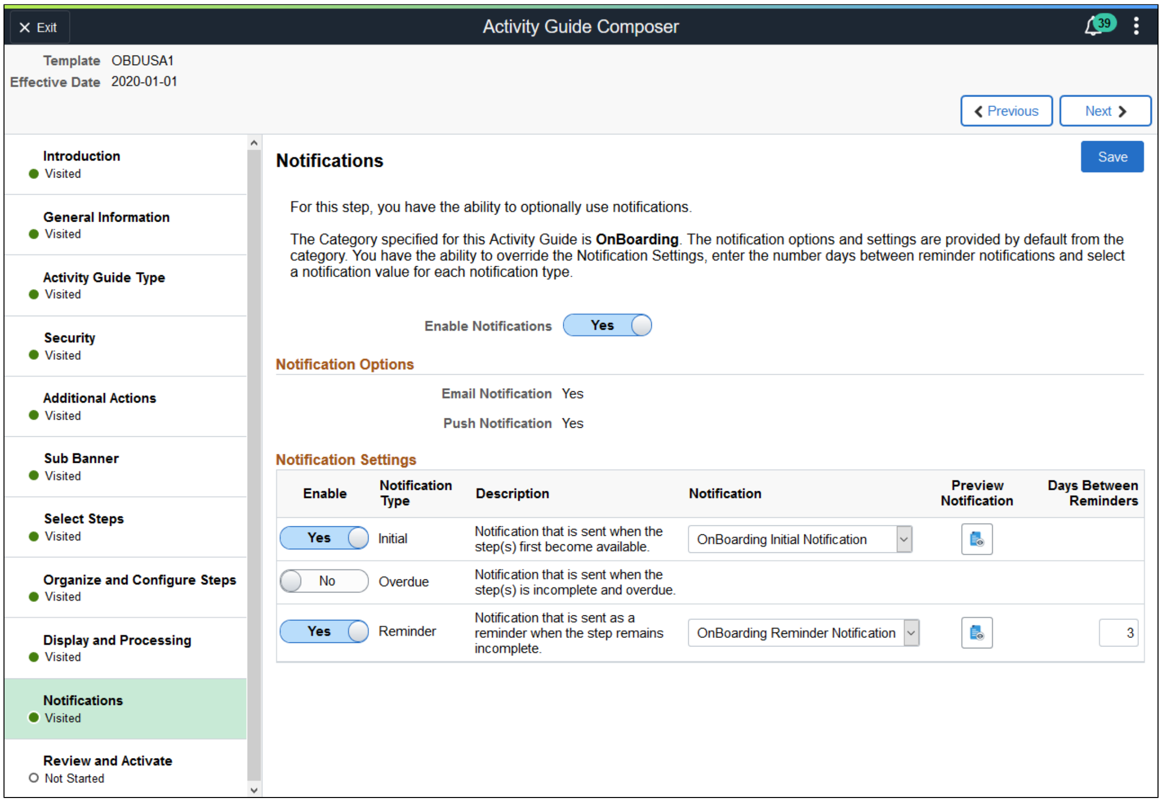
Navigation:

Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Templates**, then perform one of the following from the Activity Guide Templates Page:

- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**
- Click the **Update Template** button, then select either to update or add a row 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.

This example illustrates the fields and controls on the Activity Guide Composer - Notifications page.



Use this page to manage notification settings for a template. Default values are provided from the category but can be overridden here.

Field or Control	***Description***
Enable Notifications	Swipe this option to *Yes* to enable notifications for this template. Notifications must be enabled on the AG Composer 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.

Field or Control	***Description***
 **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

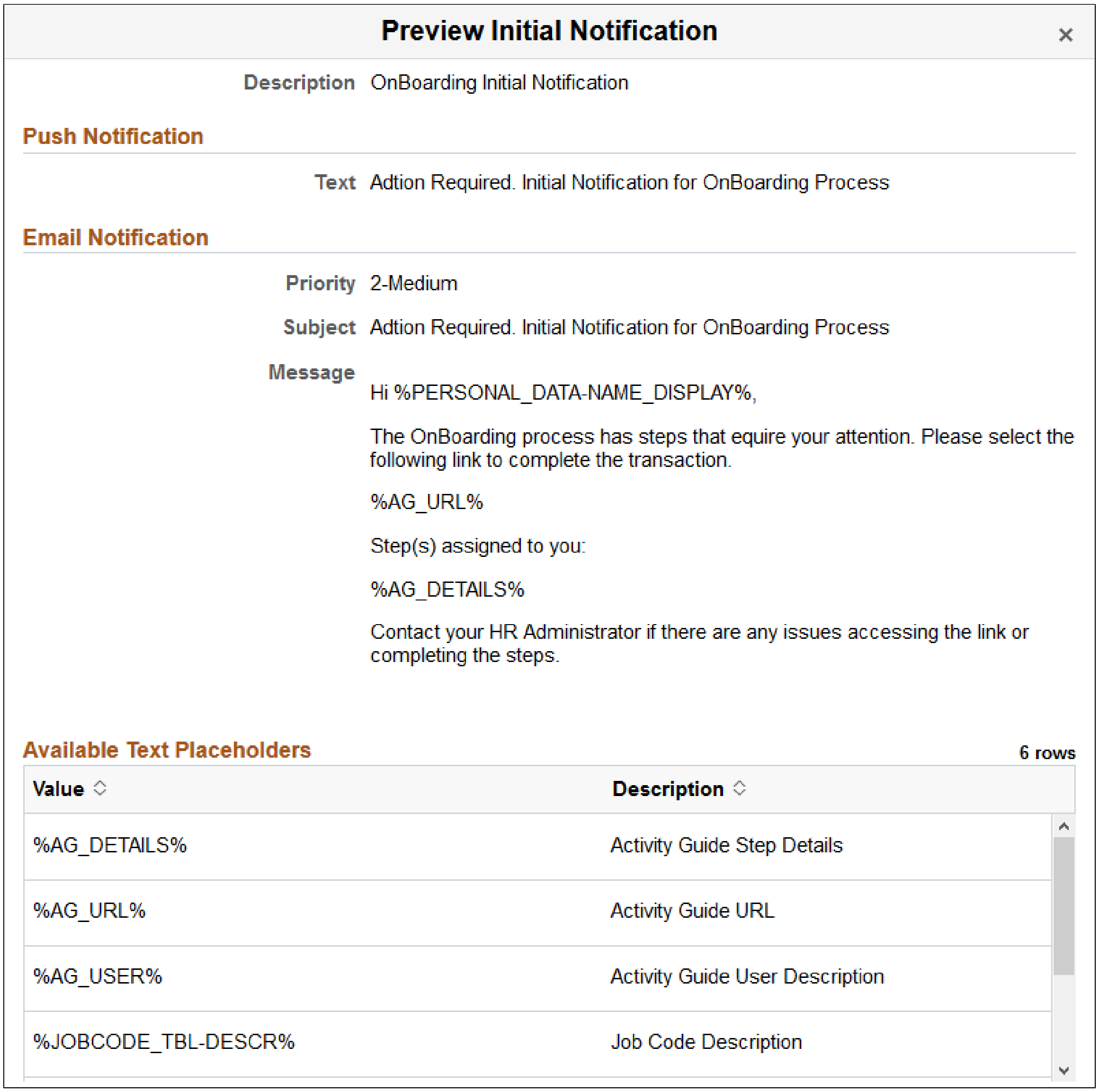
Use the Preview <Notification Type> Notification page (AGC_TMPL_NTPV_SCF) to view the notification text or message that will be sent to the users assigned to the steps.

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.

This example illustrates the fields and controls on the Preview Initial Notification page.



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:

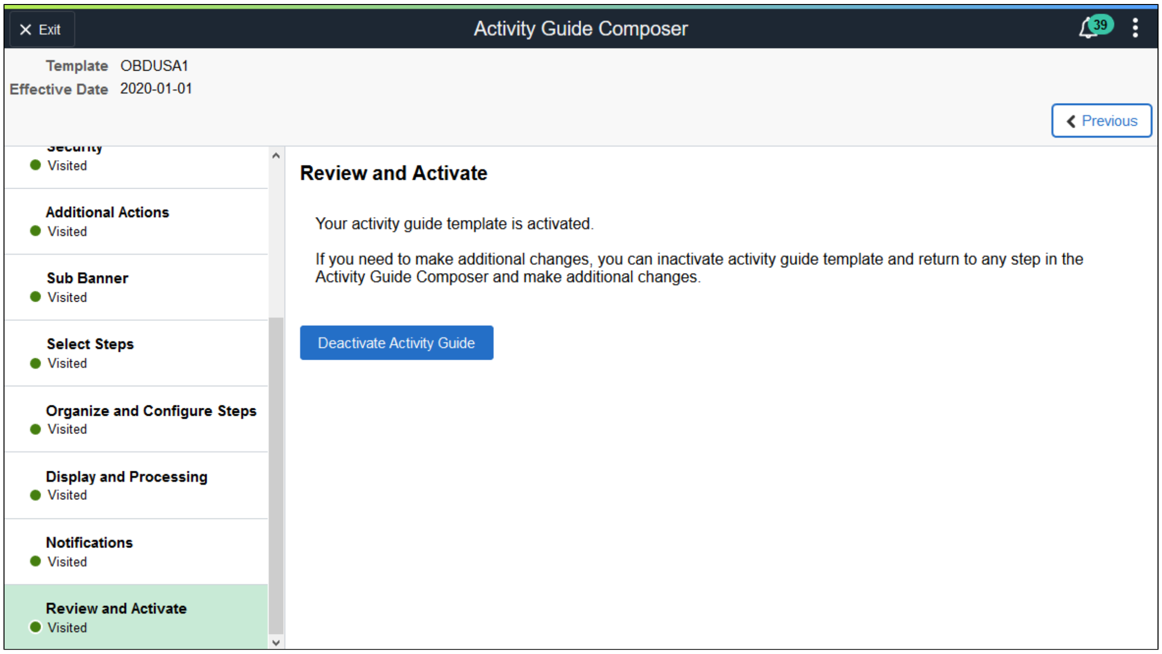
Enterprise Components > **Activity Guide Composer** > **AG Composer Templates** > **Activity Guide Templates**, then perform one of the following from the Activity Guide Templates Page:

- Click the **Add Activity Guide Template** button, enter the template ID and effective date on the Add Activity Guide Template Page, and click **Continue.**

- Click the **Update Template** button, then select either to update or add a row 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.

This example illustrates the fields and controls on the Activity Guide Composer - Review and Activate page.



Field or Control	*Description*
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_NOTIFY) 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***
Define Notifications Page	AGC_CAT_NOTIF_DEFN	Create activity guide notifications.
Process Notifications Page	AGC_NOTIFY	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 AG Composer 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.

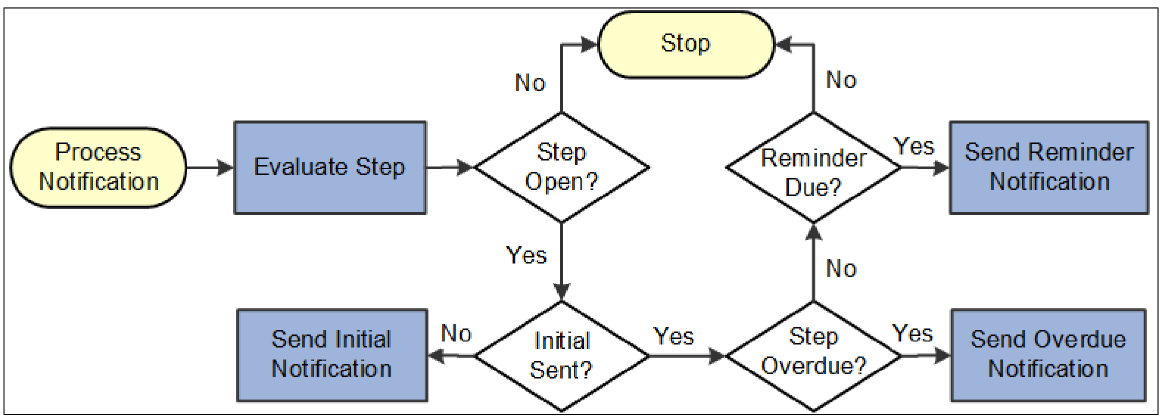
Initial Notification Priority and Considerations

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

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.

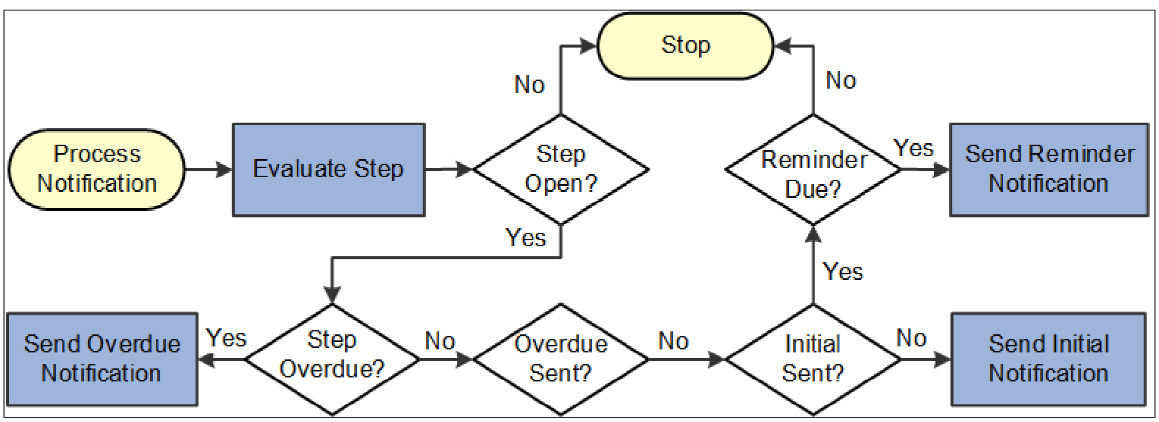
Overdue Notification Priority and Considerations

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

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.

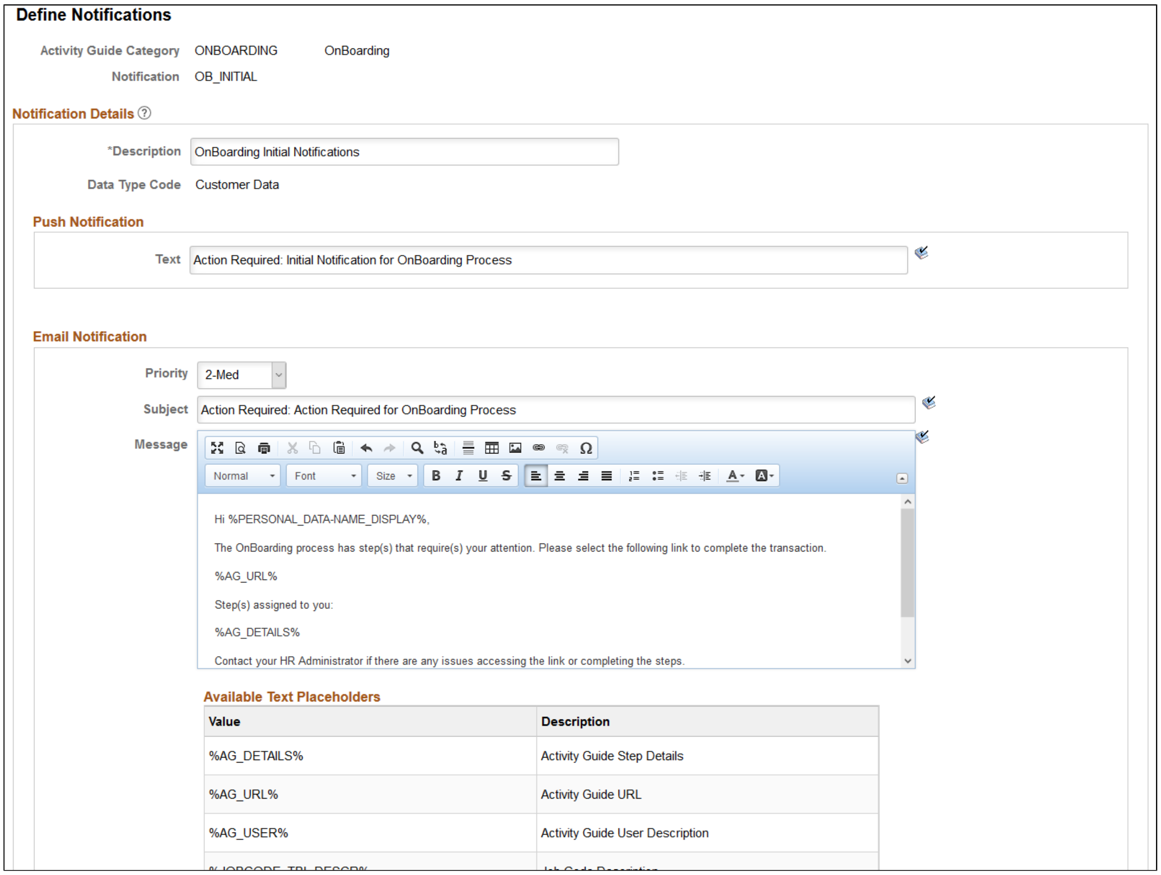
Define Notifications Page

Use the Define Notifications page (AGC_CAT_NOTIF_DEF) to create activity guide notifications.

Navigation:

Enterprise Components > Activity Guide Composer > AG Composer Notification Text

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



Field or Control	***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)..

Field or Control	*Description*
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 AG Composer 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

AG Composer Categories - Notifications Page
Activity Guide Composer - Notifications Page

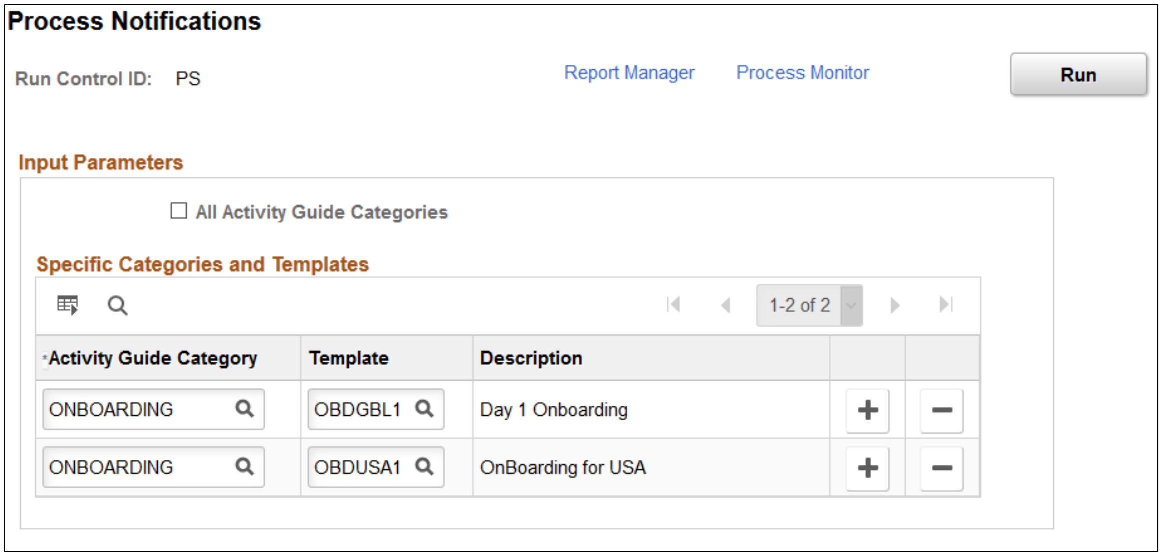
Process Notifications Page

Use the Process Notifications page (AGC_NOTIFY) to process a batch or individual template notifications.

Navigation:

Enterprise Components > **Activity Guide Composer** > **Run AG Composer Notifications**

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



Processes should be run on a regular basis to capture any new or upcoming notifications that need to be sent.

Field or Control	*Description*
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 AG Composer Search Keys Source (AGC_SRCHREC_TBL), AG Composer Asgnmt Search Keys (AGC_SRCHKEY_TBL), AG Composer Tmplt Asgnmt (AGC_TMA_TBL), and AG Composer Test Tmplt Asgnmt (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.
AG Composer Tmplt Asgnmt - General Page	AGC_TMA_TBL1	Enter search keys for the template assignment definition
AG Composer Tmplt Asgnmt - 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.

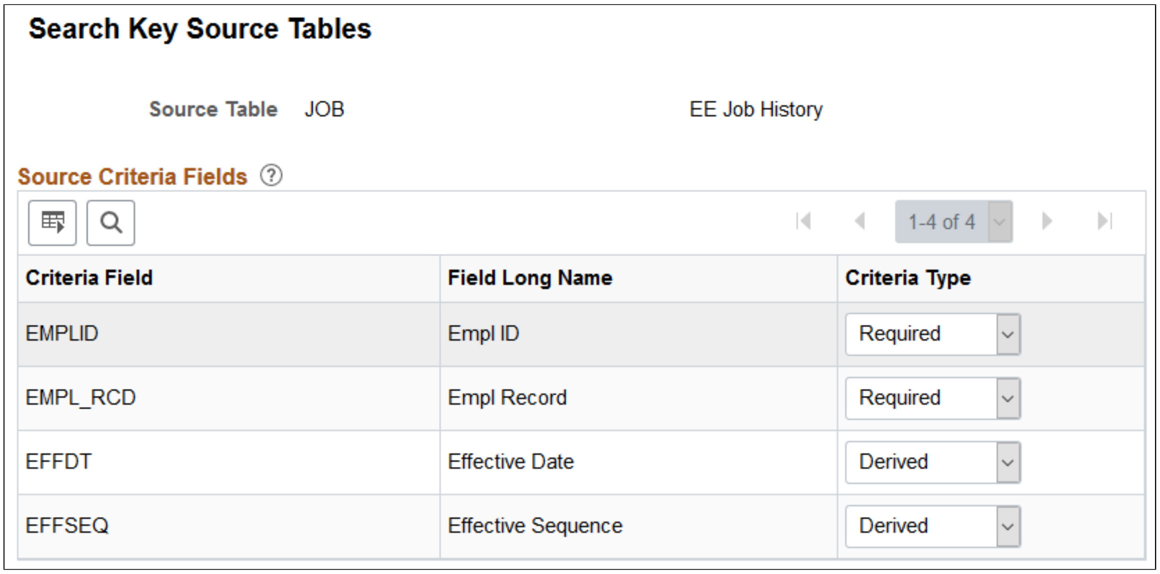
Search Key Source Tables Page

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 > AG Composer Search Keys Source > Search Key Source Tables

This example illustrates the fields and controls on the Search Key Source Tables page.



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.

Field or Control	***Description***
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.

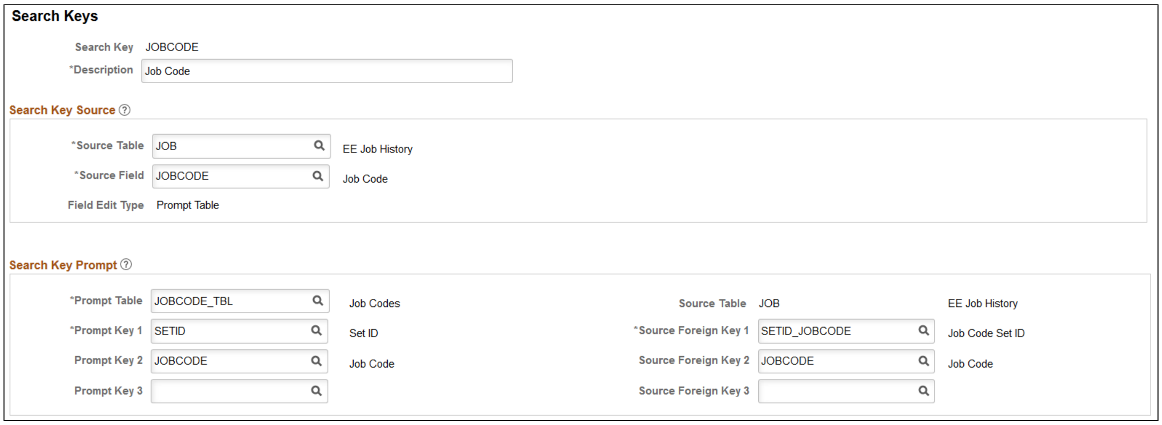
Search Keys Page

Use the Search Keys page (AGC_SRCHKEY_TBL) to identify search key source configurations.

Navigation:

Enterprise Components > **Activity Guide Composer** > **Activity Guide Utilities** > **AG Composer Asgnmt Search Keys** > **Search Keys**

This example illustrates the fields and controls on the Search Keys page.



The system uses the search keys prompt configuration when you define a Template Assignment definition (see AG Composer Tmplt Asgnmt - General Page). This ensures that the user enters valid search key values.

Search Key Source

Field or Control	***Description***
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.

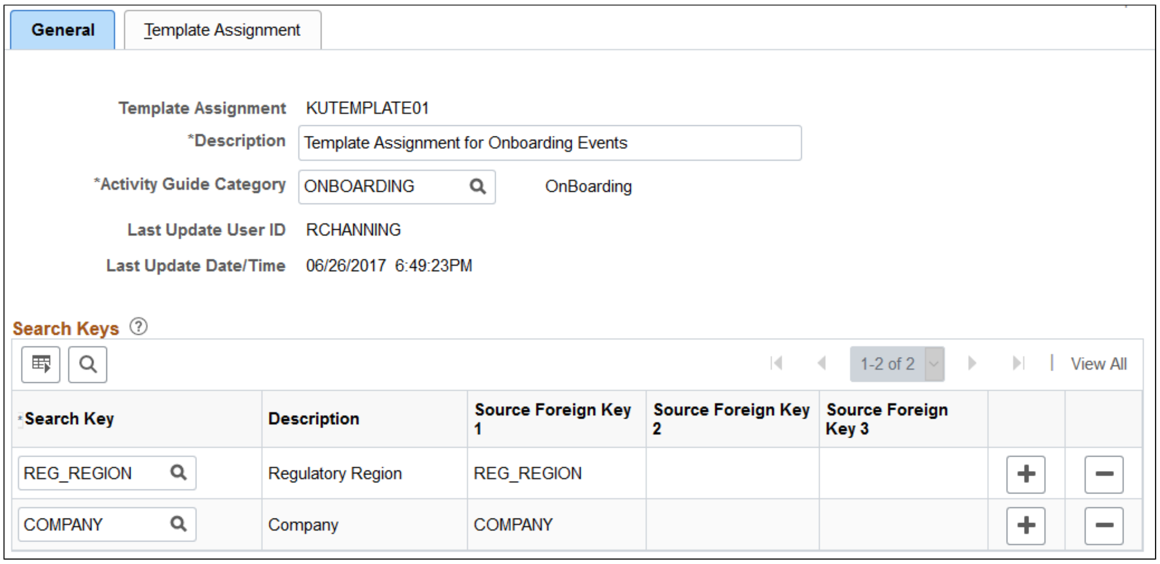
AG Composer Tmplt Asgnmt - General Page

Use the AG Composer Tmplt Asgnmt - General page (AGC_TMA_TBL1) to enter search keys for the template assignment definition.

Navigation:

Enterprise Components > **Activity Guide Composer** > **Activity Guide Utilities** > **AG Composer Tmplt Asgnmt** > **General**

This example illustrates the fields and controls on the AG Composer Tmplt Asgnmt - General page.



Field or Control	***Description***
Activity Guide Category	Select the activity guide category for which you will be performing auto template assignment. Valid values are defined using the AG Composer 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 AG Composer Tmplt Asgnmt - Template Assignment Page, which is where you will specify the criteria that should be met to assign an activity guide template to an individual.

AG Composer Tmplt Asgnmt - Template Assignment Page

Use the AG Composer Tmplt Asgnmt - Template Assignment page (AGC_TMA_TBL2) to enter template assignment definitions.

Navigation:

Enterprise Components > **Activity Guide Composer** > **Activity Guide Utilities** > **AG Composer Tmplt Asgnmt** > **Template Assignment**

This example illustrates the fields and controls on the AG Composer Tmplt Asgnmt - Template Assignment page.

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.

Field or Control	***Description***
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.

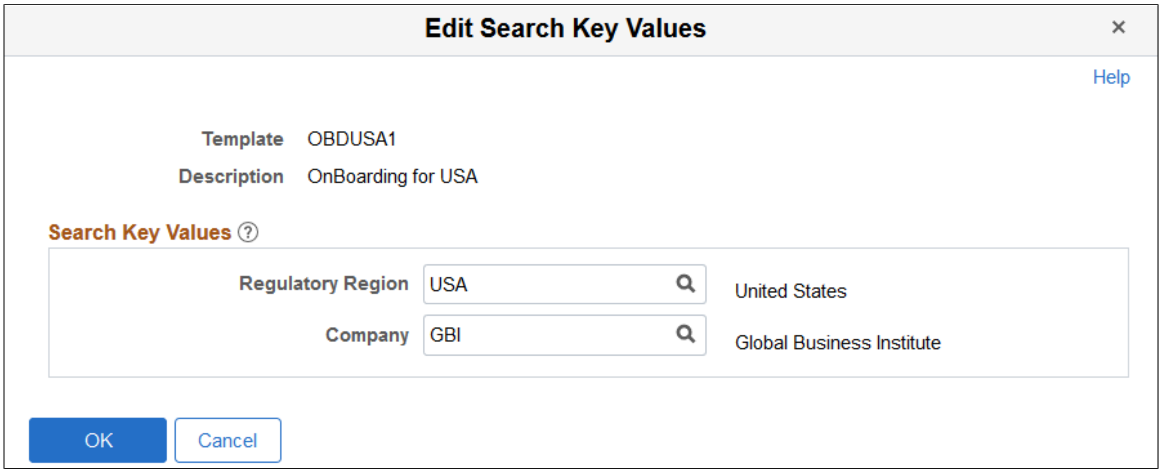
Edit Search Key Values Page

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 AG Composer Tmplt Asgnmt - Template Assignment 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 AG Composer Tmplt Asgnmt - General Page.

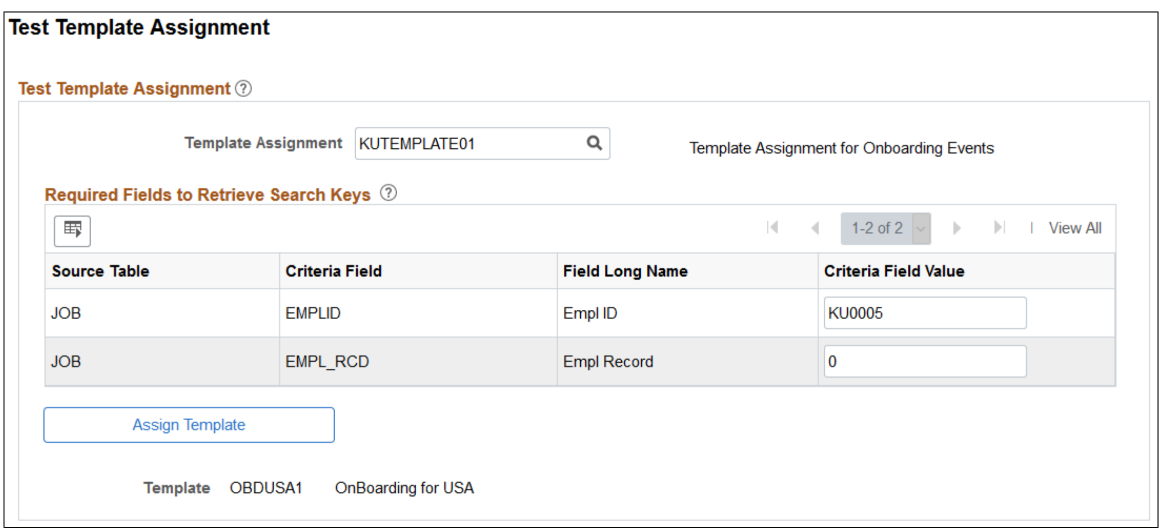
Test Template Assignment Page

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** > **AG Composer Test Tmplt Asgnmt** > **Test Template Assignment**

This example illustrates the fields and controls on the Test Template Assignment page.



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

Field or Control	Description
Template Assignment	Enter a definition value to test a template assignment. Valid value are created using the AG Composer Tmplt Asgnmt - 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.

Field or Control	Description
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

AG Composer Tmplt Asgnmt - 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 AG Composer 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

Page Name	*Definition Name*	*Usage*
AG Composer 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.
AG Composer Contextual Data - Test Page	AGC_CTXDTA_TBL2	Test and validate contextual data.

