PeopleSoft PeopleTools 8.63

Applications User's Guide

G47430-01
July 2026

PeopleSoft PeopleTools 8.63 Applications User’s Guide,

G47430-01

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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.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment. The documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see Understanding Locally Installed PeopleSoft Online Help.

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 three main types of common help are:

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- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

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.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

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.

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Typographical Convention	Description
⇒	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, Country, 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.

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

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Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that 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.

PeopleTools Related Links

PeopleSoft 8.63 Home Page

PeopleSoft Search and Insights Home Page

PeopleSoft Online Help

PeopleSoft Information Portal

PeopleSoft Spotlight Series

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Contact Us

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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1

Working With PeopleSoft Applications

Understanding PeopleSoft Browser-Based Applications

You use PeopleSoft applications in a purely internet environment called the *PeopleSoft Pure Internet Architecture,* which is a server-centric architecture that requires only that a web browser be installed on individual user machines.

With your browser, you sign in to the PeopleSoft system as you would when opening any other website. After you sign in, your default homepage is displayed by the PeopleSoft system. Whether your default homepage is a fluid homepage or a classic homepage depends on system-wide settings as well as the device you use to access the PeopleSoft system.

For more information on navigating in the PeopleSoft system from a fluid homepage, see Working with Fluid Homepages and Dashboards. (For more information on navigating in prior versions of the PeopleSoft user interface, see Using the Universal Navigation Header.)

Your PeopleSoft application is delivered with a demonstration database that includes sample data to help you see how the system works. You can also use the demonstration database to experiment with specific PeopleSoft applications. The product documentation for the various applications frequently refer to the demonstration information to clarify concepts and provide a common frame of reference for examples.

While you can use your browser as you would with most websites, do not use these browser features when signed into a PeopleSoft system:

- The back button — Using the browser's back button does not trigger standard component processing and can result in the loss of data, corruption of the navigation history stack, and other processing errors. Instead, only use the Back button that is displayed in the fluid banner or the fluid-like portal header. See Using the Back Button for more information.
- The refresh button — Using the browser's refresh button can result in duplicate entries into the navigation history stack, the loss of data, and other processing errors. Instead, navigate away from the page and then back again.
- The Open Link in New Tab (or New Window) link — These links are available in the browser's pop-up menu when you right-click a link. Using these links does not properly establish a new session and processing errors can occur as a result. Instead, only use the New Window link if it is available in the pagebar, which is a feature of classic pages only. See Using the Pagebar for more information.

Related Topics

- Fluid User Interface Developer's Guide: Setting Device Homepage Defaults
- Using PeopleSoft Applications with Mobile Devices

Signing In to PeopleSoft Applications

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

Access your default browser window.

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1. Enter the URL for your application or select the bookmark for the page where you want to work.

   The Sign In page appears.
2. Select the language in which you want your transaction pages to appear.
3. Enter your user ID and password.

   Your user ID and password are case sensitive. For security reasons, passwords always appear as asterisks in the display as you enter them.
4. Select the **Enable Screen Reader Mode** option to start the application with screen reader features enabled.
5. Press the **Tab** and **Enter** keys or click the **Sign In** button to sign in.

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

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

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

For security purposes, your PeopleSoft system logs you out of your application after a period of inactivity determined by your security administrator. Before your session times out, the system might provide a warning that your browser session is about to expire. You can continue with your current session by clicking the **OK** button in the warning message. If you do not respond within two minutes, the session ends and the expired connection page opens. To return to your application, click the **Sign in to PeopleSoft** link. The Sign In page appears, and you can sign in to the application again.

> **Important**
>
> To ensure data security in environments where multiple users have access to the same workstation, users should close the browser after logging out of the PeopleSoft system.

Using Drop-Down Menus

This topic describes how to use the drop-down menus previously used in PeopleSoft classic applications.

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> **Important**
>
> Drop-down menus and other forms of classic navigation are no longer supported. The information in this topic pertains to a prior version of PeopleSoft classic applications only. The default navigational interface for PeopleSoft applications in the current release is based on the fluid banner, which can be used for both classic and fluid applications. For information on working with the fluid user interface, see Working with Fluid Pages and Controls.

PeopleSoft Terminology

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

Here are some of the basic elements used in PeopleSoft applications:

Field or Control	Description
Main Menu	This PeopleSoft navigation structure, located at the top of your page, organizes and provides access to transaction pages from which you can carry out actions and modify data. The Main Menu contains menu items; some lead directly to transaction pages and some lead to submenus in a hierarchical format.
Menu pagelet	This PeopleSoft navigation structure, located to one side of your page, organizes and provides access to transaction pages from which you can carry out actions and modify data. The Menu pagelet contains links, some leading directly to transaction pages and some leading to other links in a hierarchical format.
Content reference	A link in the menu that accesses a transaction page or group of pages. A content reference is a reference to a URL for the transaction page.
Navigation path	The collective set of links that appear as you navigate the menu structure; they indicate the hierarchical path to your current location. Sometimes called breadcrumbs, they appear in the drop-down menu header and in the navigation page header.
Keys	The fields, such as EmplID (employee identifier), that uniquely identify one row of data in a transaction. Keys appears as fields on search pages and transaction pages. All information on a page is related to a key, which usually appears at the top of the page and is display-only.
Component	The page or group of pages that appear when you perform a search. Multiple pages in a component must share the same high-level key;

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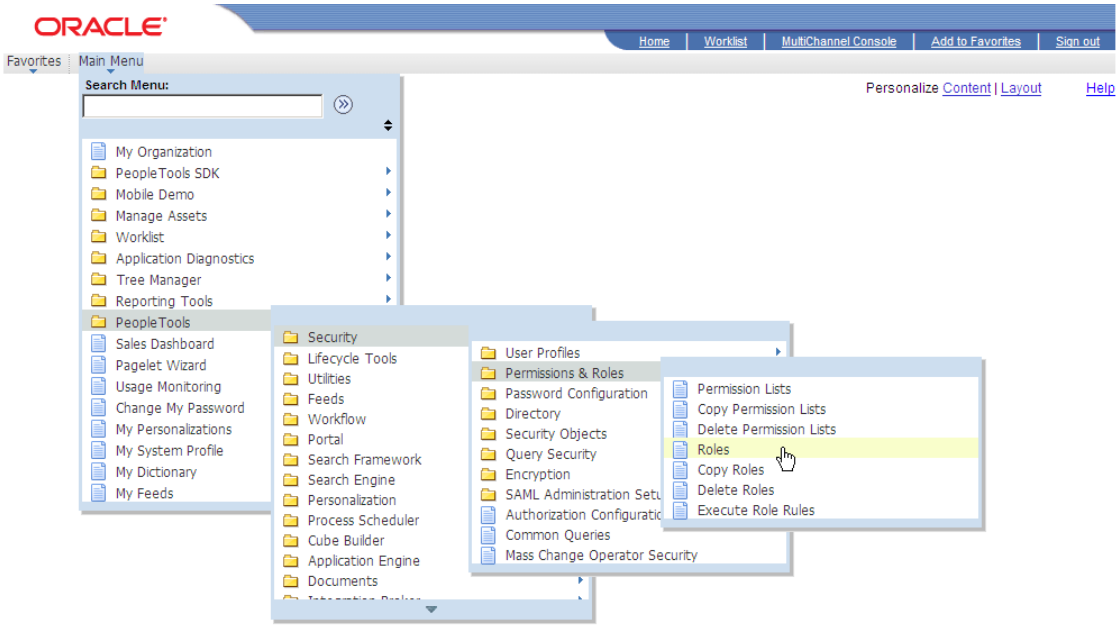
Field or Control	Description
Page	The individual display and data-entry screens for each part of your PeopleSoft application. Pages appear in the browser window.

Using Drop-Down Menus

Drop-down menus are an intuitive, nonlinear way to navigate PeopleSoft applications and access your application data. Drop-down menus appear at the top of your browser, above the transaction page or content area, and contain lists of menu items. The menu items are either links that provide direct access to a transaction or detail page, or they are folders that provide access to submenus, which cascade to the side and contain more menu items. Folders typically organize menu items based on business processes or other relationships that exist among transactions.

This example shows the Main Menu drop-down navigation.



Access the Main Menu.

> **Note**
>
> The **Main Menu** and all subsequent menus display only menu items that you are authorized to access.

1. Click a folder label to open its submenu.
2. Click a link to open the resource in the content area.

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> **Note**
>
> If you click the folder icon instead of the label, the navigation page appears.

See Using Navigation Pages.

Scrolling and Sorting

Submenus always open in the viewable area. If the viewable area is too small to display the full list of items in a submenu, then scroll indicators (up and down arrows) appear at the top and bottom of the submenu to let you know that the list contains more menu items. Hover your mouse over the up or down arrow to make the menu scroll in the direction of the arrow. Click and hold the arrow to double the scrolling speed. You can also use your mouse wheel to scroll through a menu.

You can sort the drop-down menu alphabetically by clicking the sort icon on the Main Menu window. Continue clicking to toggle through an ascending, descending, and portal sequence number sort. As you click the sort icon, the icon changes to indicate the direction of the sort.

This example shows the Main Menu drop-down navigation with scroll and menu sort indicators.

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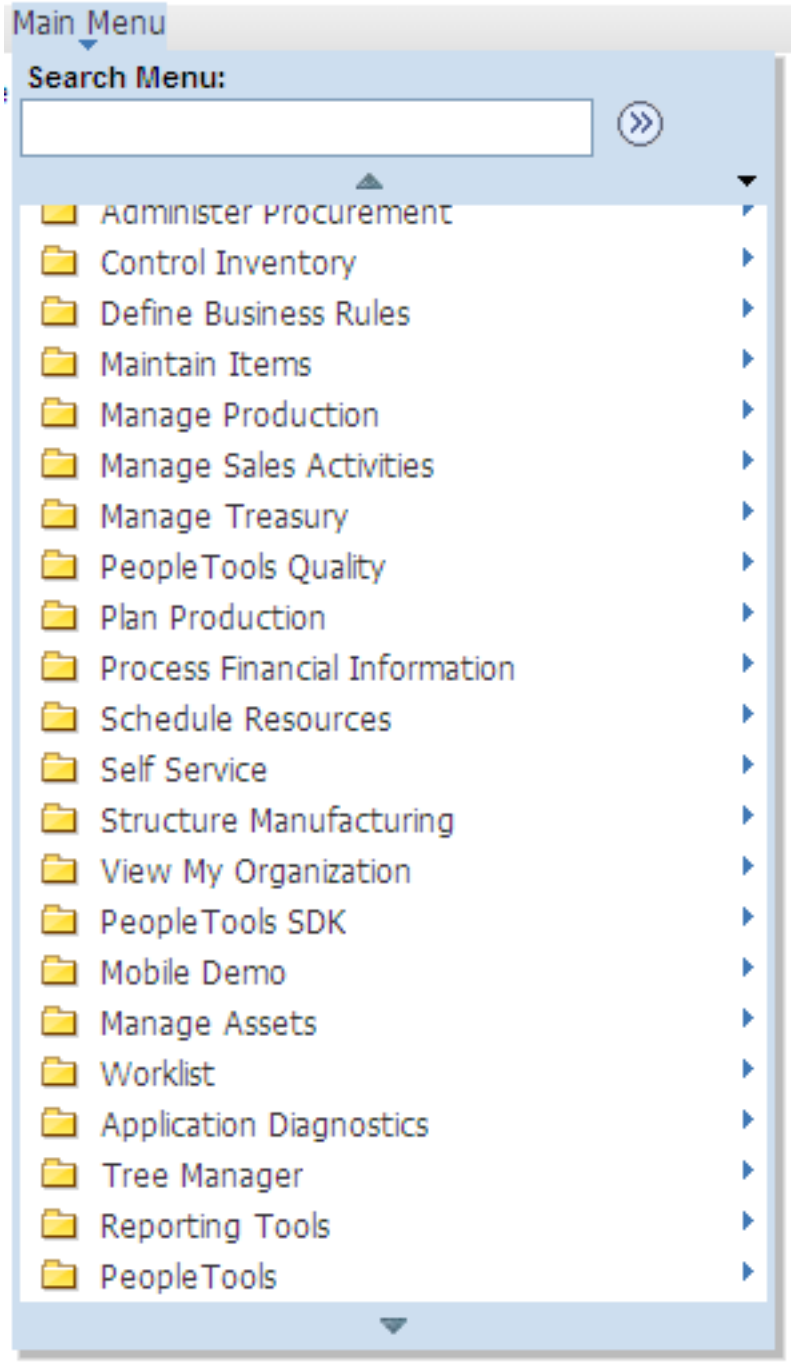

Note

While the sort icon appears only on the Main Menu, any sort you initiate at the Main Menu level applies to all submenus and persists until you change the sort or sign out.

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Navigating Breadcrumbs

> **Important**
>
> Breadcrumbs and other forms of classic navigation are no longer supported. The information in this topic pertains to a prior version of PeopleSoft classic applications only. The default navigational interface for PeopleSoft applications in the current release is based on the fluid banner, which can be used for both classic and fluid applications. For information on working with the fluid user interface, see Working with Fluid Pages and Controls.

Breadcrumbs refer to the collective sequence of items that appear above the content area when you navigate to transaction pages or navigation pages using the drop-down menu. The breadcrumbs display the path you took to get to where you are—that is, the component you are on. Each item in the breadcrumb list is either a link to a folder, subfolder, or component, and represents a level in the overall menu hierarchy. When navigating within a WorkCenter or from a dashboard, the breadcrumbs include the WorkCenter or dashboard link. In addition, the breadcrumbs might also include search text, related actions, and the persistent search icon. Click any breadcrumb item to navigate directly to the corresponding item and reveal the subordinate menu items.

> **Note**
>
> Breadcrumbs are updated only when you use drop-down menu navigation; tracking of navigation paths when using menu pagelets is not supported.

All PeopleSoft applications dynamically generate the individual items in the breadcrumb list using the following criteria:

1. The first item in the sequence is always the Main Menu.
2. The intermediate items in the sequence are the names of each item that you click to access the resource; menu items and component names appear in the order that you click them
3. The last item in the sequence is:
   - The label of the component link when you access a transaction page.
   - The folder name when you access a navigation page.
   - The WorkCenter or dashboard name when you access the WorkCenter or dashboard.
   - The value of the focus node when you access a SmartNavigation page.

Breadcrumbs can reveal both the navigational path to your current location and the hierarchical or parent-child relationships that exist among the items in the breadcrumb sequence.

In certain circumstances, the breadcrumbs will not be updated when you navigate to a new page. These circumstances include:

- When the new page comes from a content provider system on a release earlier than PeopleTools 8.53.
- If the page, or the folder that contains it, is hidden.

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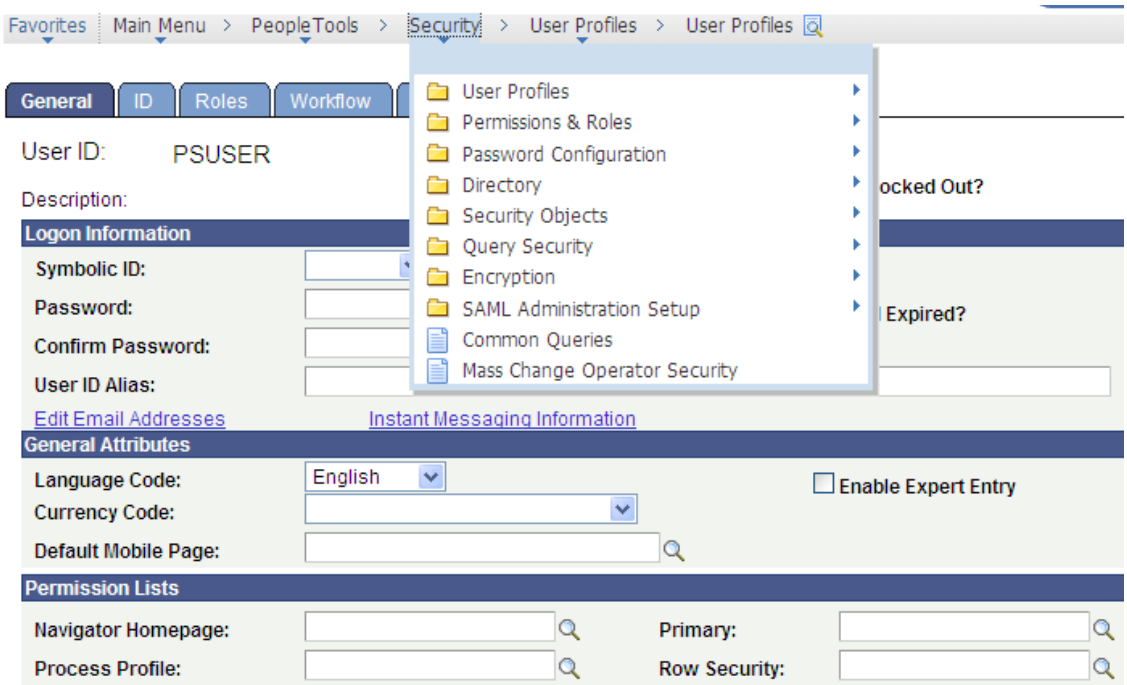
- If the page is part of an unregistered component.
- If the page is part of a component that does not have the **Include in Navigation** option selected.

The following example shows a breadcrumb that lists the navigation path that was used to access the User Profiles component. The user has selected the Security item within the breadcrumb, revealing the items subordinate to that menu level.



Using SmartNavigation

> **Important**
>
> SmartNavigation has been desupported.

Most drop-down menus are comprised of menu items that are static and completely independent of your application data and any relationships that exist among your data. You navigate through menu items to access a link that you click to open a search page. You then enter a search value that the system uses to retrieve data, which populates the transaction page

SmartNavigation extends and enhances drop-down menus by incorporating your data into the menu structure itself. Menu items are dynamic and appear in the menu hierarchy based on parent-child relationships. When you use SmartNavigation menus, rather than navigating *to* your data you navigate the data itself.