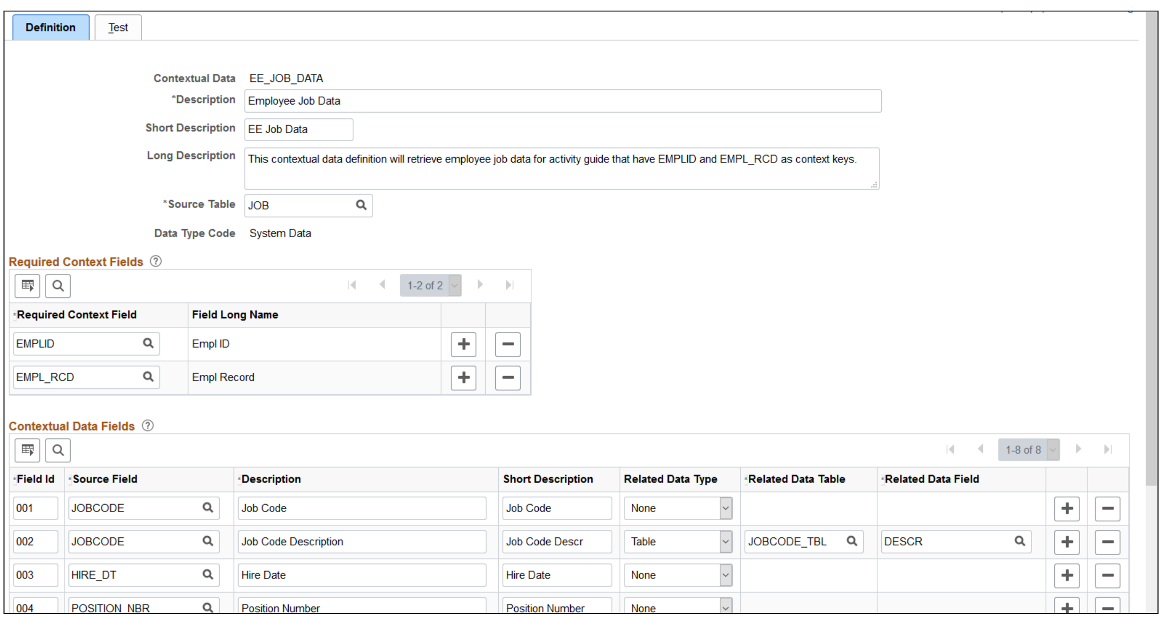
AG Composer Contextual Data - Definition Page

Use the AG Composer 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** > **AG Composer Contextual Data** > **Definition**

This example illustrates the fields and controls on the AG Composer Contextual Data - Definition page.



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.

Field or Control	*Description*
Description	Enter a description for the contextual data. This is the value that will appear in the **Contextual Data** field on the AG Composer 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 or Control	*Description*
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 *JOBCODE* and related data type specified as *Table* where the table is *JOBCODE_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.

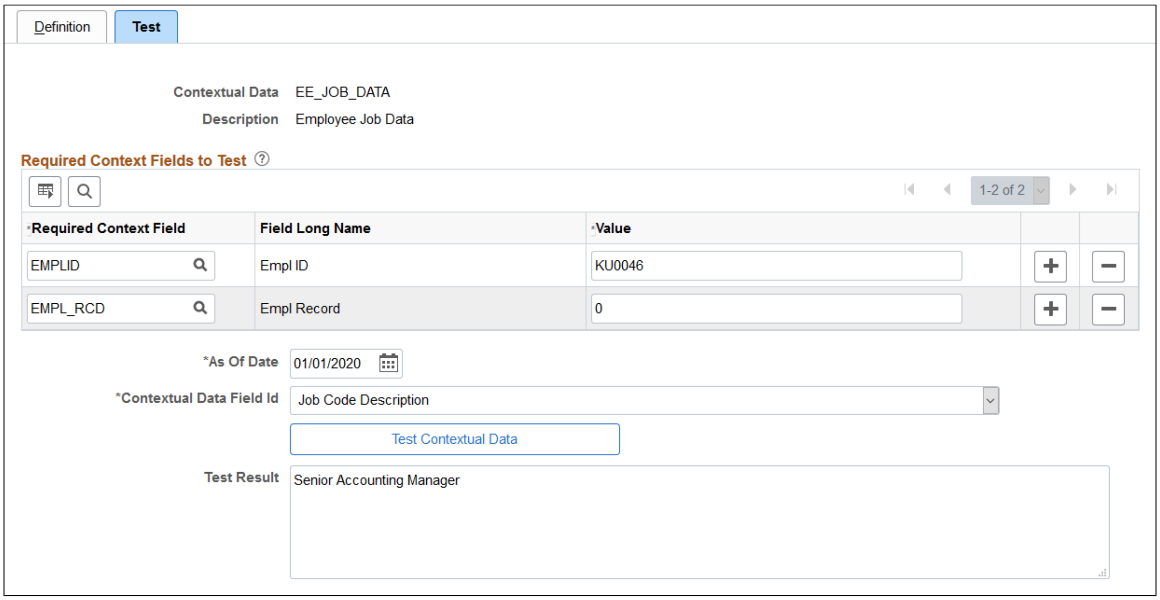
AG Composer Contextual Data - Test Page

Use the AG Composer Contextual Data - Test page (AGC_CTXDTA_TBL2) to test and validate contextual data.

Navigation:

Enterprise Components > **Activity Guide Composer** > **Activity Guide Utilities** > **AG Composer Contextual Data** > **Test**

This example illustrates the fields and controls on the AG Composer Contextual Data - Test page.



Field or Control	***Description***
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 AG Composer 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 AG Composer 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 AG Composer 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 deploying and managing activity guide pages.

The following video provides an overview of Activity Guide Composer multi user guides and creating tiles for the users:

Video: 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.
AG Composer Tiles Page	AGC_TILE_TBL1	Create and publish activity guide tiles for assignees
<Business Process> - Review Activity Guide Page	AGC_REVIEW_AG_FL	Access activity guide instances from a custom tile or My Processes Page.

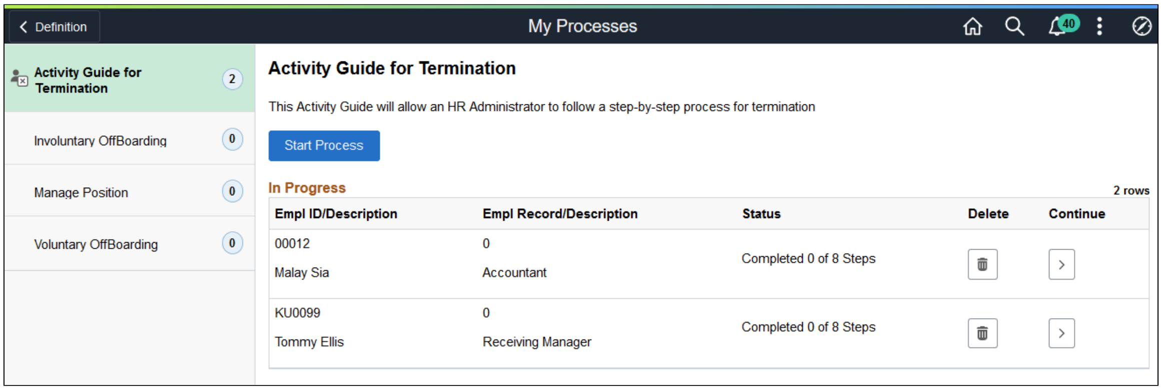
My Processes Page

Use the My Processes page (AGC_MYAG_DETAIL_FL) to view and manage activity guide processes.

Navigation:

Enterprise Components > **Activity Guide Composer** > **My Processes**

This example illustrates the fields and controls on the My Processes page.



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:

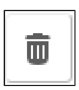
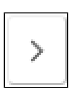
1. You have been granted the security access role as defined for the *End User* security type for this template on the Activity Guide Composer - Security Page.

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.

Field or Control	***Description***
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 AG Composer 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.

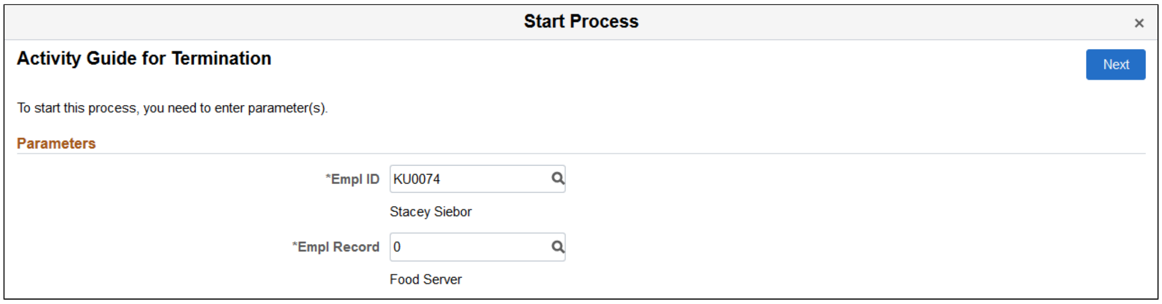
Start Process Page

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.

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 AG Composer Categories - Context Page.
Click the **Next** button to either access the Questionnaire page or start the activity guide.

Start Process - Questionnaire Page

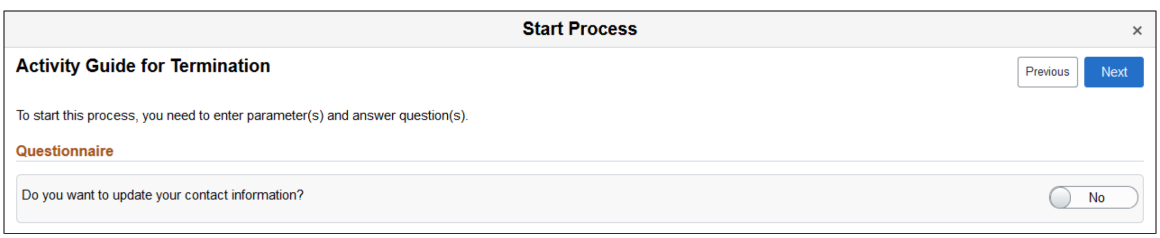
Use the Start Process – Questionnaire page (AGC_START_AG_FL) to answer questions that determine if certain page steps will appear in the activity guide transaction process.

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.

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

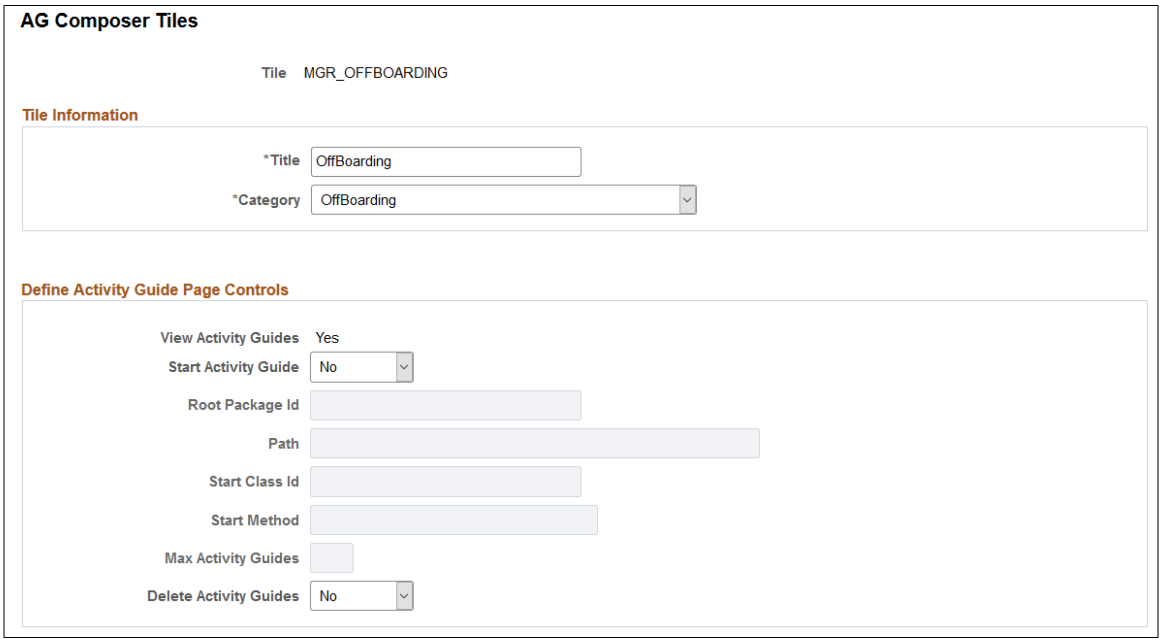
AG Composer Tiles Page

Use the AG Composer Tiles page (AGC_TILE_TBL1) to create and publish activity guide tiles for assignees.

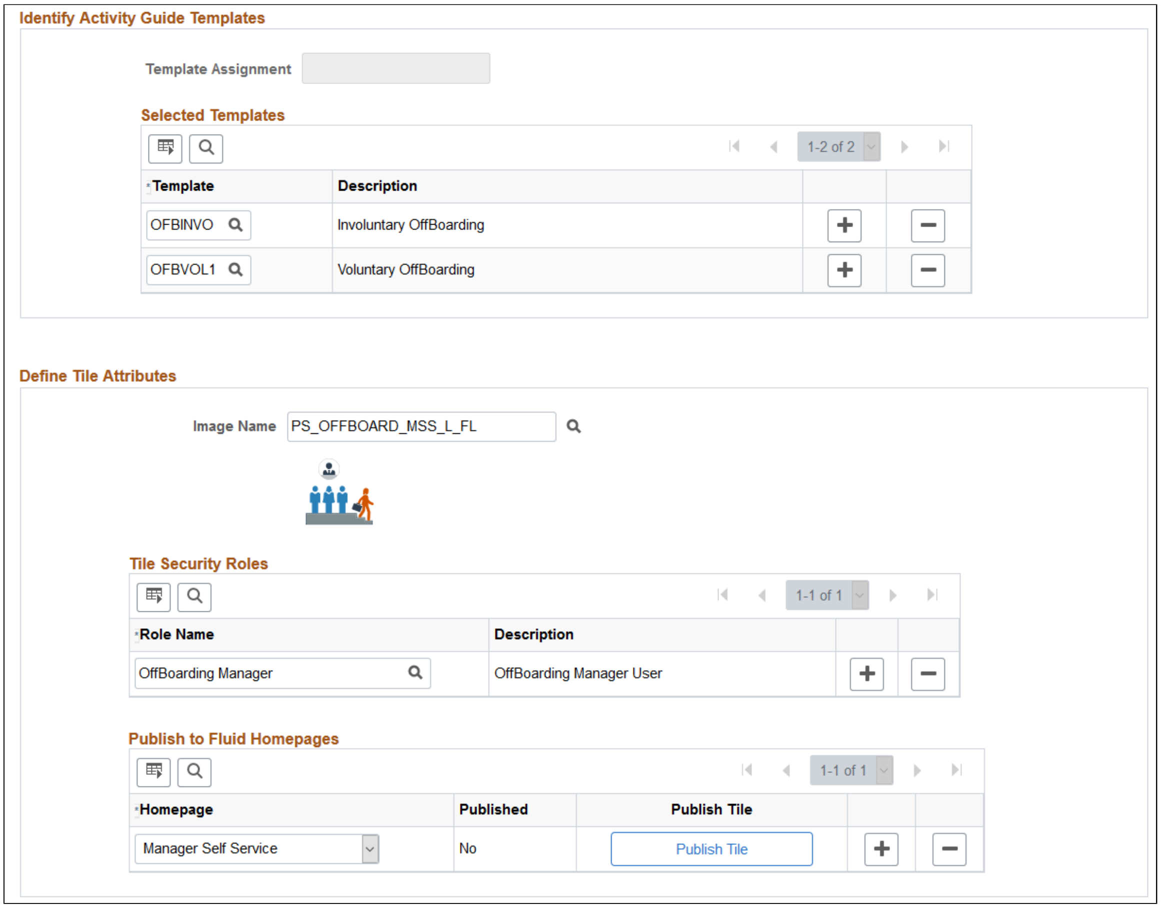
Navigation:

Enterprise Components > **Activity Guide Composer** > **Activity Guide Utilities** > **AG Composer Tiles**

This example illustrates the fields and controls on the AG Composer Tiles page (1 of 2).



This example illustrates the fields and controls on the AG Composer Tiles page (2 of 2).



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

Field or Control	***Description***
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.

Field or Control	Description
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 Composer - Categories component (see Setting Up Activity Guide Categories)

Define Activity Guide Page Controls

Field or Control	Description
View Activity Guides	Displays *Yes* 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 *Yes* to enable the user to initiate an activity guide instance from the new tile. By selecting *Yes*, 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.

Field or Control	*Description*
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.

Field or Control	*Description*
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

Field or Control	*Description*
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.

Field or Control	*Description*
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 AG Composer 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.

<Business Process> - Review Activity Guide Page

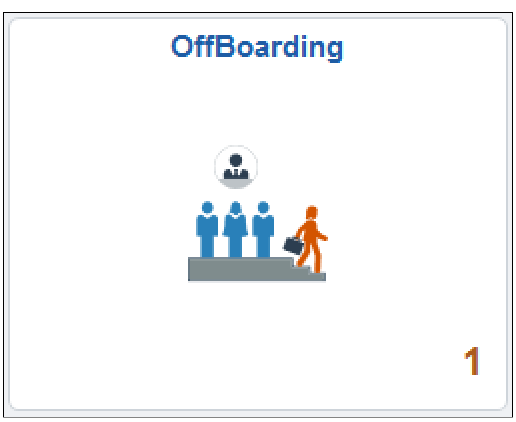
Use the <Business Process> - Review Activity Guide page (AGC_REVIEW_AG_FL) to access activity guide instances from a custom tile or My Processes Page page.

Note: The title of the tile and review page is based on the **Title** value you entered on the AG Composer Tiles Page.

Navigation:

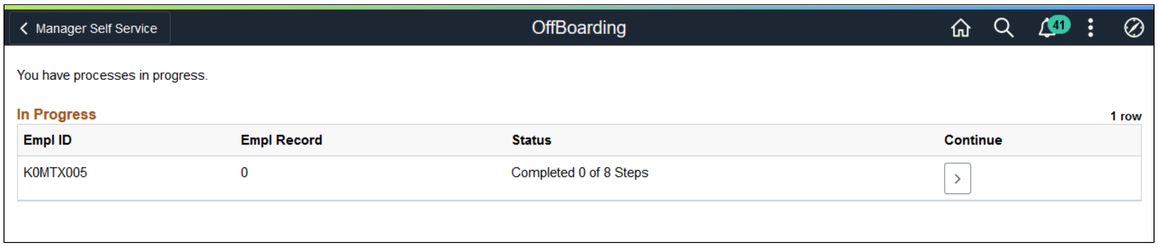
Access the homepage to which you published your custom activity guide tile, then click the tile.

This example illustrates a custom tile created using the AG Composer Tiles page.



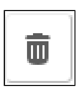
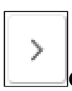
The tile will display the number of activity guide processes in progress.

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.

Field or Control	***Description***
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 AG Composer Tiles Page.
 Delete 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 AG Composer Tiles Page.
 **Continue** icon button	Click this button to access this activity guide process instance and view or complete the activity guide.

Chapter 23

Chatbot Integration Framework

Understanding Skills

A skill (also known as 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. Skills are most useful for mundane and repetitive business transactions that involve predictable conversation paths. 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 skills, see

https://www.oracle.com/solutions/chatbots/what-is-a-chatbot/

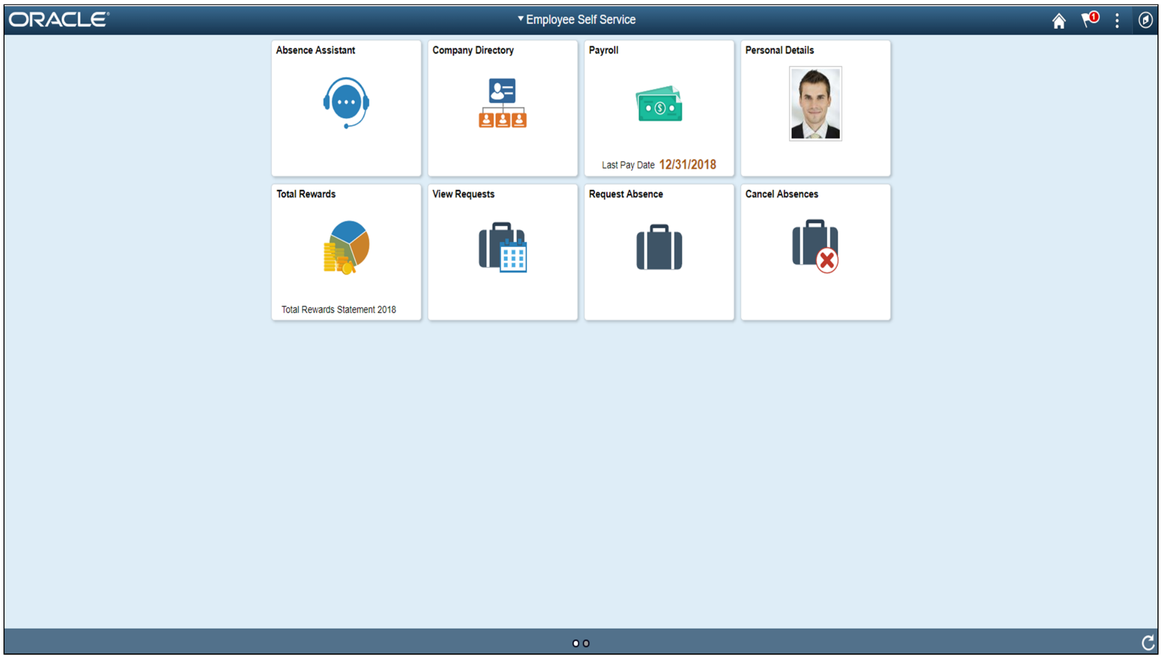
Video: PeopleSoft Digital Assistant Technology and Extensibility

PeopleSoft delivers setup pages which can be used to develop and deploy skills on PeopleSoft systems. Oracle Digital Assistant (ODA) is leveraged to enable skills on PeopleSoft systems. For more details on Oracle Digital Assistant, refer to:

https://cloud.oracle.com/digital-assistant

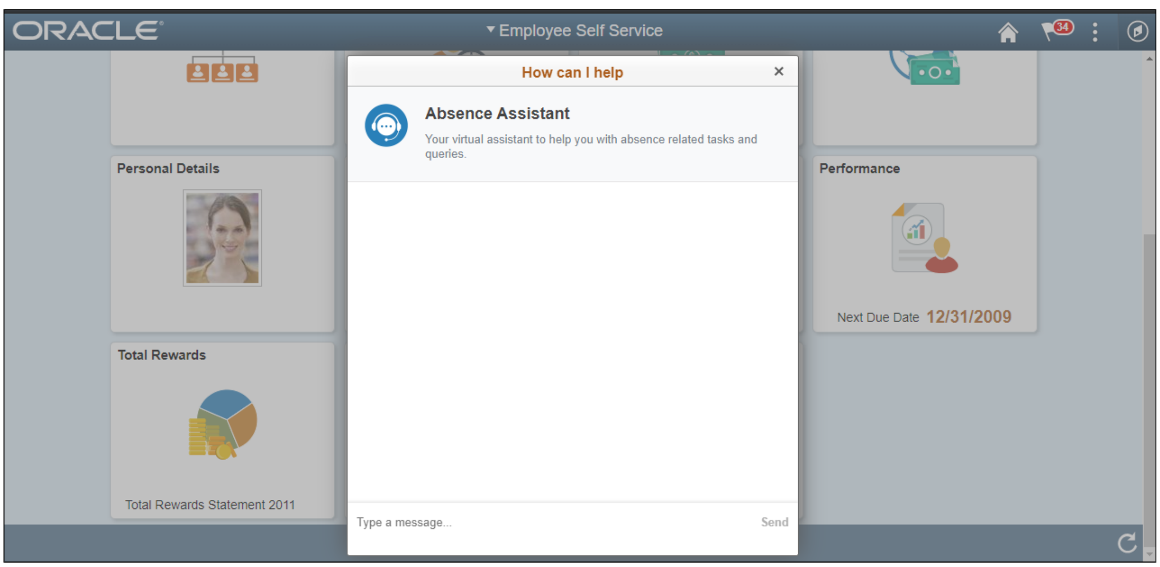
A skill can be configured as a tile or as part of a widget to PeopleSoft application pages. It can also be accessed through external messaging client (like SMS client) by sending a message directly to the Twilio number of the skill.

This image illustrates the skill tile (Absence Assistant) on a desktop



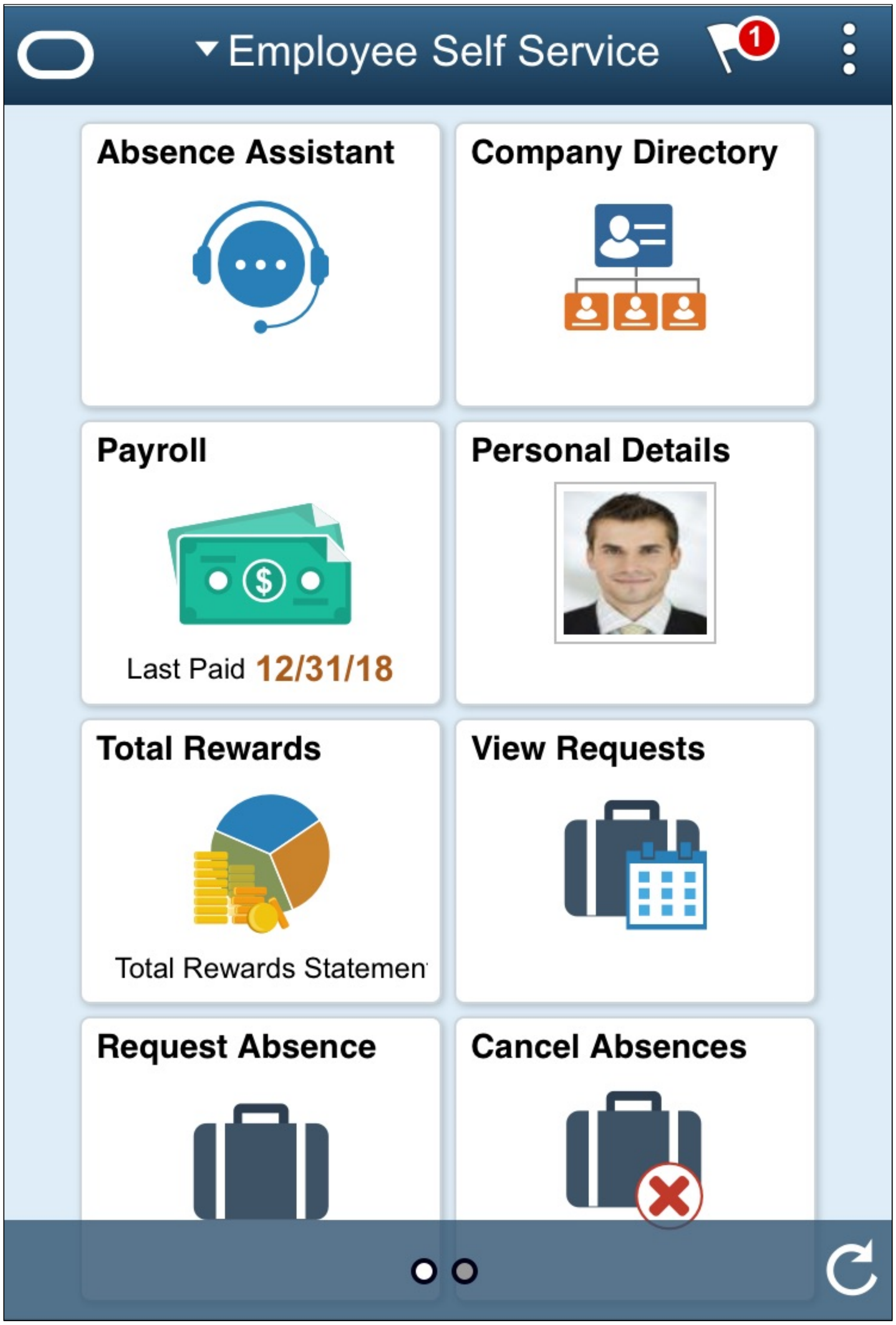
Click the tile to launch the skill. You can start a conversation with the skill through the chat window.

This image illustrates the chat window of a skill.

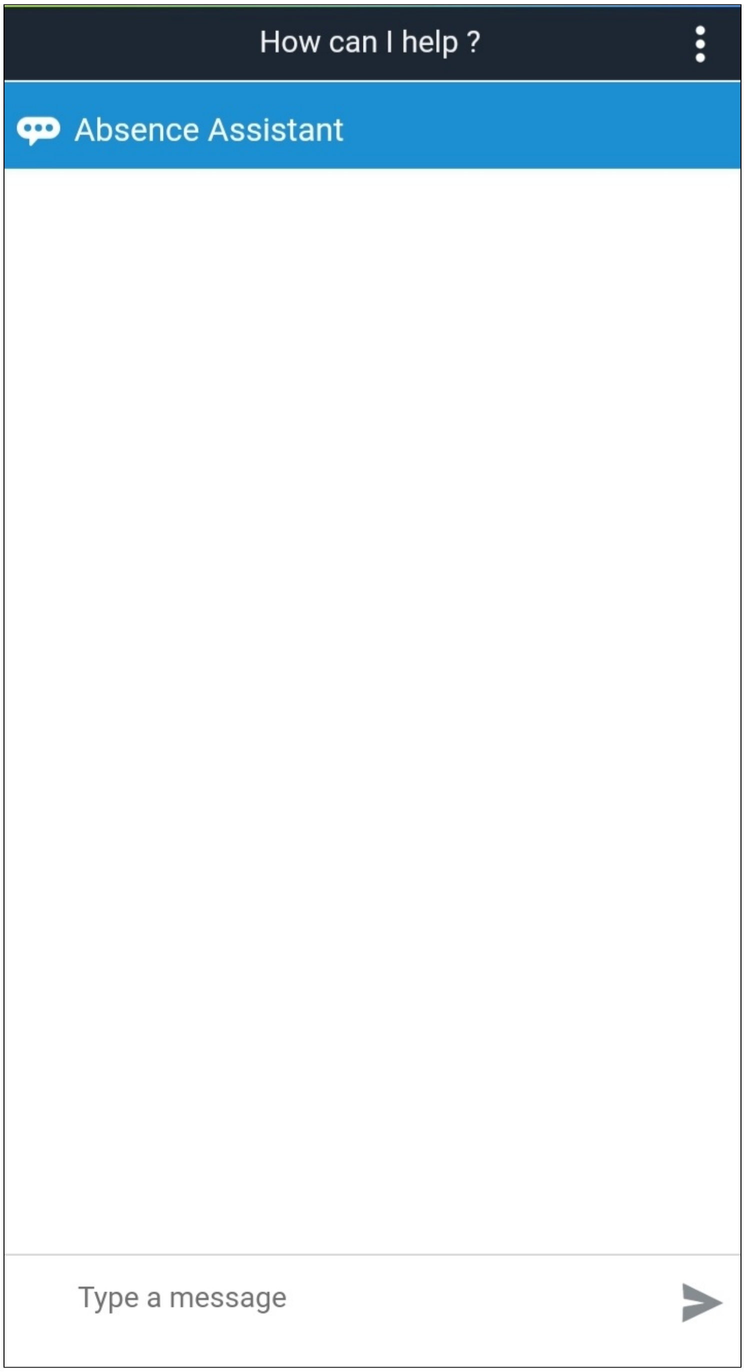


The chat client window on a desktop device is launched as a modal from the tile which the user can use to chat with the skill. On a mobile device, the chat window is displayed as a standard page.

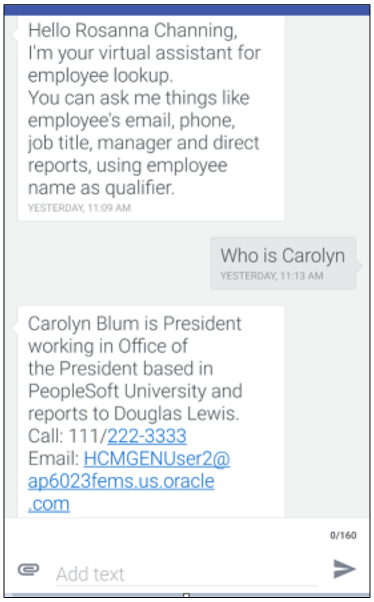
Skill tile on a mobile device



Skill client on a mobile device.



Skill through text messaging

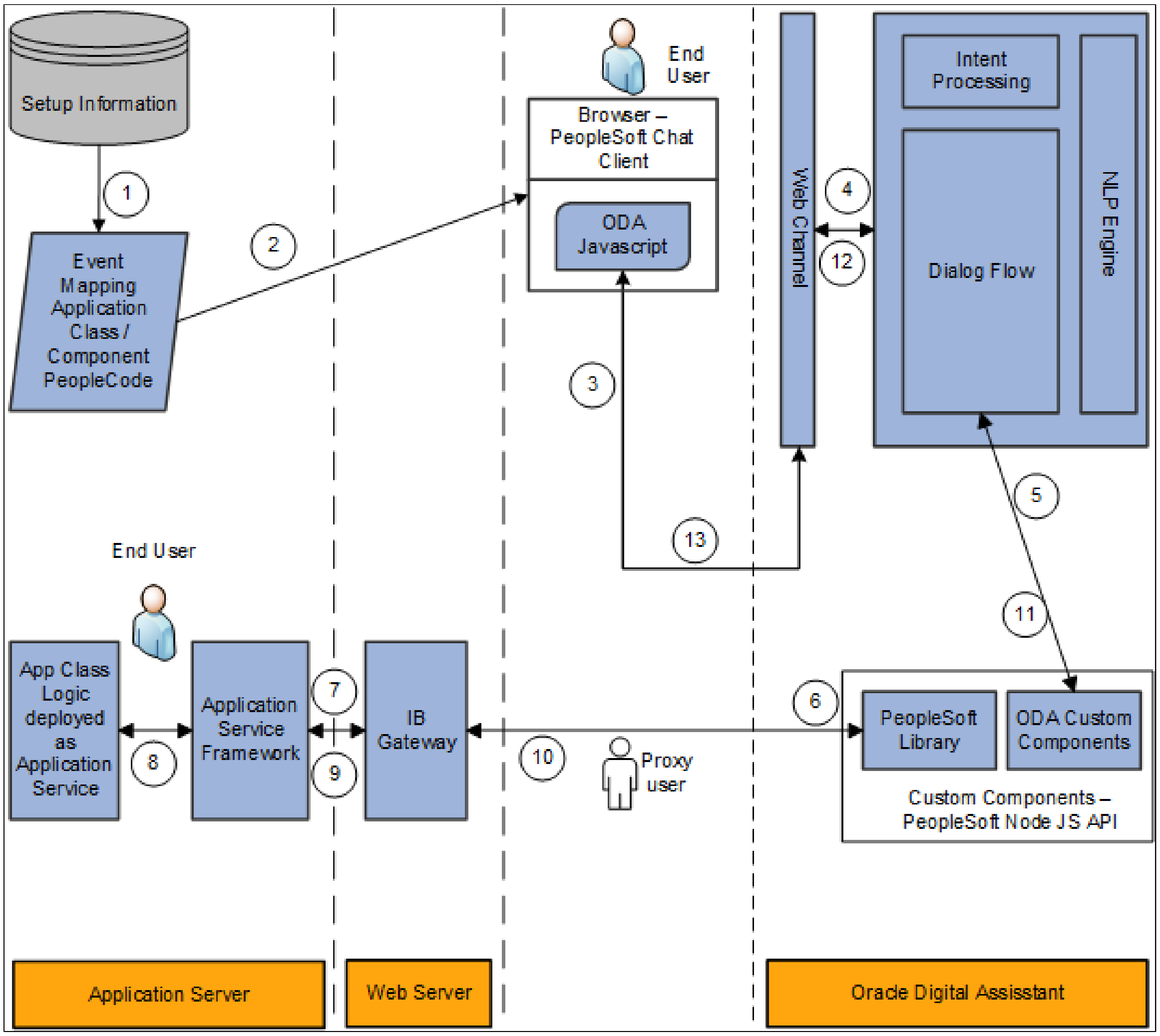


Understanding the Chatbot Architecture

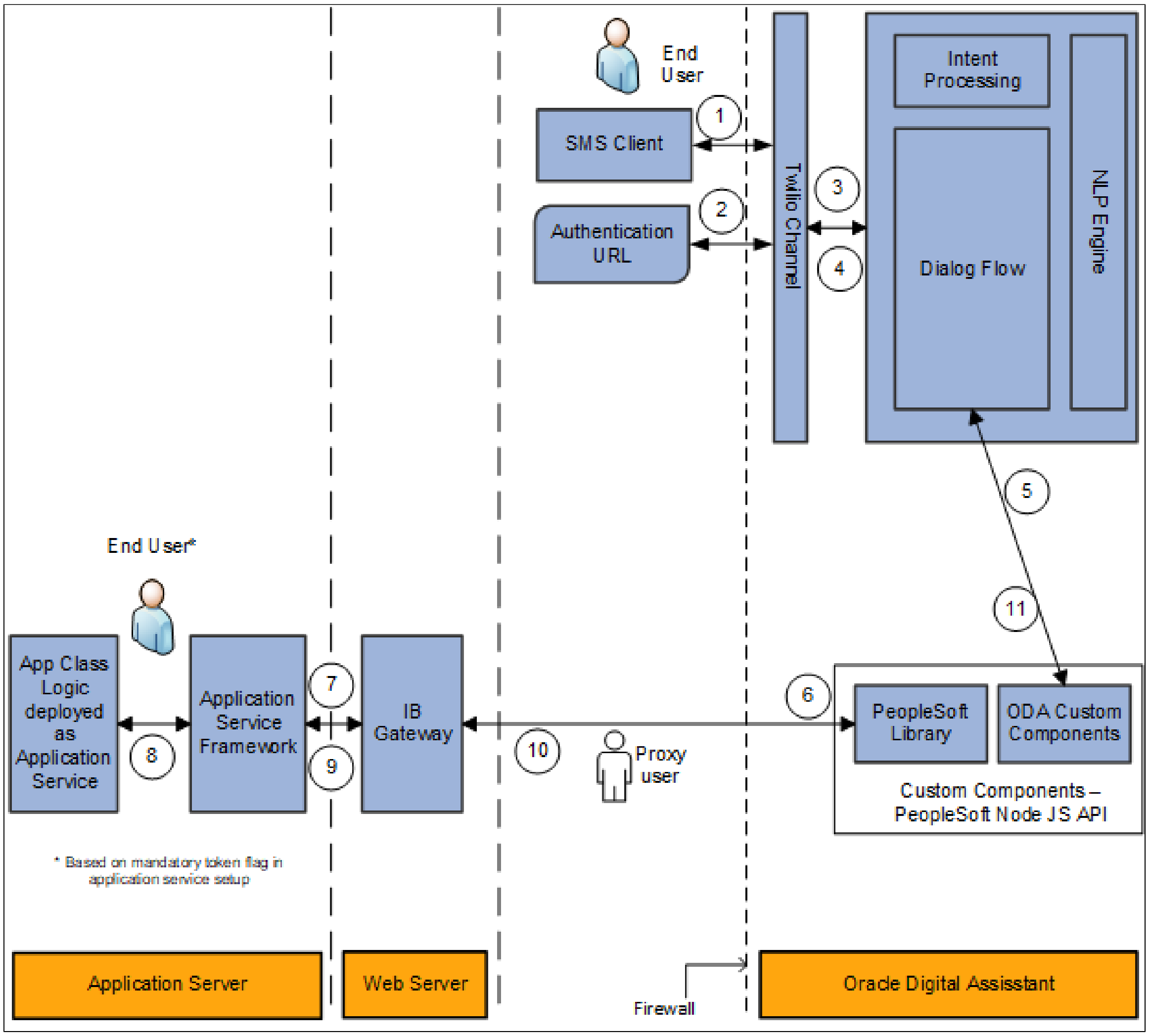
The Chabot Integration Framework consists of components in PeopleSoft and in ODA. Refer the diagram to see how the different components are connected to each other.

The sequence of flow of data or information is represented by the sequential numbers.

Chatbot Architecture Diagram for Web Channel



Chatbot Architecture Diagram for Twilio (text) Channel



The different parts or components involved in the Chatbot Integration Framework are summarized below:

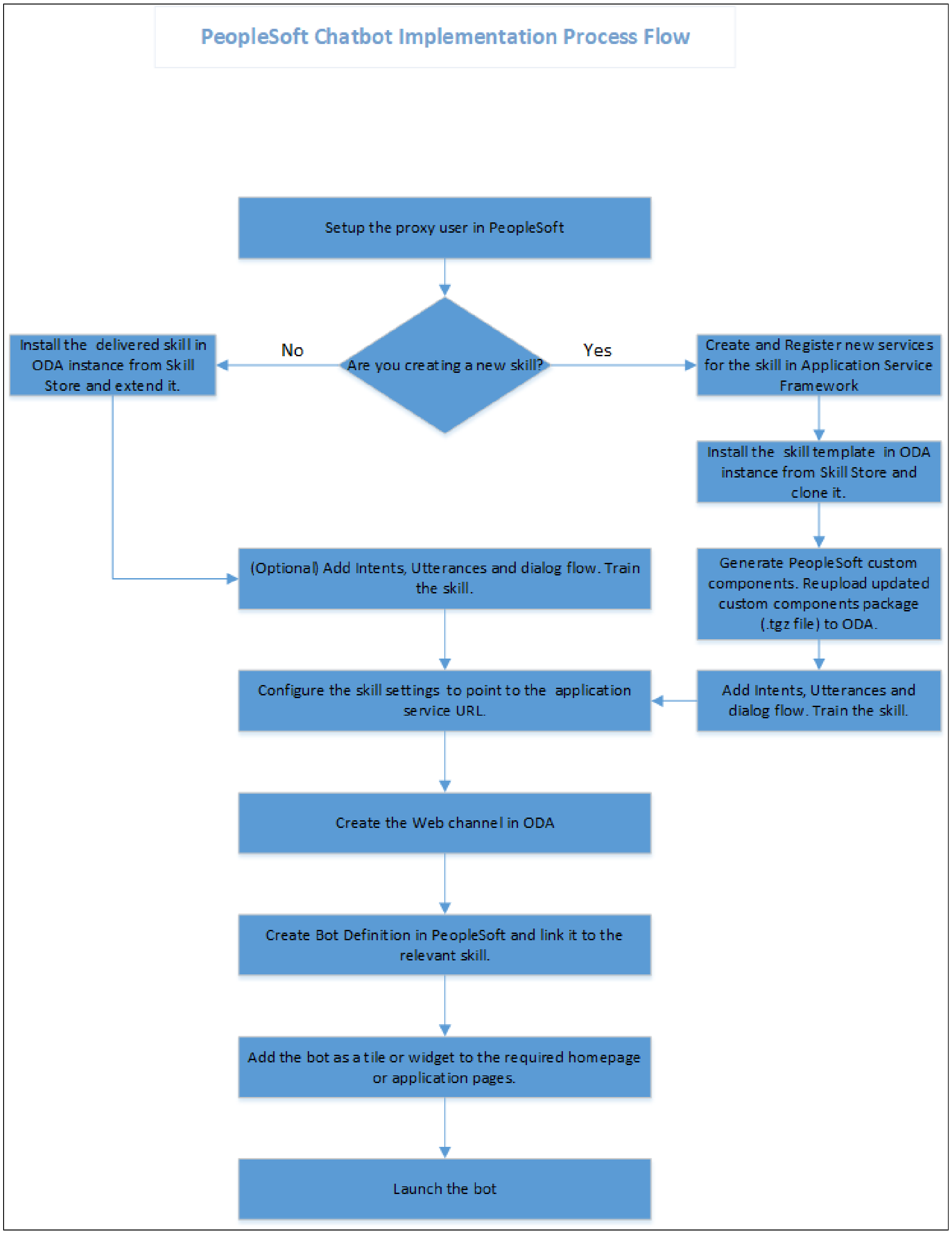
Component	***Description***
Chat Client	The chat client in PeopleSoft is a web based client that users use as the interface to converse with the chatbot. The chat client is rendered with the help of the Web SDK which contains the JavaScript to embed the client to any web page and to handle the communication with the chat server. Chat client can be rendered as a 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.
Twilio	The Text Channel (in ODA) works as the communication end point between the Digital Assistant and the chat client.

Component	***Description***
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.
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 (for Web channel)	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).
Twilio (for Text channel)	Chatbot User can also access the PeopleSoft Chatbots on SMS clients through the Twilio channel. In this method, the user sends messages directly to the skills' designated Twilio number. The authentication is handled through the PeopleSoft REST service. Apart from the client and explicit authentication, the backend invocation flow is same for the Web channel and Twilio channel.

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.

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 **Note:** If you are using PeopleTools **8.59** or higher, the *PTCB_ADMINISTRATOR* role is not required to add or modify the Application Service.
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. **Note:** If you are using PeopleTools **8.59** or higher, the *PTCB_ADMINISTRATOR* role is not required to add or modify the Application Service.
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

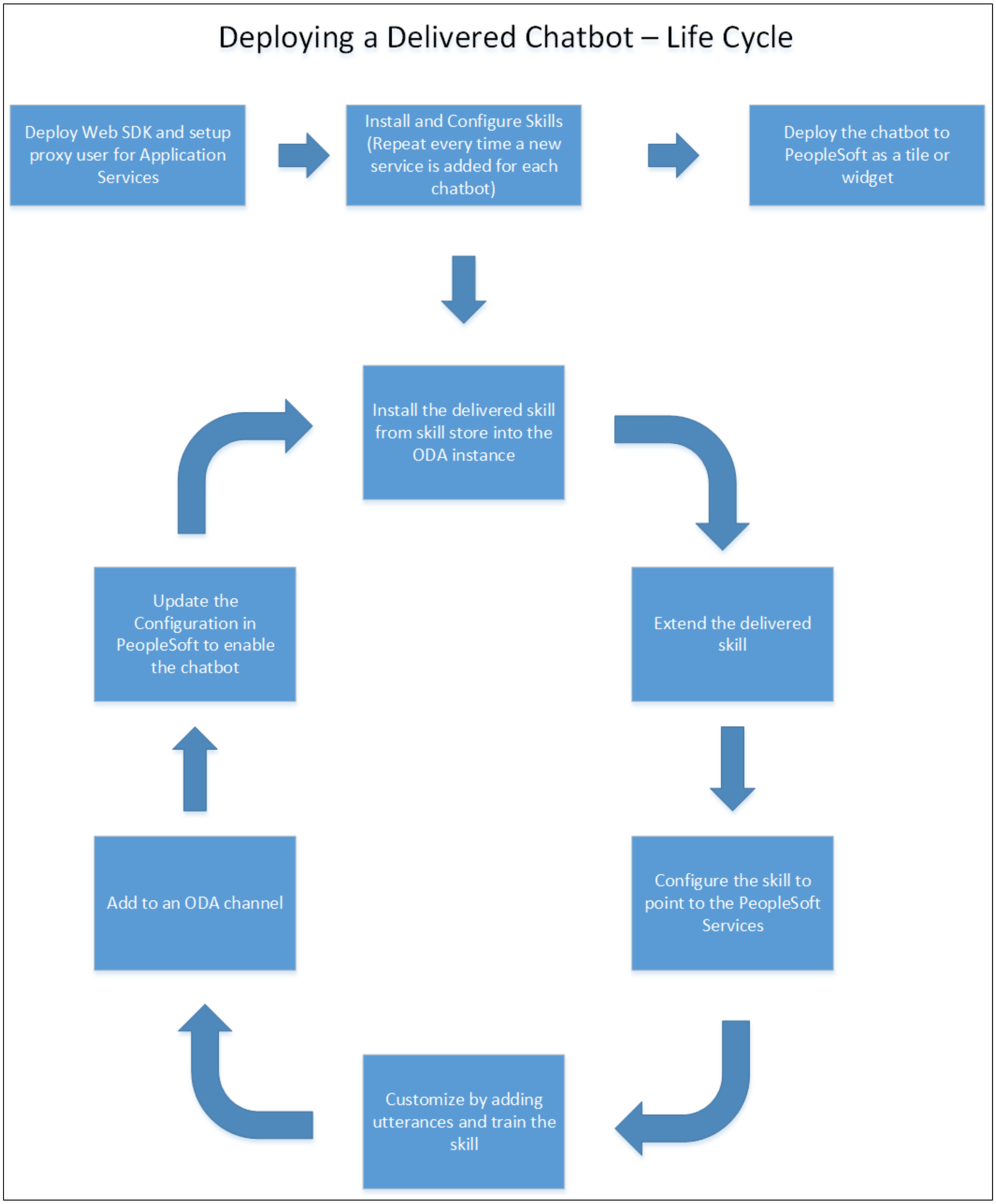
For more details on how to generate custom components for new services for your chatbot, please refer the red paper on Chatbot Integration Framework. https://support.oracle.com/epmos/faces/DocumentDisplay?id=2558379.1

Installing and Setting Up a Delivered Skill

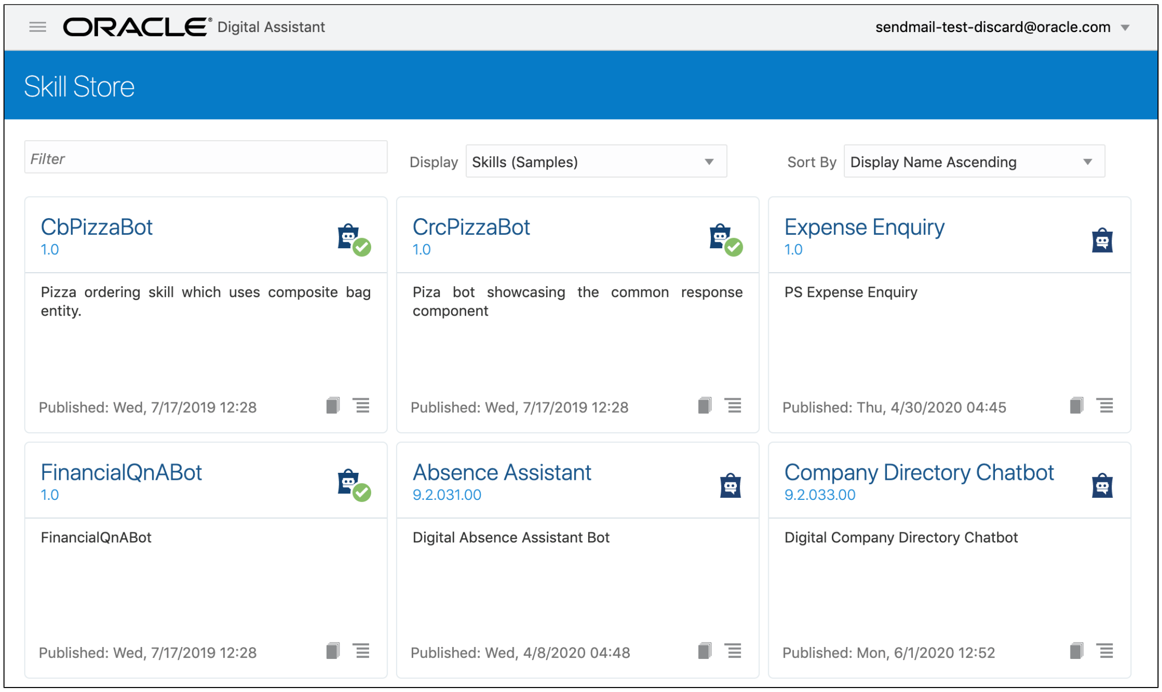
Once the site is setup and proxy user is available for communicating with the chatbot application services, install the skill in the ODA instance which is delivered by PeopleSoft from ODA skill store.

Extend it and configure the integration parameters. Whenever new skills are delivered or new services are introduced, the process of installation and configuring needs to be repeated. Here is the high level illustration of the life cycle of a delivered skill.

Life Cycle management of a Delivered Skill



A typical Skill Store page in ODA



Use the Pull/Install option to install the skill in your ODA instance.

Extend the Delivered Skill

Use the extend functionality of ODA to extend the installed skill. For more information on extending a skill, please refer the ODA Documentation on extending a skill. If customer uses the clone functionality instead of extend, they will not be able use the rebase feature to upgrade their cloned skill to latest version of the skill.

Configure to Point to PeopleSoft Service

The extended version of the delivered skill now needs to be connected to the relevant service in PeopleSoft.

Access the configuration settings option of the cloned skill

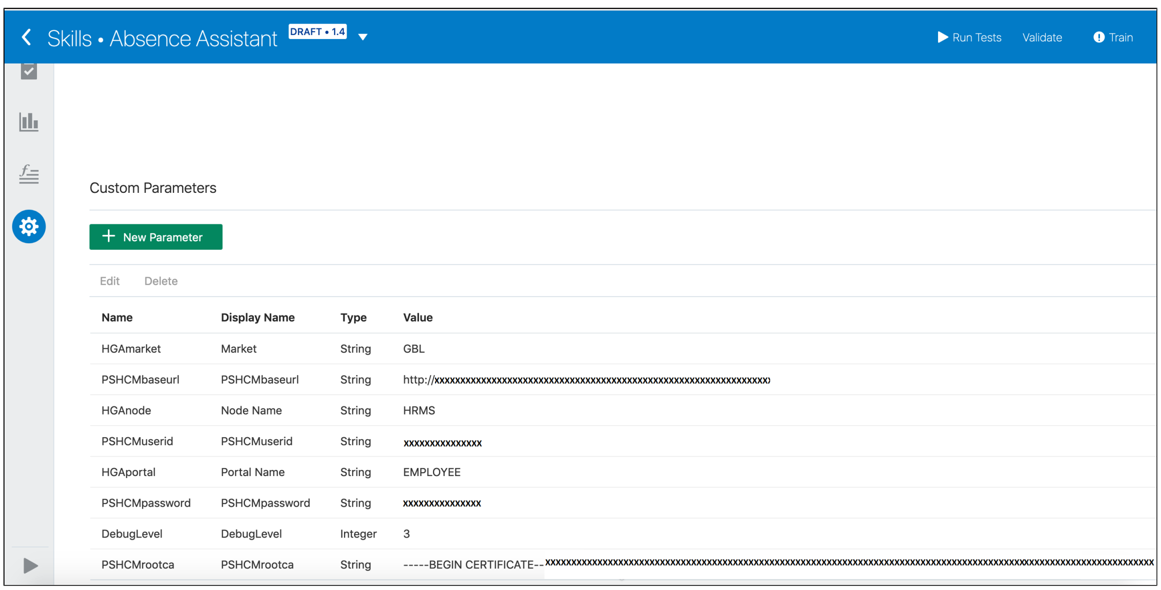
Under Custom Parameters add the following parameters

Name	***Display Name***	***Type***	***Value***
Add the Base URL name in the format *PS <pillar> baseurl* 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 *HCM Base URL*	Add type as *String*	Enter the URL of the application service. It is in the format *https://<server>:<port>/PSIGW/RESTListeningConnector/<node>/PTCB_APPL_SVC.v1*

Name	*Display Name*	*Type*	*Value*
Add the proxy user name in the format PS <pillar> userid	Add the display name for the proxy user	Add type as *String*	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 *String*	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*.

Configure skill to point to PeopleSoft service.



Customize and Train the Skill

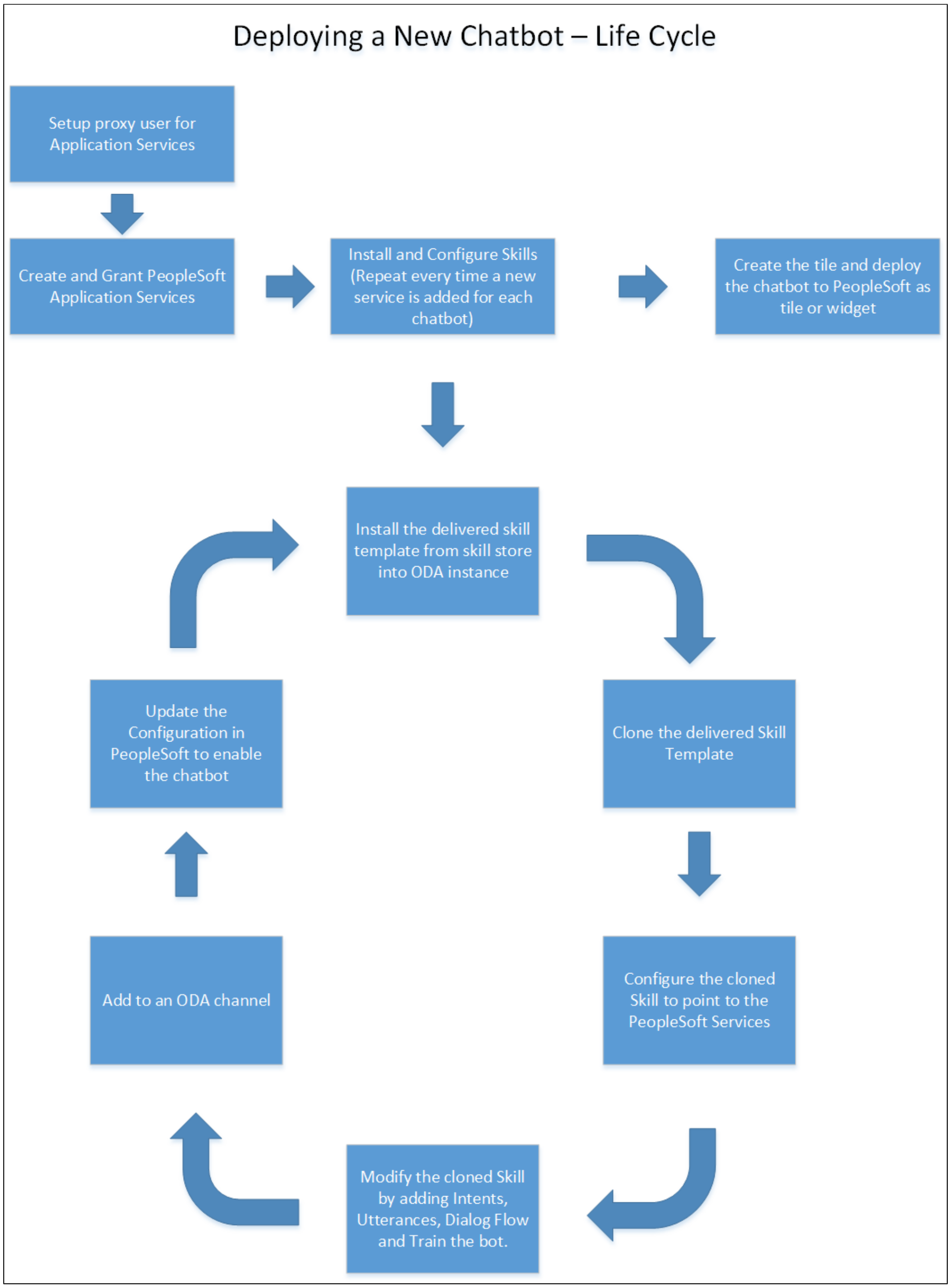
Though the skill is ready to be deployed as is, it needs to be trained with the delivered list of utterances. Additional changes can be done to build it into an effective skill for the required business needs. For more details on adding Intents and training the skill, please refer the Intents section in the ODA documentation.

Installing 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.

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

Install 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 install the skill template:

1. Login to your ODA instance.
2. Access the Skill Store.
3. Install the Skill Template.

Clone the Skill Template

Clone the skill to create a new skill which can then be modified as per your needs.

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 Frameworkhttps://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 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.

Creating the Web Channel

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 the Twilio Channel

To create a new Twilio channel for your skill, refer the ODA documentation on creating Text-Only channels.

Configure the Oracle Web Channel

Refer the My Oracle Support document 2681215.1 to set up the Twilio channel for a PeopleSoft chatbot.

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

Page Name	***Definition Name***	***Usage***
Bot Definition Page	EOCB_BOTSRCH_FL	Search or view the list of available bot definitions.
Add Bot Definition Page	EOCB_ADDBOTDEFN_FL	Add a Bot ID.
Maintain Bot Definition Page	EOCB_BOTDEFN_FL	Configure the Bot ID.
Maintain Branding Template Page	EOCB_BRNDTMPL_FL	Configure the branding for the Bot ID.

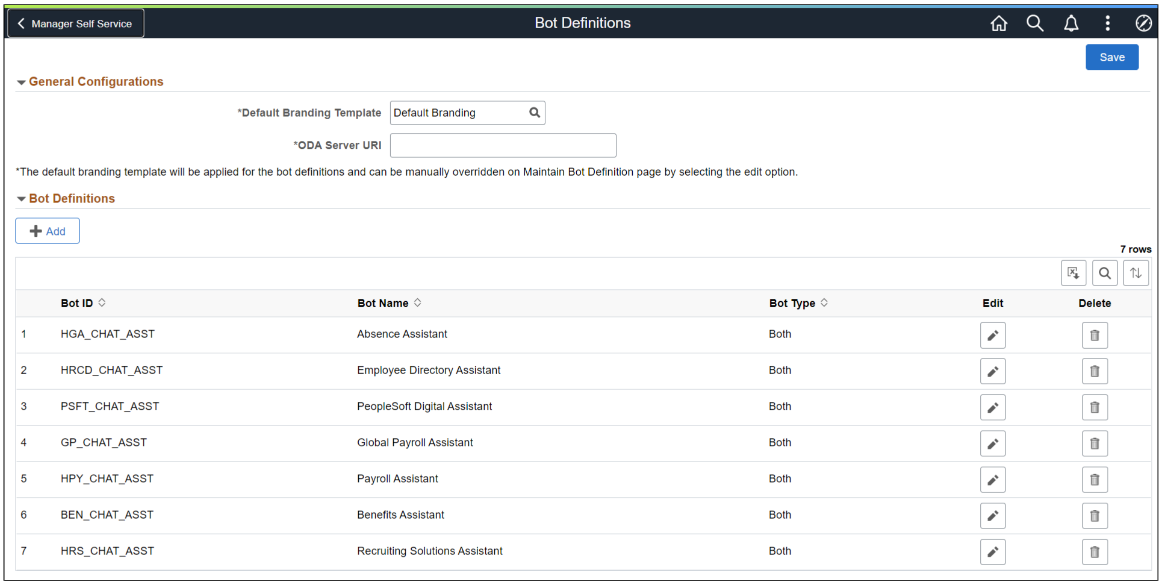
Bot Definition Page

Use the Bot Definition page (EOCB_BOTSRCH_FL) to view, edit or add a new bot definition.

Navigation:

Enterprise Components > **Chatbot Configurations** > **Chatbot Definitions**

Bot Definitions Page



Field or Control	***Description***
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.

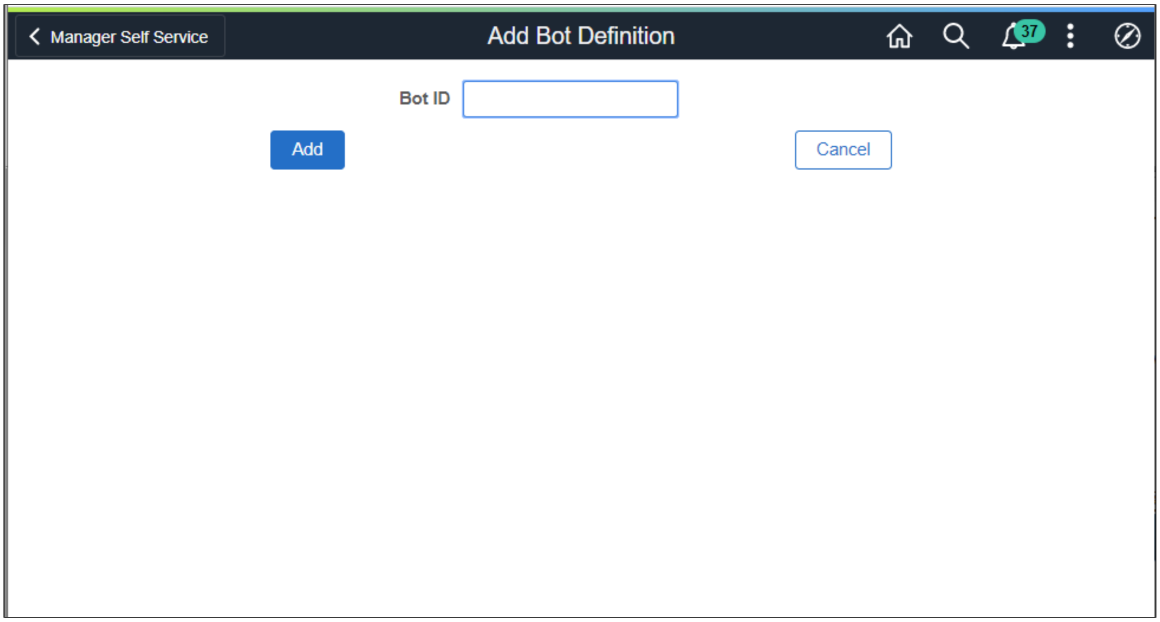
Use the Edit button corresponding to a bot to edit the bot definition.

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.

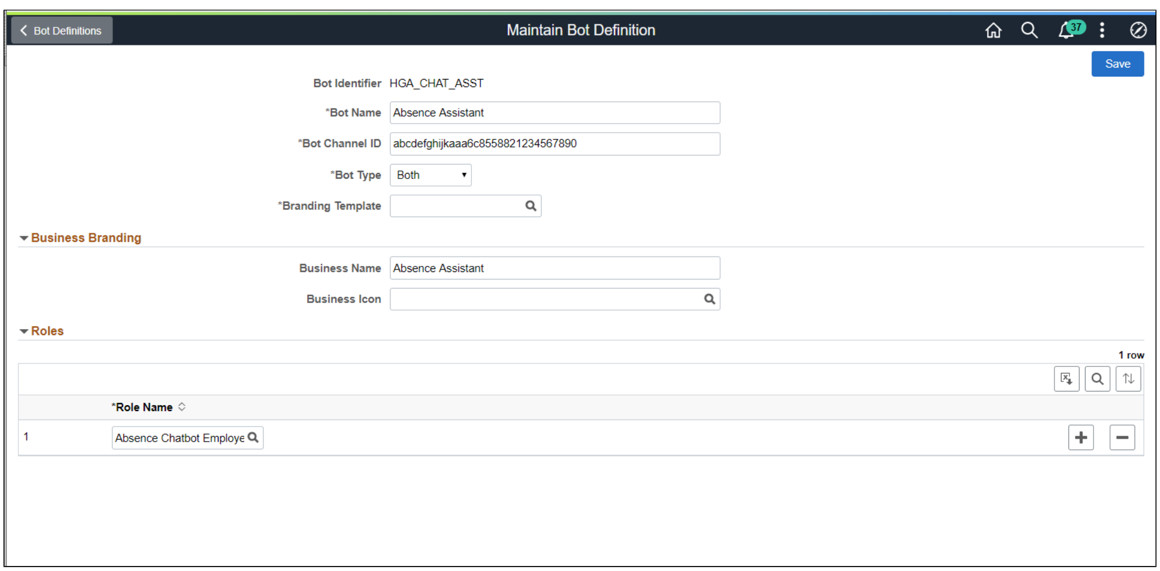
Add Bot Definition page



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.