SmartNavigation menus and menu items represent hierarchically related entities, such as:

- Employees in a department.

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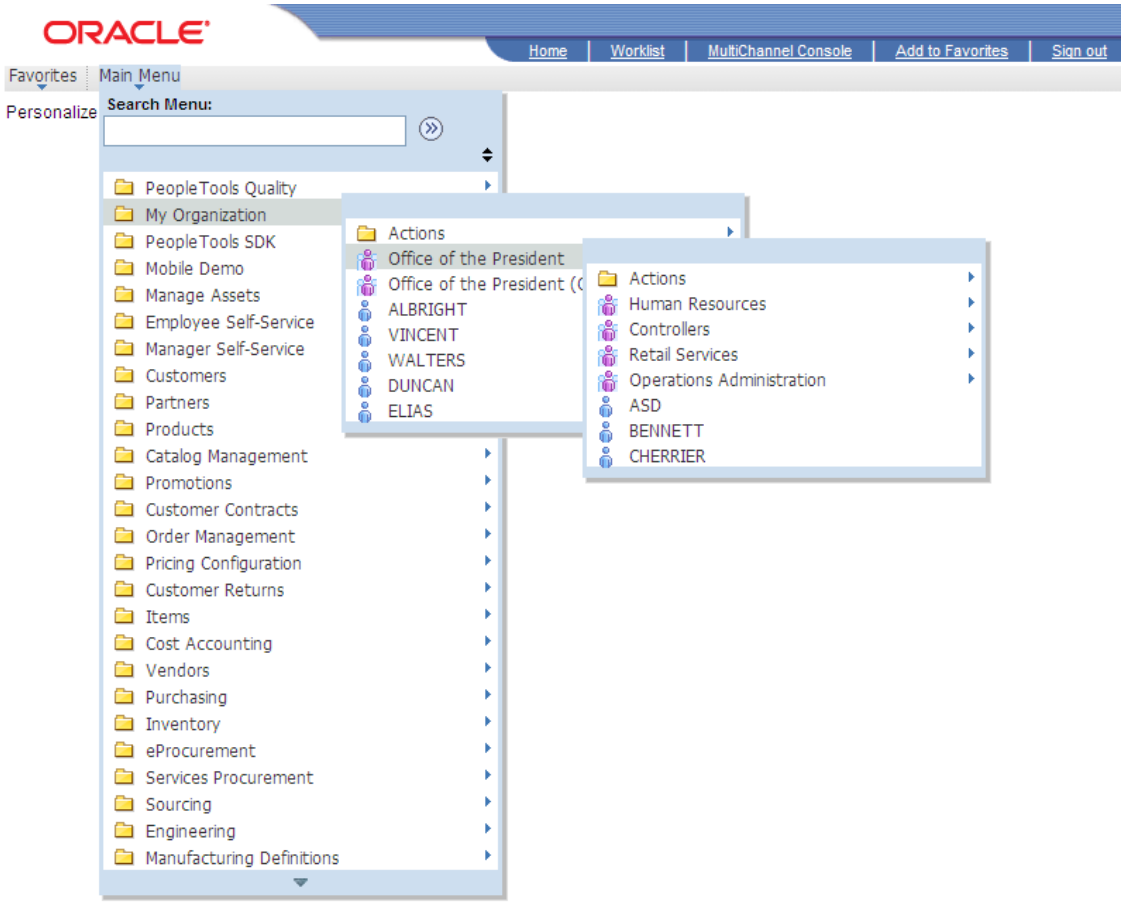
- Accounts in a region.
- Students in a class.

This example illustrates SmartNavigation drop-down menus.



Each menu item is a unique row of data. The menu items are organized based on parent-child relationships. The key field values of the row determine the labels of the menu items. The key field structure of the underlying table determines the position of the menu items in the menu hierarchy.

Similar to standard menu items, SmartNavigation menu items expand when you click the label of a parent menu item. When you click the icon of a child menu item, the transaction or detail page appears.

In addition to your data, SmartNavigation menus also display an Actions folder. The Actions folder contains links to the details component and related actions components.

> **Note**
>
> Left navigation from the Menu pagelet does not support SmartNavigation menus.

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> **Note**
>
> In addition, in certain scenarios, when navigating through a SmartNavigation menu to content contained in an Actions folder, the breadcrumb list is painted with an "Actions" element. This Actions element is non-operable—that is, you cannot select the drop-down menu beneath this Actions element like a normal folder. Rather, it is only there to suggest your navigation through the menu. If you attempt to select the drop-down menu beneath this Actions element, the following message will be displayed:
>
> `Updating DOM Unsuccessful: Error - TypeError: flyout is null`

SmartNavigation Icons

SmartNavigation menu items do not use the standard folder and content reference icons. SmartNavigation menu items icons are graphically stylized representations of entities. A multi-entity icon appears next to menu items that are parent rows with one or more subordinate menu items that are child rows. A single-entity icon appears next to menu items that are child rows with no subordinate menu items or child rows.

Using Menu Pagelets

> **Important**
>
> Menu pagelets and other forms of classic navigation are no longer supported. The information in this topic pertains to a prior version of PeopleSoft classic applications only. The default navigational interface for PeopleSoft applications in the current release is based on the fluid banner, which can be used for both classic and fluid applications. For information on working with the fluid user interface, see Working with Fluid Pages and Controls.

The Menu pagelet navigation is an intuitive way of updating or viewing data in your database. The menu consists of a hierarchy of links and content references. Expanding and collapsing these links and then selecting content references that are within them is one of the primary ways of navigating PeopleSoft applications.

This example illustrates Menu pagelet navigation.

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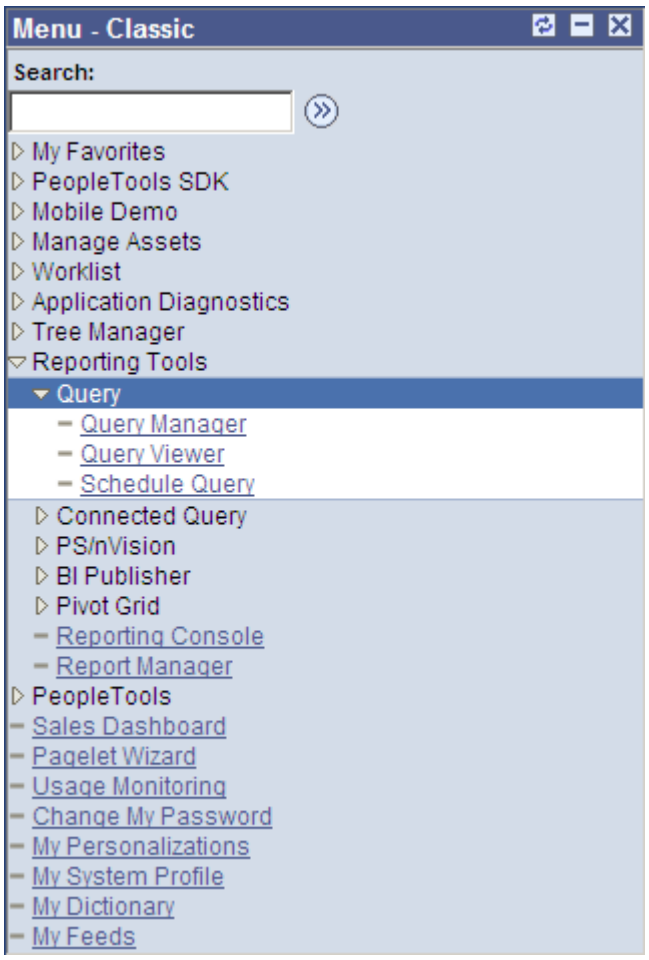

The Menu pagelet contains a list of the general areas to which you have access in the application. From this point you can expand any folder to access additional folders or content references that open transaction pages.

When you click folders in the main menu, the system retrieves only the appropriate hierarchy for the selected link or folder, instead of refreshing the entire menu. When you click the folder image next to the folder name, only the specific folder contents are retrieved. When you click the folder link itself, the system retrieves and displays the entire hierarchy of the root portal registry contents and the folder contents themselves. As you navigate the folders, the levels within the folder hierarchy change color for visual identification.

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Using Navigation Pages

> **Important**
>
> Standard navigation pages (DFANs), custom navigation pages (CFANs), SmartNavigation, and other forms of classic navigation are no longer supported. The information in this topic pertains to a prior version of PeopleSoft classic applications only. The default navigational interface for PeopleSoft applications in the current release is based on the fluid banner, which can be used for both classic and fluid applications. For information on working with the fluid user interface, see Working with Fluid Pages and Controls.

PeopleSoft applications include navigation pages, which are task-driven pages that offer intuitive access to pages needed to complete your business processes. These navigation pages may incorporate icons to make it even easier for you to navigate your application.

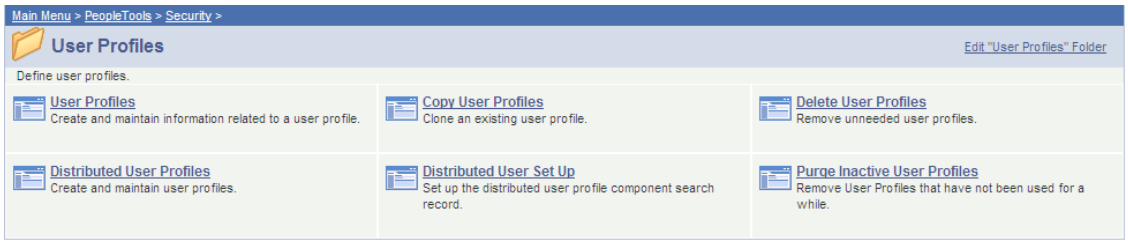
You access navigation pages by clicking a folder icon in the menu. The two types of navigation pages are:

- Standard navigation pages.
- SmartNavigation pages.

Standard Navigation Pages

Elements embedded in the folder, including content references and other folders, are arranged in a graphical format on a navigation page that appears in the content area. For example, clicking the PeopleTools, Utilities folder in the menu pagelet displays the Utilities navigation page.

This example shows the PeopleTools Security User Profiles standard navigation page.



Related Topics

- Portal Technology: Understanding Navigation Pages

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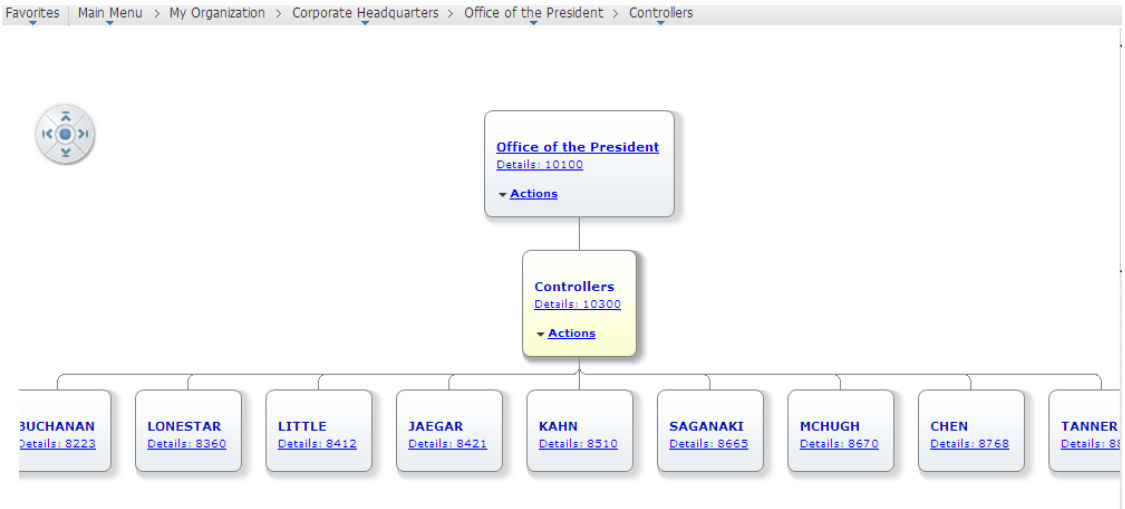
SmartNavigation Pages

> **Important**
>
> SmartNavigation pages are a desupported feature, however, you may see them in existing PeopleSoft applications, depending on the version of your application.

SmartNavigation pages are different than standard navigation pages.

SmartNavigation pages organize your data into a tree-like chart that displays two or three levels at one time, as you see here:

This example illustrates a SmartNavigation page.



> **Note**
>
> If the focus node does not have a parent or it does not have children, only two levels appear; otherwise, three levels appear.

Note these points about the organization of the chart:

- The chart represents hierarchical data arrayed in levels.

  Adjacent levels, joined by connectors, indicate parent-child relationships; nodes at the same level are sibling nodes.
- Each level consists of one or more nodes.

  Each node represents a single entity, such as an employee in an organization, and corresponds to one row of data. Other than the top-level node, each node has one parent and zero, one, or more child nodes.
- Each node, which is linked to a detail component, contains values—usually a detail value and a descriptive value.

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> **Note**
>
> Some nodes also contain a related Actions drop-down menu. This menu displays links, which you click to access other transactional data that is in some way related to the data on the node where the Actions menu appears.

The descriptive value can appear as either static text or as a link that you use to navigate through the chart. When you click this link, the corresponding node moves to the middle level of the chart, which now displays three levels. The top and bottom levels contain the parent and child nodes, respectively. Click these links until the chart displays the data you want.

The search key or detail value always appears as a link that you use to access a component. When you click a Details link, the system:

- Accesses the component to which the node is linked.
- Passes the detail value to the component search record.
- Retrieves the row of data indicated by the search key value.
- Populates the transaction page with the data and displays it to you.
- Displays node names in the navigation path at the top of the page to show the hierarchical structure of the data.

- SmartNavigation pages have a limited amount of space. If a level contains more nodes than can appear within the allotted space, the SmartNavigation page enables you to reposition the chart by using:
  - The navigator button.

    The button includes directional arrows that you click to move the chart in the direction of the corresponding arrow. Click the arrow until any nodes outside of field of vision come into view or click the center of the button to center the chart horizontally and vertically on the node in the middle level.
  - The cursor.

    Move the cursor inside the chart area. When the cursor changes into a hand, click and drag the chart until any hidden nodes come into view.

The chart, the nodes, and the actions are highly configurable based on security, business processes, and your data.

> **Note**
>
> SmartNavigation pages cannot be pinned to a fluid homepage, to the NavBar, or to the Favorites list. Pinning refers to using the Add To ... feature in the Actions menu.

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Using the Portal Search Field

Important

Menu pagelets, the drop-down menu, the portal search field, and other forms of classic navigation are no longer supported. The information in this topic pertains to a prior version of PeopleSoft classic applications only. The default navigational interface for PeopleSoft applications in the current release is based on the fluid banner, which can be used for both classic and fluid applications. For information on working with the fluid user interface, see Working with Fluid Pages and Controls.

Use the **Search** field to search for a registered content reference within the system. Enter the name of the page you want to find and press the **Enter** key or click the search button. As you type, you might see suggestions drop down below the search field. These suggestions help you narrow the search. Autocomplete uses the text entered and searches for this text from the list of content references available from the portal registry. It returns the list of target content references only (no folders) that the current user is authorized to view. The target content reference label (defined in Portal registry) is checked for the search text entered by the user.

This example shows an autocomplete pop-up window in the Search Menu.

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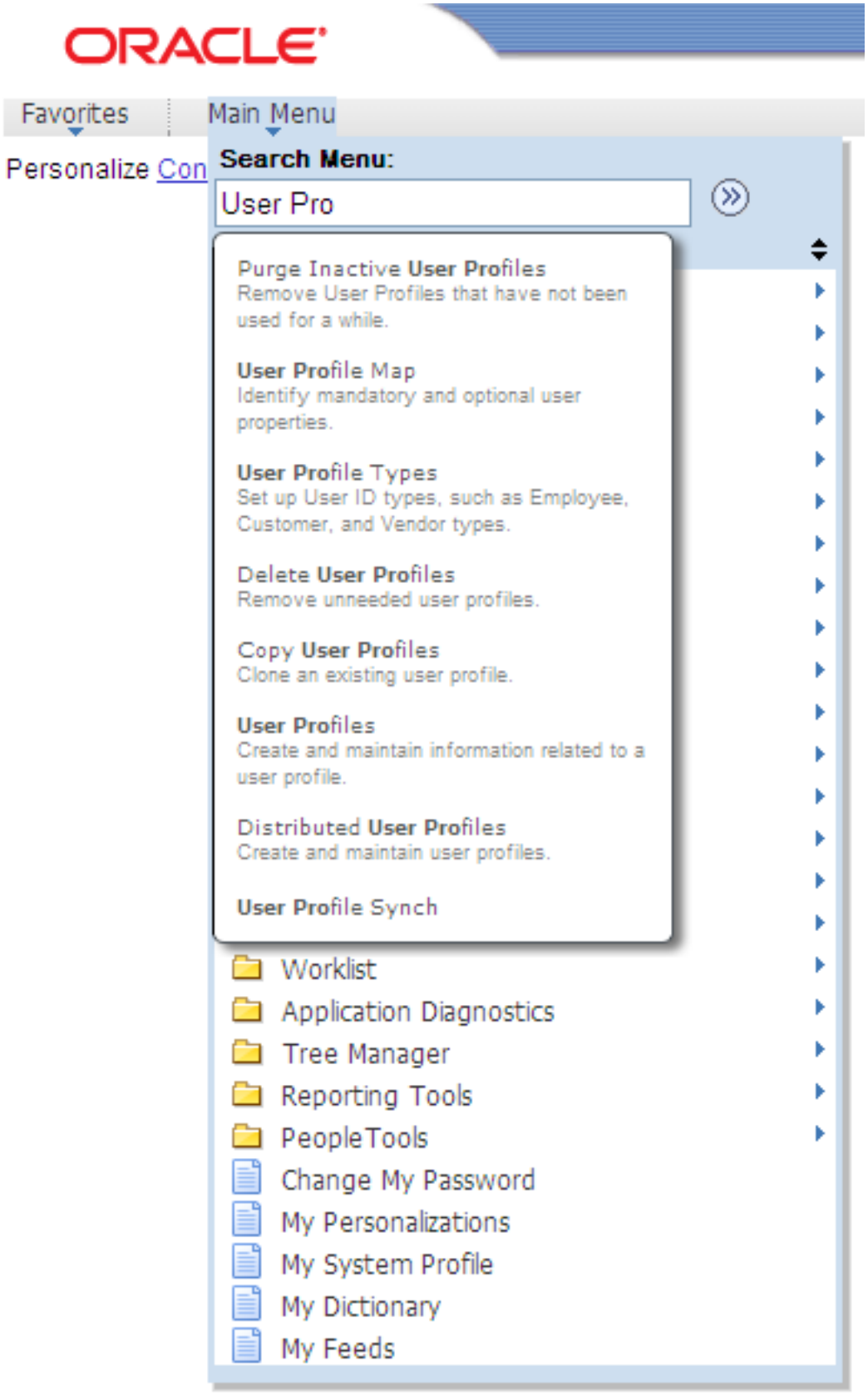

Select from the list or continue to enter the page name and click the search button.