Maintain Bot Definition page



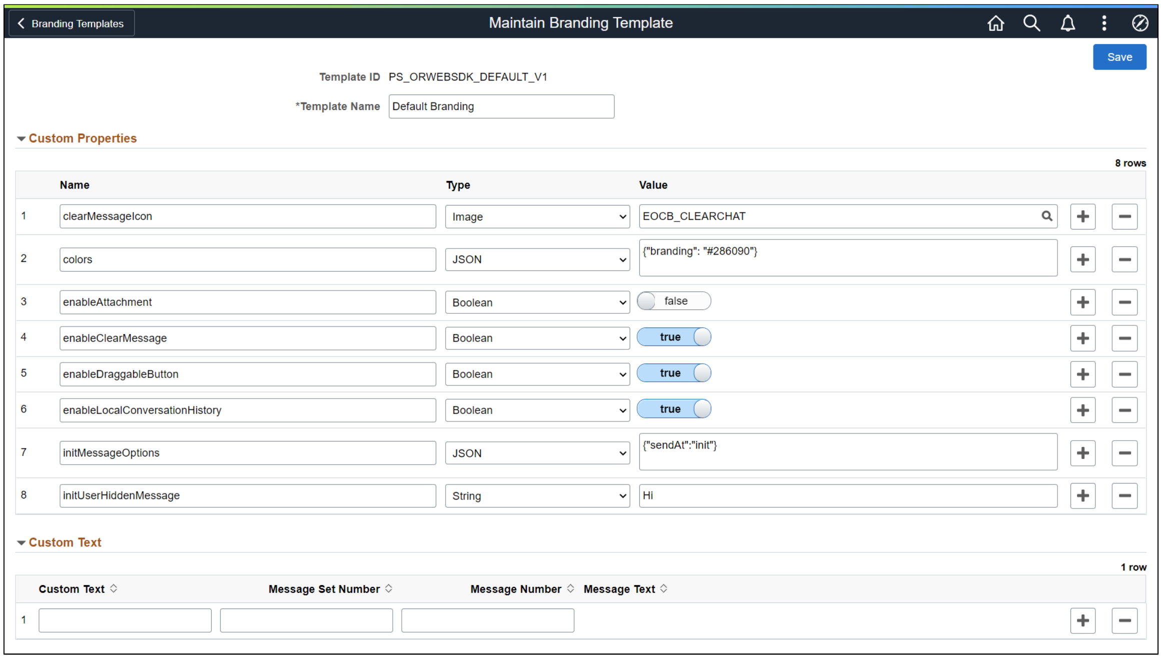
Field or Control	*Description*
Field	Description
Bot name	Name of the Bot

Field or Control	***Description***
Bot Channel ID	Enter the Channel ID of the corresponding channel which routes chat request either to Skill or a Digital Assistant in ODA. For more details, see Creating the Web Channel
Bot Type	Choose 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, such as color scheme, initial greeting, attachments, and other behaviors.

Maintain Branding Template page.



Field or Control	***Description***
Template Name	Enter a name for the template.

Custom Properties

Choose the custom properties for the bot available from ODA to customize the digital assistant layout, color and icons. In the Name filed, enter the appropriate name reference listed in the ODA documentation to set the custom property.

Use the *botButtonIcon* custom property to update the icon associated with the digital assistant. PeopleSoft delivers these icons:

- *PS_CHATBOTICON_1_L_FL*
- *PS_CHATBOTICON_2_L_FL*
- *PS_CHATBOTICON_3_L_FL*
- *PS_CHATBOTICON_4_L_FL*

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

After configuring the Bot ID, chatbot can be rendered on relevant fluid pages of the application. Based on the Chatbot Type selected in the Bot Definition page, the chat client can be rendered as a tile or as a widget. This section discusses:

- Adding the Chatbot for a Delivered Skill to a PeopleSoft Page as a Tile
- Adding the Chatbot for a New Skill to a PeopleSoft Page as a Tile
- Adding the Chatbot to a PeopleSoft Page as a Widget

Adding the Chatbot for a Delivered Skill to a PeopleSoft Page as a Tile

PeopleSoft delivers the tile for the delivered skills. To enable the delivered skill as a tile in a page:

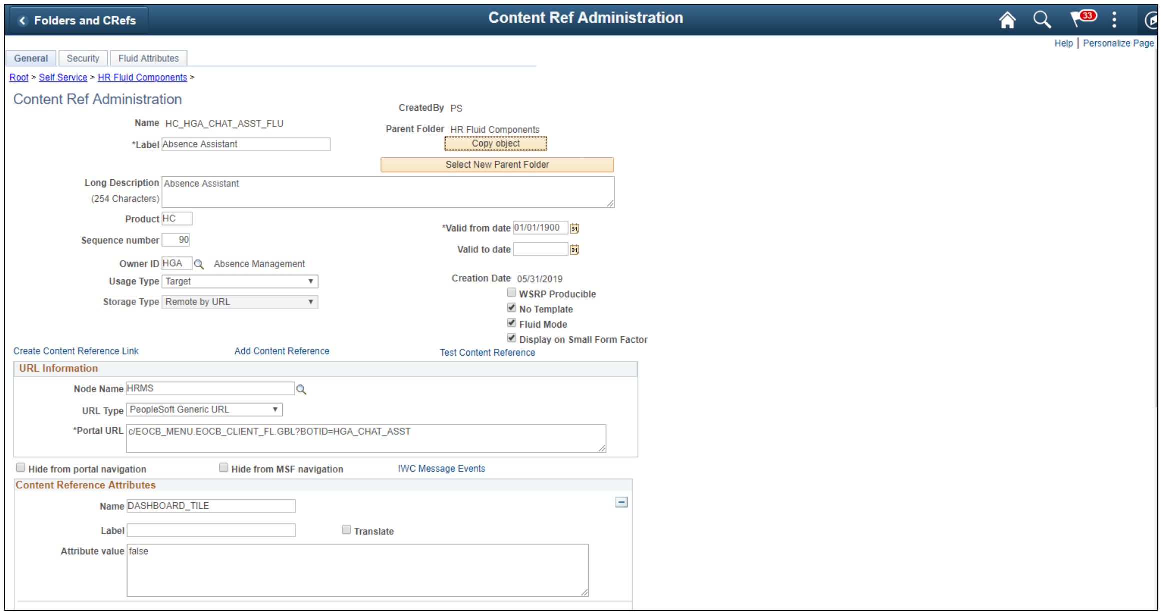
1. From the relevant Homepage, choose the Personalize Homepage option.
2. Choose the Add Tile button.
3. Add the delivered Chatbot Tile to the homepage.

Adding the Chatbot for a New Skill to a PeopleSoft Page as a Tile

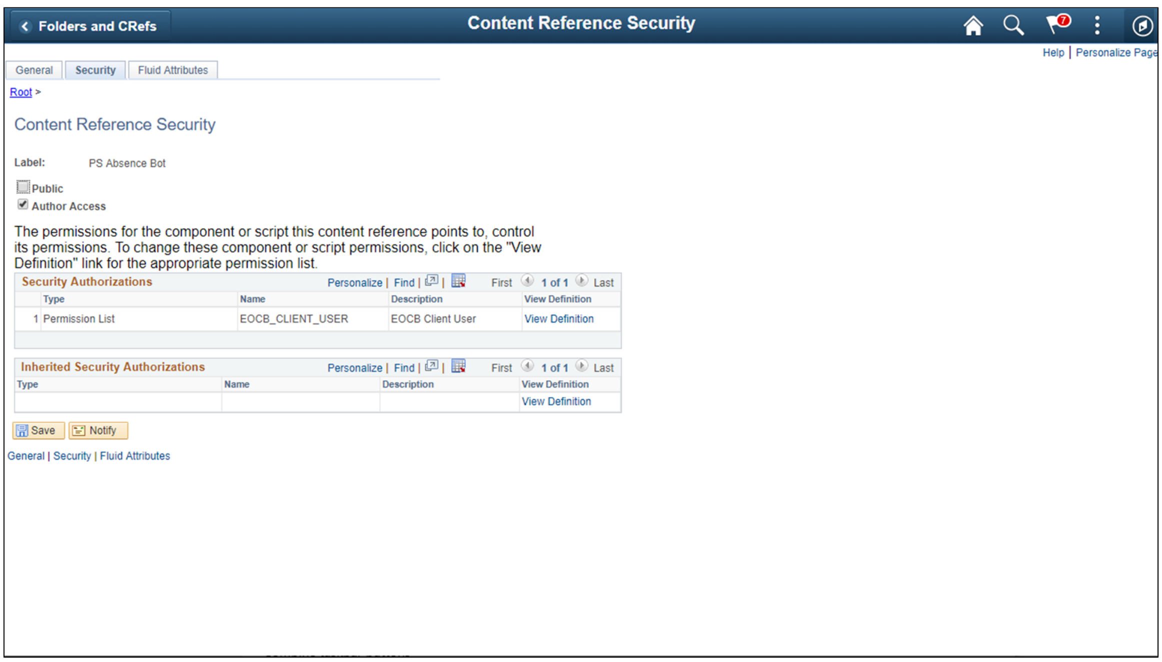
To create and enable the tile for the chatbot for a new skill:

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*.

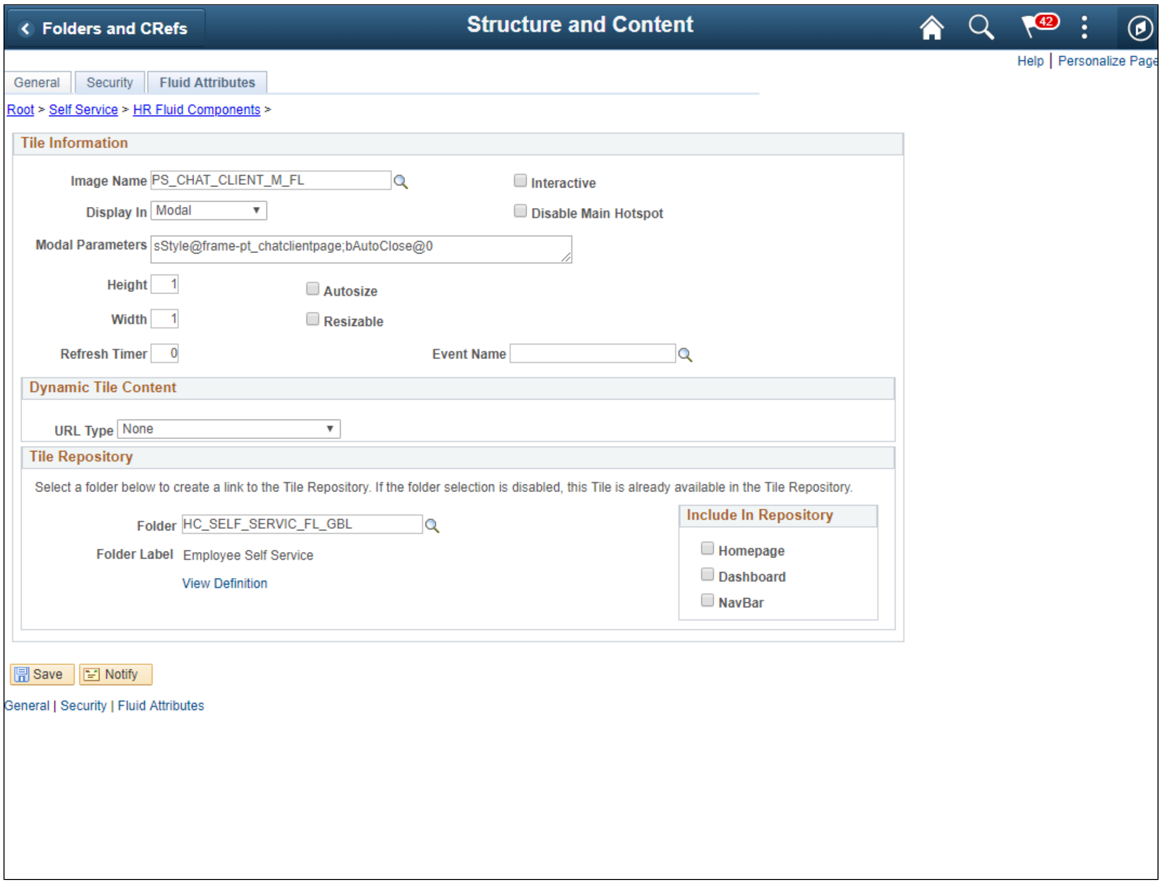
Content Reference General tab.



This example illustrates the Content Reference Security tab.

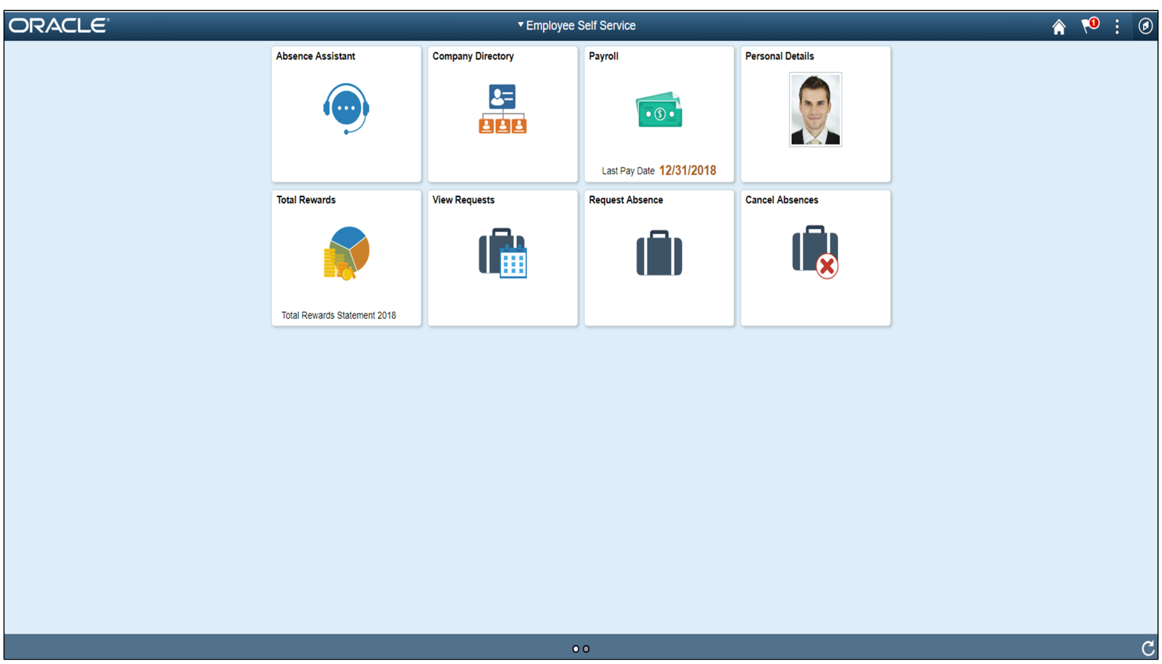


This example illustrates the Content Reference Fluid Attributes tab.



Once this is done, Add the tile to the relevant homepages.

This example illustrates the 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.

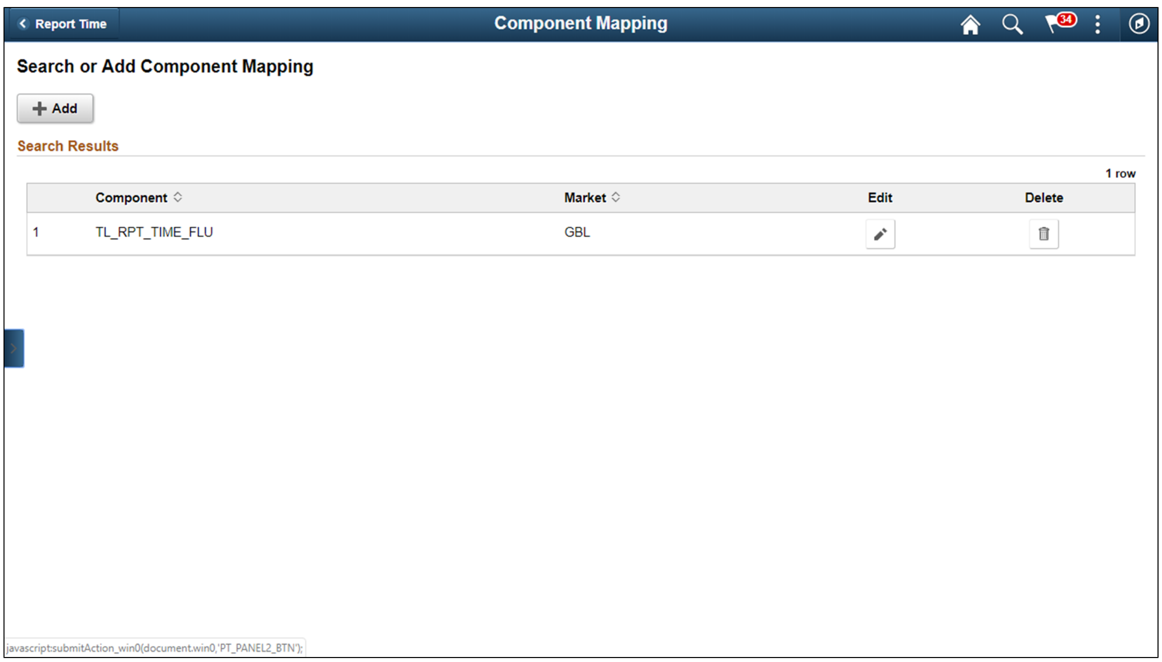
Component Mapping Page

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.

Navigation:

Enterprise Component > **Chabot Configurations** > **Chatbot Component Mapping** > **Component Mapping**

This example illustrates the Component Mapping page

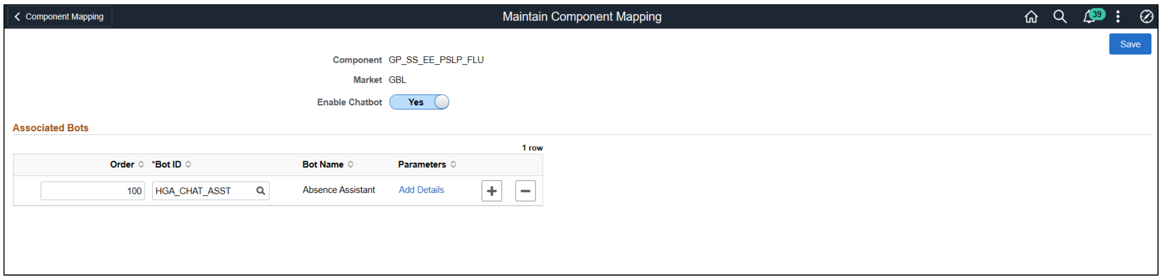


To add a new component, click the **Add** button.

Maintain Component Mapping Page

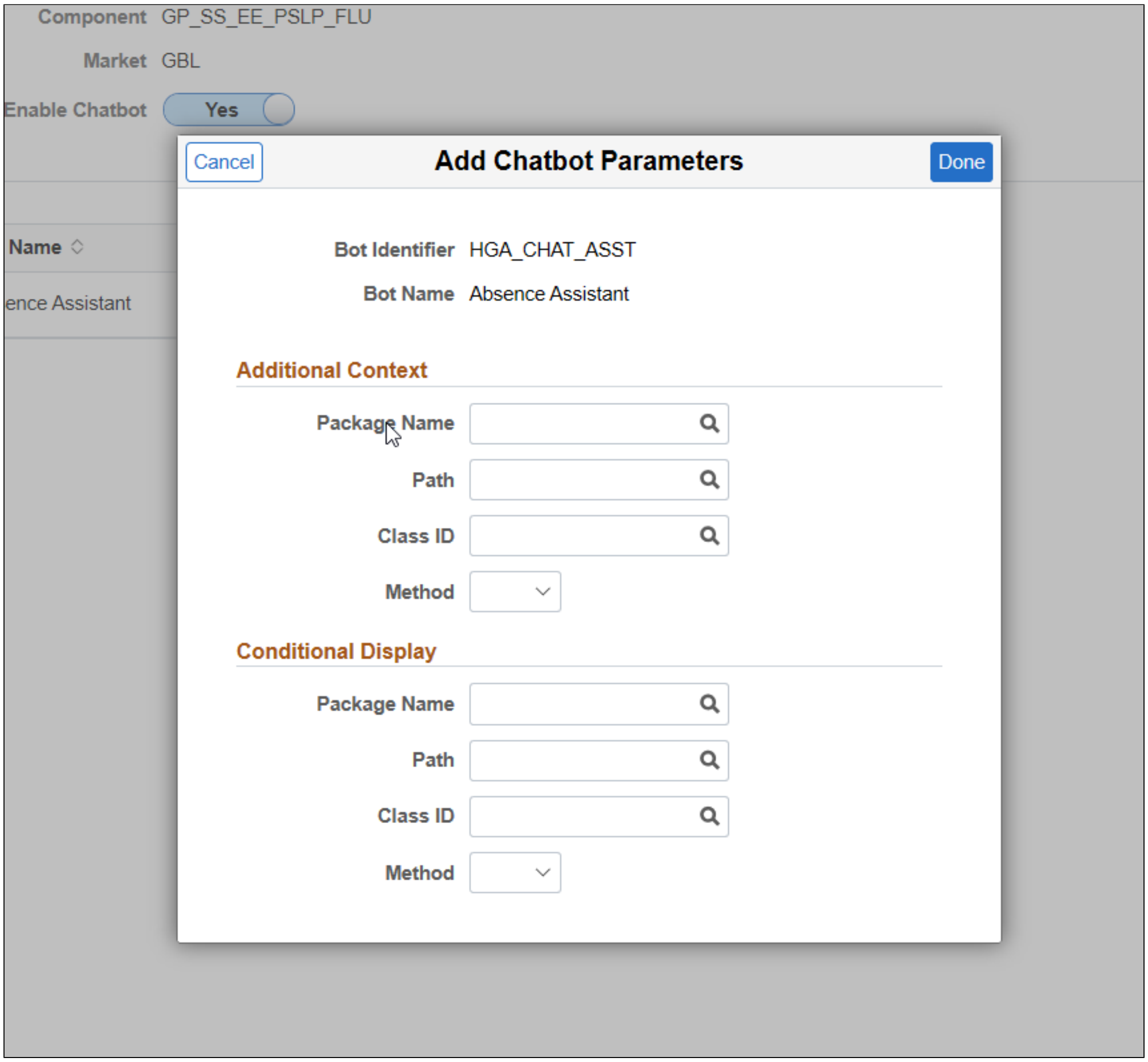
Use the Maintain Component Mapping page (EOCB_COMP_ASSOC_FL) to associate Bot IDs to a component.

This example illustrates the Maintain Component Mapping page



Field or Control	*Description*
Component	Choose the component in which the bot needs to be enabled.
Market	Choose the market.
Enable Chatbot	Select *Yes* to enable a chatbot on the component. After you save the component mapping, the event mapping configuration is automatically created for all the Content References that point to the selected component. **Note:** This toggle is disabled when you implement the Global Chatbot feature. Global chatbots manage associated bots and override settings using the Global Chatbot Configuration - Override Settings Page.
Order	Specify the 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.
Bot Name	Name of the bot is displayed based on the selected Bot ID.
Parameters	Click the **Add Details** link to open the Add Chatbot Parameters modal.

This example illustrates the Add Chatbot Parameters Modal



As an admin user or application developer, you can create application package and corresponding application class for a specific chatbot. It gives you more control in managing the chat widget in a component. Based on your business requirements, you can configure the context data to be passed and also whether to conditionally hide or display the widget.

Additional Context

Here, you can specify the application package, class and method you have created for passing additional context details.

Field or Control	***Description***
Package Name	Select the application package.
Path	Select the required path.
Class ID	Select the application class ID.

Field or Control	Description
Method	Select the application class method. The value returned after execution of this application class are passed as contextual parameters when the chat client is launched. The contextual parameters can then be retrieved within the Skill Dialog flow from user profile variable - ps_context_pram.

Conditional Display

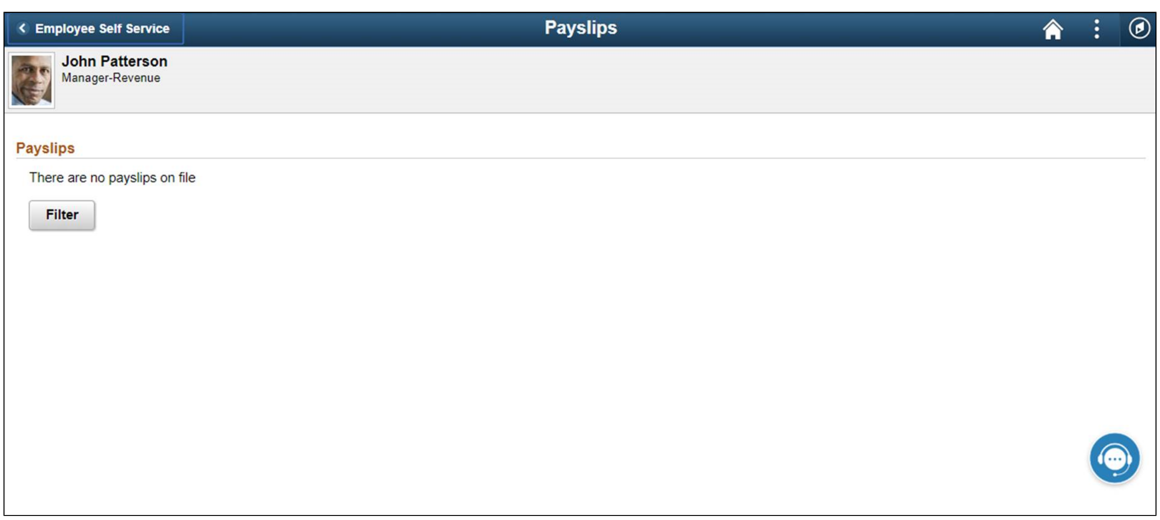
Even if the chatbot widget is enabled, as an application developer, you can conditionally hide or display the widget based on your business requirements.

Field or Control	Description
Package Name	Select the application package you have created with conditions.
Path	Select the required path.
Class ID	Select the application class ID.
Method	Select the application class method. The boolean value returned after execution of this app class controls the visibility of the chat widget.

Note: This feature applies to the HCM pillar only.

Once you save, the chatbot widget becomes available at the bottom right corner of the application page.

This example illustrates the Chatbot widget on the application page



Creating Global Chatbots

This topic discusses creating and configuring global chatbots.

Note: This feature is currently only used by the FSCM and HCM products.

Pages Used to Create Global Chatbots

Page Name	*Definition Name*	*Usage*
Global Chatbot Configuration Page	EOCB_SKILLSRCH_FL	View, edit, or add global chatbot definitions. You can also activate or delete global chatbot definitions from this page.
Global Chatbot Configuration - Bot Definition Page	EOCB_BOTCFG_FL	View, edit, or add chatbot definitions.
Add Bot Definition Page	EOCB_BOTDEFN_FL	Add a new chatbot, which can be configured as a skill or digital assistant.
Global Chatbot Configuration - Global Settings Page	EOCB_GLBL_STTNG_FL	Select a chatbot to serve as a global chatbot and associate it with a PeopleSoft portal. You can also define conditional display requirements for the global chatbot.
Global Chatbot Configuration - Override Settings Page	EOCB_OVRRDE_CMP_FL	View existing global chatbot overrides for a component, add new overrides, or clone overrides.
Add Override Settings Page	EOCB_CMP_OVRD_FL	Hide the global chatbot from a component or override it with a different chatbot.
Add Chatbot Parameters Page	EOCB_OVRD_MAP_SCF	Define the conditions or order in which the chatbot displays, when overriding or restricting the global chatbot from a component.
Clone Component Overrides Page	EOCB_CLON_COMP_SCF	Clone component override settings from an existing chatbot.

Understanding Global Chatbots

The Global Chatbot Configuration component enables you to create a chatbot that is visible across all components within a PeopleSoft portal.

You can configure global chatbots to be a *skill* or a *digital assistant.* Once the global chatbot definition is complete, simply enable the chatbot and the event mapping configuration is automatically created for all components in the portal.

The Global Chatbot Configuration component also provides you with several methods to fine-tune global visibility and access:

- Limit access by user role.
- Limit visibility using conditional display parameters.
- Limit visibility by hiding the global chatbot from specific components.
- Override the global chatbot with a different chatbot on specific components.

Steps to Create a Global Chatbot

Follow these steps to create a global chatbot:

1. Add a new chatbot definition and define access privileges by user role using the Global Chatbot Configuration - Bot Definition Page and Add Bot Definition Page. You can configure the chatbot as a skill or digital assistant.
2. Configure the chatbot to serve as a global chatbot and associate it with a PeopleSoft portal using the Global Chatbot Configuration Activity Guide. The Global Chatbot Configuration - Global Settings Page represents first step of the activity guide.
3. (Optional) Define conditional display requirements for the global chatbot using the Global Chatbot Configuration - Global Settings Page.
4. (Optional) Define settings to hide the global chatbot from a component or override it with a different chatbot using the Global Chatbot Configuration - Override Settings Page and Add Override Settings Page.
5. Enable the global chatbot using the Global Chatbot Configuration Page.

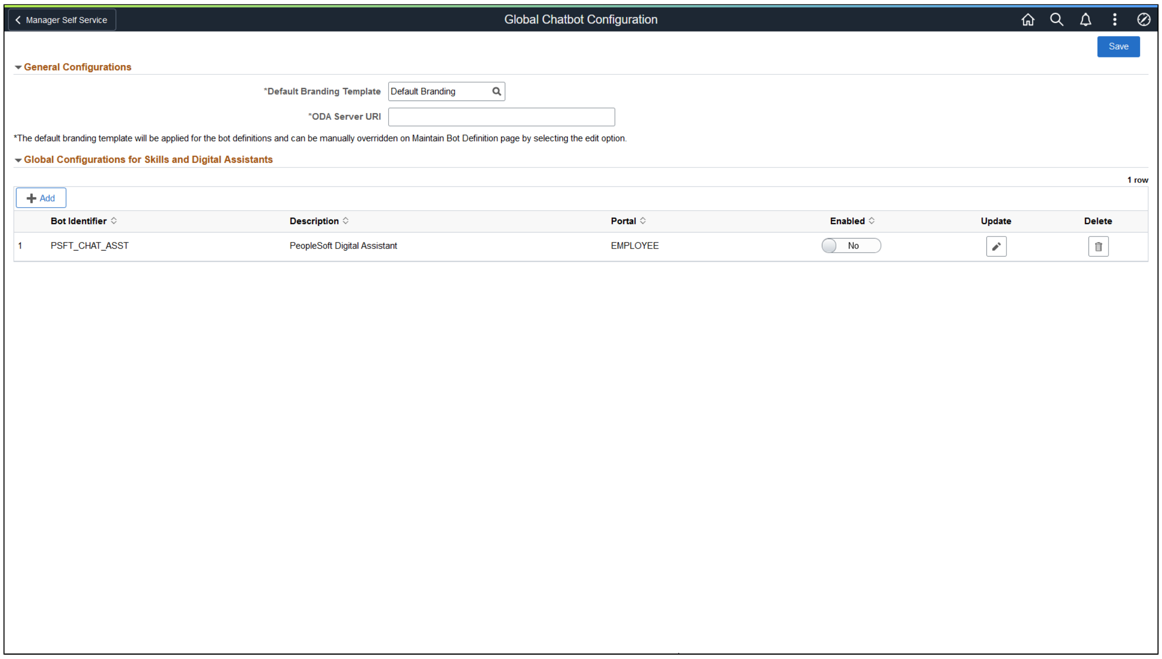
Global Chatbot Configuration Page

Use the Global Chatbot Configuration page (EOCB_SKILLSRCH_FL) to view, edit, or add global chatbot definitions. You can also activate or delete global chatbot definitions from this page.

Navigation:

Enterprise Components > **Chatbot Configurations** > **Global Chatbot Configuration**

This example illustrates the fields and controls on the Global Chatbot Configuration page.