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

> **Note**
>
> The maximum number of automatically suggested entries that appears in the pop-up menu when you begin typing is controlled in the general portal settings.

When you click the search button, this action opens the Search page displaying the results. If your search produces a large number of results, modify your search criteria, select the **Search Within Results** option, and then select **Find** to narrow your search further. Use the **Personalize Settings** link to hide or show summaries of each search result and to control the number of search results that appear on each page.

> **Note**
>
> An administrator must grant you full access to this web library to get the suggestion list: WEBLIB_PORTAL.PORTAL_SEARCH_PB.FieldFormula.ISCRIPT_PortalSearch.

Related Topics

- Portal Technology: Managing General Portal Settings

Using the Universal Navigation Header

This section describes how to use the universal navigation header previously used in PeopleSoft classic applications.

> **Important**
>
> The information in this topic pertains to a prior version of PeopleSoft classic applications only. The default navigational interface for PeopleSoft applications in the current release is based on the fluid banner, which can be used for both classic and fluid applications. For information on working with the fluid user interface, see Working with Fluid Pages and Controls.

Understanding the Universal Navigation Header

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

This example shows the universal navigation header.

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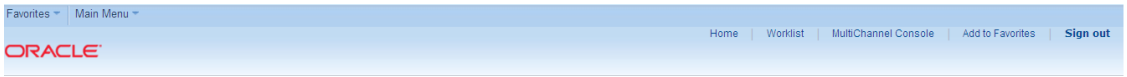

The universal navigation header contains these links:

Term	Definition
Favorites	The favorites list is like your own list of bookmarks to components and transaction pages that you use frequently. After you add a favorite, it appears in the Favorites menu. You can return to the page by clicking the Favorites menu and clicking the link for the page that you want to view. You can store favorites with a specific key, for example, if you consistently access the ABC department, then you can store a favorite that directly accesses the ABC department.
Main Menu	Click to access all folders, submenus, and content references.
Home	Click to return to your homepage.
Worklist	Click to access the Worklist page, which provides summary information about all items on your personal worklist. This page also provides links that enable you to view additional details about the work, perform the indicated work, and reassign work items. See Using Worklists to Receive Ad Hoc Notifications.
MultiChannel Console	If you are defined as an agent in PeopleSoft MultiChannel Framework, click to access and manage tasks assigned to you. This is an optional setting that your system administrator enables. If you do not have access to this feature, the system displays a warning message to that effect. See the product documentation for MultiChannel Framework.
Performance Trace	Click to monitor the performance of a business process that you typically complete. Because this is an optional setting that your system administrator enables using PeopleTools Security, it may not appear to all users.
Add to Favorites	Click to add the current page to your favorites list for easy accessibility.
Sign out	Click to sign out of the application and return to the Sign In page. **Important:** For security purposes, you should sign out when you are finished with your PeopleSoft session rather than simply closing the browser window. Other users could potentially access your cached homepage from another portal if you do not sign out properly.

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> **Note**
>
> Guest accounts do not have access to **Favorites** or **Add to Favorites.** You must have the appropriate security before you can access favorites.

Adding Pages to the Favorites Menu

To add pages to the Favorites menu:

1. Open the page that you want to designate as a favorite.
2. Click **Add to Favorites** in the universal navigation header.

   The Add to Favorites modal window appears, with the page name as the default in the **Description** field.
3. Update the description for the favorite, if necessary.
4. Click **OK.**

   The favorite is saved and appears in the Favorites menu.
5. Click **OK** to dismiss the dialog box.

> **Note**
>
> If pages are not registered in the portal registry, you cannot add them to the Favorites menu. If content of a folder is dynamically generated you will not be able to add the content to the Favorites menu. See your portal administrator for assistance.

Related Topics

- Working with Favorites
  In the Actions menu, click the Add to Favorites link to add the current page as a favorite.

Using the Recently Used Menu

When you visit a component, it is automatically added to the Recently Used list under the Favorites menu. This list is limited to the five most recently visited components.

> **Note**
>
> The recently used data is stored to the list when you leave the component by either clicking on the header or going to a different component.

The system does not update the recently used list if:

- You close the browser without signing out first.
- Your session times out.

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Accessing Pages from the Recently Used Menu

To access pages from the Recently Used Menu, click the item name. If the component has a search record, the search page appears. Enter search criteria to access the page. If the component has no search record, the page appears without search criteria.

Using the Pagebar

> **Note**
>
> The information provided in this topic applies to the PeopleSoft classic user interface.

Just below the universal navigation header is the pagebar—a series of links and buttons that appear when you are on a transaction page.

This example shows the pagebar.

The availability of these options is controlled by the application developer. All options may not be available for each component. The options include:

Field or Control	Description
New Window	Click to open a new browser window. See Opening New Windows. **Note:** This option is not available on modal pages.
Help	Click to open the online help for the displayed transaction page.

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Field or Control	Description
Personalize Page	Click to control the initial page display. Opens the Page personalization page, where you can: • Select the initial page in the component to be displayed. • Save the state of the expanded and collapsed sections. • Save the state of the View All settings on the page for grids and scroll areas. • Enable or disable autocomplete for a field, the entire page, or the entire component. • Personalize the page field tabbing order: – **Clear Tabbing Order.** Removes the existing tabbing order. – **Restore Default.** Restores the default tabbing order. – **Include In Tabbing Order.** Click this option and then click a tabbed item to include it in the tabbing order. – **Remove From Order**. Click this option and then click a tabbed item to remove it from the tabbing order. – **Move Up In Order.** Click this option and then click a tabbed item to move it up in the tabbing order. – **Move Down In Order.** Click this option and then click a tabbed item to move it down in the tabbing order. You can also elect to copy and share the settings that you have saved for the personalized page. See Personalizing Pages. **Note:** This option is not available on modal pages.
Print	Prints the current page. Includes all data in scrollable grids. This option must be enabled. For configuration information, see Portal Technology: Configuring Web Profiles. **Note:** This option is not available on modal pages.

Processing Components

This section discusses how to interact with components and pages.

Accessing Pages and Components

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

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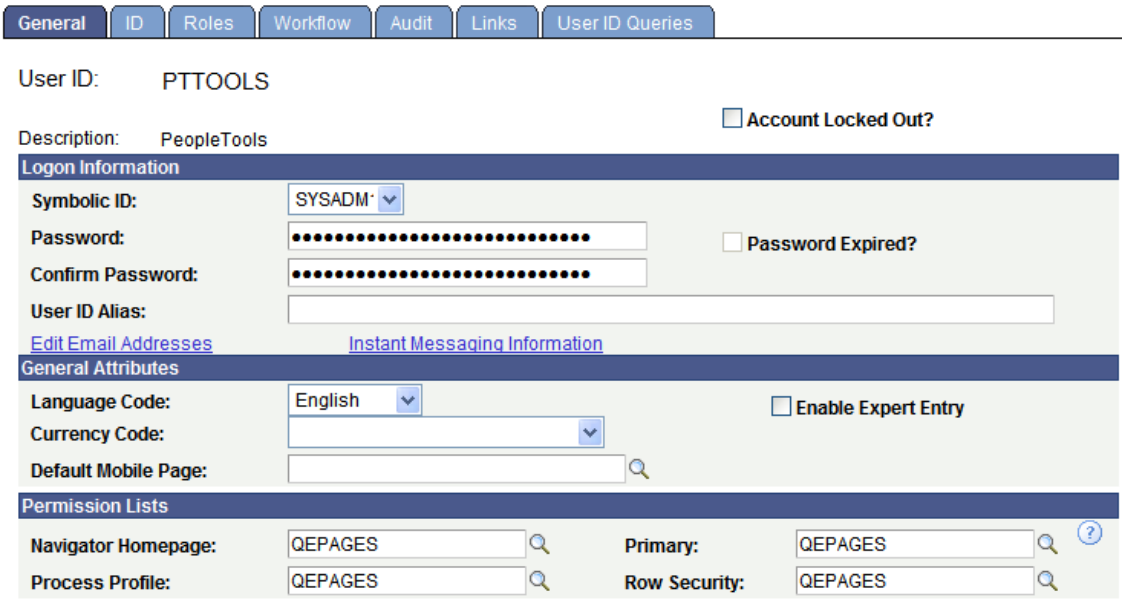
In addition to selecting tabs, you can click the links at the bottom of each page in the component to move to other pages within the component. Alternatively, you can use the corresponding keyboard shortcuts.

See Using Keyboard Shortcuts.

This example illustrates a sample component.



To access a component:

1. Select the content reference from the menu hierarchy or navigation page that relates to your page.
2. On the search page, enter search criteria to identify the row of data that you want to retrieve from the database.
3. Click **Search** to perform the search.

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

See Entering and Saving Search Criteria.

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

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

Linking to Related Pages

In addition to having links to other pages within a component, some pages have links to related components or pages. The related links appear at the bottom of the transaction area and immediately before the toolbar. You can click any of these links to move easily to related

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transactions for the same key field, so you can enter data without going through the search process again.

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

Opening New Windows

Use the New Window feature to open the current component in a new browser tab (or window). From this window, you can view or enter new data. You can open as many child windows as needed by clicking the New Window item.

Whether the New Window item is displayed at all and where it is displayed depends on the current component:

- For fluid components and “fluid wrappers,” New Window is displayed as a menu item in the Actions menu. See Using the Actions Menu.

  > **Note**
  >
  > A *fluid wrapper* is a fluid activity guide, a fluid navigation collection, or a master/detail component.

  - When a fluid component is displayed standalone, outside of a fluid wrapper, the component settings determine whether the New Window item is displayed in the Actions menu.
  - When a master/detail component is displayed, the master/detail component determines whether New Window is displayed in the Actions menu except when a fluid component is the currently displayed item. Then, the component settings of the fluid component determine whether New Window is displayed.
  - Fluid navigation collections display the New Window menu item by default, unless the configuration for that fluid navigation collection overrides this setting.

    > **Note**
    >
    > The component settings for fluid components are ignored in a fluid navigation collection.

- Fluid activity guides display the New Window menu item by default, unless the New Window option is disabled in the activity guide template properties.
- For classic components, New Window is displayed as a link in the pagebar on the page. See Using the Pagebar

  Whether the New Window link is displayed depends on the component settings. The New Window link will not be displayed if the pagebar is disabled or if the New Window option is disabled in the component properties.

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> **Note**
>
> When a classic component is displayed within a fluid wrapper, two New Window items can be displayed depending on the settings of the wrapper and the settings of the classic component. The resulting action depends on which of these two New Window items you click.

What is displayed in the new window depends on the current component:

- From a fluid wrapper (a fluid navigation collection or a master/detail component) the new window redisplays the fluid wrapper with its default item selected, which is the first item by default. In both cases, what is the default item can be overridden.
- From a fluid activity guide, the new window displays the last visited homepage or if a last visited homepage does not exist, then it displays the default homepage (which is the homepage configured for the Home button).
- From a classic component or a standalone fluid component with a search page:
  - When the URL for the current component does not include any explicitly defined keys, the system-generated component search page is displayed.
  - When the URL for the current component includes explicitly defined keys, the default page from the component is displayed displaying the specific transaction associated with those keys.
- From a classic component or a standalone fluid component without a search page, the new window displays the default page from the component.
- From a classic WorkCenter or a classic activity guide, the currently displayed component is redisplayed outside of the classic WorkCenter wrapper subject to the conditions regarding components with or without search pages.

The Back button is not displayed on any page displayed in a new browser window or tab, either as the result of clicking the New Window item or as the result of a PeopleCode program. This new window has a separate session and navigation history stack. See Using the Back Button.

> **Important**
>
> Do *not* select **File**, and then **New**, and then **Window** from the browser menu. Doing so copies the current HTML from the parent window instead of opening a new PeopleSoft-maintained window session.

Saving Data

After modifying the data on a page, you *must* click the **Save** button to commit your changes to the database. When you click the **Save** button, a processing sign spins in the upper right corner of the page. When processing is complete, the **Saved** icon appears.

If you attempt to leave the page without saving—by clicking another content reference from the menu hierarchy or by clicking a different toolbar button, such as **Next in List,**—a save warning appears. Click **OK** to return to the page to save your changes. Click **Cancel** to exit the page without saving.

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> **Note**
>
> Do not use the browser's back button to exit the page. It does not trigger standard component processing and can result in the loss of data, corruption of the navigation history stack, and other processing errors. Instead, only use the Back button that is displayed in the fluid banner. See Using the Back Button for more information.

Working With Dialog Boxes

When you work with PeopleSoft applications, dialog boxes might appear to provide different types of messages. Dialog boxes might display an error, a warning, or an informational message.

All dialog boxes share these characteristics:

- They are modal, meaning that they hover on top of a primary page, which is grayed out.
- You can drag and relocate them using the title bar.
- They display informational text.
- They display at least one button.

To dismiss a dialog box, you must click one of the buttons in the dialog box or click the **Close** button on the right side of the title bar.

Using Buttons and Links

This section discusses how to use buttons and links.

Understanding Buttons and Links

PeopleSoft Pure Internet Architecture provides buttons and links to help you navigate and process transactions. In general, if an action is related to navigating, then it appears as a link. If the action is truly an action, such as *save* or *process*, then it appears as a button. Click a button or link to carry out a command.

If a button appears grayed out, then that action is currently disabled. For example, when working in a transaction for the first data set from a search list, you might see the following:

This example illustrates enabled and disabled buttons for a search list.

Your only option in this case is to click the **Next in List** button. After you click **Next in List**, however, the **Previous in List** button will become available.

Similarly, links at the bottom of a page often enable you to move to another component page. In the following example, you can use the **ID**, **Roles**, and other links to navigate to other pages. Notice that Workflow is not a link (it is not underlined) because it is the current page:

This example illustrates page links in a component.

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General | ID | Roles | Workflow | Audit | Links | User ID Queries

Tool Tips

Tool tips are pop-up text messages that appear when your mouse pointer hovers over a button or link. Sometimes called *hover text*, tool tips display additional information about the action that the button or link performs. Typically, tool tips display what a button or link will do and may list its keyboard hot key, if applicable.

Using Processing Buttons

The following buttons process transactions.

Field or Control	Description
Look Up	Click to look up the data input without returning to the main page. Useful if you want to perform additional searches. Usually found on a page that you open by clicking a prompt button.
OK	Click to accept the data entered on an auxiliary page and return to the main page.
Cancel	Click to clear the page and any data that you may have entered or changed without saving. When you click **Cancel,** the system does not warn you to save changes. Click **Cancel** if you entered data incorrectly and want to begin again.

Using Toolbar Buttons

The toolbar appears at the bottom of most pages. It can include search list navigation buttons, page navigation buttons, and page action buttons. It changes depending on the type of page that is active or the settings that the developer has put into place for a particular transaction. Not all buttons shown in the following table appear on every page. Likewise, some buttons may be unavailable for selection.

> **Note**
>
> In some cases, you may see different representations of a button, but the action is the same.

Field or Control	Description
Save	Click to send the information that you entered on the page to the database. Generally, you save when you come to the end of a component. The **Save** button updates the data for all pages in a component. When activated, the system displays the saved message in the upper-right corner of the page.

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Field or Control	Description
Return to Search	Click to return to the search page.
Previous in List	Displays the data for the previous data row in your search results grid. This button is unavailable if you did not select the data row from the search results grid, if the grid had only one row, or if the data that appears *is* the first row in the grid.
Next in List	Displays the information for the next data row in your search results grid. This button is unavailable if you did not select the data row from a search results grid, if the grid had only one row, or if the data that appears *is* the last row in the grid.
Next tab	Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.
Previous tab	Displays the previous page in the current component. If you are in the first page of the component, this button is unavailable.
Update/Display	Click to access existing rows of data in the database. If data is effective-dated, only current and future rows appear.
Include History	Click to display all rows of data: current, future, and history.
Correct History	Click to access existing rows of data in the database and display all effective-dated rows. This button enables you to update all rows, including history rows. **Note:** This button is available only if you have the proper permission.
Add	Click to add a high-level key row of data to the database for the current transaction.
Refresh	Click to force a trip to the server, validating any data that was entered and processing any deferred PeopleCode changes. **Note:** This button appears only for components that are enabled for deferred mode processing.
Related Links	Appears when several pages are related to the current page. Click to access a new page containing a list of related page links.
Notify	Click to open the Send Notification page, where you can specify names, email addresses, or worklists to which to send notifications.

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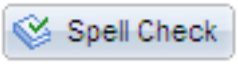
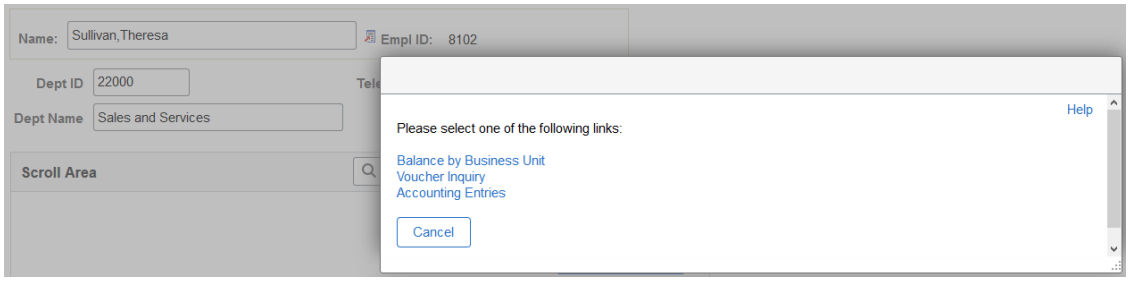
Field or Control	Description
	Click to activate the spell check feature for all spell check-enabled fields on the page. Spelling is checked for each field individually. As spelling is checked for each field, processing continues to the next field, displaying the spell check page if errors occurred. If no errors occur, then the *No misspellings found* message appears. See Using Spell Check.

Using Pop-up Links

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

This example illustrates pop-up links next to the View Other Links button.



Field or Control	Description
	Click the View Other Links button to open a modal window where you can select from among the links listed. **Note:** This icon appears if the pop-up links consist of more than one item.
	Click this button, labeled with the name of the single link, to execute the action of the link directly. **Note:** This icon appears if the pop-up links consist of only one item.

> **Note**
>
> In previous releases, these items were referred to as pop-up menus, but they are actually links.

Navigating with the Keyboard

This section provides an overview of keyboard shortcuts and describes how to navigate using the keyboard.

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Using Keyboard Shortcuts

Working in a browser-based environment can often be mouse intensive. However, PeopleSoft applications offer keyboard navigation alternatives to using a mouse. To view a printable list of all keyboard shortcuts while using a PeopleSoft application, press **Alt + K** (**Ctrl + K on a Mac)**.The key sequences displayed are appropriate for the browser that you are currently signed on with. If you sign on with a different browser (for example, Safari instead of Firefox), then different key sequences may apply.

> **Note**
>
> Certain PeopleSoft hot keys do not work as expected on alternate, non-U.S. keyboard layouts. For example, **Alt + '**, **Alt + **, and **Alt + /** do not produce the expected results on the AZERTY keyboard. This occurs because some keys on non-U.S. keyboards produce different key codes than the same key on a U.S. keyboard (also known as a QWERTY keyboard).
>
> See Global Technology: PeopleSoft Hot Keys Do Not Function As Expected on a non-U.S. Keyboard for a solution to this problem.

The following table lists the keyboard shortcuts available in a PeopleSoft system. The key sequences can differ depending on the desktop operating system and sometimes the browser. Some shortcuts are designated as valid in a classic context only while others are designated as valid in a fluid context only. In addition, when a second or third shortcut is listed, it is alternative to the primary shortcut, which may not work in all circumstances.

Shortcut (Windows)	Shortcut (macOS)	Result	Classic	Fluid
• **Alt + 1** • **Alt + Shift + 1** (fluid, Firefox only)	• **Ctrl + Shift + 1** (classic) • **Ctrl + Alt + 1** (fluid)	For classic components, executes a specific button depending on the page type: • When the toolbar is present at the bottom of a standard page, invokes the Save button. • On a secondary page, invokes the OK button. • On a component search page, invokes the Search or Add button. • On a prompt page, invokes the Search (or Lookup) button. For fluid components, executes a specific button depending on the page type: • On a standard page, invokes the Save button if the button was generated by PeopleTools. • In a modal window, invokes the Done button in the header of the modal window. • On a component search page, invokes the Search button. • On a prompt page, invokes the Search button.	Y	Y
Alt + 2	**Ctrl + Shift + 2**	Returns to the search page from a transaction page.	Y	N

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Shortcut (Windows)	Shortcut (macOS)	Result	Classic	Fluid
Alt + 3	Ctrl + Shift + 3	Views the next row in the list when the Next in List button is active.	Y	N
Alt + 4	Ctrl + Shift + 4	Views the previous row in the list when the Previous in List button is active.	Y	N
Alt + 5	Ctrl + Shift + 5	Executes an action depending on the context: • Opens the lookup page from a prompt field. • Opens the calendar prompt from a date field.	Y	Y
Alt + 6	Ctrl + Shift + 6	Opens a pop-up window to show other links or activates the link when there is only one link.	Y	N
Alt + 7	Ctrl + Shift + 7	Inserts a row in a grid or scroll area.	Y	Y
Alt + 8	Ctrl + Shift + 8	Deletes the current row in a grid or scroll area.	Y	Y
Alt + 9	Ctrl + Shift + 9	Takes you to the first link in the pagebar at the top of the page	Y	N
Alt + 0	Ctrl + Shift + 0	Refreshes the page by invoking the Refresh button on the toolbar.	Y	N
Alt + .	Ctrl + Shift + 0	Displays the next set of rows in a grid or scroll area.	Y	N
Alt + ,	Ctrl + Shift + ,	Displays the previous set of rows in a grid or scroll area.	Y	N
Alt + /	Ctrl + Shift + /	Finds data in a grid or scroll area when the cursor is within the grid or scroll area page control.	Y	Y
Alt + ‘	Ctrl + Shift + ‘	Views all rows of data in a grid, scroll area, or search page results list.	Y	N
Alt + \	Ctrl + Shift + \	Depending on the context, performs a different action: • On a standard page, takes you to the first button in the toolbar at the bottom of the page. • On a component search page, toggles between the Find an Existing Value and the Add a New Value tabs.	Y	N
Alt + ;	Ctrl + Shift + ;	Displays the related action's page field context menu.	Y	Y
• Alt + J • Ctrl + J • Ctrl + Shift + J	• Ctrl + Shift+ J • Ctrl + J	Displays the system information page if it is configured by an administrator to be displayed. See Applications User’s Guide: Using the System Information Page.	Y	Y
• Alt + K • Ctrl + Alt + K	Ctrl + K	Displays the keyboard shortcuts information page.	Y	Y
Ctrl + M	Ctrl + M	Activates drag mode for the selected object.	N	Y
Ctrl + Alt + M	Ctrl + Alt + M	Places (drops) an object that was moved in drag mode.	N	Y

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Shortcut (Windows)	Shortcut (macOS)	Result	Classic	Fluid
Ctrl + Alt + P	**Ctrl + Alt + P**	• When screen reader mode is not enabled, opens a mouse over pop-up page for a field (if configured for that field). Hit the **Esc** key to close this page. • When screen reader mode is enabled, you can continue to use the information (i) icon to open the pop-up page.	Y	N
Ctrl + Alt + S	**Ctrl + Alt + S**	Displays the **Skip to Main Content** link and sets focus on the link. See Using the Skip to Main Content Link for more information.	Y	Y
Enter	**Enter**	In certain circumstances, the Enter key has been given these additional behaviors: • When a modal window is displayed, invokes the OK (or Done) button. • When a component search page is displayed, invokes the Search or Add button. • When a prompt page is displayed, invokes the Lookup (or Search) button.	Y	Y
Esc	**Esc**	Activates the **Cancel** button if it is displayed.	Y	Y

Using the Skip to Main Content Link

The Skip to Main Content link allows keyboard-only users to bypass all the header links and get to the main content on the page.

When you tab from the browser header area into a PeopleSoft page (non-modal pages only), the Skip to Main Content link is displayed automatically. Also, when you are on any control within any PeopleSoft page, you can use **Ctrl + Alt + S** to display the Skip to Main Content link. Then, press Enter to dismiss the link and place focus on the first actionable field within the main content of the PeopleSoft page.

> **Note**
>
> For fluid pages, focus is first placed on the main fluid page container, which is itself not actionable. Then, press Tab once to place focus on the first actionable field within the main content of the page.
>
> Pressing tab on the skip to main content link, closes the pop-up menu and places you on the first button on the banner.

Using the Keyboard with the NavBar

The NavBar (navigation bar) is a control that provides quick access to tiles, folders, and pages in your PeopleSoft system. The NavBar contains tiles on the left that, when clicked, display a list of associated items on the right. The list items can be folders, links, or other objects. Users can use the list of items to access a page.

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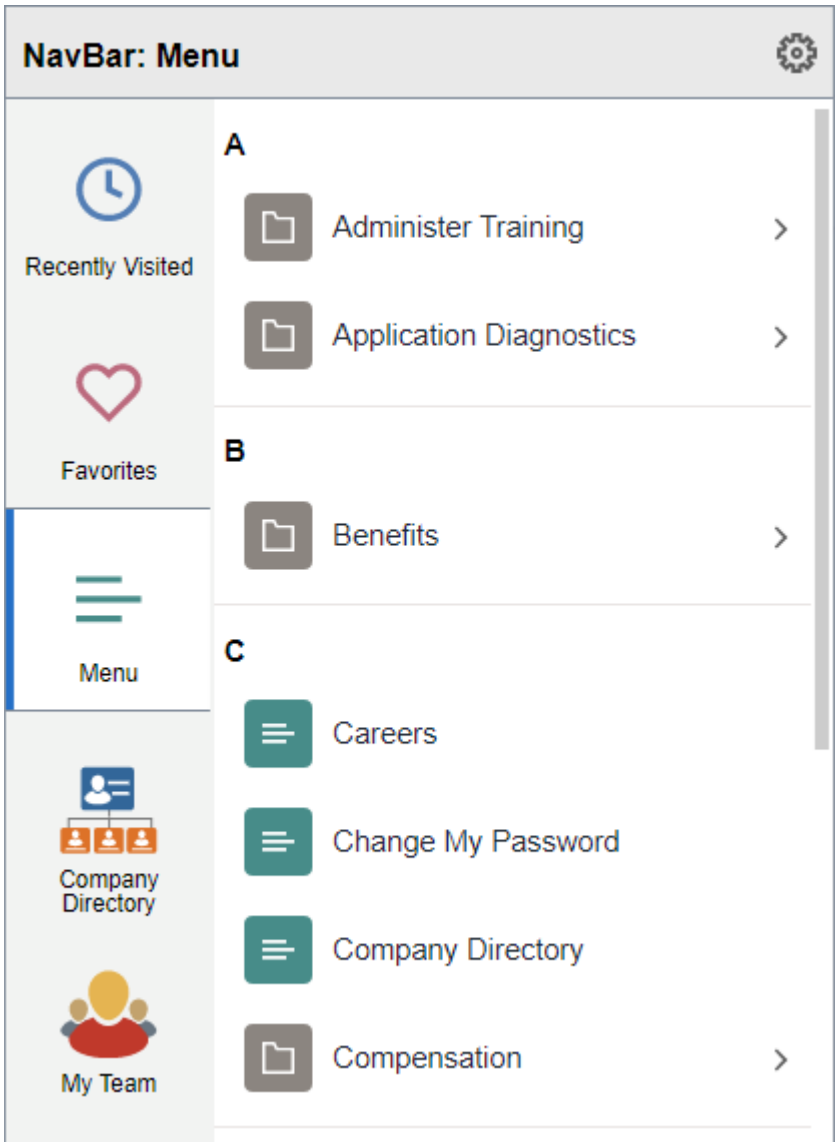
This example illustrates the appearance of the three sections of the NavBar: the NavBar header, the tile list on the left, and the content area on the right.



You can use the following keyboard shortcuts within the NavBar:

Key or Key Combination	Result
Tab	Moves focus forward through the three sections of the NavBar: the NavBar header, the tile list on the left, and the content area on the right. **Note:** When the NavBar is first opened, the content area on the right is not displayed.
Shift + Tab	Moves focus backward through the three sections of the NavBar: the NavBar header, the tile list on the left, and the content area on the right. **Note:** When the NavBar is first opened, the content area on the right is not displayed.

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Key or Key Combination	Result
Down Arrow	When focus is on either the tile list or the content area, moves focus to the next item.
Up Arrow	When focus is on either the tile list or the content area, moves focus to the previous item.
Enter	• When focus is on a tile, toggles the content area open or closed. When the content area is opened to display new content, focus is moved to the first item in the list. • When focus is on an item in the content area, opens the content associated with that item—for example, a menu folder or a menu item. • When the menu is displayed in alphabetical order and when focus is on an alphabetical section divider such as the letter B, selects the alphabetical section divider. **Note:** When an alphabetical section divider is selected in this manner, it remains selected throughout the time the menu remains open in the content area of the NavBar. Then, when you tab out and tab back into the content area again, this section divider is selected rather than the first one in the list. If you close the menu or select a different NavBar tile, this selection is discarded.
Right Arrow	• When focus is on a menu folder, opens the menu folder. • Only when the menu is displayed in alphabetical order and focus is on an alphabetical section divider, moves focus to the first item in that section.
Left Arrow	• When focus is on a menu item or menu folder, moves focus backward to the parent menu folder. • Only when the menu is displayed in alphabetical order and focus is on an item beneath an alphabetical section divider, moves focus back to the alphabetical section divider.

Navigating Fluid Pop-up Menus Using Keyboard Shortcuts

You can use keyboard shortcuts to navigate items of a fluid pop-up menu.

The Actions menu is an example of a fluid pop-up menu:

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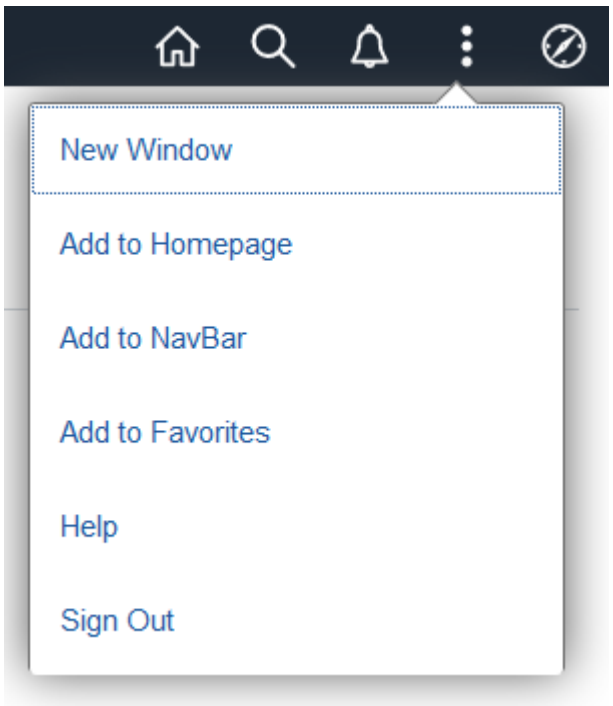

This table lists the key or key combinations that you use to navigate fluid pop-up menus:

Key or Key Combination	Result
Enter	• When focus is on the menu button, opens the menu and moves focus to the first menu item in the list. • When focus is on a menu item, performs the action of that item (for example, accessing a new component) and closes the menu.
Down Arrow	When focus is on a menu item, moves focus to the next item, optionally wrapping from the last to the first.
Up Arrow	When focus is on a menu item, moves focus to the previous item, optionally wrapping from the first to the last.
Esc	Closes the pop-up menu and returns focus to the item or context from which the menu was opened—for example, the menu button or parent menu item.
Tab	Closes the pop-up menu and moves focus to the next item in the tab sequence.
Shift + Tab	Closes the pop-up menu and moves focus to the previous item in the tab sequence.

Related Topics

- Fluid User Interface Developer's Guide: Creating Fluid Pop-up Menus

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Navigating Fluid Sectional Tabs Using Keyboard Shortcuts

You can use keyboard shortcuts to navigate items within a collection of fluid sectional tabs.

The following example illustrates fluid sectional tabs in a horizontal layout:

This table lists the key or key combinations that you use to navigate fluid sectional tabs and the results of using those keys:

Key or Key Combination	Result
Tab	• When focus moves to the tab set, places focus on the first tab. • When focus is on the tab set, moves focus out of the tab set and onto the next focusable item on the page.
Shift + Tab	• When focus moves to the tab set, places focus on the first tab. • When focus is on the tab set, moves focus out of the tab set and onto the previous focusable item on the page.
• **Right Arrow** • **Down Arrow**	Moves focus to the next tab. If focus is on the last tab, moves focus to the first tab.
• **Left Arrow** • **Up Arrow**	Moves focus to the previous tab. If focus is on the first tab, moves focus to the last tab.
• **Enter** • **Space**	Activates the tab.

Related Topics

- Fluid User Interface Developer's Guide: Creating Sectional Tabs on a Page

Navigating Calendar Controls Using Keyboard Shortcuts

This table lists the key or key combinations that you use to navigate through calendar controls and the results of using those keys:

> **Note**
>
> Screen reader users, use the table command to change the date.

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Key or Key Combination	Result
Tab	Moves focus to the next object within the calendar control. When you initially open a calendar control, the focus is on the current date link.
Enter	Selects the current item. In the Date table, pressing **Enter** on a date selects that date and closes the calendar control. On the **Current Date** link, pressing **Enter** selects the current date and closes the calendar control.
Esc	Closes the calendar without any action.
Down Arrow	Moves to the same day of the week in the next week.
Up Arrow	Moves to the same day of the week in the previous week.
Right Arrow	Moves to the next day.
Left Arrow	Moves to the previous day.