Field or Control	***Description***
Default Branding Template	Select the default branding template for the global chatbot. Branding templates control the chatbot color scheme, initial greeting, attachments, and other behaviors. Define branding templates using the Maintain Branding Template Page.
ODA Server URI	Enter the Uniform Resource Identifier of your Oracle Digital Assistant instance.
Add	Select this button to access the first step of the Global Chatbot Configuration Activity Guide (Global Chatbot Configuration - Bot Definition Page) and create a new global chatbot.
Bot Identifier	Displays the ID of the global chatbot definition.
Description	Displays the description of the global chatbot definition.
Portal	Displays the PeopleSoft portal associated with the global chatbot. Only one portal can be associated with the global chatbot. You specify the portal for the global chatbot using the Global Chatbot Configuration - Global Settings Page.

Field or Control	*Description*
Enabled	Enable or disable the global chatbot definition. Select *Yes* to enable the global chatbot across the portal. When you save the transaction, the event mapping configuration is automatically created for all components in the portal. The global chatbot is visible across all components within the portal. **Note:** You can only activate or deactivate a global chatbot definition from this page.
Update	Select to access the Global Chatbot Configuration - Bot Definition Page and update a global chatbot definition.
Delete	Select to delete an existing global chatbot definition.
Save	Select to save changes to global chatbot definitions.

Global Chatbot Configuration - Bot Definition Page

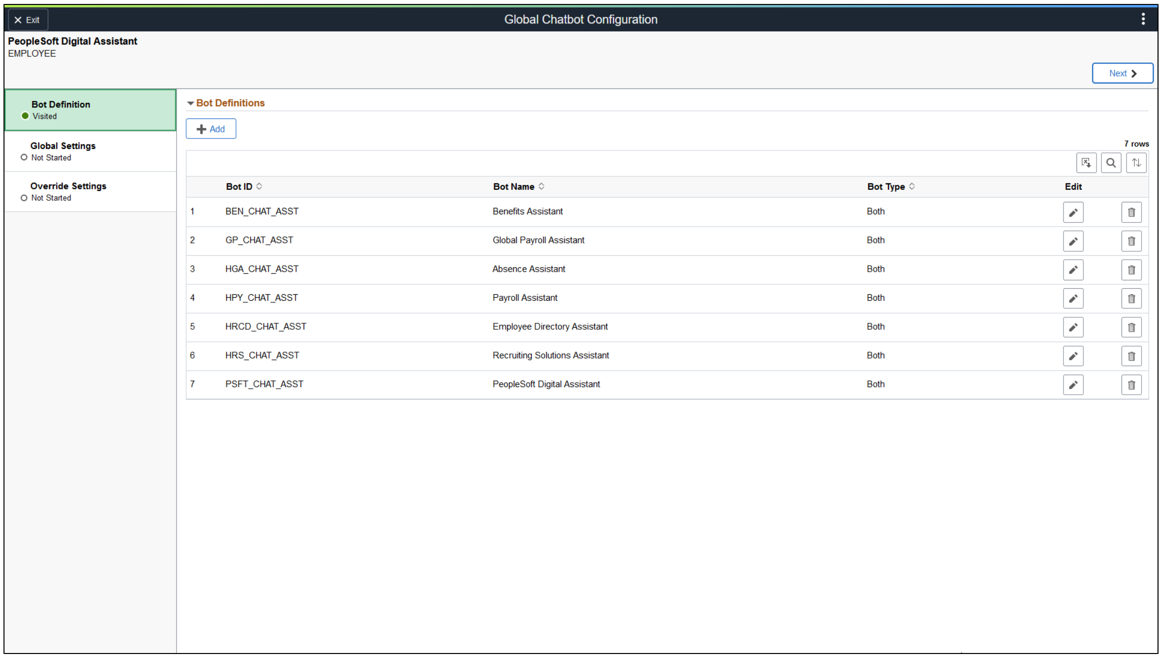
Use the Global Chatbot Configuration - Bot Definition page (EOCB_BOTCFG_FL) to view, edit, or add chatbot definitions.

Navigation:

Enterprise Components > **Chatbot Configurations** > **Global Chatbot Configuration** > **Select the Add button**

Enterprise Components > **Chatbot Configurations** > **Global Chatbot Configuration** > **Select the Update button for an existing chatbot definition**

This example illustrates the fields and controls on the Global Chatbot Configuration - Bot Definition page.



Field or Control	***Description***
Add	Select to access the Add Bot Definition Page and add a new chatbot.
Bot ID	Displays the ID of the chatbot.
Bot Name	Displays the name of the chatbot.
Bot Type	Displays the format in which the chatbot client is rendered. Values are: *Web Based, Widget,* or *Both.* This value is defined on the Add Bot Definition Page.
Edit	Select to access the Edit Bot Definition page and edit the chatbot definition. See Add Bot Definition Page
Delete	Select to delete an existing chatbot. **Note:** Deletions are not final until you save the transaction.
Next	Select to advance to the next step of global chatbot configuration, the Global Chatbot Configuration - Global Settings Page.

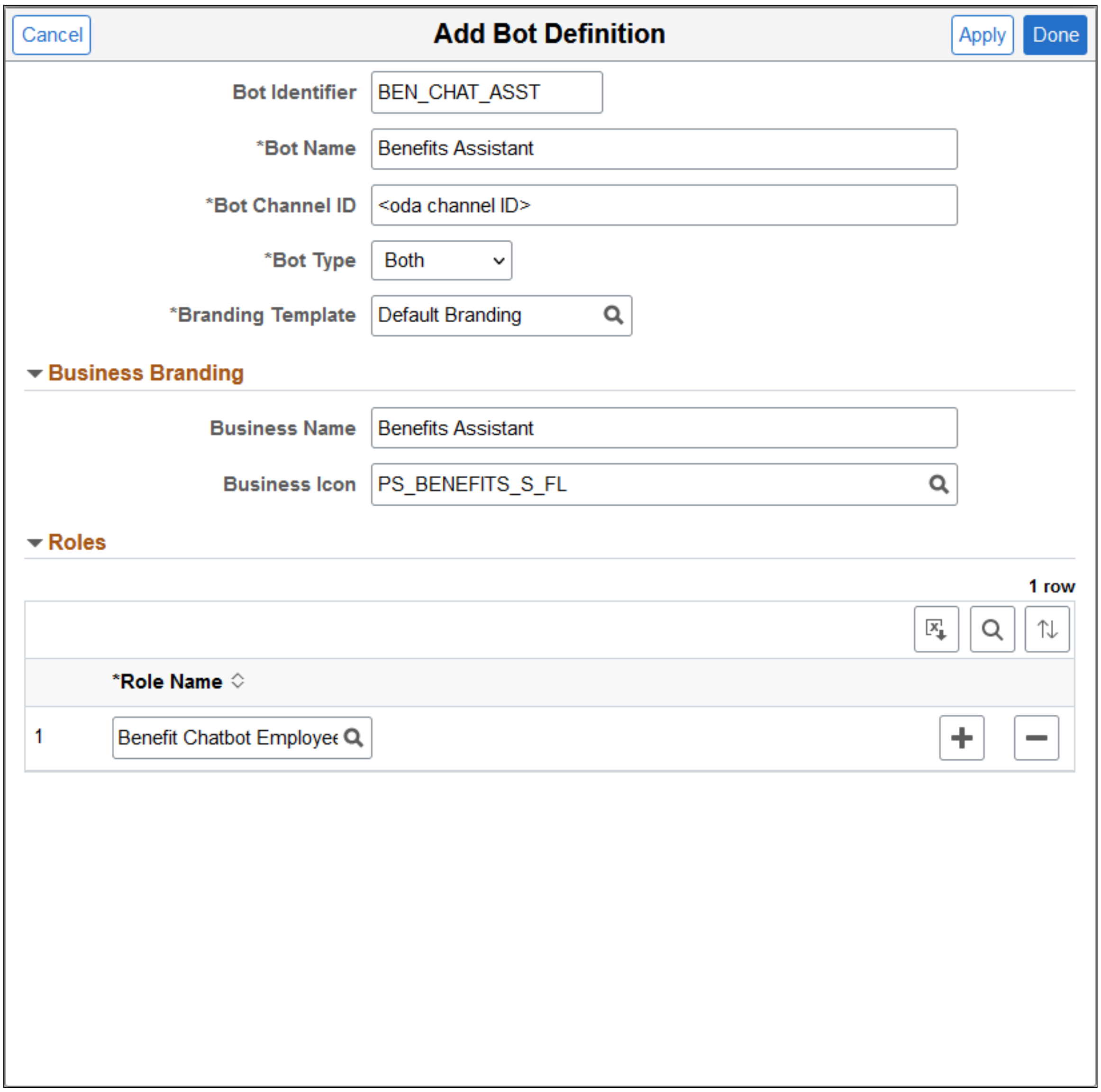
Add Bot Definition Page

Use the Add Bot Definition page (EOCB_BOTDEFN_FL) to add a new chatbot, which can be configured as a skill or digital assistant.

Navigation:

Select the Add button on the Global Chatbot Configuration - Bot Definition Page.

This example illustrates the fields and controls on the Add Bot Definition page.



Field or Control	***Description***
Bot Identifier	Enter the ID of the chatbot.
Bot Name	Enter the name of the chatbot.

Field or Control	Description
Bot Channel ID	Enter the ID of the channel you want to use to route a chat request to an ODA skill or Digital Assistant. For more details, see Creating the Web Channel.
Bot Type	Select the format in which the chatbot client is rendered. Available types are: • *Web Based* - Renders the chat client as a tile. • *Widget* - Renders the chat client as a widget at the bottom of the screen • *Both* - Renders the chat client in web and widget formats.
Branding Template	Select a branding template for the chatbot. Branding templates control the chatbot color scheme, initial greeting, attachments, and other behaviors. Define branding templates using the Maintain Branding Template Page.
Business Name	Enter a name for the chatbot. The name you specify appears to users on the chatbot client.
Business Icon	Select an icon for the chatbot. The chatbot client takes the form of the icon you specify.
Role Name	Select user roles that can access the chatbot.

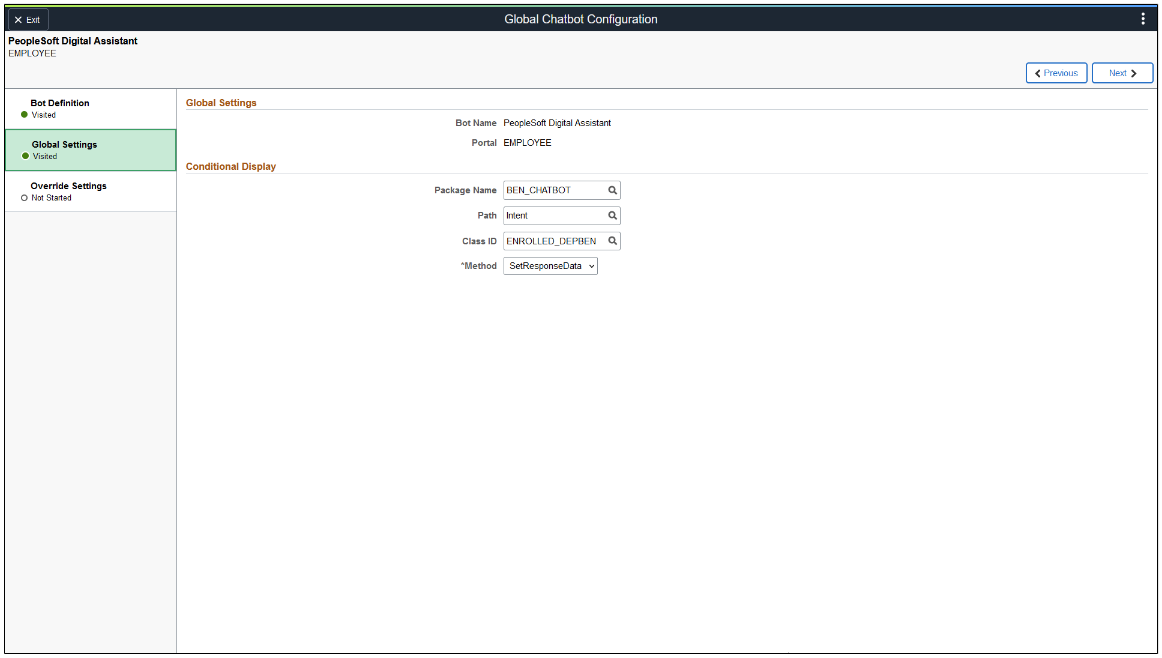
Global Chatbot Configuration - Global Settings Page

Use the Global Chatbot Configuration - Global Settings page (EOCB_GLBL_STTNG_FL) to select a chatbot to serve as a global chatbot, and associate it with a PeopleSoft portal. You can also define conditional display requirements for the global chatbot.

Navigation:

Select the Next button on the Global Chatbot Configuration - Bot Definition Page.

This example illustrates the fields and controls on the Global Chatbot Configuration - Global Settings page.



Global Settings

Field or Control	***Description***
Bot Name	Select a chatbot to serve as a global chatbot. A global chatbot is visible across all components within a PeopleSoft portal.
Portal	Select a PeopleSoft portal to associate with the global chatbot. A global chatbot can only be associated with one portal.

Conditional Display

Use this section to define conditional display requirements for the global chatbot. That is, you can prevent the global chatbot from displaying unless certain conditions are met. This section is useful when you want to restrict the global chatbot from many components. If you want to restrict the global chatbot from only a few components, you can do so here, but the Global Chatbot Configuration - Override Settings Page may be more convenient.

Note: This section is optional.

Field or Control	***Description***
Package Name	Select the PeopleTools application package related to your conditional display requirement.
Path	Select the path (location) of the PeopleTools Application Class related to your conditional display requirement.
Class ID	Select the PeopleTools Application Class related to your conditional display requirement.
Method	Select the application class method related to your conditional display requirement. The method should return a *True* or *False* value. A value of True indicates that the global chatbot should display. A value of False indicates that the global chatbot should not display.

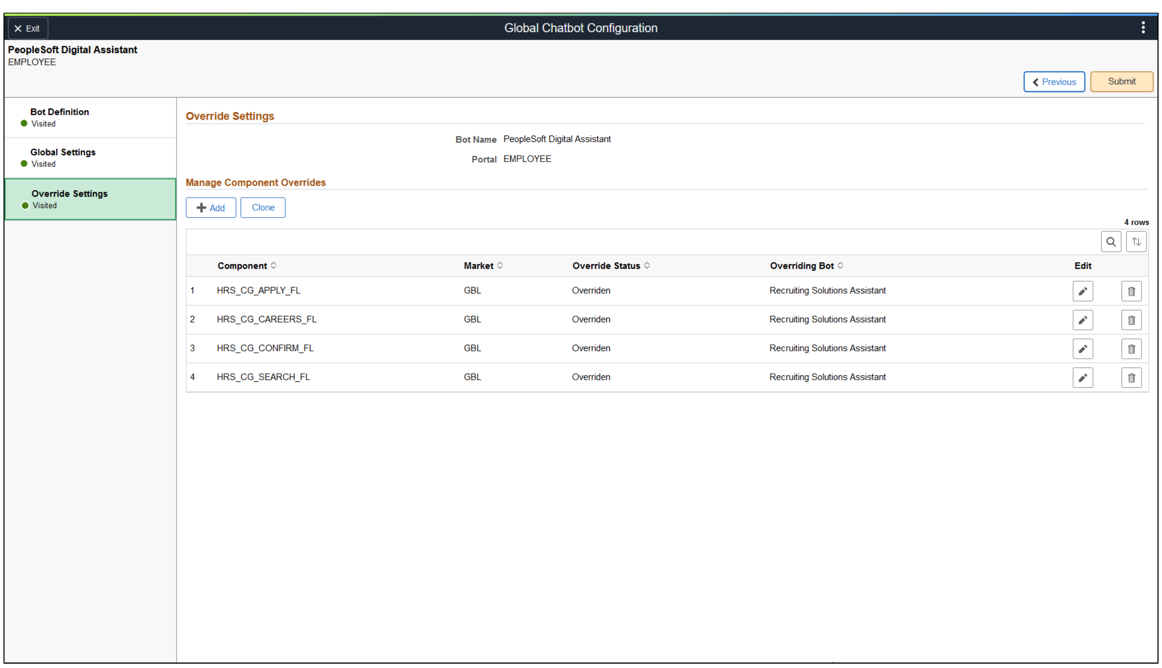
Global Chatbot Configuration - Override Settings Page

Use the Global Chatbot Configuration - Override Settings page (EOCB_OVRRDE_CMP_FL) to view existing global chatbot overrides for a component, add new overrides, or clone overrides.

Navigation:

Select the Next button on the Global Chatbot Configuration - Global Settings Page.

This example illustrates the fields and controls on the Global Chatbot Configuration - Override Settings page.



Field or Control	***Description***
Bot Name	Displays the global chatbot.
Portal	Displays the PeopleSoft Portal associated with the global chatbot.
Add	Select to access the Add Override Settings Page and hide the global chatbot or override it with a different chatbot.
Clone	Select to access the Clone Component Overrides Page and clone component override settings from an existing chatbot.
Component	Displays the PeopleSoft component that has override settings defined for it.
Market	Displays the market in which the component is registered (for example, *Global*).
Override Status	Displays the override status for the component.
Overriding Bot	Displays the chatbot that overrides the global chatbot.
Edit	Select to access the Edit Override Settings page and edit the override settings for the component. See Add Override Settings Page.
Delete	Select to delete an existing global chatbot override. **Note:** Deletions are not final until you save the transaction.

Note: Once you implement global chatbot functionality, use this page exclusively to manage associated bots and override settings. The system automatically disables the **Enable Chatbot** toggle on the Component Mapping Page.

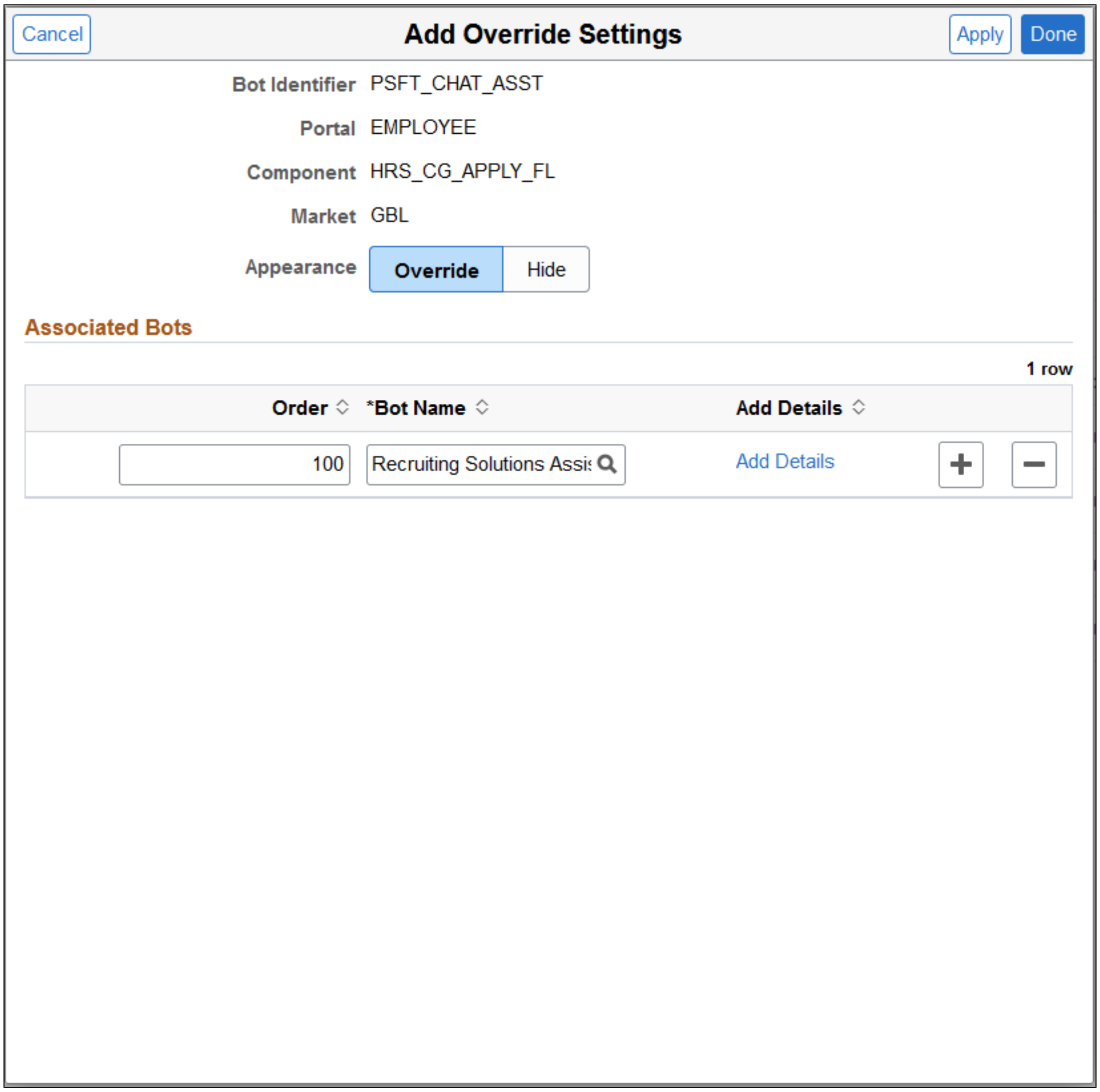
Add Override Settings Page

Use the Add Override Settings page (EOCB_CMP_OVRD_FL) to hide the global chatbot from a component or override it with a different chatbot. This page is useful when you want to override or restrict the global chatbot for only a few components.

Navigation:

Select the Add button on the Global Chatbot Configuration - Override Settings Page.

This example illustrates the fields and controls on the Add Override Settings page.



Field or Control	*Description*
Bot Name	Displays the name of the global chatbot.
Portal	Displays the portal associated with the global chatbot.
Component	Select the component for which you want to override the global chatbot.
Market	Displays the market in which the component is registered.
Appearance (Override or Hide)	Select *Override* to override the global chatbot with a different chatbot on the specified component. Select *Hide* to hide the global chatbot on the specified component.

Field or Control	*Description*
Order	When multiple chatbots are associated with the component, enter a numeric value to indicate the sequence in which the chatbots are displayed to a user. If the user has access to the chatbot with the lower numeric value, and conditional display criteria for the chatbot is satisfied, the chatbot displays for the user. If the user does not have access to the chatbot with the lower numeric value, or conditional display criteria for the chatbot is not satisfied, the system evaluates the subsequent chatbot in the sequence. If user access and conditional display conditions are satisfied for the subsequent chatbot, the chatbot displays for the user. Conditional display and contextual parameters are defined on the Add Chatbot Parameters Page.
Bot Name	Select the chatbot you want to override the global chatbot.
Add Details	Select to access the Add Chatbot Parameters Page and define the conditions or order in which the chatbot displays.

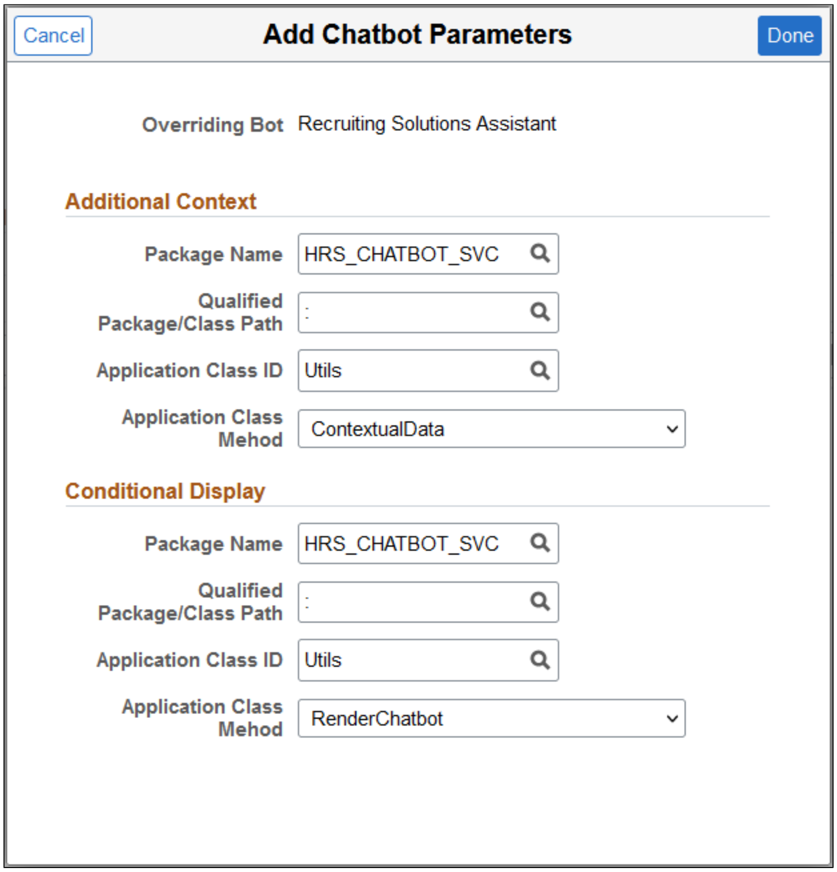
Add Chatbot Parameters Page

Use the Add Chatbot Parameters page (EOCB_OVRD_MAP_SCF) to define the conditions or order in which the chatbot displays, when overriding or restricting the global chatbot from a component.

Navigation:

Select the Add Details link on the Add Override Settings Page.

This example illustrates the fields and controls on the Add Chatbot Parameters page.



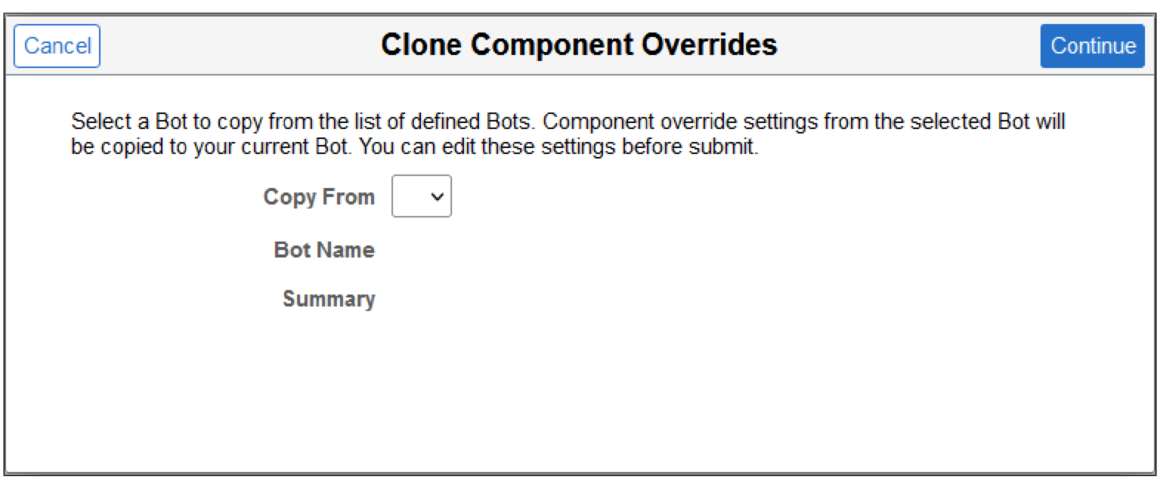
Clone Component Overrides Page

Use the Clone Component Overrides page (EOCB_CLON_COMP_SCF) to clone component override settings from an existing chatbot.

Navigation:

Select the Clone button on the Global Chatbot Configuration - Override Settings Page.

This example illustrates the fields and controls on the Clone Component Overrides page.



Field or Control	***Description***
Copy From	Select an existing chatbot to clone component override settings from it.
Bot Name	Displays the name of the chatbot.
Summary	Displays a summary of the chatbot.

Chapter 24

PeopleSoft Intelligent Chat ASsistant from Oracle (PeopleSoft PICASO)

Understanding PeopleSoft PICASO

PeopleSoft Intelligent Chat ASsistant from Oracle (PICASO, or PeopleSoft PICASO), refers to the complete chatbot solution that is delivered by PeopleSoft.

PeopleSoft PICASO uses the Oracle Digital Assistant (ODA) to create and deploy role-based or function-based digital assistants for your users, enabling them to interact with multiple skills simultaneously through a unified user interface. With their AI-driven interfaces, digital assistants help users accomplish a variety of tasks in natural language conversations.

PeopleSoft PICASO represents all digital assistants that are published by PeopleSoft. They are:

- Employee Digital Assistant

  The Employee Digital Assistant comprises of these skills:

  - Absence Skill

    Use this skill to ask absence-related questions, and perform self-service transactions, such as adding or canceling an absence request.

    For more information, see *PeopleSoft HCM: Absence Management*, "Understanding Absence Assistant."

  - Benefits Skill

    Use this skill to ask questions about benefits, view or update employee’s benefits enrollments.

    For more information, see *PeopleSoft HCM: Benefits Administration*, "Understanding Benefits Assistant."

  - Employee Directory Skill

    Use this skill to search for employee profiles and contact information from the Company Directory.

    For more information, see *PeopleSoft HCM: Human Resources Administer Workforce*, "Understanding Employee Directory Assistant Chatbot."

  - Expenses Skill

    Use this skill to perform expense report inquiries and create Wallet transactions.

    For more information, see *PeopleSoft FSCM: Expenses*, "Using the Expenses Skill".

- Payroll Skill

  Use this skill to ask questions about paychecks, and perform self-service transactions, such as adding or updating direct deposit information, or viewing year end forms.

  For more information, see *PeopleSoft HCM: ePay*, "Setting Up Payroll Assistant."

- Requisition Skill

  Use this skill to search for requisition items and view item statuses in the Request Lifespan.

  For more information, see *PeopleSoft FSCM: eProcurement*, "Understanding Requisition Inquiry Skill."

- Supplier Public Digital Assistant

  The Supplier Public Skill is part of PeopleSoft Intelligent Chatbot ASsistant from Oracle (PICASO). Use the Supplier Public Skill to inquire about business opportunities, and accomplish different tasks related to user registration and bidding events.

  For more information, see *PeopleSoft FSCM: PeopleSoft Source to Settle Common Information*, "Using The Supplier Skill On The Supplier Public Portal."

- Supplier Secure Digital Assistant

  The Supplier Secure Digital Assistant comprises of these skills:

  - Supplier Secure Collaboration Skill

    Use this skill to inquire about PO Acknowledgements, Overdue Shipments, and Rejected Receipts.

  - Supplier Secure General Skill

    Use this skill to inquire about Calendar Events, Announcements, FAQs, and contact details.

  - Supplier Secure Invoice and Payment Skill

    Use this skill to inquire about open invoices, recent invoices and invoices in dispute.

  - Sourcing Skill

    Use this skill to inquire about Invited Bid Events, Events Pending Awards, and Awarded Events.

  For more information see *PeopleSoft FSCM: PeopleSoft Source to Settle Common Information: "Using the Supplier Secure Digital Assistant"*.

- Recruiting Digital Assistant

  Recruiting Digital Assistant comprises the Recruiting Careers Skill and is part of the PeopleSoft Intelligent Chatbot ASsistant from Oracle (PICASO). Use the Recruiting Digital Assistant to assist external applicants to search jobs, view FAQs, application status, notifications and saved searches.

For more information, see *PeopleSoft HCM: Recruiting Solutions: "Setting Up Recruiting Digital Assistant"*

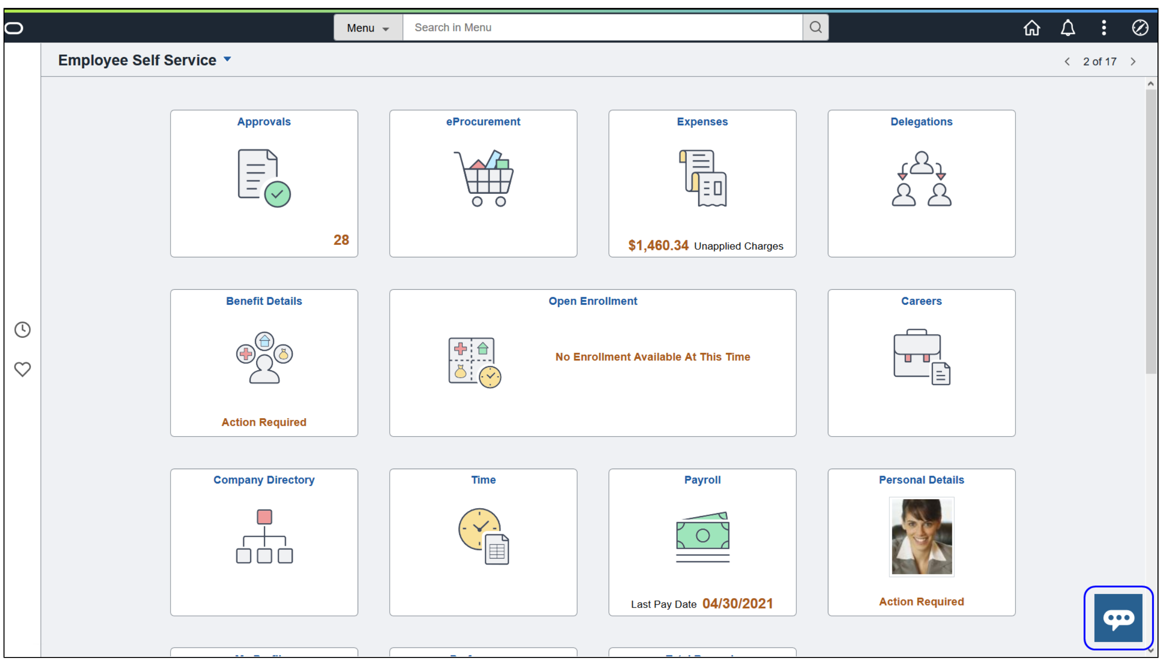
Note: You can assemble one or more PeopleSoft skills in a digital assistant. PeopleSoft skills are individual computer programs that focus on specific types of tasks, such as requesting absence, changing dependants/beneficiaries, or inquiring about requisitions. You can add skills to a digital assistant and customize it further based on your unique requirements. For more information, refer to Oracle Digital Assistants and Skills.