Navigating Charts Using Keyboard Shortcuts

This table lists the key or key combinations that you use to navigate through charts and the results of using those keys:

> **Note**
>
> These keyboard shortcuts apply to charts beginning with PeopleTools release 8.55. Charts from previous releases, and some specific charts do not support these keyboard shortcuts.

Key or Key Combination	Result
Tab	Moves focus to next component.
Shift + Tab	Moves focus to the previous component.
Up Arrow	Moves focus and selection to previous data item.
Down Arrow	Moves focus and selection to next data item.
Left Arrow	Moves focus and selection to previous data item (on left).
Right Arrow	Moves focus and selection to next data item (on right).
Shift + Up Arrow	Moves focus and multi-selects previous data item.
Shift + Down Arrow	Moves focus and multi-selects next data item.
Shift + Left Arrow	Moves focus and multi-selects previous data item (on left).

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Key or Key Combination	Result
Shift + Right Arrow	Moves focus and multi-selects next data item (on right).
Ctrl + Up Arrow	Moves focus to previous data item, without changing the current selection.
Ctrl + Down Arrow	Moves focus to next data item, without changing the current selection.
Ctrl + Left Arrow	Moves focus to previous data item (on left), without changing the current selection.
Ctrl + Right Arrow	Moves focus to next data item (on right), without changing the current selection.
Ctrl + Spacebar	Multi-selects data item with focus.
= or +	Zooms in one level if zooming is enabled.
- or _	Zooms out one level if zooming is enabled.
Page Up	Pans up if scrolling is enabled.
Page Down	Pans down if scrolling is enabled.
Shift + Page Up	Pans left in left-to-right locales. Pans right in right-to-left locales.
Shift + Page Down	Pans right in left-to-right locales. Pans left in right-to-left locales.

Navigating Drop-Down Menus Using Keyboard Shortcuts

Important

Drop-down menus and other forms of classic navigation are no longer supported. The information in this topic pertains to a prior version of PeopleSoft classic applications only. The default navigational interface for PeopleSoft applications in the current release is based on the fluid banner, which can be used for both classic and fluid applications. For information on using the keyboard to navigate within the fluid user interface, see Using the Keyboard with the NavBar.

This table lists the key or key combinations that you use to navigate the drop-down menu structure and the results of using those keys:

Key or Key Combination	Result
Ctrl + Y	Expands the Main Menu.
Alt + Z	If the search field is configured to appear in the Main Menu, expands the Main Menu and moves the cursor to a search field.
Tab	If the search field is configured to appear in the Main Menu, press **Tab** to move past the search field and sort icons to access the menu items.

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Key or Key Combination	Result
Up Arrow	Varies based on context: • In an expanded menu, moves one item upward through a list of folders and content references. • When moving through the navigation path, collapses a drop-down menu item.
Down Arrow	Varies based on context: • In an expanded menu, moves one item downward through a list of folders and content references. • When moving through the navigation path, expands a drop-down menu item.
Right Arrow **Note:** This functionality applies only to languages read from left to right.	Varies based on context: • In an expanded menu, opens a folder to the right so that subfolders or content references appear. • When moving through the navigation path, accesses the next menu item to the right.
Right Arrow **Note:** This functionality applies only to languages read from right to left.	Varies based on context: • In an expanded menu, closes the current folder and sets the focus on its parent folder. • When moving through the navigation path, accesses the next menu item to the right.
Left Arrow **Note:** This functionality applies only to languages read from left to right.	Varies based on context: • In an expanded menu, closes the current folder and sets the focus on its parent folder. • When moving through the navigation path, accesses the next menu item to the left.
Left Arrow **Note:** This functionality applies only to languages read from right to left.	Varies based on context: • In an expanded menu, opens a folder to the right so that subfolders or content references appear. • When moving through the navigation path, accesses the next menu item to the left.
Esc	Closes all open menu items. Collapses all expanded menus.

Navigating in the Rich Text Editor Using Shortcuts

This table lists the key or key combinations that you use to navigate to and from the rich text editor toolbar and the results of using those keys:

Keyboard Shortcuts in Rich Text Editor v5

Key or Key Combination	Result
Alt + F10 On a Mac, you may require the **Fn** key.	Moves the focus to the toolbar.
• **Enter** • **Space**	Selects a toolbar option when the focus is on the toolbar.

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Key or Key Combination	Result
Esc	Closes contextual balloons and UI components, for example, drop-down list box.
Arrow keys	Moves through toolbar items and options.

Setting Navigation Personalizations

If you frequently use the tab key to navigate, you can opt to skip page elements that you know you will not need to access. For example, you can set your navigation personalizations to always tab over the calendar prompt if you always type the date into a date field and then press **Tab** to move quickly to the next field rather than opening the calendar prompt, selecting the date, and then closing the prompt. To do this:

1. Select **My Preferences** from Actions.

   The My Preferences page appears.
2. The appearance of this page may differ depending on the application that you are using. If multiple preference categories appear in the left panel, select General Settings.
3. Expand the **Navigation Personalizations** section.
4. Configure the navigation options—specifically, tab navigation options—as you prefer.
5. Save your changes; your selections will be active the next time you log on to the system.

Related Topics

- Applications User's Guide: Defining User Preferences

Using the System Information Page

This section provides an overview of the system information page and discusses how to view the system information page.

With the combination of accessing PeopleSoft applications with a browser, single sign-on between databases, and the PeopleSoft Portal, users and system administrators need a quick tool to provide orientation information and information regarding the current environment. For this reason, PeopleSoft provides the system information page.

Understanding the System Information Page

With single sign-on and the portal, it may not be apparent to all end users just exactly what databases or applications they are currently accessing. Viewing environment information can help end users orient themselves.

In most cases, the administrators use the system help page to aid in troubleshooting. If a user has trouble accessing a particular application, the system administrator can instruct the user to provide the system information that appears in this page so that the administrator can immediately identify the current application server, database, software version, operating system, and so on.

Viewing the System Information Page

To view the System Information help page, you press a keyboard shortcut while a PeopleSoft page is active.

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Use one of these keyboard shortcuts on Microsoft Windows operating systems. Use the second and third shortcuts as alternatives if the first shortcut does not work.

- Alt + J
- Ctrl + J
- Ctrl + Shift + J

Use one of these keyboard shortcuts on a Mac. Use the second shortcut as an alternative if the first shortcut does not work.

- Ctrl + Shift + J
- Ctrl + J

The following example illustrates the type of information that appears.

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

PeopleSoft System Information

Browser	CHROME/99.0
Operating System	WIN10
Browser Compression	ON (gzip)
Device Type	pc
Mode	FLUID
Tools Release	8.60-905W_2203220501
Application Release	PeopleTools 8.60.00.000
Service Pack	0
Page	PTPG_NUI_VWR
Component	PTPG_NUI
Menu	PTPG_WIZ_MENU
User ID	QEDMO
Database Name	T60860LG
Database Type	ORACLE
Application Server	//slc11kqz:9000
Component Buffer Size (KB)	513

The following table briefly describes each item:

Item	Description
Browser	The browser version and type, such as Mozilla Firefox.
Operating System	The operating system that runs on the computer on which the browser is running. For example, this refers to the operating system of the end user's workstation or the operating system running on a kiosk machine. It does not refer to the operating system that runs on the application server, web server, or database server.

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Item	Description
Browser Compression	Indicates if browser compression is enabled in the **Compress Responses** field on the General page of the current web profile. Values are: • ON: The flag is on in the web server configuration and the page is compressed. The compression type is either gzip or zip. • OFF: The page is not compressed because the flag is cleared in the web profile. • OFF (not supported): The page is not compressed because the browser doesn't support compression, however the flag is turned on in the web profile.
Device Type	The device type, such as pc, tablet, or phone.
Mode	The display mode, such as Classic or Fluid.
Tools Release	The version of PeopleTools that is currently installed at the site. For example, PeopleTools 8.56, 8.58.01, and so on.
Application Release	The version of PeopleSoft applications that are currently installed at the site.
Service Pack	Typically, updates to PeopleSoft applications arrive in the form of a service pack. This item shows the current service pack that is applied to the applications.
Page	The current page that the user is accessing.
Component	The component to which the current page belongs.
Menu	The name of the menu under which the component appears.
User ID	The user ID of the user that is currently accessing PeopleSoft.
Database Name	The name of the database that the user is currently performing a transaction in.
Database Type	The type of the current database, as in Microsoft, Oracle, or DB2 z/OS.
Application Server	The domain name server name or Internet Protocol (IP) address and the JSL port number.
Component Buffer Size (KB)	The component buffer size, which reflects the data buffer size, not including metadata, such as the record definition or component definition. This metric is the same metric also displayed by the Performance Monitor. **Note:** The Performance Monitor does not need to be configured for this value to be populated.

You enable and disable the System Information page using the **Show Connection Information** check box on the Debugging page of the current web profile.

Related Topics

- Portal Technology: Configuring Trace and Debug Options

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Using PeopleSoft Applications with Mobile Devices

> **Note**
>
> Unless specifically noted in this section, issues with mobile devices pertain to accessing pages in PeopleSoft classic components and not to pages presented in the PeopleSoft Fluid User Interface.

At sign on, the PeopleSoft system recognizes mobile phones and tablets as mobile devices. Many differences that you encounter when you access your PeopleSoft applications using mobile devices stem from the basic tenet that you interact directly with the touch screen, rather than through an intermediary device, such as a mouse. Consequently, while the tap on a mobile device compares to the mouse-click on desktop devices, mobile devices neither recognize nor support certain mouse-specific events, such as hover.

This table lists the interface differences and explains the process differences that you will encounter when you access your PeopleSoft applications using a mobile device:

Interface Difference	Process Explanation
Auto-complete results contain a Close button.	Auto-complete results do not disappear automatically if no user action occurs. In addition, auto-complete results do not disappear when you click the Clear button on a search page. To dismiss an auto-complete drop-down list: • Tap the Close button. • Dismiss the device's keyboard. • Tap another control on the page to remove focus from the field. • Select an item in the list.
Classic pages and page elements are not sized appropriately on small form factor devices.	While the device viewport is set by fluid applications, it is not set by classic pages and applications. Therefore, certain elements of classic pages are not sized appropriately on small form factor devices such as mobile phones. You may notice the following when viewing classic pages on these devices as compared to viewing the same page on a different device, such as a laptop or tablet: • The text and page controls appear smaller on small form factor devices. • The buttons and icons in the portal header appear larger on small form factor devices. • Action list items appear smaller on small form factor devices. • NavBar tiles and menu items appear smaller on small form factor devices. **Note:** Fluid wrapper components—such as fluid activity guides, master/detail components, and certain fluid navigation collections—set the device viewport. Therefore, If you access the same classic page inside a fluid wrapper component, then many of the issues noted here are eliminated.

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Interface Difference	Process Explanation
Desktop behavior is observed on a mobile device—for example, the classic homepage rather than the fluid homepage is displayed by default.	While mobile devices such as phones and tablets can run multiple third-party browsers (for example, Firefox on Android devices and Chrome on iOS devices), only the operating system's native browser will result in the device reporting itself as a mobile device. The use of third-party browsers will result in the device reporting itself and being recognized as a desktop computer. When accessing a PeopleSoft system on a mobile device, use the operating system's native browser.
Download to Excel is not supported.	You cannot download a grid to Excel on a mobile device. **Note:** This limitation does not apply to Windows 8 laptops with touch screens.
Drag-and-drop of pagelets on classic homepages and dashboards is not supported.	You cannot drag and drop pagelets on a mobile device. Instead, click the Personalize Layout link to rearrange the layout of pagelets on homepages and dashboard pages.
Drop-down menus and submenus contain a Close button.	Drop down menus and submenus do not disappear automatically without valid user actions. To dismiss the drop-down menus and submenus: • Tap the Close button. • Tap a navigation header link, such as Home. • Select a menu item.
Fluid navigation collections operate differently on small form factor devices.	On small form factor devices such as mobile phones, an *optimized* fluid navigation collection is displayed merely as a list of links and folders. Clicking a link exits the fluid navigation collection wrapper; the target content completely replaces the browser window. Use the Back button to return to the navigation collection.
Initial focus is not set on mobile devices on fluid pages in certain circumstances.	On a mobile device, whenever a fluid page is displayed or redisplayed due to user action, the PeopleSoft application does not automatically set focus to any field that would activate the device's keyboard (for example, input fields) or that would activate selectors (for example, drop-down list boxes, date/time fields, and so on).
Mouse over pop-up pages (referred to as pop-up pages in this section) appear when you tap the triggering field.	Mobile devices do not recognize mouse over or hover events. To access pop-up pages, tap the dash-underlined field.
The Personalize Column and Sort Order page that you use to personalize grids is not the same page that you see in desktop-based browsers.	The Personalize Column and Sort Order page is the same page that users see in PeopleSoft accessible layout mode; it provides a less complex interface, but retains all functionality.
Pop-up pages contain a Close button.	Pop-up pages do not disappear automatically without valid user action. To dismiss the pop-up page, you must tap the Close button.

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Interface Difference	Process Explanation
Related content contextual page field pop-up menus contain a Close button.	Related content contextual page field menus do not disappear automatically without valid user actions. To dismiss the pop-up menu: • Tap the Close box. • Tap a navigation header link, such as Home. • Select a menu item.
Scroll bars are absent from the sides of pages, including: • Transaction pages • Prompt pages • Look up pages • Recent search results pages • Secondary pages • Pop-up pages • Scrollable grids • Long edit boxes	Mobile devices use a touch-based paradigm for scrolling. If the data extends beyond the visible area, you drag the page to scroll or to pan.
Scroll bars do not appear within: • Scrollable grids • Long edit boxes • Oversized pagelets	Mobile devices use a touch-based paradigm for scrolling. If you need to scroll or pan through the information within the grid, long edit box, or pagelet, use a two-finger drag.
The Tab key is absent from the keyboard.	The Tab key does not appear on some mobile device keyboards. On iOS devices only, to tab through fields, tap the > button or the < button, which appear above the keyboard.
Tool tips (sometimes called mouse over text or alternate text), such as the text that describes images, do not appear as expected.	No support for the hover event exists on mobile devices. However, to display tool tips for a chart, tap and hold (long press). Tool tips disappear after five seconds or when you tap and hold another object with a tool tip.

Related Topics

- Gestures Used with Mobile Devices
  When you use a mobile device to access your PeopleSoft applications, your interactions will differ from how you interact when using a browser on a desktop or laptop computer. In part, this is due to the gestures used to interact directly with the mobile device. In addition, this can be due to how PeopleSoft applications are displayed on mobile devices.
- PeopleTools Browser Compatibility Guide (Doc ID 704492.1)

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Personalizing Your PeopleSoft Experience to Support Assistive Technology

Enabling Screen Reader Mode

When you use a PeopleSoft system, you can enable screen reader mode so that PeopleSoft pages are rendered in a manner that supports assistive technologies such as screen readers. You can enable screen reader mode:

- Temporarily for the current session only.

  > **Note**
  >
  > When screen reader mode is enabled temporarily, it can be disabled only by signing out and signing back in.

  To enable screen reader mode for the current session only:

  – Select the Enable Screen Reader Mode check box on the PeopleSoft signon page.

  – Select the Enable Screen Reader Mode link in the Actions menu. If you are prompted to retain this setting for subsequent sessions, click No.

  – Select the Enable Screen Reader mode menu item from the Accessibility button. The Accessibility button is available in the quick access bar on the fluid banner. If you are prompted to retain this setting for subsequent sessions, click No.

  > **Note**
  >
  > On small form factor devices, the Accessibility button is available only on the homepage in the quick access bar.

  See Accessibility Guide: Using the Accessibility Button in Fluid.

- For the current session and any subsequent sessions. (If you do not have permission to update personalizations, then you also do not have the ability to turn screen reader mode on for subsequent sessions.)

  > **Note**
  >
  > When screen reader mode is enabled for the current session and subsequent sessions, it can be disabled only by changing by the accessibility layout option in My Preferences.

  To enable screen reader mode for the current session and subsequent sessions:

  – Select Screen reader mode on as the accessibility layout option in My Preferences.

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- Select the Enable Screen Reader Mode link in the Actions menu. When prompted, click Yes to turn on screen reader mode for subsequent sessions.
- Select the Enable Screen Reader mode menu item from the Accessibility button. The Accessibility button is available in the quick access bar on the fluid banner. If you are prompted to retain this setting for subsequent sessions, click Yes.

> **Note**
>
> On small form factor devices, the Accessibility button is available only on the homepage in the quick access bar.

See Accessibility Guide: Using the Accessibility Button in Fluid.

After you change the setting for screen reader mode (either enabling it or disabling it), a confirmation page is displayed where the new setting is in effect. Click the Back button to return to the previous context retaining the new screen reader setting.

Note that when the Enable Screen Reader Mode link has been enabled by the system administrator using the personalization infrastructure, it is available under My Preferences on fluid homepages and fluid pages only. While this link is available in most fluid applications, it is not displayed:

- When screen reader mode is already in effect.
- In fluid activity guides, fluid navigation collections, and in My Preferences.
- When you have been assigned the DisableScreenReaderInActions role.
- On classic pages and homepages.

> **Note**
>
> The Enable Screen Reader Mode link under the Accessibility button ignores this setting and is always available.

> **Note**
>
> Keyboard-only navigation features are available to all users and do not require users to enable accessibility features.

Related Topics

- Navigating with the Keyboard
  This section provides an overview of keyboard shortcuts and describes how to navigate using the keyboard.

Setting Your Personalizations

Use My Preferences to set personalizations to support your use of assistive technologies.

1. Select **My Preferences** from the Actions menu.

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2. On the General Settings page, in the **General Options** section.
3. Select one of the following options for **Accessibility Layout**:

Field or Control	Description
Screen reader mode off	Select this option to disable screen reader mode for the current session and subsequent sessions.
Screen reader mode on	Select this option to enable screen reader mode for the current session and subsequent sessions.

> **Note**
>
> After you select to persist screen reader mode or to disable the persistence of screen reader mode, a confirmation page is displayed that then transfers you back to the current context so that your changes are now in effect.

4. Select one of the options for **Screen Reader in Actions Menu**:

Field or Control	Description
Yes	Display the Enable Screen Reader Mode link in the Actions menu. **Note:**This link is available on fluid homepages and fluid pages only. However, while this link is available in fluid applications, it is not displayed in fluid activity guides, fluid navigation collections, and in My Preferences.
No	Do not display the Enable Screen Reader Mode link in the Actions menu.

5. Save your changes.

> **Note**
>
> If you changed the screen reader mode, a confirmation page is displayed.

Related Topics

- Applications User's Guide: Specifying General Settings in My Preferences

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2
Setting User Preferences

Defining User Preferences

This section describes how to establish user preferences.

Understanding User Preferences

PeopleSoft applications enable you to personalize your application based on your daily needs, style of work, language preference, preference for the mouse or the keyboard, and so on. Users of PeopleSoft applications include casual users and power users.

Casual users work with PeopleSoft applications only occasionally because these applications are not an integral part of their daily job. For example, casual users might use the PeopleSoft self-service applications only occasionally to maintain their employee information, to enroll in benefits, and so on.

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

> **Note**
>
> Your security administrator determines what personalization options are available for you to customize. You may see options documented in this topic that you do not see in your My Preferences interface.

Specifying General Settings in My Preferences

To define general user preferences, access the My Preferences - General Settings page.

Navigation:

Actions menu, and then **My Preferences**

This example illustrates the fields and controls on the My Preferences - General Settings: General Options section. You can find definitions for the fields and controls later on this page.

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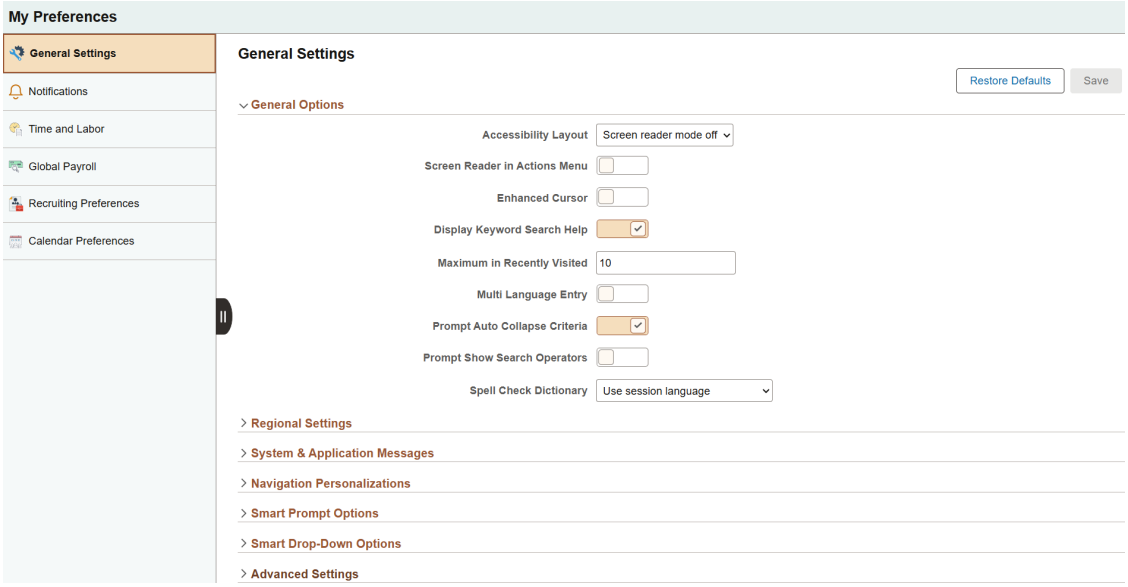

General Options

Expand this section to specify signon and other general options.

Field or Control	Description
Accessibility Layout	**Note:** Keyboard-only navigation features are available to all users and do not require users to enable accessibility features. Select one of the following options to specify the accessibility layout to use: • *Screen reader mode off* Select this option to disable screen reader mode for the current session and subsequent sessions. • *Screen reader mode on* Select this option to enable screen reader mode either temporarily for the current session or for the current session and subsequent sessions. **Note:** After you select to enable screen reader mode or to disable the persistence of screen reader mode, a confirmation page is displayed that then transfers you back to the current context so that your changes are now in effect.
Screen Reader in Actions Menu	Select this option to display the Enable Screen Reader Mode link in the Actions menu. **Note:** This link is available on fluid homepages and fluid pages only. However, while this link is available in fluid applications, it is not displayed in fluid activity guides, fluid navigation collections, and in My Preferences.
Enhanced Cursor	This accessibility feature provides bold highlighting of page elements that have focus. **Note:** The enhanced cursor feature is available on classic pages only.

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Field or Control	Description
Display Keyword Search Help	When a component is keyword search enabled, show help for enhanced search. This option is enabled by default.
Maximum in Recently Visited	Set a value between 0 and 30 for the number of recently visited items. The default value is 10.
Multi Language Entry	Select this option to be able to enter data in the language you specify in the Data Language list in pages where multiple language entry is available. This option is disabled by default.
Prompt Auto Collapse Criteria	Select this option to auto-collapse the search criteria when the prompt page is opened or after a search is performed. This option is enabled by default. See Working with Fluid Lookup Pages. **Note:** In screen reader mode, this setting is ignored and the search criteria always remains expanded.
Prompt Show Search Operators	Select this option to display the search operators in the search criteria as changeable drop-down list values. This option is disabled by default. See Working with Fluid Lookup Pages. **Note:** In screen reader mode, this setting is ignored and the search operators in the search criteria are always displayed as changeable drop-down list values.
Spell Check Dictionary	Select the language to use as your spell check dictionary from the list. **Note:** *Use session language* is the default option, which selects the dictionary associated with your signon language as specified on the Manage Installed Languages page. See Using Spell Check.

Saving Your Preferences

Click the **Save** button to save any updated preference settings. Except for changes to screen reader mode, which take effect immediately after confirmation, other changes to your preferences take effect the *next* time you login.

To revert all preference settings back to their default values, click **Restore Defaults** button.

> **Note**
>
> After you change the setting for screen reader mode (either enabling it or disabling it), a confirmation page is displayed where the new setting is in effect. Click the Back button to return to the previous context retaining the new screen reader setting. If restoring default settings changes the screen reader mode, then you are also transferred to the confirmation page where the new setting is in effect.

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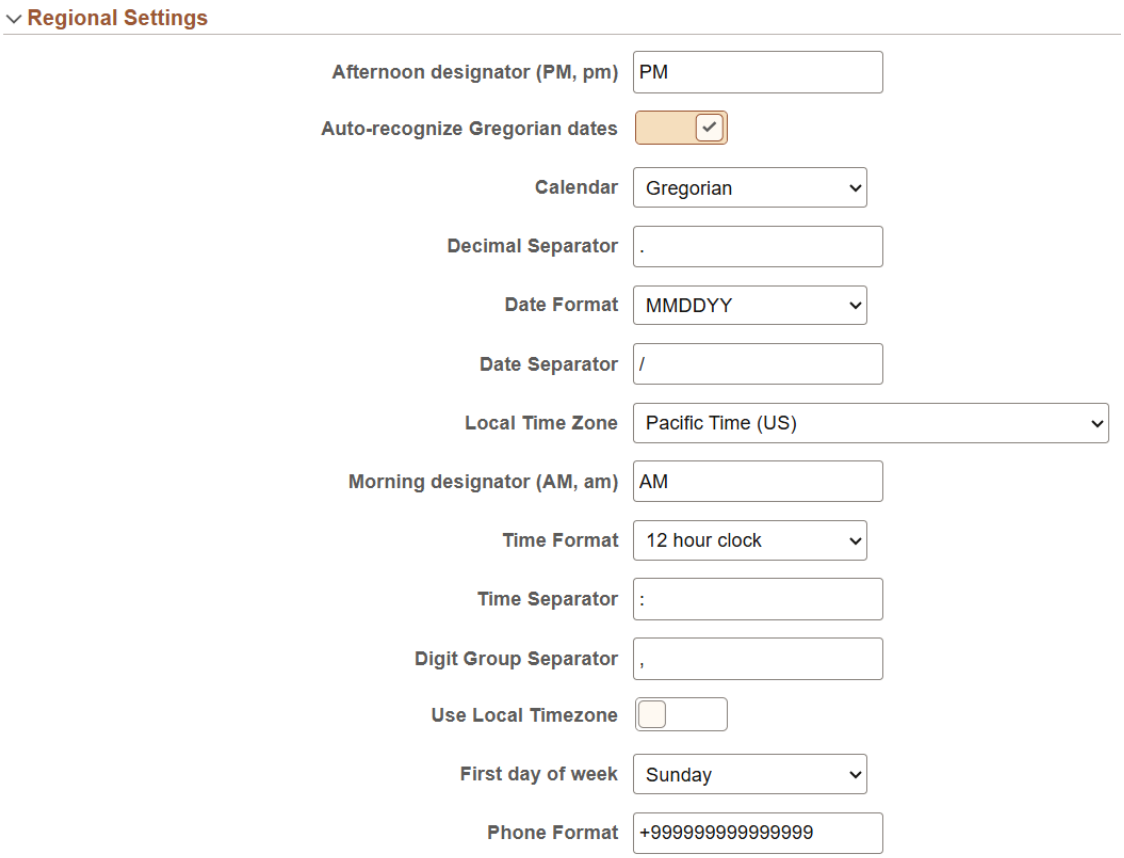
Regional Settings

Expand this section to specify your preferred date, time, and calendar related settings.

This example illustrates the fields and controls in the Regional Settings section of the My Preferences - General Settings page. Details about these options are described following the example.



Field or Control	Description
Afternoon designator (PM, pm)	Select the format for designating afternoon when using a 12 hour clock. The default value is *PM*.
Auto-recognize Gregorian dates	When you enable this option, if your calendar preference is set to use a non-Gregorian calendar, a date entered with a year between 1800 and 2300 will be assumed to represent a Gregorian date. Once entered and saved, the date will still be displayed using your selected calendar. This option is enabled by default.

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Field or Control	Description
Calendar	Select the type of calendar. This setting takes effect for all date entry and display fields. The Gregorian calendar is the primary calendar used by international business. Other supported calendars include the Thai Buddhist calendar and the Islamic Hijri calendar. The default value is *Gregorian*.
Date Format	Select the format to use for date fields. *MMDDYY* is the default value.
Local Time Zone	Select your local time zone. This option determines which time zone is used when the Use Local Timezone option is set to Yes. The default value is *Pacific Time (US)*.
Morning designator (AM, am)	Select the format for designating morning when using a 12 hour clock. The default value is *AM*.
Time Format	Select the format to use for time fields. Determines whether time will be displayed in civilian (8:05:00 PM) or military (20:05:00) time format. The determination of whether seconds and microseconds are displayed is made at the field level, and is not a personalization. The default value is *12 hour clock*.
Use Local Timezone	Select this option to use your local time zone rather than the server time zone. This option is disabled by default.
First day of week	Select the day to use as the first day of the week. The default value is *Sunday*.
Phone Format	Specify the format to use for phone number fields. It should be an international phone number format (known as E.164), which is a number of up to fifteen digits in length starting with a + (plus) sign. The format should use the digit 9 to represent a number. For example, `+999999999999999`, `+9(999)-99-9999`.

System & Application Messages

Expand this section to specify your preferences for displaying several system warnings and confirmation messages.

This example illustrates the fields and controls in the System & Application Messages section of the My Preferences - General Settings page. Details about these options are described following the example.

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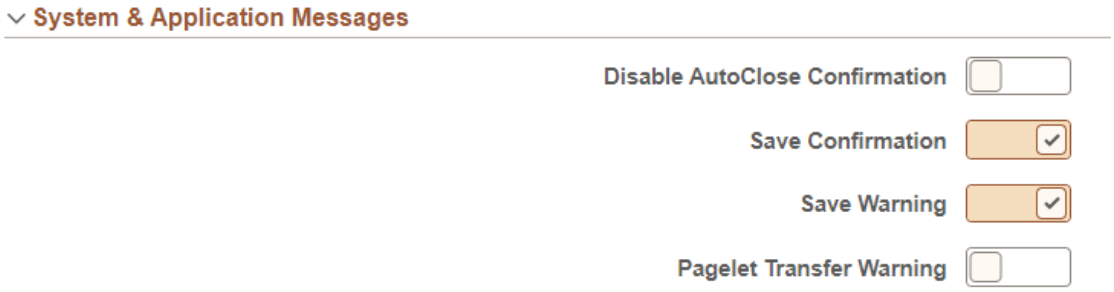

Field or Control	Description
Disable AutoClose Confirmation	Enable this option to prevent confirmation messages from automatically closing. This option is required for WCAG 2.0 standards, so that accessibility users have adequate time to read confirmations. When set to *Yes*, you must close a message to dismiss it; it will not disappear automatically. This option is disabled by default.
Save Confirmation	Enable this option to display a message to the user indicating that a save request completed successfully. *Yes* is the default value.
Save Warning	Enable this option to display a warning when transferring from a page that has unsaved changes. This option is enabled by default.
Pagelet Transfer Warning	Enable this option to display a warning in screen reader mode when transferring from a pagelet (homepage or dashboard) to another object. This option is disabled by default.

Navigation Personalizations

Expand this section to specify keyboard navigation preferences. For example, suppose you always prefer to type the date into a date field and then press **tab** to move quickly to the next field rather than opening the calendar prompt, selecting the date, and then closing the prompt. If you enable the **Tab over Calendar Button**, when you navigate with the **tab** key your cursor focus will never rest on a calendar button.

This example illustrates the fields and controls in the Navigation Personalizations section of the My Preferences - General Settings page. Details about these options are described following the example.

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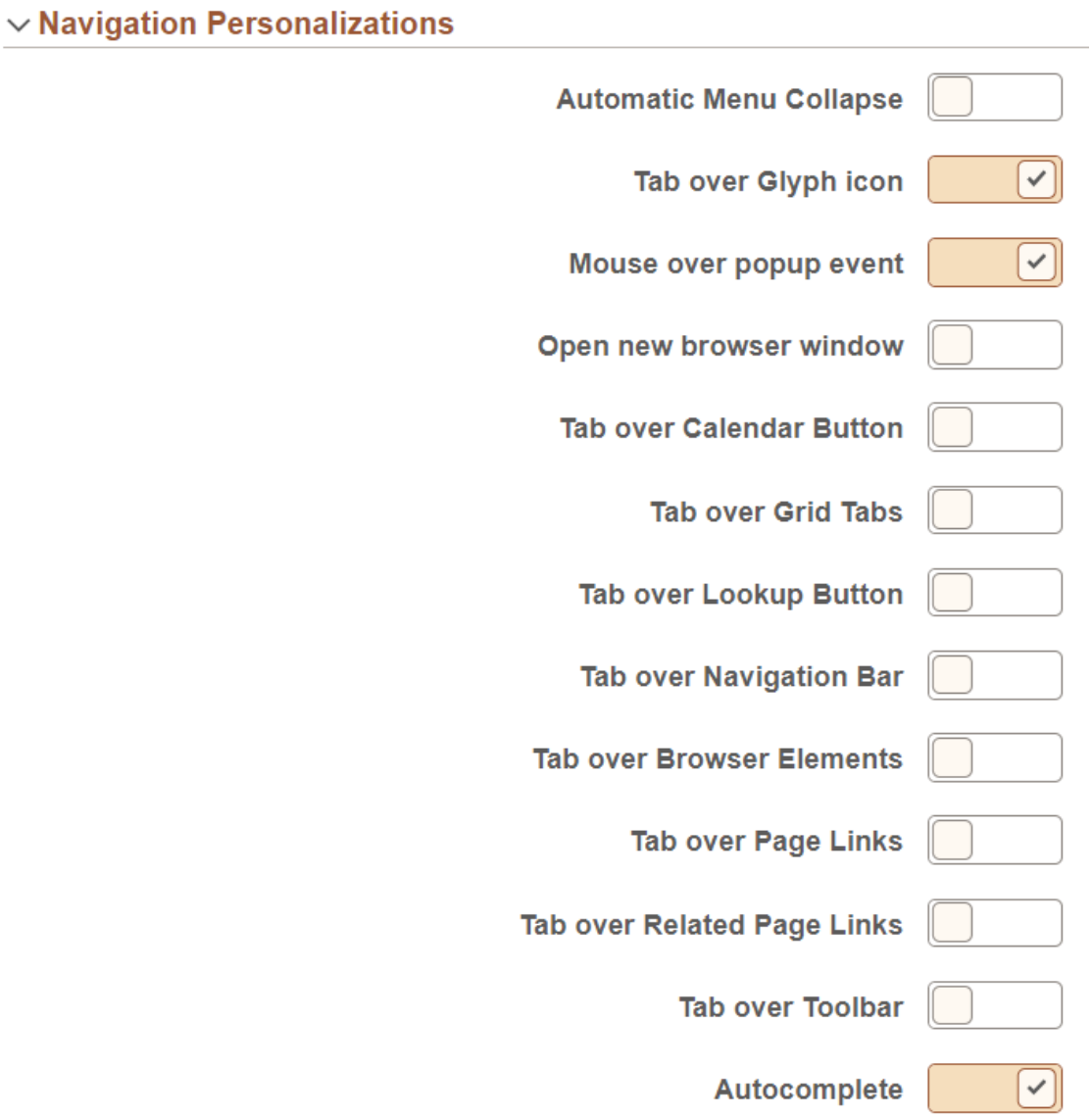

Select the navigation options to enable them. The following options are enabled by default:

- **Tab over Glyph icon.**
- **Mouse over pop-up event.**
- **Autocomplete.**

Field or Control	Description
Automatic Menu Collapse	Enable this option to cause the menu to automatically collapse when a transaction is selected. You can expand the menu either by using **Ctrl+Y** or the show menu icon.
Tab over Glyph icon	Enable this option to skip glyph icons when using the **Tab** key to move through page objects. A glyph icon displays the related contextual menu for a field.