Accessing PeopleSoft PICASO

To launch PeopleSoft PICASO, use the button that appears at the bottom right corner of a PeopleSoft homepage, dashboard, or fluid application page that is set up to display it.

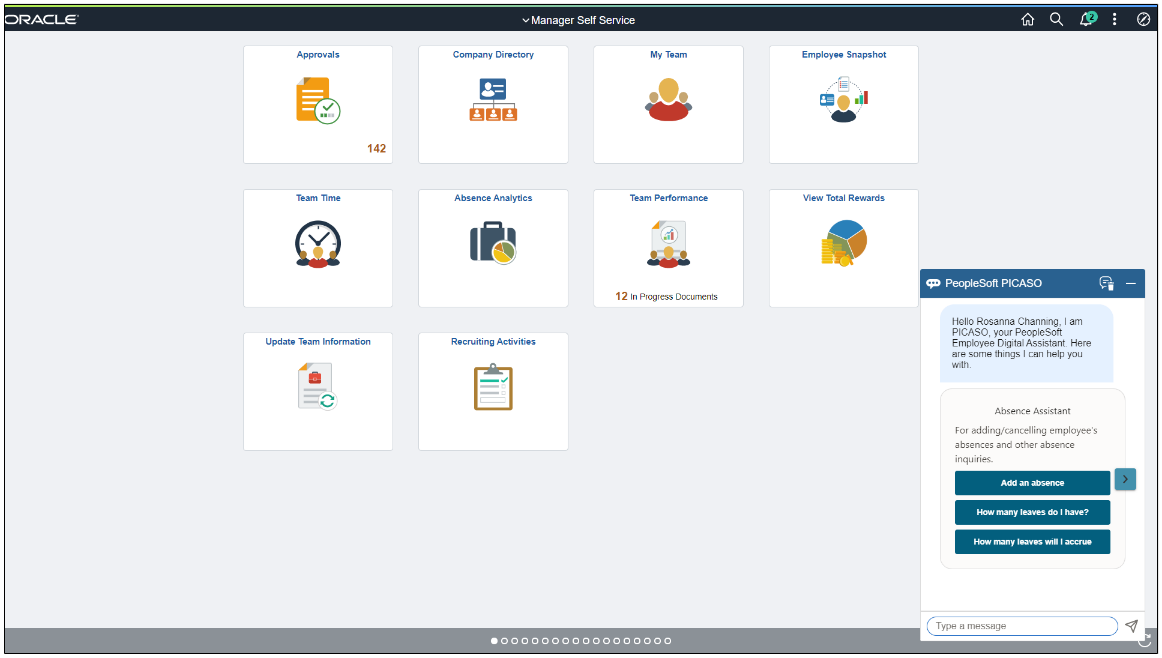
Note: Classic pages are not currently supported.

This example illustrates PeopleSoft PICASO, which appears as a button at the bottom right corner of a PeopleSoft homepage, dashboard, or fluid application page.

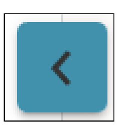
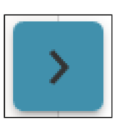


Note: The PeopleSoft PICASO is available for both desktop and mobile users.

This example illustrates the Employee Digital Assistant that is designed to assist employees.



When the chat session starts, the digital assistant welcomes the user, lists what it can do, and provides entry points into the skills that it supports. The user can use the buttons of a given skill to perform actions, or request for service by conversing with the digital assistant.

Field or Control	***Description***
	Use this button to clear the chat. **Note:** If the chat is not cleared manually, the chat history is maintained throughout the session to provide a seamless interaction experience while you navigate through different skills. Once you log out from the session, the history is cleared.
 and 	Use these buttons to navigate to the previous or next skill.

For more information about chatbots and the technology behind PeopleSoft PICASO, see:

https://www.oracle.com/solutions/chatbots/what-is-a-chatbot/

Video: PeopleSoft Chatbot Technology and Extensibility

PeopleSoft delivers configuration pages that can be used to create definitions and branding of digital assistants. ODA is leveraged to enable digital assistants on PeopleSoft systems. For more details on ODA, refer to:

https://cloud.oracle.com/digital-assistant

Configuring PeopleSoft PICASO

This topic discusses how to configure PeopleSoft Intelligent Chat ASsistant from Oracle (PICASO, or PeopleSoft PICASO).

Configuring PeopleSoft PICASO

To configure PeopleSoft PICASO for a PeopleSoft application:

1. Install/pull a PeopleSoft-delivered digital assistant from the Skill Store.

   For more information, see Installing and Setting Up a Delivered Skill.

2. Create a channel and route it to the digital assistant.

   For more information, see Creating the Channel.

3. Update the delivered *PSFT_CHAT_ASST* PeopleSoft bot definition with the channel ID created in the previous step.

   For more information on how to complete the configuration, see Creating Bot Definitions.

4. Review the Component Mapping and enable the digital assistant manually for each component. It can be done in bulk using the *EOCB_CMPMAP* application engine process.

   Note: Repeat steps 3 and 4 for all participating applications/nodes in a cluster setup.

Enabling PeopleSoft PICASO on a Clustered Environment

You can run PeopleSoft PICASO in a clustered environment, which enables users to continue the interaction with the digital assistant across different nodes seamlessly.

For the digital assistant to work on a cluster environment, perform the following steps (before the skill setup):

1. Complete Integration Broker and Single Signon (SSO) setup between participating nodes in the cluster.

   For more information on the Integration Broker and SSO setup, see *PeopleTools: Integration Broker*, "Understanding Configuring PeopleSoft Integration Broker for Handling Services." and *PeopleTools: Security Administration*, "Implementing PeopleSoft-Only Single Signon."

2. Create routing for each node in the cluster corresponding to the Service - EOCB_Integration.

For more information on creating routing, see *PeopleTools: Integration Broker*, "Adding Routing Definitions."

Chapter 25

REST API Endpoints for PeopleSoft

Understanding REST API Endpoints for PeopleSoft

PeopleSoft delivers Representational State Transfer (REST) Application Programming Interfaces (APIs) to support your integration of PeopleSoft Skills with new or existing applications or business flows.

An API is a set of definitions and protocols that define how applications or devices can connect to and communicate with each other. It enables an application or service to access a resource within another application or service.

A REST API is an API that conforms to the constraints of REST architectural style and allows for interaction with RESTful web services.

REST APIs use a:

- GET request to retrieve a record.
- POST request to create one.
- PUT request to update a record.
- DELETE request to delete one.

This topic provides an overview of PeopleSoft delivered APIs and discuses these concepts:

- Delivered REST API Endpoint Common to PeopleSoft Applications
- Delivered REST API Endpoints for PeopleSoft HCM
- Delivered REST API Endpoints for PeopleSoft FSCM

Note: There are security implications when you use PeopleSoft resources from outside the system. To know more about the security implications, refer to the "Setting Applications Services Security" topic in the *PeopleTools Integration Broker* documentation. Also, refer to the "Understanding OAuth2.0" topic in the *PeopleTools Security Administration* documentation.

Delivered REST API Endpoint Common to PeopleSoft Applications

This table lists the delivered REST API common to PeopleSoft applications:

REST API	***Functional Area***	***Link to Product Documentation***
Chatbot Integration Framework Utility Services (utilities)	Chatbot Integration Framework	Understanding REST API Endpoints for PeopleSoft Chatbot Integration Framework Utility Services (utilities)

Delivered REST API Endpoints for PeopleSoft HCM

This table lists the delivered REST APIs for PeopleSoft HCM:

REST API	***Functional Area***	***Link to Product Documentation***
Absence Management Application Services (absence)	Absence Management	Understanding REST API Endpoints for PeopleSoft Absence Management Application Services (absence)
Employee Directory (employeedirectory)	Employee Directory	Understanding REST API Endpoints for PeopleSoft Employee Directory (employeedirectory)
Payroll for North America Services (payrollbankingyearendforms)	Payroll for North America	Understanding REST API Endpoints for PeopleSoft Payroll for North America Services (payrollbankingyearendforms)
Generate Careers URL (hrsutilities)	Recruiting	Understanding REST API Endpoints for PeopleSoft Generate Careers URL (hrsutilities)
Applicant Activity (hrsapplicantcgactivity)	Recruiting	Understanding REST API Endpoints for PeopleSoft Applicant Activity (hrsapplicantcgactivity)
Job Search Services (hrsjobs)	Recruiting	Understanding REST API Endpoints for PeopleSoft Job Search Services (hrsjobs)
HR Common Utility Services (hcmcommonutilities)	Not applicable.	Understanding REST API Endpoints for PeopleSoft HR Common Utility Services (hcmcommonutilities)

Delivered REST API Endpoints for PeopleSoft FSCM

PeopleSoft FSCM delivers the following REST APIs:

REST API	***Functional Area***	***Link to Product Documentation***
Get Requisition for Item (eprogetrequisitionforitem)	eProcurement	Understanding REST API Endpoints for PeopleSoft Get Requisition for Item (eprogetrequisitionforitem)
Get Requester List (eprogetrequesterlist)	eProcurement	Understanding REST API Endpoints for PeopleSoft Get Requester List (eprogetrequesterlist)

REST API	*Functional Area*	*Link to Product Documentation*
Get Requester Name (eprogetrequestername)	eProcurement	Understanding REST API Endpoints for PeopleSoft Get Requester Name (eprogetrequestername)
Get Requisition Status (eprogetrequisitionstatus)	eProcurement	Understanding REST API Endpoints for PeopleSoft Get Requisition Status (eprogetrequisitionstatus)
Fetch Disputed Invoices (esfetchdispinvoice)	eSettlements	Understanding REST API Endpoints for PeopleSoft Fetch Disputed Invoices (esfetchdispinvoice)
Fetch Invoice Inquiry (esfetchinvoiceinquiry)	eSettlements	Understanding REST API Endpoints for PeopleSoft Fetch Invoice Inquiry (esfetchinvoiceinquiry)
Payment Inquiry (esfetchpaymentinquiry)	eSettlements	Understanding REST API Endpoints for PeopleSoft Payment Inquiry (esfetchpaymentinquiry)
Get First Name (esgetname)	eSettlements	Understanding REST API Endpoints for PeopleSoft Get First Name (esgetname)
Invoice and Payment Inquiry (esinvpyminqlink)	eSettlements	Understanding REST API Endpoints for PeopleSoft Invoice and Payment Inquiry (esinvpyminqlink)
Fetch Invoice Status (esinvoicestatus)	eSettlements	Understanding REST API Endpoints for PeopleSoft Fetch Invoice Status (esinvoicestatus)
Payment Difference (espymntdiff)	eSettlements	Understanding REST API Endpoints for PeopleSoft Payment Difference (espymntdiff)
Fetch Payment Status (espaymentstatus)	eSettlements	Understanding REST API Endpoints for PeopleSoft Fetch Payment Status (espaymentstatus)
Fetch Denied Line (exdenydetails)	Expenses	Understanding REST API Endpoints for PeopleSoft Fetch Denied Line (exdenydetails)
Expense Type Location Validation (exexptypelocedit)	Expenses	Understanding REST API Endpoints for PeopleSoft Expense Type Location Validation (exexptypelocedit)

REST API	***Functional Area***	***Link to Product Documentation***
Fetch by Creation Date (exfetchbycreationdate)	Expenses	Understanding REST API Endpoints for PeopleSoft Fetch by Creation Date (exfetchbycreationdate)
Fetch By Sheet Name (exfetchbysheetname)	Expenses	Understanding REST API Endpoints for PeopleSoft Fetch By Sheet Name (exfetchbysheetname)
Fetch by Status (exfetchbystatus)	Expenses	Understanding REST API Endpoints for PeopleSoft Fetch by Status (exfetchbystatus)
Fetch Last Five Transactions (exfetchlast5)	Expenses	Understanding REST API Endpoints for PeopleSoft Fetch Last Five Transactions (exfetchlast5)
Date Validation (exfromtodatevalidation)	Expenses	Understanding REST API Endpoints for PeopleSoft Date Validation (exfromtodatevalidation)
Get Requester Name (exgetname)	Expenses	Understanding REST API Endpoints for PeopleSoft Get Requester Name (exgetname)
Get Transaction Details (exgettransdetails)	Expenses	Understanding REST API Endpoints for PeopleSoft Get Transaction Details (exgettransdetails)
Create Wallet Entry (exinsertmywallet)	Expenses	Understanding REST API Endpoints for PeopleSoft Create Wallet Entry (exinsertmywallet)
Send Notification (exsendnotification)	Expenses	Understanding REST API Endpoints for PeopleSoft Send Notification (exsendnotification)
Date Format Validation (exvalidatedateformat)	Expenses	Understanding REST API Endpoints for PeopleSoft Date Format Validation (exvalidatedateformat)
Wallet Location Validation (exwalletvalidateloc)	Expenses	Understanding REST API Endpoints for PeopleSoft Wallet Location Validation (exwalletvalidateloc)

REST API	Functional Area	Link to Product Documentation
Supplier Comprehensive Portal Service (scp)	Supplier Secure Collaboration Supplier Secure General Supplier Secure Invoice and Payment Supplier Public Sourcing	Understanding REST API Endpoints for PeopleSoft Supplier Comprehensive Portal Service (scp)

Understanding REST API Endpoints for PeopleSoft Chatbot Integration Framework Utility Services (utilities)

This topic lists the REST resources and its methods for the Chatbot Integration Framework Utility Services API (utilities). Use this API to retrieve message catalog and user profile details. You can also verify access for particular end point of REST service for a user.

API Resources Used With the Chatbot Integration Framework Utility Services API

This table lists the delivered API resources used with the Chatbot Integration Framework Utility Services API.

API Resource	Description
messagecatalog	API resource to retrieve message catalog data for a given set number and message number.
serviceaccess	API resource to verify access for service given the component name.
user	API resource to retrieve user profile details.

messagecatalog

API resource to retrieve message catalog data for a given set number and message number.

Method: GET

Path: /message/{msgSetNumber}

Request Parameters	***Description***
msgSetNumber	Message set number.

Response Parameters	***Response Result Type***	***Description***
⇒ `"msgCatBundleObject": { "msgCatBundleObject": ⇒ { "msgSetNumber": { "messageNumber":`	Success	Message Number and Text in a Message Set.
⇒ `"msgCatDescrBundleObject":⇒ { "msgSetNumber": { "messageNumber":`	Success	Message Number and Description in a Message Set.

Method: POST

Path: /message/{msgSetNumber}

Request Parameters	***Description***
msgSetNumber	Message set number.

Response Parameters	***Response Result Type***	***Description***
⇒ `"msgCatBundleObject": { "msgCatBundleObject": ⇒ { "msgSetNumber": { "messageNumber":`	Success	Message Number and Text in a Message Set.
⇒ `"msgCatDescrBundleObject"⇒ : { "msgSetNumber": { "messageNumber"`	Success	Message Number and Description in a Message Set.

serviceaccess

API resource to verify access for service given the component name.

Method: GET

Path: /verify/{componentName}

Request Parameters	***Description***
componentname	ODA component name.

Response Parameters	***Response Result Type***	***Description***
No response parameters.	N/A	N/A

Response Result Code	***Description***
200	Authorized Unauthorized Invalid

Method: GET

Path: /verify/{serviceID}/{root}/{uri}/{method}

Request Parameters	***Description***
serviceID	Service ID.
root	Root resource name.
uri	URI template ID.
method	API method.

Response Parameters	***Response Result Type***	***Description***
No response parameters	N/A	N/A

Response Result Code	***Description***
200	Authorized Unauthorized Invalid

user

API resource to retrieve user profile details.

Method: GET

Path: /profile

Request Parameters	***Description***
None available.	N/A

Response Parameters	***Response Result Type***	***Description***
emailAddress	Success	Email address.
employeeID	Success	Employee ID.
language	Success	Language.
languageBase	Success	Base language.
languageUser	Success	User language.
operatorDescr	Success	Operator description.
operatorID	Success	Operator ID.

Understanding REST API Endpoints for PeopleSoft Absence Management Application Services (absence)

This topic lists the REST resources and methods for the PeopleSoft Absence Management Application Services API (absence). Use this API to create and manage absence requests, and view absence balances. The Absence Management Application Services REST API can be used for the Absence skill.

API Resources Used With the PeopleSoft Absence API

This table lists the delivered API resources used with the PeopleSoft Absence API.

API Resource	***Description***
request	API resource to create, update, and retrieve absence request information.
balance	API resource to retrieve employee absence balance information.
configuration	API resource to retrieve absence configuration information, which was set up in Absence Management. Configuration information includes rules and input fields applicable for a particular absence type.
validation	API resource to validate absence information that was input by a user when they created an absence request.
employee	API resource to retrieve employee information.

request

API resource to create, update, and retrieve absence request information.

Method: POST

Path: /request/createabsence

Request Parameters	***Description***
absencereason	Reason for absence.
charuf1	Character type user field number one.
charuf2	Character type user field number two.

Request Parameters	***Description***
charuf3	Character type user field number three.
charuf4	Character type user field number four.
comments	Absence request comments.
durationabs	Absence duration.
durationdays	Absence duration, days.
durationhrs	Absence duration, hours.
emplid	Employee ID.
emplrcd	Employee record.
enddt	Absence end date.
numuf1	Number type user field, number one.
numuf2	Number type user field, number two.
numuf3	Number type user field, number three.
numuf4	Number type user field, number four.
pintakenum	Pin take number.
seqnumuf1	Sequence number field one.
seqnumuf2	Sequence number field two.
seqnumuf3	Sequence number field three.
seqnumuf4	Sequence number field four.
startdt	Absence begin date.

Response Parameters	***Response Result Type***	***Description***
msgout	Success	Message out. This is the message returned after the API is executed.

Method: PUT

Path: /request/cancelabsence

Request Parameters	***Description***
cancelreason	Absence cancellation reason.
comments	Absence comments.
transactionnbr	Absence transaction number.

Response Parameters	***Response Result Type***	***Description***
msgout	Success	Message out. This is the message returned after the API is executed.

Method: GET

Path: /request/calculateduration/{emplid}/{emplrcd}/{pintakenum}/{startdt}/{enddt}

Request Parameters	***Description***
emplid	Employee ID
emplrcd	Employee record
enddt	Absence end date.
pintakenum	Pin take number
startdt	Absence begin date.

Response Parameters	*Response Result Type*	*Description*
durationabs	Success	Absence duration.
durationdays	Success	Absence duration, days.
durationhrs	Success	Absence duration, hours.
msgout	Success	Message out. This is the message returned after the API is executed.
unittype	Success	Absence unit type.

Method: GET

Path: /request/eligibility/{emplid}/{emplrcd}/{pintakenum}/{startdt}/{enddt}

Request Parameters	*Description*
emplid	Employee ID
emplrcd	Employee record
enddt	Absence end date.
pintakenum	Pin take number
startdt	Absence begin date.

Response Parameters	*Response Result Type*	*Description*
fcstvalue	Success	Forecast value.
msgout	Success	Message out. This is the messag e returned after the API is executed.

Method: GET

Path: /request/absencerequests/{emplid}/{emplrcd}/{fromdate}/{todate}

Request Parameters	***Description***
emplid	Employee ID.
emplrcd	Employee record.
fromdate	Absence from date
todate	Absence to date

Response Parameters	***Response Result Type***	***Description***
absName	Success	Absence name (for example, Vacation, Sick, and so forth).
absencereason	Success	Absence reason.
canceloption	Success	Cancel option.
comments	Success	Absence request comments.
country	Success	Country.
enddt	Success	Absence end date.
pintakenum	Success	Pin take number.
quantity	Success	Quantity.
requestdate	Success	Absence request date.
requestenddate	Success	Absence request end date.
requestor	Success	Absence requestor.
startdt	Success	Absence begin date.

Response Parameters	*Response Result Type*	*Description*
statuscode	Success	Absence status code.
transactionnbr	Success	Absence transaction number.
workflowStatus	Success	Workflow status.

Method: GET

Path: /request/absencerequests/{emplid}/{emplrcd}/{fromdate}/{todate}/{absencename}/{wfstatus}

Request Parameters	*Description*
absencename	Absence name.
emplid	Employee ID.
emplrcd	Employee record.
fromdate	Absence from date.
todate	Absence to date.
wfstatus	Workflow status.

Response Parameters	*Response Result Type*	*Description*
absName	Success	Absence name (for example, Vacation, Sick, and so forth).
absencereason	Success	Absence reason.
canceloption	Success	Cancel option.
comments	Success	Absence request comments.
country	Success	Country.

Response Parameters	*Response Result Type*	*Description*
enddt	Success	Absence end date.
pintakenum	Success	Pin take number.
quantity	Success	Quantity.
requestdate	Success	Absence request date.
requestenddate	Success	Absence request end date.
requestor	Success	Absence requestor.
startdt	Success	Absence begin date.
statuscode	Success	Absence status code.
transactionnbr	Success	Absence transaction number.
workflowStatus	Success	Workflow status.

Method: GET

Path: /request/cancelrequests/{emplid}/{emplrcd}/{fromdate}/{todate}

Request Parameters	*Description*
emplid	Employee ID.
emplrcd	Employee record.
fromdate	Absence from date.
todate	Absence to date.

Response Parameters	***Response Result Type***	***Description***
absName	Success	Absence name (for example, Vacation, Sick, and so forth).
absencereason	Success	Absence reason.
canceloption	Success	Cancel option.
comments	Success	Absence request comments.
country	Success	Country.
enddt	Success	Absence end date.
pintakenum	Success	Pin take number.
quantity	Success	Quantity.
requestdate	Success	Absence request date.
requestenddate	Success	Absence request end date.
requestor	Success	Absence requestor.
startdt	Success	Absence begin date.
statuscode	Success	Absence status code.
transactionnbr	Success	Absence transaction number.
workflowStatus	Success	Workflow status.

Method: GET

Path: /request/cancelrequests/{emplid}/{emplrcd}/{fromdate}/{todate}/{absencename}/{wfstatus}

Request Parameters	***Description***
absencename	Absence name.

Request Parameters	***Description***
emplid	Employee ID.
emplrcd	Employee record.
fromdate	Absence from date.
todate	Absence to date.
wfstatus	Workflow status.

Response Parameters	***Response Result Type***	***Description***
absName	Success	Absence name (for example, Vacation, Sick, and so forth).
absencereason	Success	Absence reason.
canceloption	Success	Cancel option.
comments	Success	Absence request comments.
country	Success	Country.
enddt	Success	Absence end date.
pintakenum	Success	Pin take number.
quantity	Success	Quantity.
requestdate	Success	Absence request date.
requestenddate	Success	Absence request end date.
requestor	Success	Absence requestor.
startdt	Success	Absence begin date.

Response Parameters	***Response Result Type***	***Description***
statuscode	Success	Absence status code.
transactionnbr	Success	Absence transaction number.
workflowStatus	Success	Workflow status.

Method: GET

Path: /request/url/{emplid}/{emplrcd}/{pintakenum}/{startdt}/{enddt}/{portal}/{node}/{market}

Request Parameters	***Description***
emplid	Employee ID.
emplrcd	Employee record.
enddt	Absence end date.
market	Market name of the component (used in generating a PeopleSoft URL).
node	Node name (used in generating a PeopleSoft URL).
pintakenum	Pin take number.
portal	Portal name in the PeopleSoft URL.
startdt	Absence begin date.

Response Parameters	***Response Result Type***	***Description***
msgout	Success	Message out. This is the message returned after the API is executed.
url	Success	PeopleSoft URL for the absence request page.

balance

API resource to retrieve employee absence balance information.

Method GET

Path: /balance/{emplid}/{emplrcd}

Request Parameters	***Description***
emplid	Employee ID
emplrcd	Employee record

Response Parameters	***Response Result Type***	***Description***
asofdate	Success	Absence balance as of date.
balance	Success	Absence balance.
balancestring	Success	Absence balance string.
entbalname	Success	Absence entitlement balance name.
entbalnbr	Success	Absence entitlement balance number.
msgout	Success	Message out. This is the message returned after the API is executed.
unittype	Success	Unit type for absence balance (days, hours).

Method: GET

Path: /balance/{emplid}/{emplrcd}/{pintakenum}

Get the employee's current absence balance for the given absence type.

Request Parameters	***Description***
emplid	Employee ID.

Request Parameters	*Description*
emplrcd	Employee record.
pintakenum	Pin take number.

Response Parameters	*Response Result Type*	*Description*
asofdate	Success	Absence balance as of date.
balance	Success	Absence balance.
balancestring	Success	Absence balance string.
entbalname	Success	Absence entitlement balance name.
entbalnbr	Success	Absence entitlement balance number.
msgout	Success	Message out. This is the message returned after the API is executed.
unittype	Success	Unit type for absence balance (days, hours).

Method: GET

Path: /balance/{emplid}/{emplrcd}/{pintakenum}/{fcstdate}

Get the employee's future absence balance for the given absence type.

Request Parameters	*Description*
emplid	Employee ID.
emplrcd	Employee record.
fcstdate	Forecast date.
pintakenum	Pin take number.

Response Parameters	***Response Result Type***	***Description***
asofdate	Success	Absence balance as of date.
balance	Success	Absence balance.
balancestring	Success	Absence balance string.
entbalname	Success	Absence entitlement balance name.
entbalnbr	Success	Absence entitlement balance number.
msgout	Success	Message out. This is the message returned after the API is executed.
unittype	Success	Unit type for absence balance (days, hours).

configuration

API resource to retrieve absence configuration information, which was set up in Absence Management. Configuration information includes rules and input fields applicable for a particular absence type.

Method: GET

Path: /configuration/absencetakes/{emplid}/{emplrcd}/{asofdate}/{transtype}/{absencename}

Request Parameters	***Description***
absencename	Absence name.
asofdate	Absence as of date.
emplid	Employee ID.
emplrcd	Employee record.
transtype	The transaction type (B - Balance or R - Request).

Response Parameters	***Response Result Type***	***Description***
allowpartialdays	Success	Allow partial days.
description	Success	Description.
fcstRequired	Success	Forecast required.
partialdaysoptn	Success	Partial days option.
pintakenum	Success	Pin take number.

Method: GET

Path: /configuration/absencereasons/{emplid}/{emplrcd}/{pintakenum}/{asofdate}

Request Parameters	***Description***
asofdate	Absence as of date.
emplid	Employee ID.
emplrcd	Employee record.
pintakenum	Pin take number.

Response Parameters	***Response Result Type***	***Description***
absencereason	Success	Reason for absence.
description	Success	Description.

Method: GET

Path: /configuration/cancelreasons/{emplid}/{emplrcd}/{pintakenum}/{asofdate}

Request Parameters	***Description***
asofdate	Absence as of date.

Request Parameters	***Description***
emplid	Employee ID.
emplrcd	Employee record.
pintakenum	Pin take number.

Response Parameters	***Response Result Type***	***Description***
cancelreason	Success	Reason for absence cancellation.
description	Success	Description.

Method: GET

Path: /configuration/userfields/{emplid}/{emplrcd}/{pintakenum}/{startdt}

Request Parameters	***Description***
emplid	Employee ID.
emplrcd	Employee record.
pintakenum	Pin take number.
startdate	Begin date.

Response Parameters	***Response Result Type***	***Description***
label	Success	User field label. This information comes from the absence configuration, which was set up in Absence Management.
msgout	Success	Message out. This is the message returned after the API is executed.

Response Parameters	Response Result Type	Description
required	Success	User field required flag. This information comes from the absence configuration, which was set up in Absence Management.
seqnum	Success	User field sequence number. This information comes from the absence configuration, which was set up in Absence Management.
type	Success	User field type (character, number, date). This information comes from the absence configuration, which was set up in Absence Management.

validation

API resource to validate absence information that was input by a user when they created an absence request.

Method: GET

Path: /validation/absencename/{emplid}/{emplrcd}/{asofdate}/{absencenam e}

Request Parameters	Description
absencename	Absence name
asofdate	Absence as of date.
emplid	Employee ID.
emplrcd	Employee record.

Response Parameters	Response Result Type	Description
allowpartialdays	Success	Allow partial days.

Response Parameters	***Response Result Type***	***Description***
description	Success	Description.
fcstRequired	Success	Forecast required.
partialdaysoptn	Success	Partial days option.
pintakenum	Success	Pin take number.

Method: GET

Path: /validation/forecastdate/{emplid}/{emplrcd}/{fcstdate}

Request Parameters	***Description***
emplid	Employee ID.
emplrcd	Employee record.
fcstdate	Forecast date.

Response Parameters	***Response Result Type***	***Description***
finalizedprdenddt	Success	Finalized period end date.

employee

API resource to retrieve employee information.

Method: GET

Path: /employee/jobs/{emplid}

Request Parameters	***Description***
emplid	Employee ID.

Response Parameters	***Response Result Type***	***Description***
emplrcd	Success	Employee record.
jobtitle	Success	Employee job title.

Understanding REST API Endpoints for PeopleSoft Employee Directory (employeedirectory)

This topic lists the REST resources and methods for the PeopleSoft Employee Directory API (employeedirectory). Use this API to retrieve employee details. The Employee Directory REST API can be used for the Employee Directory skill.

API Resources Used With the PeopleSoft Employee Directory API

This table lists the delivered API resources used with the PeopleSoft Employee Directory API.

API Resource	***Description***
ViewEmployee	API resource to retrieve the employee details based on the Employee Name or Employee ID and Record Number.
viewdirectreports	API resource to retrieve the details of direct reportees based on manager's name or manager's ID and record number.

ViewEmployee

API resource to retrieve the employee details based on the Employee Name or Employee ID and Record Number.

Method: GET

Path: /viewemployee/{employeename}

Request Parameters	***Description***
employeename	Name of the employee.

Response Parameters	***Response Result Type***	***Description***
emplbuilding	Success	Employee's building.
emplbusnaddress	Success	Business address of the employee.
emplcellphone	Success	Cell phone number of the employee.
empldepartment	Success	Employee department.
emplemail	Success	Email address of the employee.
emplid	Success	Emplolee ID.
empljobtitle	Success	job title of the employee.
empllocation	Success	Location of the employee
emplnamedisplay	Success	Display name of the employee
emploperatorname	Success	Operator name of the employee.
emplphone	Success	Phone number of the employee.
emplphotourl	Success	Employee photo URL.
emplposition	Success	Position of the employee.
emplrcd	Success	Employee record.
reporteecount	Success	Count of the direct reportees.
supervisordept	Success	Supervisor's department.
supervisoremail	Success	Supervisor's email.
supervisoremplid	Success	Supervisor's Employee ID.
supervisoremplrcd	Success	Supervisor's employee record.

Response Parameters	***Response Result Type***	***Description***
supervisorlocation	Success	Supervisor's location.
supervisorname	Success	Supervisor's name.
supervisorphone	Success	Supervisor's phone number.
supervisortitle	Success	Supervisor's title.

Method: GET

Path: /viewemployee/{employeeid}/{employeercd}

Request Parameters	***Description***
employeeid	Employee ID.
employeercd	Employee Record.

Response Parameters	***Response Result Type***	***Description***
emplbuilding	Success	Employee's building.
emplbusnaddress	Success	Business address of the employee.
emplcellphone	Success	Cell phone number of the employee.
empldepartment	Success	Employee department.
emplemail	Success	Email address of the employee.
emplid	Success	Emplolee ID.
empljobtitle	Success	job title of the employee.
empllocation	Success	Location of the employee
emplnamedisplay	Success	Display name of the employee

Response Parameters	***Response Result Type***	***Description***
emploperatorname	Success	Operator name of the employee.
emplphone	Success	Phone number of the employee.
emplphotourl	Success	Employee photo URL.
emplposition	Success	Position of the employee.
emplrcd	Success	Employee record.
reporteecount	Success	Count of the direct reportees.
supervisordept	Success	Supervisor's department.
supervisoremail	Success	Supervisor's email.
supervisoremplid	Success	Supervisor's Employee ID.
supervisoremplrcd	Success	Supervisor's employee record.
supervisorlocation	Success	Supervisor's location.
supervisorname	Success	Supervisor's name.
supervisorphone	Success	Supervisor's phone number.
supervisortitle	Success	Supervisor's title.

viewdirectreports

API resource to retrieve the details of direct reportees based on manager's name or manager's ID and record number.

Method: GET

Path: /viewdirectreports/{employeename}

Request Parameters	*Description*
employeename	Name of the employee.

Response Parameters	*Response Result Type*	*Description*
empldepartment	Success	Employee department.
emplemail	Success	Email address of the employee.
emplid	Success	Emplolee ID.
empljobtitle	Success	job title of the employee.
empllocation	Success	Location of the employee
emplnamedisplay	Success	Display name of the employee
emplphone	Success	Phone number of the employee.
emplrcd	Success	Employee record.
reporteecount	Success	Count of the direct reportees.
supervisorname	Success	Supervisor's name.

Method: GET

Path: /viewdirectreports/{employeeid},{employeercd}

Request Parameters	*Description*
employeeid	Employee ID.
employeercd	Employee Record Number.

Response Parameters	Response Result Type	Description
empldepartment	Success	Employee department.
emplemail	Success	Email address of the employee.
emplid	Success	Emplolee ID.
empljobtitle	Success	job title of the employee.
empllocation	Success	Location of the employee
emplnamedisplay	Success	Display name of the employee
emplphone	Success	Phone number of the employee.
emplrcd	Success	Employee record.
reporteecount	Success	Count of the direct reportees.
supervisorname	Success	Supervisor's name.

Understanding REST API Endpoints for PeopleSoft Payroll for North America Services (payrollbankingyearendforms)

This topic lists the REST resources and methods for the PeopleSoft Payroll for North America Services API (payrollbankingyearendforms). Use this API to retrieve paycheck related details. The Payroll for North America Services REST API can be used for the Payroll for North America skill.

API Resources Used With the PeopleSoft Payroll for North America Services API

This table lists the delivered API resources used with the PeopleSoft Payroll for North America Services API.

API Resource	Description
paycheckheaderdetails	API resource to retrieve employee paycheck and paycheck header level details.

API Resource	***Description***
paycheckemployerpaidbenefits	API resource to retrieve employer paid benefits to an employee for a given paycheck.
paycheckgarnishment	API resource to retrieve employee garnishments for a given paycheck number and pay end date.
yearendforms	API resource to retrieve year end forms (report details) of the employee from a given date.
bankingdetails	API resource to retrieve employee direct deposit details.
garnishmentdetails	API resource to retrieve active garnishment details for an employee.
employeepayfrequency	API resource to retrieve employee payment frequency details.
paycheckearnings	API resource to retrieve employee payment frequency details.
paychecktaxes	API resource to retrieve employee tax details for a given paycheck.
paycheckaftertaxdeductions	API resource to retrieve after tax deductions for an employee for a given paycheck.
paycheckbeforetaxdeductions	API resource to retrieve employee before tax deductions for an employee for a given paycheck.

paycheckheaderdetails

API resource to retrieve employee paycheck and paycheck header level details for:

- Total Earnings
- Total Deductions
- Total Taxes
- Net Pay
- Gross Pay
- Total Employer Paid Benefits
- Total After Tax deductions
- Total Before Tax deductions

- Leave Balances
- Direct Deposit in Paycheck
- Garnishment details in Paycheck

Method: GET

Path: /paycheckheaderdetails/{fromDate}/{toDate}

This end point retrieves the paycheck details between the provided From Date and To Date.

Request Parameters	***Description***
fromDate	From date.
toDate	To date.

Response Parameters	***Response Result Type***	***Description***
emplId	Success	Employee ID.
checkDate	Success	Paycheck date.
paycheckNumber	Success	Paycheck number.
paybeginDate	Success	Pay period begin date.
payendDate	Success	Pay period end date.
companyID	Success	Company ID.
payGroup	Success	Employee pay group.
OffCycle	Success	Off cycle (paycheck)
pageNum	Success	Paycheck page number.
lineNum	Success	Paycheck line number.
netPay	Success	Paycheck net pay.

Response Parameters	***Response Result Type***	***Description***
earningsDetails	Success	Paycheck earnings details.
deductionDetails	Success	Paycheck deduction details.
taxDetails	Success	Paycheck tax details.
pdfURL	Success	PDF URL. URL to download PDF version of a paycheck.
piaURL	Success	PIA URL. URL to PeopleSoft Self-service Paycheck page, where user can retrieve paycheck details.
titleValue	Success	Title value (paycheck date details).
headerValue	Success	Header value (paycheck details for gross wages, taxes, deductions, and so forth).

Method: GET

Path: /paycheckheaderdetails/{fromDate}/{toDate}/{paycheckSection}

This end point retrieves the employee payslip header details based on the payslip section name provided. The end point also filters the details based on the count provided.

Request Parameters	***Description***
fromDate	From date.
paycheckSection	Paycheck section filter.
toDate	To date.

Response Parameters	***Response Result Type***	***Description***
emplId	Success	Employee ID.

Response Parameters	***Response Result Type***	***Description***
checkDate	Success	Paycheck date.
paycheckNumber	Success	Paycheck number.
paybeginDate	Success	Pay period begin date.
payendDate	Success	Pay period end date.
companyID	Success	Company ID.
payGroup	Success	Employee pay group.
OffCycle	Success	Off cycle (paycheck)
pageNum	Success	Paycheck page number.
lineNum	Success	Paycheck line number.
netPay	Success	Paycheck net pay.
earningsDetails	Success	Paycheck earnings details.
deductionDetails	Success	Paycheck deduction details.
taxDetails	Success	Paycheck tax details.
pdfURL	Success	PDF URL. URL to download PDF version of a paycheck.
piaURL	Success	PIA URL. URL to PeopleSoft Self-service Paycheck page, where user can retrieve paycheck details.
titleValue	Success	Title value (paycheck date details).

Response Parameters	Response Result Type	Description
headerValue	Success	Header value (paycheck details for gross wages, taxes, deductions, and so forth).

Method: GET

Path: /paycheckheaderdetails/{fromDate}/{toDate}/{paycheckSection}/{categoryID}

This end point retrieves specific earnings or deductions details from employee paycheck based on category.

Request Parameters	Description
categoryID	Paycheck category ID.
fromDate	From date.
paycheckSection	Paycheck section filter.
toDate	To date.

Response Parameters	Response Result Type	Description
emplId	Success	Employee ID.
checkDate	Success	Paycheck date.
paycheckNumber	Success	Paycheck number.
paybeginDate	Success	Pay period begin date.
payendDate	Success	Pay period end date.
companyID	Success	Company ID.
payGroup	Success	Employee pay group.
OffCycle	Success	Off cycle (paycheck)

Response Parameters	***Response Result Type***	***Description***
pageNum	Success	Paycheck page number.
lineNum	Success	Paycheck line number.
netPay	Success	Paycheck net pay.
earningsDetails	Success	Paycheck earnings details.
deductionDetails	Success	Paycheck deduction details.
taxDetails	Success	Paycheck tax details.
pdfURL	Success	PDF URL. URL to download PDF version of a paycheck.
piaURL	Success	PIA URL. URL to PeopleSoft Self-service Paycheck page, where user can retrieve paycheck details.
titleValue	Success	Title value (paycheck date details).
headerValue	Success	Header value (paycheck details for gross wages, taxes, deductions, and so forth).

Method: GET

Path:/paycheckheaderdetails/{fromDate}/{toDate}/{paycheckSection}/{categoryID}/{filterBy}/{countFilter}/{garnishType}/{searchText}

This end point retrieves details based on the filter values and count value provided.

Request Parameters	***Description***
categoryID	Paycheck category ID.
countFilter	Count filter

Request Parameters	***Description***
filterBy	Filter by criteria.
fromDate	From date.
garnishType	Wage garnishment type.
paycheckSection	Paycheck section filter.
searchText	Search text.
toDate	To date.

Response Parameters	***Response Result Type***	***Description***
emplId	Success	Employee ID.
checkDate	Success	Paycheck date.
paycheckNumber	Success	Paycheck number.
paybeginDate	Success	Pay period begin date.
payendDate	Success	Pay period end date.
companyID	Success	Company ID.
payGroup	Success	Employee pay group.
OffCycle	Success	Off cycle (paycheck)
pageNum	Success	Paycheck page number.
lineNum	Success	Paycheck line number.
netPay	Success	Paycheck net pay.
earningsDetails	Success	Paycheck earnings details.

Response Parameters	*Response Result Type*	*Description*
deductionDetails	Success	Paycheck deduction details.
taxDetails	Success	Paycheck tax details.
pdfURL	Success	PDF URL. URL to download PDF version of a paycheck.
piaURL	Success	PIA URL. URL to PeopleSoft Self-service Paycheck page, where user can retrieve paycheck details.
titleValue	Success	Title value (paycheck date details).
headerValue	Success	Header value (paycheck details for gross wages, taxes, deductions, and so forth).

paycheckemployerpaidbenefits

API resource to retrieve employer paid benefits to an employee for a given paycheck.

Method: GET

Path: /paycheckemployerpaidbenefits/{paycheckNum}/{endDate}

This end point retrieves employer paid benefits for an employee for a given paycheck number and pay end date.

Request Parameters	*Description*
endDate	End date.
paycheckNum	Paycheck number.

Response Parameters	*Response Result Type*	*Description*
headerValue	Success	Header value (paycheck details for gross wages, taxes, deductions, and so forth).

Response Parameters	Response Result Type	Description
sectnDetails	Success	Section details (paycheck benefits details, such as 401(k) and so forth).

paycheckgarnishment

API resource to retrieve employee garnishments for a given paycheck number and pay end date.

Method: GET

Path: /paycheckgarnishment/{paycheckNum}/{endDate}

Request Parameters	Description
endDate	End date.
paycheckNum	Paycheck number.

Response Parameters	Response Result Type	Description
headerValue	Success	Header value (paycheck details for gross wages, taxes, deductions, and so forth).
accntDetails	Success	Account details (garnishment details for the paycheck).

yearendforms

API resource to retrieve year end form details for an employee.

Method: GET

Path:/yearendforms/{fromDate}

This end point retrieves year end report details for the employee, for a given date.

Request Parameters	Description
fromDate	From date.

Response Parameters	***Response Result Type***	***Description***
taxformidOut	Success	Tax form ID out. Description of the year end tax form (for example, W-2).
titleValue	Success	Title value (year end form details, such as company and date).
headerValue	Success	Header value (year end form details, such as tax form issue date, description, and so forth).
urlDetails	Success	URL details. URL to download PDF version of year end forms.
buttonDescr	Success	Button description (button label in Digital Assistant).
consentForm	Success	Consent form flag.

Method: GET

Path: /yearendforms/{fromDate}/{taxformID}

This end point retrieves employee year end forms for the given date and for a particular tax form ID.

Request Parameters	***Description***
fromDate	From date.
taxformID	Tax form ID

Response Parameters	***Response Result Type***	***Description***
taxformidOut	Success	Tax form ID out. Description of the year end tax form (for example, W-2).

Response Parameters	Response Result Type	Description
titleValue	Success	Title value (year end form details, such as company and date).
headerValue	Success	Header value (year end form details, such as tax form issue date, description, and so forth).
urlDetails	Success	URL details. URL to download PDF version of year end forms.
buttonDescr	Success	Button description (button label in Digital Assistant).
consentForm	Success	Consent form flag.

Method: GET

Path: /yearendforms/{fromDate}/{taxformID}/{formAvailability}

This end point retrieves year end availability date for a given tax form ID and for a given date.

Request Parameters	Description
formAvailability	Tax form availability.
fromDate	From date.
taxformID	Tax form ID.

Response Parameters	Response Result Type	Description
taxformidOut	Success	Tax form ID out. Description of the year end tax form (for example, W-2).
titleValue	Success	Title value (year end form details, such as company and date).

Response Parameters	***Response Result Type***	***Description***
headerValue	Success	Header value (year end form details, such as tax form issue date, description, and so forth).
urlDetails	Success	URL details. URL to download PDF version of year end forms.
buttonDescr	Success	Button description (button label in Digital Assistant).
consentForm	Success	Consent form flag.

Method: GET

Path: /yearendforms/{fromDate}/{taxformID}/ConsentCheck/{consentAvailability}

This end point retrieves consent availability for year end forms for the employee for the given date and tax form ID.

Request Parameters	***Description***
consentAvailability	Consent form availability.
fromDate	From date.
taxformID	Tax form ID.

Response Parameters	***Response Result Type***	***Description***
taxformidOut	Success	Tax form ID out. Description of the year end tax form (for example, W-2).
titleValue	Success	Title value (year end form details, such as company and date).

Response Parameters	***Response Result Type***	***Description***
headerValue	Success	Header value (year end form details, such as tax form issue date, description, and so forth).
urlDetails	Success	URL details. URL to download PDF version of year end forms.
buttonDescr	Success	Button description (button label in Digital Assistant).
consentForm	Success	Consent form flag.

Method: GET

Path: /yearendforms/{fromDate}/{taxformID}/{formAvailability}/{consentAvailability}/{countFilter}/{searchText}

This end point retrieves year end forms details or consent details or availability date details for a given date and taxform id or based on forms count.

Request Parameters	***Description***
consentAvailability	Consent form availability.
countFilter	Count filter.
formAvailability	Form availability.
fromDate	From date.
searchText	Search text.
taxformID	Tax form ID.

Response Parameters	***Response Result Type***	***Description***
taxformidOut	Success	Tax form ID out. Description of the year end tax form (for example, W-2).
titleValue	Success	Title value (year end form details, such as company and date).
headerValue	Success	Header value (year end form details, such as tax form issue date, description, and so forth).
urlDetails	Success	URL details. URL to download PDF version of year end forms.
buttonDescr	Success	Button description (button label in Digital Assistant).
consentForm	Success	Consent form flag.

bankingdetails

API resource to retrieve employee direct deposit details.

Method: GET

Path:/bankingdetails/{txnType}

This end point retrieves direct deposits available for an employee.

Request Parameters	***Description***
txnType	Banking Transaction type.

Response Parameters	***Response Result Type***	***Description***
headerValue	Success	Header value (bank account header details).

Response Parameters	*Response Result Type*	*Description*
accntDetails	Success	Account details (bank account details for the user).
piaURL	Success	PIA URL. URL to view direct deposit details.

Method: GET

Path: /bankingdetails/{txnType}/{depositType}

This end point retrieves direct deposit details for an employee based on the deposit type and action type provided.

Request Parameters	*Description*
depositType	Banking deposit type.
txnType	Banking Transaction type.

Response Parameters	*Response Result Type*	*Description*
headerValue	Success	Header value (bank account header details).
accntDetails	Success	Account details (bank account details for the user).
piaURL	Success	PIA URL. URL to view direct deposit details.

Method: GET

Path: /bankingdetails/{txnType}/{depositType}/{actionType}/{searchText}

This end point retrieves direct deposit details based on the deposit type and action type provided.

Request Parameters	*Description*
actionType	Banking action type.

Request Parameters	***Description***
depositType	Banking deposit type.
searchText	Search text.
txnType	Banking Transaction type.

Response Parameters	***Response Result Type***	***Description***
headerValue	Success	Header value (bank account header details).
accntDetails	Success	Account details (bank account details for the user).
piaURL	Success	PIA URL. URL to view direct deposit details.

garnishmentdetails

API resource to retrieve active garnishment details for an employee.

Method: GET

Path: /garnishmentdetails

Request Parameters	***Description***
None available.	N/A

Response Parameters	***Response Result Type***	***Description***
headerValue	Success	Header value (garnishment name).
accntDetails	Success	Account details for the garnishment.

employeepayfrequency

API resource to retrieve employee payment frequency details.

Method: GET

Path: /employeepayfrequency/{payFrequency}/{frequencySchedule}

Request Parameters	***Description***
frequencySchedule.	Pay frequency schedule.
payFrequency	Pay frequency check.

Response Parameters	***Response Result Type***	***Description***
titleValue	Success	Title value (employee pay frequency).

paycheckearnings

API resource to retrieve employee earnings for a given paycheck.

Method: GET

Path: /paycheckearnings/{paycheckNum}/{endDate}

Request Parameters	***Description***
endDate	Pay period end date.
paycheckNum.	Paycheck number.

Response Parameters	***Response Result Type***	***Description***
headerValue	Success	Header value (paycheck generation details).
sectnDetails	Success	Section details (paycheck earnings details).

paychecktaxes

API resource to retrieve employee tax details for a given paycheck.

Method: GET

Path: /paychecktaxes/{paycheckNum}/{endDate}

Request Parameters	***Description***
endDate	Pay period end date.
paycheckNum	Paycheck number.

Response Parameters	***Response Result Type***	***Description***
headerValue	Success	Header value (paycheck generation details).
sectnDetails	Success	Section details (paycheck tax details).

paycheckaftertaxdeductions

API resource to retrieve employee after tax deductions for a given paycheck.

Method: GET

Path: /paycheckaftertaxdeductions/{paycheckNum}/{endDate}

Request Parameters	***Description***
endDate	Pay period end date.
paycheckNum	Paycheck number.

Response Parameters	***Response Result Type***	***Description***
headerValue	Success	Header value (paycheck generation details).
sectnDetails	Success	Section details (paycheck after tax deduction details).

paycheckbeforetaxdeductions

API resource to retrieve employee before tax deductions for a given paycheck.

Method: GET

Path:/paycheckbeforetaxdeductions/{paycheckNum}/{endDate}

Request Parameters	***Description***
endDate	Pay period end date.
paycheckNum	Paycheck number.

Response Parameters	***Response Result Type***	***Description***
headerValue	Success	Header value (paycheck generation details).
sectnDetails	Success	Section details (paycheck before tax deduction details).

Understanding REST API Endpoints for PeopleSoft Generate Careers URL (hrsutilities)

This topic lists the REST resources and methods for the Generate Careers URL API (hrsutilities). Use this API to generate applicant-facing Careers URL (Careers Homepage) based on the site and site setup. The Generate Careers URL API can be used for the Recruiting Skill.

API Resource Used With the PeopleSoft Generate Careers URL API

This table lists the delivered API resource used with the PeopleSoft Generate Careers URL API.

API Resource	***Description***
cgurl	API resource to generate applicant-facing Careers URL (Careers Homepage) based on the site and site setup. Site setup is defined using the Setup Site ID (HRS_SITE_ID) component.

cgurl

API resource to generate applicant-facing Careers URL (Careers Homepage) based on the site and site setup. Site setup is defined using the Setup Site ID (HRS_SITE_ID) component.

Method: GET

Path: /cgurl/{portal}/{node}/{menu}/{component}/{market}/{page}/{action}/{siteid}/{urltype}

Request Parameters	***Description***
action	Action.
component	Component.
market	Market.
menu	Menu.
node	Node.
page	PeopleSoft page.
portal	PeopleSoft portal.
siteid	Careers site.
urltype	URL type.

Response Parameters	***Response Result Type***	***Description***
url	Success	Careers URL.

Understanding REST API Endpoints for PeopleSoft Applicant Activity (hrsapplicantcgactivity)

This topic lists the REST resources and methods for the Applicant Activity API (hrsapplicantcgactivity). Use this API to retrieve applicant activity with the Recruiting Solutions Careers page. The Applicant Activity API can be used for the Recruiting Skill.

API Resources Used With the Applicant Activity API

This table lists the delivered API resources used with the Applicant Activity API.

API Resource	***Description***
applications	API resource to retrieve job application details for an applicant.
applicantdetails	API resource to generate applicant name.
notifications	API resource to retrieve applicant notification details.
savedsearches	API resource to retrieve an applicant's saved searches (job agents) in the Recruiting Solutions Careers page.

applications

API resource to retrieve job application details for an applicant.

Method: GET

Path:/applications/{siteid}/{sessionid}/{begindate}/{enddate}/{status}

Request Parameters	***Description***
begindate	Application begin date.
enddate	Application end date.
sessionid	Session ID. This is a unique ID generated when an applicant accesses a Recruiting Solutions Careers site and signs in with their user ID and password. This ID is passed to Recruiting Solutions Digital Assistant.
siteid	Site ID. This is a unique ID created with the Site Setup page in PeopleSoft Candidate Gateway.
status	Application status.

Response Parameters	***Response Result Type***	***Description***
alternatesearchdone	Success	Alternate search done. This flag indicates whether an alternate search was performed by the API when the API was unable to fetch the necessary application based on input parameters.
appjobopeningid	Success	Application job opening ID.
applicationstatuscode	Success	Application status code.
applicationstatushelptext	Success	Application status help text. Provides application status details.
apppostingtitle	Success	Application posting title (job post title).
date	Success	Application date.
lastchangedate	Success	Date the application was last modified.
profilesequence	Success	Profile sequence of the application.
status	Success	Application status.
submitsource	Success	Submit source (indicates whether an applicant applied to the job or a recruiter attached applicant to the job).

applicantdetails

API resource to generate applicant name.

Method: GET

Path:/applicantdetails/name/{siteid}/{sessionid}

Request Parameters	Description
sessionid	Session ID. This is a unique ID generated when an applicant accesses a Recruiting Solutions Careers site and signs in with their user ID and password. This ID is passed to Recruiting Solutions Digital Assistant.
siteid	Site ID. This is a unique ID created with the Site Setup page in PeopleSoft Candidate Gateway.

Response Parameters	Response Result Type	Description
name	Success	Applicant name.

notifications

API resource to retrieve applicant notification details.

Method: GET

Path:/notifications/{siteid}/{sessionid}/{begindate}/{enddate}/{status}/{type}

Request Parameters	Description
begindate	Application begin date.
enddate	Application end date.
sessionid	Session ID. This is a unique ID generated when an applicant accesses a Recruiting Solutions Careers site and signs in with their user ID and password. This ID is passed to Recruiting Solutions Digital Assistant.
siteid	Site ID. This is a unique ID created with the Site Setup page in PeopleSoft Candidate Gateway.
status	Application status.
type	Application type.

Response Parameters	***Response Result Type***	***Description***
date	Success	Notification date.
notificationstatusdesc	Success	Notification status description.
notificationsubject	Success	Notification subject.
notificationtype	Success	Notification type.
notificationtypedescr	Success	Notification type description.
status	Success	Notification status.
timereceived	Success	Time the notification was received.

savedsearches

API resource to retrieve an applicant's saved searches (job agents) in the Recruiting Solutions Careers page.

Method: GET

Path:/savedsearchesforjobs/{siteid}/{sessionid}

Request Parameters	***Description***
sessionid	Session ID. This is a unique ID generated when an applicant accesses a Recruiting Solutions Careers site and signs in with their user ID and password. This ID is passed to Recruiting Solutions Digital Assistant.
siteid	Site ID. This is a unique ID created with the Site Setup page in PeopleSoft Candidate Gateway.

Response Parameters	***Response Result Type***	***Description***
facets	Success	Search facets.
keyword	Success	Keyword search.

Response Parameters	Response Result Type	Description
name	Success	Search name.
postedwithin	Success	Posted within (number of days since the job was posted).

Understanding REST API Endpoints for PeopleSoft Job Search Services (hrsjobs)

This topic lists the REST resources and methods for the PeopleSoft Job Search Services API (hrsjobs). Use this API to facilitate job searches. The Job Search Services API can be used for the Recruiting Skill.

API Resource Used With the PeopleSoft Job Search Services API

This table lists the delivered API resource used with the PeopleSoft Job Search Services API.

API Resource	Description
searchjobs	API resource to facilitate job searches using the Candidate Gateway.

searchjobs

API resource to facilitate job searches using the Candidate Gateway.

Method: GET

Path: /searchjobs/{siteid}/{searchstring}

Request Parameters	Description
searchstring	Search keyword.
siteid	Site ID. This is a unique ID created with the Site Setup page in PeopleSoft Candidate Gateway.

Response Parameters	***Response Result Type***	***Description***
encodedparameter	Success	Encoded parameter. This refers to the specific parameter used to form the URL in chat so user can access the Careers page with the appropriate search results pre-listed.
jobopeningid	Success	Job opening ID.
jobpostingsequence	Success	Job posting sequence number. A job opening can have different job postings, each identified with a different sequence number.
postdate	Success	Job posting date.
postingcount	Success	Job posting count.
postingtitle	Success	Job posting title.

Method: GET

Path: /searchjobs/keyword/{siteid}/{sessionid}/{searchstring}

Request Parameters	***Description***
searchstring	Search keyword.
sessionid	Session ID. This is a unique ID generated when an applicant accesses a Recruiting Solutions Careers site and signs in with their user ID and password. This ID is passed to Recruiting Solutions Digital Assistant.
siteid	Site ID. This is a unique ID created with the Site Setup page in PeopleSoft Candidate Gateway.

Response Parameters	***Response Result Type***	***Description***
encodedparameter	Success	Encoded parameter. This refers to the specific parameter used to form the URL in chat so user can access the Careers page with the appropriate search results pre-listed.
jobopeningid	Success	Job opening ID.
jobpostingsequence	Success	Job posting sequence number. A job opening can have different job postings, each identified with a different sequence number.
postdate	Success	Job posting date.
postingcount	Success	Job posting count.
postingtitle	Success	Job posting title.

Method: GET

Path: /searchjobs/savedsearchname/{siteid}/{sessionid}/{savedsearchname}

Request Parameters	***Description***
savedsearchname	Name of saved search.
sessionid	Session ID. This is a unique ID generated when an applicant accesses a Recruiting Solutions Careers site and signs in with their user ID and password. This ID is passed to Recruiting Solutions Digital Assistant.
siteid	Site ID. This is a unique ID created with the Site Setup page in PeopleSoft Candidate Gateway.

Response Parameters	***Response Result Type***	***Description***
encodedparameter	Success	Encoded parameter. This refers to the specific parameter used to form the URL in chat so user can access the Careers page with the appropriate search results pre-listed.
jobopeningid	Success	Job opening ID.
jobpostingsequence	Success	Job posting sequence number. A job opening can have different job postings, each identified with a different sequence number.
postdate	Success	Job posting date.
postingcount	Success	Job posting count.
postingtitle	Success	Job posting title.

Understanding REST API Endpoints for PeopleSoft HR Common Utility Services (hcmcommonutilities)

This topic lists the REST resources and methods for the HR Common Utility Services API (hcmcommonutilities). Use this API to retrieve employee country and business partner contact details. The HR Common Utility Services API can be used with any of the delivered HCM skills.

API Resources Used With the HR Common Utility Services API

This table lists the delivered API resources used with the HR Common Utility Services API.

API Resource	***Description***
usercountry	API resource to retrieve employee country details.
businesspartner	API resource to retrieve business partner contact details.

usercountry

API resource to retrieve employee country details.

Method: GET

Path: /usercountry

Request Parameters	***Description***
None available.	N/A

Response Parameters	***Response Result Type***	***Description***
countryCD	Success	Country code of the current user.
countryName	Success	Country name of the current user.

businesspartner

API resource to retrieve business partner contact details.

Method: GET

Path: /businesspartner/{partnerType}

Request Parameters	***Description***
partnerType	Partner type. Partner type denotes the functional mode being used. This service retrieves the details of the business partner based on the partner type value given

Response Parameters	***Response Result Type***	***Description***
bpDesignation	Success	Business partner title.
bpEmail	Success	Business partner email.
bpName	Success	Business partner name.

Response Parameters	Response Result Type	Description
bpPhone	Success	Business partner phone number.

Understanding REST API Endpoints for PeopleSoft Get Requisition for Item (eprogetrequisitionforitem)

This topic lists the REST resources and methods for the Get Requisition for Item API (eprogetrequisitionforitem). Use this API to retrieve requisition details for an item.The Get Requisition for Item REST API can be used for the eProcurement Requisition Inquiry skill.

API Resource Used With the Get Requisition for Item API

This table lists the delivered API resource used with the Get Requisition for Item API.

API Resource	Description
eprogetrequisitionforitem	API resource retrieve requisition details for an item.

eprogetrequisitionforitem

API resource to retrieve requisition details for an item.

Method: POST

Path: /eprogetrequisitionforitem/{inDate}/{inEnddate}/{inITEMID}/{inITEMIDDESC}/{inInputString}/{inPerson}/{inRequester}/{inStartdate}

Request Parameters	Description
inDate	Requisition date range. This input parameter is used to select the requisition lines based on the date criteria.
inEnddate	Requisition date range, end date. This input parameter is used to select the requisition lines based on the date criteria.
inITEMID	Item ID.

Request Parameters	***Description***
inITEMIDDESC	Item description.
inInputString	Input parameter to select the requisition based on the requisition status. For example, 'show pending items' results in 'pending' being passed to the input parameter.
inPerson	Input parameter to select the requisition based on the requester name.
inRequester	Input parameter to select the requisition based on the requester.
inStartdate	Invoice start date.

Response Parameters	***Response Result Type***	***Description***
outCOUNT	Success	Total count of requisition lines returned.
outITEMDESC	Success	Item description.
outITEMID	Success	Item ID
outItemImage	Success	Requisition item image.
outLINENO	Success	Requisition line number.
outQTY	Success	Quantity of items in the requisition.
outREQSTATUS	Success	Requisition status.
outRETBU	Success	Business unit related to the requisition.
outRETREQID	Success	Requisition ID.
outRequester	Success	Name of person who created the requisition.
outSCHEDNO	Success	Requisition schedule number.

Response Parameters	Response Result Type	Description
outSUPPLIERID	Success	Supplier ID.
outStatus	Success	Requisition status.
outUOM	Success	Requisition unit of measure.

Understanding REST API Endpoints for PeopleSoft Get Requester List (eprogetrequesterlist)

This topic lists the REST resources and methods for the Get Requester List API (eprogetrequesterlist). Use this API to retrieve the list of requisition requesters.The Get Requester List REST API can be used for the eProcurement Requisition Inquiry skill.

API Resource Used With the Get Requester List API

This table lists the delivered API resource used with the Get Requester List API.

API Resource	Description
eprogetrequesterlist	API resource to retrieve the list of requisition requesters.

eprogetrequesterlist

API resource to retrieve the list of requisition requesters.

Method: POST

Path: /eprogetrequesterlist/{inoprid}/{inperson}

Request Parameters	Description
inoprid	Operator ID.
inperson	Person who created the requisition.

Response Parameters	Response Result Type	Description
outdesc	Success	Requester description.
outoprid	Success	Requester operator ID.

Understanding REST API Endpoints for PeopleSoft Get Requester Name (eprogetrequestername)

This topic lists the REST resources and methods for the Get Requester Name API (eprogetrequestername). Use this API to retrieve requisition requester name.The Get Requester Name REST API can be used for the eProcurement Requisition Inquiry skill.

API Resource Used With the Get Requester Name API

This table lists the delivered API resource used with the Get Requester Name API.

API Resource	Description
eprogetrequestername	API resource to retrieve requisition requester name.

eprogetrequestername

API resource to retrieve requisition requester name.

Method: POST

Path: /eprogetrequestername

Request Parameters	Description
No request parameters.	N/A

Response Parameters	Response Result Type	Description
outRequestername	Success	Requisition requester name.

Understanding REST API Endpoints for PeopleSoft Get Requisition Status (eprogetrequisitionstatus)

This topic lists the REST resources and methods for the Get Requisition Status API (eprogetrequisitionstatus). Use this API to retrieve requisition status.The Get Requisition Status REST API can be used for the eProcurement Requisition Inquiry skill.

API Resource Used With the Get Requisition Status API

This table lists the delivered API resource used with the Get Requisition Status API.

API Resource	***Description***
eprogetrequisitionstatus	API resource to retrieve requisition status.

eprogetrequisitionstatus

API resource to retrieve requisition status.

Method: POST

Path: /eprogetrequisitionstatus/{inBU}/{inLINE}/{inLineItemID}/{inLineStatus}/{inReqID}/{inSchedule}

Request Parameters	***Description***
inBU	Requisition business unit
inLINE	Requisition line number.
inLineItemID	Requisition line item ID.
inLineStatus	Requisition line status
inReqID	Requisition ID.
inSchedule	Requisition schedule number.

Response Parameters	***Response Result Type***	***Description***
outBU	Success	Requisition business unit.

Response Parameters	***Response Result Type***	***Description***
outLineNo	Success	Requisition line number.
outMultipleStatus	Success	Multiple status.
outReqID	Success	Requisition ID.
outStatus	Success	Requisition status.
outURL	Success	URL path.

Understanding REST API Endpoints for PeopleSoft Fetch Disputed Invoices (esfetchdispinvoice)

This topic lists the REST resources and methods for the Fetch Disputed Invoices API (esfetchdispinvoice). Use this API to retrieve disputed invoice details.The Fetch Disputed Invoices REST API can be used for the eSettlements skill.

API Resource Used With the Fetch Disputed Invoices API

This table lists the delivered API resource used with the Fetch Disputed Invoices API.

API Resource	***Description***
esfetchdispinvoice	API resource to retrieve disputed invoice details.

esfetchdispinvoice

API resource to retrieve disputed invoice details.

Method: POST

Path: /esfetchdispinvoice

Request Parameters	***Description***
iCurrency	Invoice currency.
iDispAmount	Invoice amount.