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Field or Control	Description
Mouse over popup event	Enable this option to enable popup events when you mouse over items on a page. Mouse over pop-ups are enabled for some fields and will display a popup page with related information on it when you hover the mouse pointer over those fields.
Open new browser window	Enable this option to open a new page in a new browser window, even when the browser setting is set to open in a new tab.
Tab over Calendar Button	Enable this option to skip calendar button controls when using the **Tab** key to move through page objects. A calendar button is the icon next to date fields that can be used to display a calendar for date selection.
Tab over Grid Tabs	Enable this option to skip grid tabs when using the **Tab** key to move through page objects. Grid Tabs appear at the top of a grid.
Tab over Lookup Button	Enable this option to skip lookup button controls when using the **Tab** key to move through page objects. A lookup button is the magnifying glass icon following fields that have a defined list of valid values.
Tab over Navigation Bar	Enable this option to skip navigation bars when using the **Tab** key to move through page objects. A navigation bar appears at the top of grids and scroll areas, and controls which rows appear.
Tab over Browser Elements	Enable this option to skip over browser elements when using the **Tab** key to move through page objects, to restrict tabbing to PeopleSoft elements in the page. Depending on your browser, it can sometimes appear as if the focus is lost, when it is actually on a browser element, such as the URL address field. By enabling this option, you can avoid this browser issue.
Tab over Page Links	Enable this option to skip page links when using the **Tab** key to move through page objects. Page Links are the hyperlinks at the bottom of a page in a multi-page component.
Tab over Related Page Links	Enable this option to skip over the icon that takes you to a list of related links when using the **Tab** key to move through page objects.
Tab over Toolbar	Enable this option to skip the toolbar when using the **Tab** key to move through page objects. The toolbar is located at the bottom of a page and contains standard operations that are needed to work with the transaction, such as **Save** and **Return to Search**.
Autocomplete	Enable this option to have the system do a prompt lookup as you type to suggest appropriate values. Applicable only for fields with defined prompt edit values.

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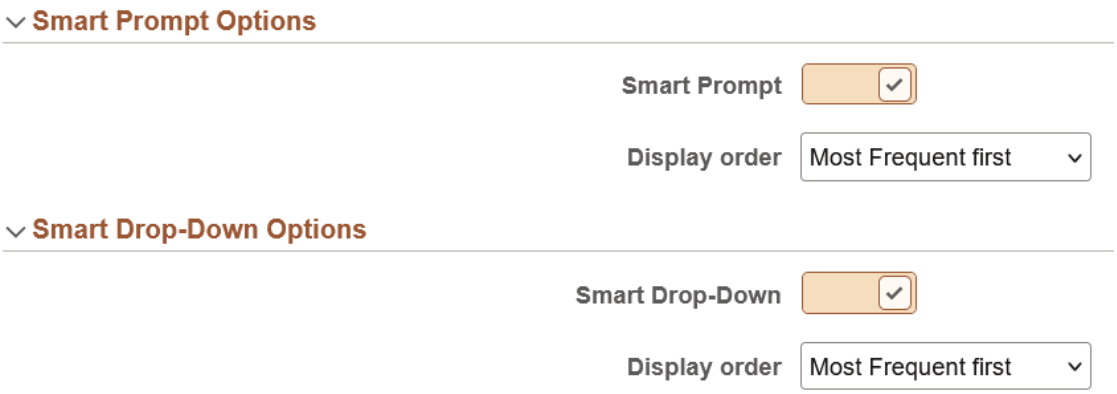
Smart Prompt Options and Smart Drop-Down Options

Expand these sections to configure prompt options and drop-down options.

These options are enabled by default. These options display prompt values and drop-down list values in two sections, namely, Most Relevant and Others. For more information, see Using Drop-Down List Boxes and Using Smart Prompts.

> **Note**
>
> The Smart Prompt Options and Smart Drop-Down Options are not available if the system administrator disables these options on the PeopleTools Options page. See System and Server Administration: PeopleTools Options, Setting Smart Prompt and Smart Drop-Down Options section, for more information.

This example illustrates the fields and controls in the Smart Prompt Options and Smart Drop-Down Options sections of the My Preferences - General Settings page. Details about these options are described following the example



Field or Control	Description
Smart Prompt	The **Smart Prompt** option is enabled by default. The **Smart Prompt** option displays prompt values based on most recently used or most frequently used items as specified by you in the **Display Order** field. Use the **Smart Prompt** check box to either disable or enable the display of smart prompt values. If you disable the **Smart Prompt** option, the prompt values are displayed in the standard manner. For more information on smart prompt, see Using Smart Prompts

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Field or Control	Description
Smart Drop-Down	The **Smart Drop-Down** option is enabled by default. The **Smart Drop-Down** option displays drop-down list values based on most recently used or most frequently used items as specified by you in the **Display Order** field. Use the **Smart Drop-Down** option to either disable or enable the display of smart drop-down list. If you disable the **Smart Drop-Down** option, the drop-down values are listed in the standard manner. For more information, see Using Drop-Down List Boxes
Display Order	Specify the display order of the most frequently used or most recently used items. The options are: • Most frequent first. • Most recent first. If you select Most frequent first, then in the Most Relevant section of the drop-down list values, the most frequent items are listed first followed by the most recent items. Similarly, if you select Most recent first, then in the Most Relevant section of the prompt values, the most recent items are listed first followed by the most frequent items.

Process Pop-up Notification

Expand this section to specify preferences for pop-up notifications.

> **Note**
>
> The display of the **Process Pop-up Notification** section is controlled by the **Pop-up Notification** check box in the Notification Settings page in **PeopleTools**, and then **Process Scheduler**, and then **Process Scheduler Settings**, and then **Notification Configuration**. The configuration settings defined under this section override the settings for run/distribution status configured in the **Notification Settings** page. See Process Scheduler: Defining Notification Configuration.

This example illustrates the fields and controls on the My Preferences - General Settings: Process Pop-up Notification section. You can find definitions for the fields and controls later on this page.

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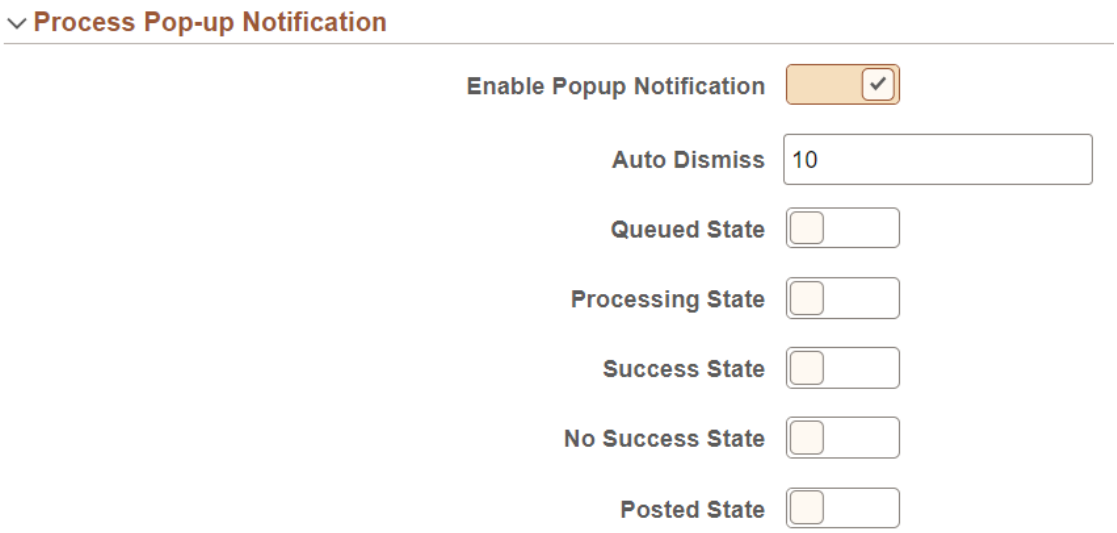

Field or Control	Description
Enable Popup Notification	Select this option to activate pop-up notifications. This option is disabled by default. **Important:** This option must be set to *Yes* for pop-up notifications to be displayed. When it is set to *No*, even if a specific pop-up notification type has been enabled, it will not appear.
Auto Dismiss	Enter the duration for pop-up notifications. The value you enter determines the number of seconds that a pop-up notification remains displayed. For example, if the value is set to 5, then a pop-up notification will be displayed for 5 seconds, after which it will automatically disappear.
Queued State	Enable this option to receive pop-up notifications when a process status changes to *Queued*. This option is disabled by default.
Processing State	Enable this option to receive pop-up notifications when a process status changes to *Processing*. This option is disabled by default.
Success State	Enable this option to receive pop-up notifications when a process status changes to *Success*. This option is disabled by default.
No Success State	Select this option to receive pop-up notifications when a process status changes to *No Success*. This option is disabled by default.
Posted State	Select this option to receive pop-up notifications when a process status changes to *Posted*. This option is disabled by default.

Advanced Settings

Expand this section to specify preferences for grouplet updates and page cache duration.

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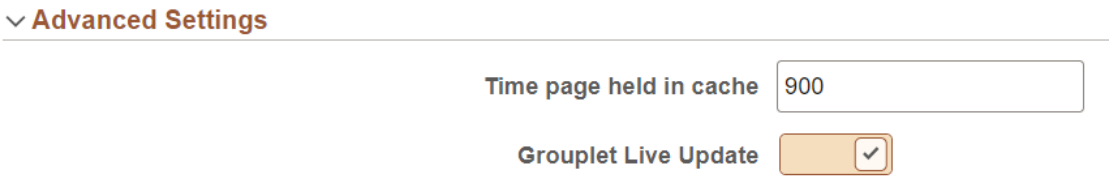
This example illustrates the fields and controls in the Advanced Settings section of the My Preferences - General Settings page. Details about these options are described following the example.



Field or Control	Description
Time page held in cache	Enter the amount of time, in seconds, that a page is held in cache memory. The default value is 900.
Grouplet Live Update	Select Yes to have grouplets update automatically. When set to No, grouplets update only when you refresh the page.

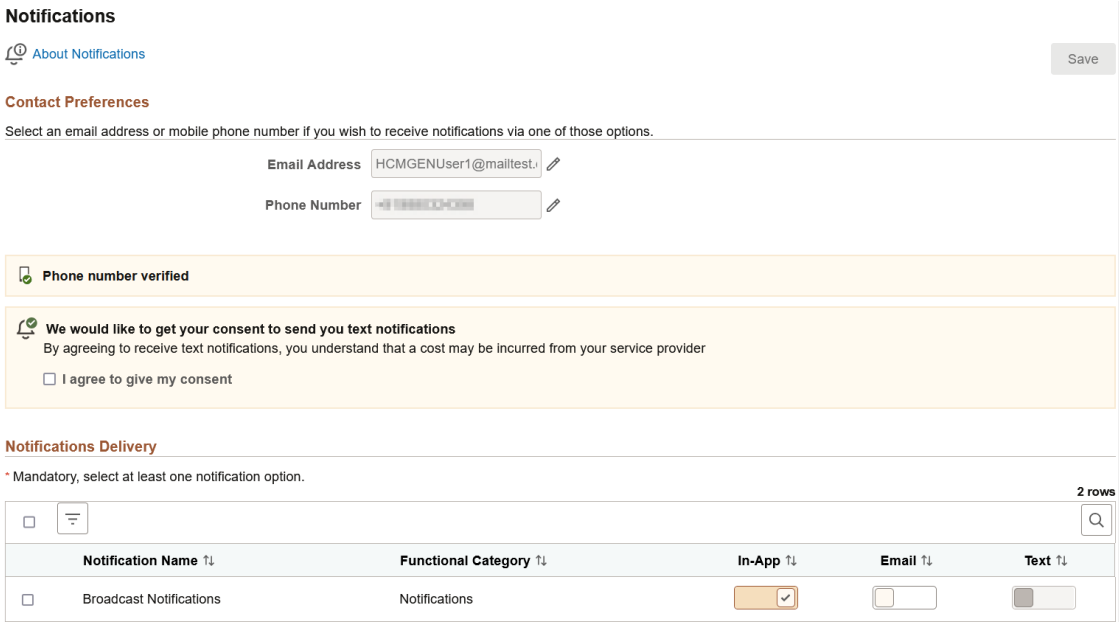
Personalizing Notifications

Use the Notifications page of My Preferences to personalize how you wish to receive notifications in the PeopleSoft system.

Navigation:

My Preferences, and then **Notifications**

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



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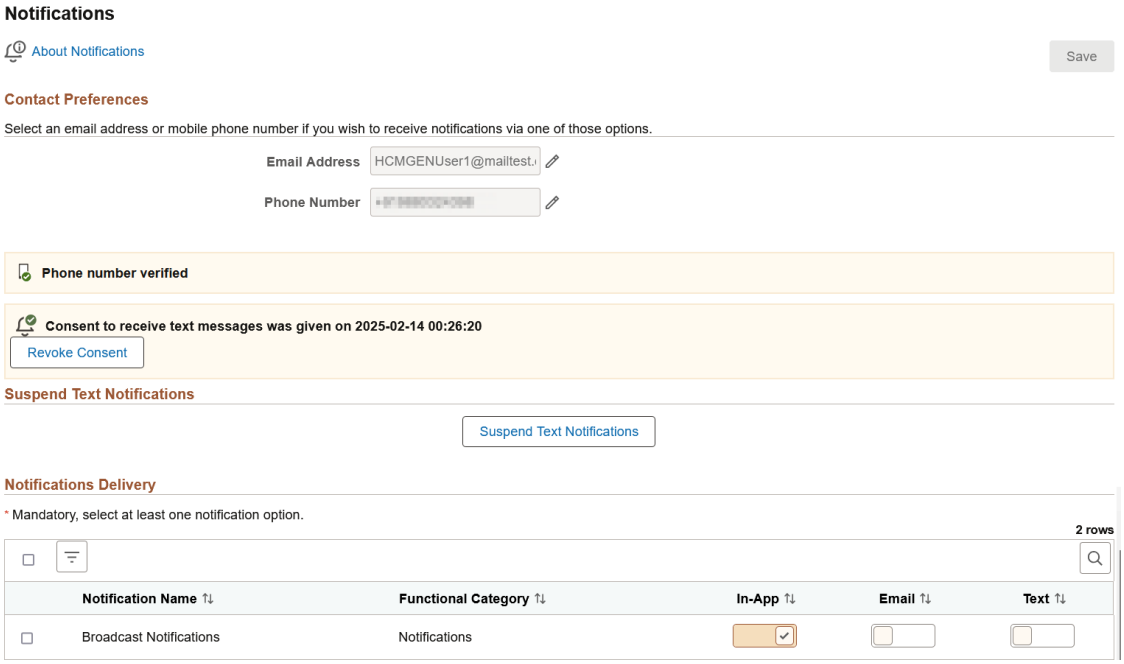
This example illustrates the fields and controls on the Notifications page after personalization. You can find definitions for the fields and controls later on this page.



When you personalize your notifications, you can select among the notification channels that have been configured for each notification category. When the options are available, you can select to receive notifications in the Notification window, in email, or by text message.

Field or Control	Description
Phone Number	Enter your phone number. Prefix your phone number with the country code. Do not include any other non-numeric characters such as spaces, dashes, periods, or parenthesis. The phone number is displayed in the format that you specified or the default format on the My Preferences - General Settings page. After entering your phone number, you have to verify the number. For more information, see the Verifying Phone Number and Obtaining Consent for Text Notifications section later in this topic.
I agree to verify my phone number	Select this check box to verify your phone number. Selecting this check box sends a one-time verification code to your phone, which you need to enter in the subsequent dialog box that appears. On successful verification of the number, the Phone number verified message is displayed. For more information, see the Verifying Phone Number and Obtaining Consent for Text Notifications section later in this topic.

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Field or Control	Description
I agree to give my consent	Select this check box only if you wish to receive text messages. **Note:** Selecting this check box enables the Text option on any notification type that has text defined as an option. However, you still must select or provide a phone number to receive text messages.
Revoke Consent	Click this button to revoke your consent to receive text messages. Revoking consent will also reset and disable the text option on any notification type that has the text option configured as available.
Suspend Text Notifications	Click this button to temporarily suspend delivery of notifications as a text message. No personalizations are reset when you suspend text notifications.
	Click the Choose button to select a different email address or phone number on which to receive notifications.
Notifications Delivery	Select the delivery options for each listed notification: In-App (the Notifications panel), Email, and Text. **Note:** Some notification categories do not allow personalization and are not displayed here. In addition, other categories may be defined as mandatory, meaning you must retain at least one delivery option as selected.

Verifying Phone Number and Obtaining Consent for Text Notifications

The PeopleSoft system verifies a phone number by sending you a one-time verification code. The email address is not verified.

Follow these steps to verify your phone number. In this scenario, it is assumed that your phone number does not exist in the PeopleSoft system.

1. On the Notifications page, in the **Phone Number** field, enter your phone number. Prefix your phone number with the country code. The phone number is displayed in the format that you specified on the General Settings page.
2. Press Enter.
3. Select the **I agree to verify my phone number** check box.

   A six-digit code is sent to your phone, which you need to enter in the **Phone Number Verification** dialog box.

   If an incorrect six-digit code is entered, you can either enter the correct code or select the **Resend** button to send the six-digit code again. You should note that the system does not generate a new code, but resends the six-digit code again.
4. On successful verification, the **Phone number verified** message is displayed.
5. Select Save.
6. Select the **I agree to give my consent** check box.