Request Parameters	***Description***
iDisputeDate	Invoice dispute date.
iEndDate	Invoice end date.
iStartDate	Invoice start date.

Response Parameters	***Response Result Type***	***Description***
oDCurrCD	Success	Currency code.
oDInvAmt	Success	invoice amount.
oDInvoiceID	Success	Invoice ID.
oDPymntStatus	Success	Invoice payment status.
oInvDate	Success	Invoice date.
oInvPymntType	Success	Invoice payment type.
oOutRowNumber	Success	Row number for the retrieved invoice. For example, if the API retrieves 10 invoices, the value for the first row is '1 of 10.'

Understanding REST API Endpoints for PeopleSoft Fetch Invoice Inquiry (esfetchinvoiceinquiry)

This topic lists the REST resources and methods for the Fetch Invoice Inquiry API (esfetchinvoiceinquiry). Use this API to retrieve invoice details.The Fetch Invoice Inquiry REST API can be used for the eSettlements skill.

API Resource Used With the Fetch Invoice Inquiry API

This table lists the delivered API resource used with the Fetch Invoice Inquiry API.

API Resource	*Description*
esfetchinvoiceinquiry	API resource to retrieve invoice details.

esfetchinvoiceinquiry

API resource to retrieve invoice details.

Method: POST

Path: /esfetchinvoiceinquiry

Request Parameters	*Description*
iCurrency	Invoice currency.
iEndDate	End date.
iInvStatus	Invoice status.
iInvoiceAmount	Invoice amount.
iInvoiceDate	Invoice date.
iStartDate	Start date.

Response Parameters	*Response Result Type*	*Description*
oGrossAmount	Success	Invoice gross amount.
oInvDate	Success	Invoice date.
oInvPymntType	Success	Invoice payment type.
oInvoiceID	Success	Invoice ID.
oOutRowNumber	Success	Row number for the retrieved invoice. For example, if the API retrieves 10 invoices, the value for the first row is '1 of 10.'

Response Parameters	Response Result Type	Description
oPymntStatus	Success	Invoice payment status.
oTxnCurrencyCD	Success	Taxation currency code.

Understanding REST API Endpoints for PeopleSoft Payment Inquiry (esfetchpaymentinquiry)

This topic lists the REST resources and methods for the Payment Inquiry API (esfetchpaymentinquiry). Use this API to retrieve invoice details based on payment inquiry.The Payment Inquiry REST API can be used for the eSettlements skill.

API Resource Used With the Payment Inquiry API

This table lists the delivered API resource used with the Payment Inquiry API.

API Resource	Description
esfetchpaymentinquiry	API resource to retrieve invoice details based on payment inquiry.

esfetchpaymentinquiry

API resource to retrieve invoice details based on payment inquiry.

Method: POST

Path: /esfetchpaymentinquiry

Request Parameters	Description
iEndDate	End Date
iPaymentDate	Payment Date
iStartDate	Start Date

Response Parameters	*Response Result Type*	*Description*
oGrossAmount	Success	Invoice gross amount.
oInvDate	Success	Invoice date.
oInvPymntType	Success	Invoice payment type.
oInvoiceID	Success	Invoice ID.
oOutRowNumber	Success	Row number for the retrieved invoice. For example, if the API retrieves 10 invoices, the value for the first row is '1 of 10.'
oPymntStatus	Success	Invoice payment status.
oTxnCurrencyCD	Success	Taxation currency code.

Understanding REST API Endpoints for PeopleSoft Get First Name (esgetname)

This topic lists the REST resources and methods for the Get First Name API (esgetname). Use this API to retrieve the name of the logged-in user.The Get First Name REST API can be used for the eSettlements skill.

API Resource Used With the Get First Name API

This table lists the delivered API resource used with the Get First Name API.

API Resource	*Description*
esgetname	API resource to retrieve the name of the logged-in user.

esgetname

API resource to retrieve the name of the logged-in user.

Method: POST

Path: /esgetname

Request Parameters	Description
No Request Parameters.	N/A

Response Parameters	Response Result Type	Description
oFirstName	Success	Name of logged-in user.

Understanding REST API Endpoints for PeopleSoft Invoice and Payment Inquiry (esinvpyminqlink)

This topic lists the REST resources and methods for the Invoice and Payment Inquiry API (esinvpyminqlink). Use this API to retrieve the link for the Invoice Inquiry and Payment Inquiry pages.The Invoice and Payment Inquiry REST API can be used for the eSettlements skill.

API Resource Used With the Invoice and Payment Inquiry API

This table lists the delivered API resource used with the Invoice and Payment Inquiry API.

API Resource	Description
esinvpyminqlink	API resource to retrieve the link for the Invoice Inquiry and Payment Inquiry pages.

esinvpyminqlink

API resource to retrieve the link for the Invoice Inquiry and Payment Inquiry pages.

Method: POST

Path: /esinvpyminqlink

Request Parameters	Description
No Request Parameters.	N/A

Response Parameters	*Response Result Type*	*Description*
oCardCount	Success	Number of cards allowed to display for an inquiry.
oDisputeStatus	Success	Dispute status.
oipinqStatus	Success	Stores the page links.

Understanding REST API Endpoints for PeopleSoft Fetch Invoice Status (esinvoicestatus)

This topic lists the REST resources and methods for the Fetch Invoice Status API (esinvoicestatus). Use this API to retrieve invoice status for an invoice number.The Fetch Invoice Status REST API can be used for the eSettlements skill.

API Resource Used With the Fetch Invoice Status API

This table lists the delivered API resource used with the Fetch Invoice Status API.

API Resource	*Description*
esinvoicestatus	API resource to retrieve invoice status for an invoice number.

esinvoicestatus

API resource to retrieve invoice status for an invoice number.

Method: POST

Path: /esinvoicestatus

Request Parameters	*Description*
iInvoiceNo	Invoice number.

Response Parameters	*Response Result Type*	*Description*
oStatus	Success	Invoice status.

Understanding REST API Endpoints for PeopleSoft Payment Difference (espymntdiff)

This topic lists the REST resources and methods for the Payment Difference API (espymntdiff). Use this API to retrieve receipt details for receipts with rejected or returned items.The Payment Difference REST API can be used for the eSettlements skill.

API Resource Used With the Payment Difference API

This table lists the delivered API resource used with the Payment Difference API.

API Resource	***Description***
espaymentdiff	API resource to retrieve receipt details for receipts with rejected or returned items.

espaymentdiff

API resource to retrieve receipt details for receipts with rejected or returned items.

Method: POST

Path: /espaymentdiff

Request Parameters	***Description***
No request parameters.	N/A

Response Parameters	***Response Result Type***	***Description***
opINVITEMID	Success	Invoice item ID.
opPOID	Success	Purchase order ID.
opQTYSHACCPTVUOM	Success	Accepted quantity in supplier UOM.
opQTYSHINSPDVUOM	Success	Inspected quantity in supplier UOM.
opQTYSHRECVDVUOM	Success	Receipt quantity in supplier UOM.
opQTYSHREJCTVUOM	Success	Rejected quantity in supplier UOM.

Response Parameters	***Response Result Type***	***Description***
opQTYSHRTNVUOM	Success	Returned quantity in supplier UOM.
opRECEIPTDTTM	Success	Receipt date time.
opRECEIVERID	Success	Receiver ID.
opREJECTREASON	Success	Reason for the rejection.
opRMAID	Success	Return merchandize authorization (RMA) number.
opRMALINENBR	Success	Return merchandize authorization (RMA) line number.
opRecvURL	Success	URL to the receipt.
opRejRetExists	Success	Flag to indicate whether an invoice with rejected or returned items exists.
opSCHEDNBR	Success	Schedule number.

Understanding REST API Endpoints for PeopleSoft Fetch Payment Status (espaymentstatus)

This topic lists the REST resources and methods for the Fetch Payment StatusAPI (espaymentstatus). Use this API to retrieve payment status details for an invoice.The Fetch Payment Status REST API can be used for the eSettlements skill.

API Resource Used With the Fetch Payment Status API

This table lists the delivered API resource used with the Fetch Payment Status API.

API Resource	***Description***
espaymentstatus	API resource to retrieve payment status details for an invoice.

espaymentstatus

API resource to retrieve payment status details for an invoice.

Method: POST

Path: /espaymentstatus

Request Parameters	*Description*
ipInvoice	Invoice number.

Response Parameters	*Response Result Type*	*Description*
opStatus	Success	Payment status.

Understanding REST API Endpoints for PeopleSoft Fetch Denied Line (exdenydetails)

This topic lists the REST resources and methods for the Fetch Denied Line API (exdenydetails). Use this API to retrieve details of a denied expense report.The Fetch Denied Line REST API can be used for the Expense skill.

API Resource Used With the Fetch Denied Line API

This table lists the delivered API resource used with the Fetch Denied Line API.

API Resource	*Description*
exdenydetailsroot	API resource to retrieve details of a denied expense report.

exdenydetailsroot

API resource to retrieve details of a denied expense report.

Method: GET

Path: /exdenydetailsroot/{iFirstPart}

Request Parameters	Description
iFirstPart	The ID of the denied Expense report for which the details need to be fetched.

Response Parameters	Response Result Type	Description
oDENLINNBR	Success	Denied expense line number details.

Understanding REST API Endpoints for PeopleSoft Expense Type Location Validation (exexptypelocedit)

This topic lists the REST resources and methods for the Expense Type Location Validation API (exexptypelocedit). Use this API to validate whether expense type is associated with a location.The Expense Type Location Validation REST API can be used for the Expense skill.

API Resource Used With the Expense Type Location Validation API

This table lists the delivered API resource used with the Expense Type Location Validation API.

API Resource	Description
exexptypeloceditroot	API resource to validate whether expense type is associated with a location.

exexptypeloceditroot

API resource to validate whether expense type is associated with a location.

Method: POST

Path: /exexptypeloceditroot/{iExpType}

Request Parameters	Description
iExpType	Value of resolved expense type.

Response Parameters	Response Result Type	Description
No response parameter.	N/A	N/A

Response Result Code	Description
200	Yes Required, Not Required.

Understanding REST API Endpoints for PeopleSoft Fetch by Creation Date (exfetchbycreationdate)

This topic lists the REST resources and methods for the Fetch by Creation Date API (exfetchbycreationdate). Use this API to retrieve expense report by creation date.The Fetch by Creation Date REST API can be used for the Expense skill.

API Resource Used With the Fetch by Creation Date API

This table lists the delivered API resource used with the Fetch by Creation Date API.

API Resource	Description
exfetchbycreationdateroot	API resource to retrieve expense report by creation date.

exfetchbycreationdateroot

API resource to retrieve expense report by creation date.

Method: GET

Path: /exfetchbycreationdateroot/{iDesc}/{iStatus}/{iFromDate}/{iToDate}

Request Parameters	Description
iDesc	Expense report description.
iFromDate	Expense report search from date.
iStatus	Expense report status.

Request Parameters	Description
iToDate	Expense report search to date.

Response Parameters	Response Result Type	Description
oSHEETAMOUNT	Success	Expense report amount.
oSHEETCREATE	Success	Expense report creation date.
oSHEETDESC	Success	Expense report description.
oSHEETNAME	Success	Expense report name.
oSHEETSTATUS	Success	Expense report status.

Understanding REST API Endpoints for PeopleSoft Fetch By Sheet Name (exfetchbysheetname)

This topic lists the REST resources and methods for the Fetch By Sheet Name API (exfetchbysheetname). Use this API to retrieve expense report by description.The Fetch By Sheet Name REST API can be used for the Expense skill.

API Resource Used With the Fetch By Sheet Name API

This table lists the delivered API resource used with the Fetch By Sheet Name API.

API Resource	Description
exfetchbysheetnameroot	API resource to retrieve expense report by description.

exfetchbysheetnameroot

API resource to retrieve expense report by description.

Method: GET

Path: /exfetchbysheetnameroot/{iSheetName}

Request Parameters	***Description***
iSheetName	Expense report description.

Response Parameters	***Response Result Type***	***Description***
oSHEETAMOUNT	Success	Expense report amount.
oSHEETCREATE	Success	Expense report creation date.
oSHEETDESC	Success	Expense report description.
oSHEETNAME	Success	Expense report name.
oSHEETSTATUS	Success	Expense report status.

Understanding REST API Endpoints for PeopleSoft Fetch by Status (exfetchbystatus)

This topic lists the REST resources and methods for the Fetch by Status API (exfetchbystatus). Use this API to retrieve expense report by status.The Fetch by Status REST API can be used for the Expense skill.

API Resource Used With the Fetch by Status API

This table lists the delivered API resource used with the Fetch by Status API.

API Resource	***Description***
statusinintent	API resource to retrieve expense report by status.

statusinintent

API resource to retrieve expense report by status.

Method: GET

Path: /statusinintent/{iDesc}/{iStatus}

Request Parameters	***Description***
iDesc	Expense report description.
iStatus	Expense report status.

Response Parameters	***Response Result Type***	***Description***
oSHEETAMOUNT	Success	Expense report amount.
oSHEETCREATE	Success	Expense report creation date.
oSHEETDESC	Success	Expense report description.
oSHEETNAME	Success	Expense report name.
oSHEETSTATUS	Success	Expense report status.

Understanding REST API Endpoints for PeopleSoft Fetch Last Five Transactions (exfetchlast5)

This topic lists the REST resources and methods for the Fetch Last Five Transactions API (exfetchlast5). Use this API to retrieve the five most recent expense report transactions.The Fetch Last Five Transactions REST API can be used for the Expense skill.

API Resource Used With the Fetch Last Five Transactions API

This table lists the delivered API resource used with the Fetch Last Five Transactions API.

API Resource	***Description***
exfetchlast5root	API resource to retrieve the five most recent expense report transactions.

exfetchlast5root

API resource to retrieve the five most recent expense report transactions.

Method: GET

Path: /exfetchlast5root/{iDesc}/{iStatus}

Request Parameters	***Description***
iDesc	Expense report description.
iStatus	Expense report status.

Response Parameters	***Response Result Type***	***Description***
oSHEETAMOUNT	Success	Expense report amount.
oSHEETCREATE	Success	Expense report creation date.
oSHEETDESC	Success	Expense report description.
oSHEETNAME	Success	Expense report name.
oSHEETSTATUS	Success	Expense report status.

Understanding REST API Endpoints for PeopleSoft Date Validation (exfromtodatevalidation)

This topic lists the REST resources and methods for the Date Validation API (exfromtodatevalidation). Use this API to validate expense report date (from date should be less than to date).The Date Validation REST API can be used for the Expense skill.

API Resource Used With the Date Validation API

This table lists the delivered API resource used with the Date Validation API.

API Resource	***Description***
exfromtodatevalidation	API resource to validate expense report date (from date should be less than to date).

exfromtodatevalidation

API resource to validate expense report date (from date should be less than to date).

Method: POST

Path: /exfromtodatevalidation

Request Parameters	Description
iFromDate	Expense report from date.
iToDate	Expense report to date.

Response Parameters	Response Result Type	Description
oValidate	Success	Date validation (from date should be less than to date).

Understanding REST API Endpoints for PeopleSoft Get Requester Name (exgetname)

This topic lists the REST resources and methods for the Get Requester Name API (exgetname). Use this API to retrieve the name of the requester.The Get Requester Name REST API can be used for the Expense skill.

API Resource Used With the Get Requester Name API

This table lists the delivered API resource used with the Get Requester Name API.

API Resource	Description
exgetnameroot	API resource to retrieve the name of the requester.

exgetnameroot

API resource to retrieve the name of the requester.

Method: GET

Path: /exgetnameroot

Request Parameters	Description
None available.	N/A

Response Parameters	Response Result Type	Description
oFirstName	Success	Requester name.

Understanding REST API Endpoints for PeopleSoft Get Transaction Details (exgettransdetails)

This topic lists the REST resources and methods for the Get Transaction Details API (exgettransdetails). Use this API to retrieve expense report transaction details.The Get Transaction Details REST API can be used for the Expense skill.

API Resource Used With the Get Transaction Details API

This table lists the delivered API resource used with the Get Transaction Details API.

API Resource	Description
exgettransdetailsroot	API resource to retrieve expense report transaction details

exgettransdetailsroot

API resource to retrieve expense report transaction details.

Method: GET

Path:/exgettransdetailsroot/{iFirstPart}

Request Parameters	Description
iFirstPart	Expense report ID.

Response Parameters	Response Result Type	Description
oTransmission1	Success	Expense report ID.
oTransmission2	Success	Expense report submitted date.
oTransmission3	Success	Action date.

Response Parameters	*Response Result Type*	*Description*
oTransmission4	Success	Comments.
oTransmission5	Success	Denied amount.
oTransmission6	Success	Prior Approvers (for multi-level approvals).
oTransmission11	Success	Expense ID description.
oTransmission12	Success	Expense amount.

Understanding REST API Endpoints for PeopleSoft Create Wallet Entry (exinsertmywallet)

This topic lists the REST resources and methods for the Create Wallet Entry API (exinsertmywallet). Use this API to create a wallet entry for an expense.The Create Wallet Entry REST API can be used for the Create Wallet Entry skill.

API Resource Used With the Create Wallet Entry API

This table lists the delivered API resource used with the Create Wallet Entry API.

API Resource	*Description*
exinsertmywalletroot	API resource to create wallet entry for an expense.

exinsertmywalletroot

API resource to create wallet entry for an expense.

Method: POST

Path: /exinsertmywalletroot/{iUserInput1}/{iUserInput2}/{iUserInput3}/{iUserInput4}/{iTransDt}/{iAmt}/{iCurr}/{iExpType}/{iLoc}/{iLoc2}

Request Parameters	*Description*
iAmt	Transaction amount.

Request Parameters	***Description***
iCurr	Transaction currency.
iExpType	Expense type.
iLoc	Primary expense location.
iLoc2	Secondary expense location.
iTransDt	Transaction date.
iUserInput1	Text string that retains the initial user ask for creating wallet entry.
iUserInput2	Expense type (as entered by user).
iUserInput3	Expense location (as entered by user).
iUserInput4	System-mapped expense location.

Response Parameters	***Response Result Type***	***Description***
oConfirmMessage	Success	Wallet creation confirmation message.
oMWAttachLink	Success	Wallet creation attachment link.
oMWLink	Success	Link to Wallet Entry page.

Understanding REST API Endpoints for PeopleSoft Send Notification (exsendnotification)

This topic lists the REST resources and methods for the Send Notification API (exsendnotification). Use this API to send a notification to expense approver.The Send Notification REST API can be used for the Expense skill.

API Resource Used With the Send Notification API

This table lists the delivered API resource used with the Send Notification API.

API Resource	Description
exsendnotificationroot	API resource to send notification to expense approver.

exsendnotificationroot

API resource to send notification to expense approver.

Method: GET

Path: /exsendnotificationroot/{iApprID}/{iFirstPart}

Request Parameters	Description
iApprID	Operator ID of the expense report approver.
iFirstPart	Expense report ID.

Response Parameters	Response Result Type	Description
oEmailSent	Success	Email sent.

Understanding REST API Endpoints for PeopleSoft Date Format Validation (exvalidatedateformat)

This topic lists the REST resources and methods for the Date Format Validation API (exvalidatedateformat). Use this API to validate the date format.The Date Format Validation REST API can be used for the Expense skill.

API Resource Used With the Date Format Validation API

This table lists the delivered API resource used with the Date Format Validation API.

API Resource	Description
exvalidatedateformat	API resource to validate the date format.

exvalidatedateformat

API resource to validate the date format.

Method: POST

Path: /exvalidatedateformat

Request Parameters	***Description***
iDate	Expense report date.

Response Parameters	***Response Result Type***	***Description***
oValidate	Success	Date format validation (format is based on user preferences).

Understanding REST API Endpoints for PeopleSoft Wallet Location Validation (exwalletvalidateloc)

This topic lists the REST resources and methods for the Wallet Location Validation API (exwalletvalidateloc). Use this API to validate wallet location or expense type information before creating the wallet transaction.The Wallet Location Validation REST API can be used for the Expense skill.

API Resource Used With the Wallet Location Validation API

This table lists the delivered API resource used with the Wallet Location Validation API.

API Resource	***Description***
exwalletvalidatelocroot	API resource to validate wallet location or expense type information before creating the wallet transaction.

exwalletvalidatelocroot

API resource to validate wallet location or expense type information before creating the wallet transaction.

Method: POST

Path: /exwalletvalidatelocroot/{iExLoc}/{iTypeOfVal}/{iTransDtString}

Request Parameters	***Description***
iExLoc	Expense location.

Request Parameters	Description
iTransDtString	Expense transaction date (string format).
iTypeOfVal	Validation type (location validation or expense type validation).

Response Parameters	Response Result Type	Description
No response parameters.	N/A	N/A

Response Result Code	Description
200	Location Resolved Location Not Resolved Type Resolved Type Not Resolved

Understanding REST API Endpoints for PeopleSoft Supplier Comprehensive Portal Service (scp)

This topic lists the REST resources and methods for the Supplier Comprehensive Portal Service API (scp). Use this API to retrieve bid details, managed content details, user preference details, supplier transaction details, link details to access pages, purchase orders with overdue shipments, purchase orders with rejected receipts, purchase orders awaiting acknowledgement, and verify whether PeopleSoft Strategic Sourcing is enabled. The Supplier Comprehensive Portal Service REST API can be used for the Supplier Secure Collaboration, Supplier Secure General, Supplier Secure Invoice and Payment, Sourcing, and Supplier Public skills.

API Resources Used With the Supplier Comprehensive Portal Service API

This table lists the delivered API resources used with the Supplier Comprehensive Portal Service API.

API Resource	Description
getlink	API resource to retrieve link details to access pages. This resource can be used for the *Supplier Secure General* and *Supplier Public* skills.

API Resource	*Description*
getbiddetails	API resource to retrieve bid details based on specific filter conditions and verify whether PeopleSoft Strategic Sourcing is enabled. This resource can be used for the *Supplier Public* and *Sourcing* skills.
getcontentdetails	API resource to retrieve managed content details, like Announcements and Events. This resource can be used for the *Supplier Public* and *Supplier Secure General* skills.
getoverduepodetails	API resource to retrieve details for purchase orders with overdue shipments. This resource can be used for the *Supplier Secure Collaboration* skill.
getrejectedreceipts	API resource to retrieve purchase orders with rejected receipts. This resource can be used for the *Supplier Secure Collaboration* skill.
getpoadetails	API resource to retrieve purchase orders awaiting acknowledgement. This resource can be used for the *Supplier Secure Collaboration* skill.
getuserpreference	API resource to retrieve user preference details. This resource can be used for the *Sourcing* and *Supplier Secure Collaboration* skills.
getassociatedsuppliers	API resource to retrieve suppliers associated with the transaction. This resource can be used for the *Sourcing* and *Supplier Secure Collaboration* skills.

getlink

API resource to retrieve link details to access pages. This resource can be used for the *Supplier Secure General* and *Supplier Public* skills.

Method: GET

Path: /getlink/{instrcontext}

Request Parameters	*Description*
instrcontext	Context String to differentiate the type of request. Possible values are: • Contact: Contact details related link. • Register: Registration related link.

Response Parameters	*Response Result Type*	*Description*
strcontacturl	Success	Contact URL.
strdescr	Success	Description.
strfaqurl	Success	FAQ URL.
strregisterurl	Success	Registration URL.
strtitle	Success	Title

getbiddetails

API resource to retrieve bid details based on specific filter conditions and verify whether PeopleSoft Strategic Sourcing is enabled. This resource can be used for the *Supplier Public* and *Sourcing* skills.

Method: GET

Path: /getpublicbiddetails/{instrstartdate}/{instrenddate}/{instrcategorytext}/{instrformatlist}

Request Parameters	*Description*
instrcategorytext	Category text filter.
instrenddate	End date filter.
instrformatlist	Bid Event format filter (sell/buy).
instrstartdate	Start date filter.

Response Parameters	Response Result Type	Description
strbiddescr	Success	Event description.
strbidformat	Success	Event format.
strbidid	Success	Event ID.
strbidtype	Success	Event type.
strenddate	Success	Event end date.
strfootertext	Success	Footer text.
strstartdate	Success	Event start date.
strurl1	Success	URL to access the event.

Method: GET

path: /getbidhealth

Request Parameters	Description
No Request Parameters.	N/A

Response Parameters	Response Result Type	Description
No response parameters.	N/A	N/A

Response Result Code	Description
200	Success Not Authorized
400	Error

Method: GET

Path: /getuserbideventdetails/{instrduration}/{instrendduration}/{instrcategorytext}/{instrtimezone}/{instrformatlist}/{instrinvtypelist}/{instrstatuslist}/{instreventparticipation}/{instrsuppliersetid}/{instrsupplierid}

Request Parameters	***Description***
instrcategorytext	Category text filter.
instrduration	Duration filter.
instrendduration	End duration filter.
instreventparticipation	Bid Event participation status filter (RESP - Submitted bids, NRESP - Yet to submit bids).
instrformatlist	Bid Event format filter (sell, buy).
instrinvtypelist	Bid Event Invitation type filter (Invited, Public).
instrstatuslist	Bid Event status filter.
instrsupplierid	Supplier ID.
instrsuppliersetid	Supplier SetID.
instrtimezone	Duration Timezone (if timezone conversion is needed).

Response Parameters	***Response Result Type***	***Description***
strawarddt	Success	Award date.
strawardtype	Success	Award type.
strbidnum	Success	Bid number.
strenddate	Success	End date.
strended	Success	Event ending flag (Y - Ended, N-Ongoing).

Response Parameters	***Response Result Type***	***Description***
strendsin	Success	Ends in.
streventformat	Success	Event format
streventid	Success	Event ID.
streventname	Success	Event name.
streventstatus	Success	Event status.
streventtype	Success	Event type.
strinvitationtype	Success	Invitation Type (Invited, Public).
strround	Success	Event round.
strstartdate	Success	Start date.
strsupplierid	Success	Supplier ID.
strsuppliername	Success	Supplier name.
strtransid	Success	Transaction ID (Purchase order, Contract ID).
strurl1	Success	URL to access the event.
strversion	Success	Event version

getcontentdetails

API resource to retrieve managed content details, like Announcements and Events. This resource can be used for the *Supplier Public* and *Supplier Secure General* skills.

Method: GET

Path: /getcontentdetails/{instrcontext}/{instrstartdate}/{instrenddate}/{instrsearchtext}

Request Parameters	***Description***
instrcontext	Context String to differentiate the type of request. Possible values are: • Announcement - For Announcement details. • Event - For Calender event details, uses Start date and End date filter. • Search - To peform search using the instrsearchtext parameter in the configurable content using Elastic Search.
instrenddate	End date filter.
instrsearchtext	Search text value that is used if context value set to Search.
instrstartdate	Start date filter.

Response Parameters	***Response Result Type***	***Description***
strcontentid	Success	Content ID.
strdescr	Success	Content description.
strenddate	Success	End date.
strfootertext	Success	Footer text.
strstartdate	Success	Start date.
strtitle	Success	Title of content.
strurl1	Success	URL to access managed content.

getoverduepodetails

API resource to retrieve details for purchase orders with overdue shipments. This resource can be used for the *Supplier Secure Collaboration* skill.

Method: GET

Path: /getoverduepodetails/{instrsuppliersetid}/{instrsupplierid}

Request Parameters	***Description***
instrsupplierid	Supplier ID.
instrsuppliersetid	Supplier setID.

Response Parameters	***Response Result Type***	***Description***
nbroverdueschedulecount	Success	Count of purchase orders with overdue schedules.
strbuyingorg	Success	Buying organization.
strpodate	Success	Purchase order date.
strpoid	Success	Purchase order ID.
strsupplierlocation	Success	Supplier location.
strsuppliername	Success	Supplier name.
strurl1	Success	URL to access purchase order overdue details.

getrejectedreceipts

API resource to retrieve purchase orders with rejected receipts. This resource can be used for the *Supplier Secure Collaboration* skill.

Method: GET

path: /getrejectedreceipts/{instrsuppliersetid}/{instrsupplierid}/{instrreceiptfromdt}/{instrreceipttodt}

Request Parameters	***Description***
instrreceiptfromdt	Receipt from date filter.

Request Parameters	***Description***
instrreceipttodt	Receipt to date filter.
instrsupplierid	Supplier ID.
instrsuppliersetid	Supplier setID.

Response Parameters	***Response Result Type***	***Description***
nbrpoline	Success	Purchase order line number.
nbrreceptline	Success	Receipt line number.
strbuyingorg	Success	Buying organization.
stritemid	Success	Item ID.
stritemname	Success	Item name.
strpoid	Success	Purchase order ID.
strreceiptdate	Success	Receipt date.
strreceiptid	Success	Receipt ID.
strrejectedquantity	Success	Rejected quantity.
strsuppliername	Success	Supplier name.
struom	Success	Unit of measure.
strurl1	Success	URL to access receipt details.

getpoadetails

API resource to retrieve purchase orders awaiting acknowledgement. This resource can be used for the *Supplier Secure Collaboration* skill.

Method: GET

Path: /getpoadetails/{instrsuppliersetid}/{instrsupplierid}/{instrpoastatusfilter}

Request Parameters	*Description*
instrpoastatusfilter	Purchase order status Filer. To filter overdue transactions, the currently accepted value is ODUE.
instrsupplierid	Supplier ID.
instrsuppliersetid	Supplier setID.

Response Parameters	*Response Result Type*	*Description*
isoverdue	Success	Acknowledgement is overdue.
strackstatus	Success	Acknowledgement status.
strbuyer	Success	Buyer.
strbuyingorg	Success	Buying organization.
strduein	Success	Due in.
strpoid	Success	Purchase order ID.
strsupplierlocation	Success	Supplier location.
strsuppliername	Success	Supplier name.
strurl1	Success	URL to access the purchase order acknowledgement details.

getuserpreference

API resource to retrieve user preference details. This resource can be used for the *Sourcing* and *Supplier Secure Collaboration* skills.

Method: GET

Path: /getuserpreference/{instrcontext}

Request Parameters	***Description***
instrcontext	Context String to differentiate the type of request. Possible values are: • OS - Overdue Shipments • RR - Rejected Receipts • POA - PO Acknowledgements • BO - Bidding Events & • AE - Awarded Events

Response Parameters	***Response Result Type***	***Description***
nbrlastndayscount	Success	User preference value.
strbaseurl	Success	URL to access the page based on the context.
strdatepreference	Success	Date preference.
strmultisupplier	Success	Suppliers associated with the logged in user (Y - multiple supplier, N - single Supplier).

getassociatedsuppliers

API resource to retrieve suppliers associated with the transaction. This resource can be used for the *Sourcing* and *Supplier Secure Collaboration* skills.

Method: GET

Path: /getoverdueposuppliers

Request Parameters	***Description***
No request parameters.	N/A

Response Parameters	Response Result Type	Description
nbrcount	Success	Number of overdue shipments.
sno	Success	Serial number generated in the response.
strsetid	Success	Supplier setID.
strsupplierid	Success	Supplier ID.
strsuppliername	Success	Supplier name.
strurl1	Success	URL to access supplier details.

Method: GET

Path: /getpoasuppliers/{instrpoastatusfilter}

Request Parameter	Description
instrpoastatusfilter	Purchase order acknowledgement status Filer. To filter overdue transactions, the currently accepted value is ODUE.

Response Parameters	Response Result Type	Description
nbrcount	Success	Number of purchase orders awaiting acknowledgement.
sno	Success	Serial number generated in the response.
strsetid	Success	Supplier setID.
strsupplierid	Success	Supplier ID.
strsuppliername	Success	Supplier name.
strurl1	Success	URL to access purchase order details.

Method: GET

Path: /getarejectedreceiptsuppliers/{instrreceiptfromdt}/{instrreceipttodt}

Request Parameters	***Description***
instrreceiptfromdt	Receipt from date filter.
instrreceipttodt	Receipt to date filter.

Response Parameters	***Response Result Type***	***Description***
nbrcount	Success	Number of purchase orders associated with rejected receipt lines.
sno	Success	Serial number generated in the response.
strsetid	Success	Supplier setID.
strsupplierid	Success	Supplier ID.
strsuppliername	Success	Supplier name.
strurl1	Success	URL to access supplier details.

Method: GET

Path: /getbidassociatedsuppliers/{instrduration}/{instrendduration}/{instrtimezone}/{instrcategorytext}/{instrformatlist}/{instrinvtypelist}/{instrstatuslist}/{instreventparticipation}

Request Parameters	***Description***
instrcategorytext	Category text filter.
instrduration	Duration filter.
instrendduration	End duration filter.
instreventparticipation	Bid event participation status filter (RESP - submitted bids, NRESP - yet to submit bids)

Request Parameters	*Description*
instrformatlist	Bid event format filter (sell, buy).
instrinvtypelist	Bid event invitation type filter (invited, public)
instrstatuslist	Bid event status filter.
instrtimezone	Duration timezone (if timezone conversion is needed).

Response Parameters	*Response Result Type*	*Description*
nbrcount	Success	Number of bid events.
sno	Success	Serial number generated in the response.
strsetid	Success	Supplier setID.
strsupplierid	Success	Supplier ID.
strsuppliername	Success	Supplier name.