   The Revoke Consent and the Suspend Text Notifications buttons appear.

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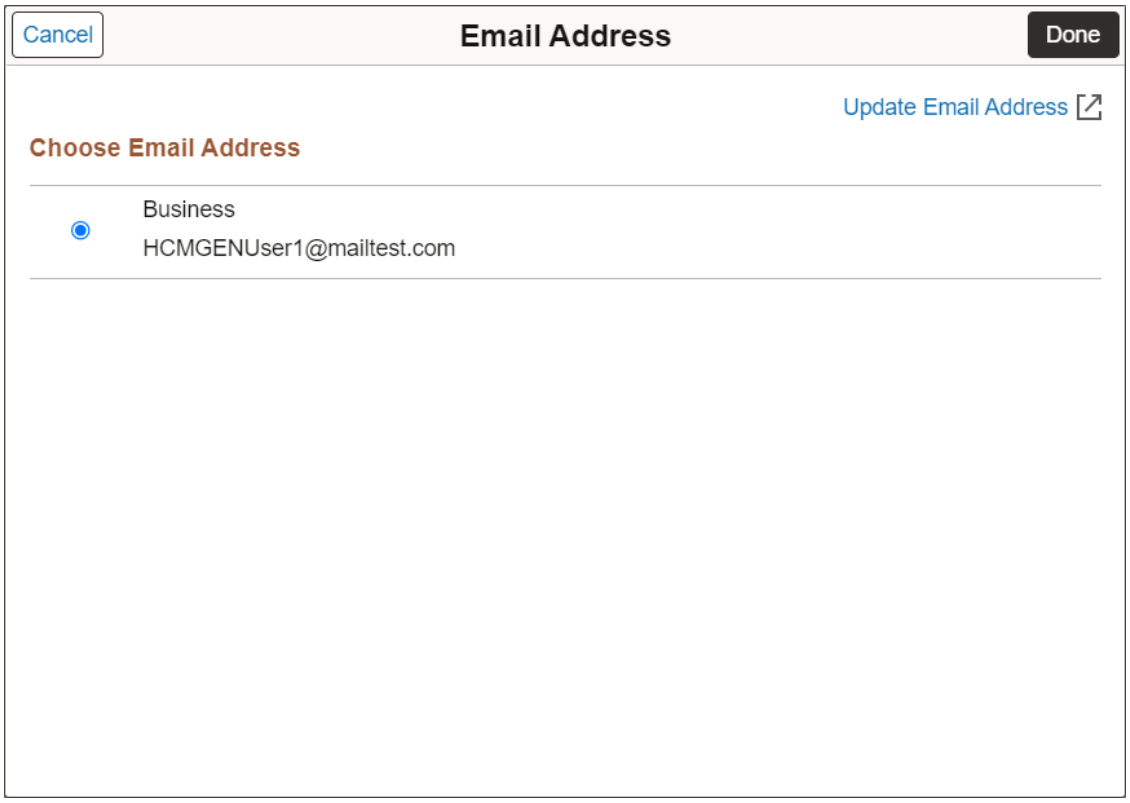
Consider the following scenarios with regard to existing phone numbers in the PeopleSoft system:

- Your phone number already exists in the system, that is, you had entered the phone number in the pre-8.62 version. When you upgrade to PeopleTools 8.62, your phone number is considered to be verified, and you will continue to receive text notifications.
- You have entered your phone number and consented to receive text notifications, but you want to edit the phone number. You can use the edit option for the phone number and after you edit the number, you will be prompted to verify the new phone number. However, you do not have to provide your consent to receive text notifications again.

Selecting and Updating Email Addresses and Phone Numbers

Use the Email Address page or the Phone Number page to select or update your selection of the email address or phone number on which you wish to receive notifications.

This example illustrates the fields and controls on the Email Address page. The Phone Number page, which has similar fields, is not shown here.



The Email Address page and the Phone Number page display your contact information that is entered elsewhere in the PeopleSoft system. On these pages, you can merely select one of the values presented to you; you cannot update them. To update contact information or to enter a new email address or phone number, select one of the values displayed here first. Then, the Update Email Address link (or the Update Phone Number link) will become active. Then, you can click that link to be redirected to the configured application-specific component where you can update your email or phone contact information.

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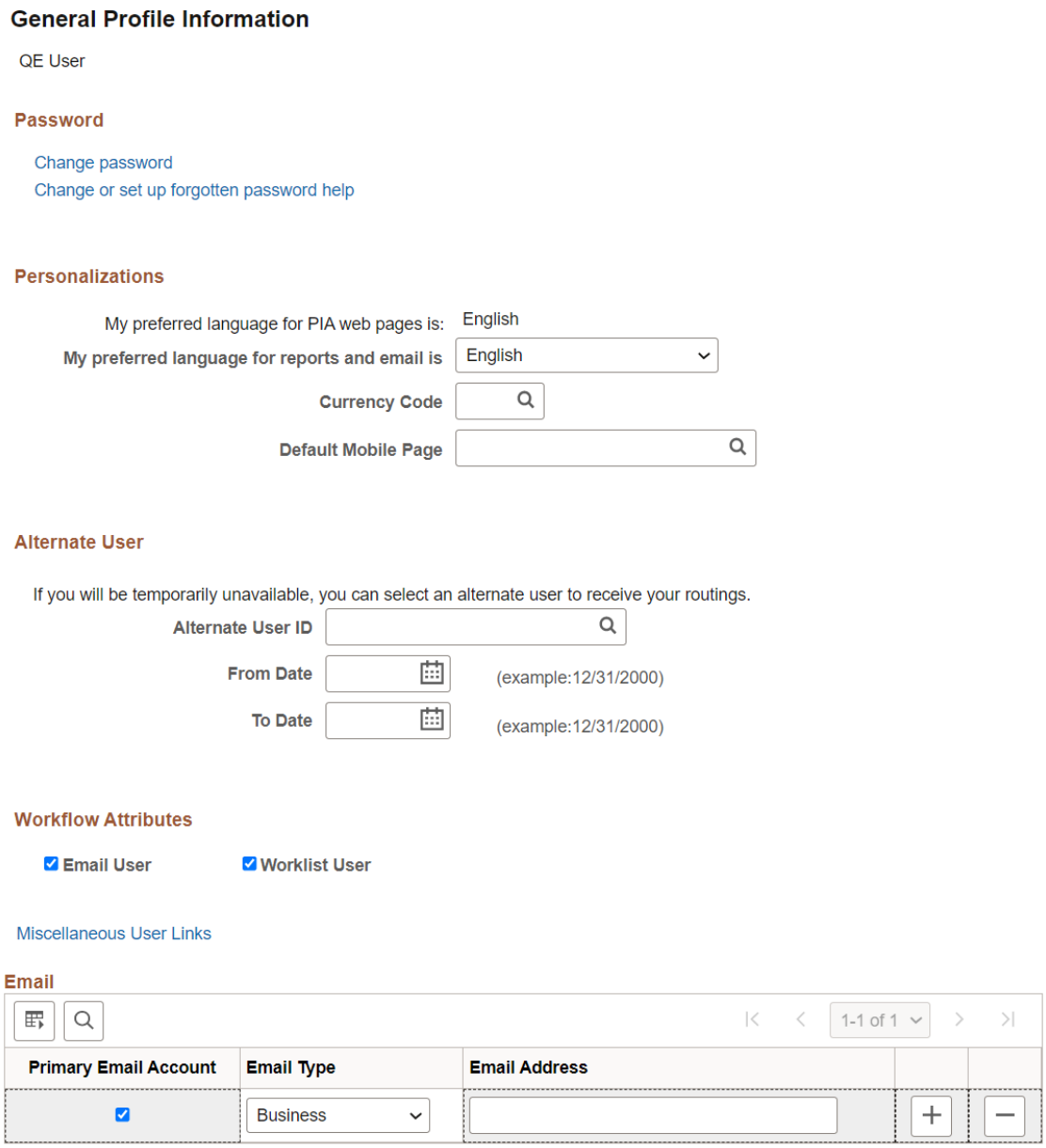
> **Note**
>
> If no application-specific configuration has been defined on your system, the PeopleTools-delivered configuration will redirect you to My System Profile where you can maintain your email addresses.

Setting Up Your System Profile

Access the General Profile Information page (from Home, select My System Profile).

This example illustrates the fields and controls on the General Profile Information page.



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Field or Control	Description
Password	Click one of the following links, which are self-service options related to passwords: • **Change password.** • **Change or set up forgotten password help.** See Security Administration: Changing Passwords.
Personalizations	This region lists your current language preference for web pages and your preferred language for reports and email. You can change the language setting for your reports and email on this page. You can also select the currency code for the currency symbol that will appear on pages when you enter currency values. **Note:** The decimal placement is a property of the currency code; two decimal places is standard. Select the mobile homepage that should appear after you sign on to a mobile device. PeopleSoft Mobile Agent is a desupported product. These features exist for backward compatibility only. **Note:** For more personalizations options, open the My Personalizations page.
Alternate User	If you are going to be on vacation or some other type of temporary leave, you can add the user ID of a colleague who is looking after your tasks in your absence. Select the alternate user ID and enter the dates during which you want the alternate ID to be active. After that time has passed, your tasks are automatically routed back to you. **Note:** When applying an alternate user ID in your workflow settings, note that the system only sends workflow routings to the immediate alternate user ID. The system does not send routings down multiple levels of alternate user IDs. For example, assume user A specifies user B as the alternate user ID while user A is out of the office. Also assume that user B is out of the office at some time during user A's absence, and user B specifies user C as an alternate user ID. In this case, the system does not send workflow routings originally intended for user A to user C.
Workflow Attributes	Select one or more check boxes. The available options are determined by the workflow setup at your site. These settings affect how you receive ad hoc workflow routings through your workflow system. An email user receives notifications through email, while a worklist user receives notifications through worklists.

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Field or Control	Description
Miscellaneous User Links	Follow this link to view other security links. These links are controlled by the security configuration of your system. Contact your system administrator for more information.
Email	Use the **Email** grid to edit your current email address or enter additional email types, such as home or Blackberry. You can enter one address of each **Email Type**.

Personalizing Classic Homepages and Dashboards

> **Note**
>
> The information provided in this topic applies to PeopleSoft classic applications. For information about fluid homepages and dashboards, see Working with Fluid Homepages and Dashboards.

You can specify your preferences for the layout and content of your classic homepages.

> **Note**
>
> The labels of system-defined homepages and dashboards are translatable; however, personalized labels of homepages and dashboards are not translatable—this applies to personal fluid homepages as well as the personalized labels of fluid homepages, fluid dashboards, classic homepages and classic dashboards.

Related Topics

- Portal Technology: Managing Homepages

Personalizing Content

Access the Personalize Content page (on your classic homepage or dashboard, click the **Personalize Content** link).

This example illustrates the fields and controls of the Personalize Content page for an example homepage.

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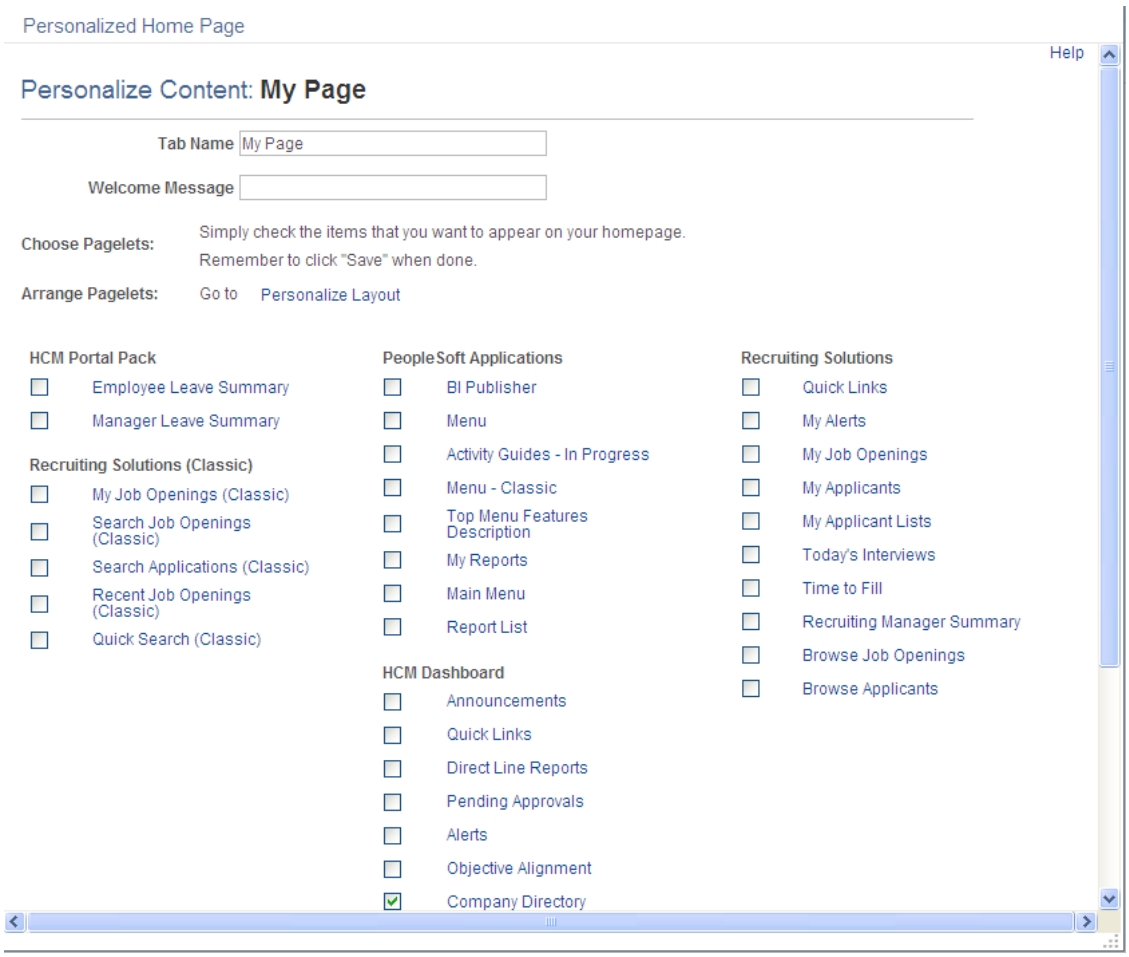

1. (Optional). Enter a tab name and welcome message.

   This message appears in the header of your homepage or dashboard when you navigate to it.

2. Select the check boxes associated with the pagelets that you want to appear on your personalized homepage or dashboard.

   The portal administrator presets the available selection of pagelets. You can preview each pagelet by clicking the pagelet name, which opens a pagelet preview in a smaller window. If a pagelet is not available to you, you will receive a message in the pagelet. Any links in the pagelet are disabled.

3. Click the **Save** button.

> **Note**
>
> You can click **Personalize Layout** from here to immediately begin laying out how the pagelets will appear on your homepage or dashboard.

Personalizing Layout

Use either of these two methods to personalize your homepage or dashboard layout:

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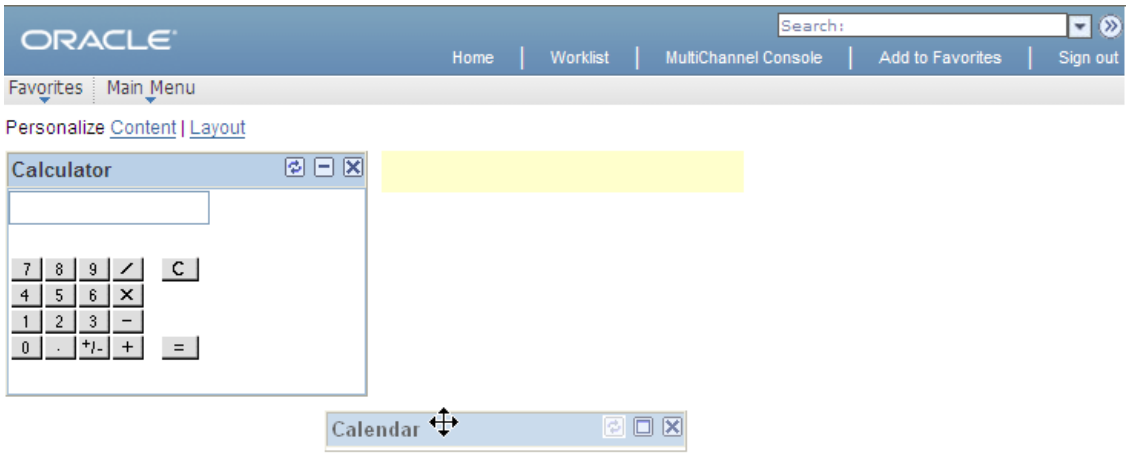
- Drag and drop pagelets.
- Use the Personalize Layout page.

Dragging and Dropping Pagelets

You can rearrange pagelets on your homepage or dashboard by dragging and dropping them between columns, as you see in this example:

This example illustrates dragging the Calendar pagelet to change the homepage layout.



1. Access the homepage or dashboard.

   > **Note**
   >
   > The homepage or dashboard must already be configured with one or more pagelets.

2. Move your cursor to the pagelet header.

   The cursor changes shape to indicate that you can drag the pagelet.

3. Click the pagelet header.

   The system automatically minimizes the pagelet when you click the mouse button.

4. Drag the pagelet to a new location.

   When your pagelet header is in the new space, the background of the browser window changes color. This color change represents the new location. If you are changing columns, at least 50 percent of the width of the header must be in the new column before the system identifies the new location.

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> **Note**
>
> If your mouse has a scrollable wheel, you can scroll the wheel while you press the mouse button to facilitate the movement of pagelets below the visible area of the browser window.

5. Release the mouse button.

   The pagelet maximizes automatically in the new location unless you manually minimized the pagelet.

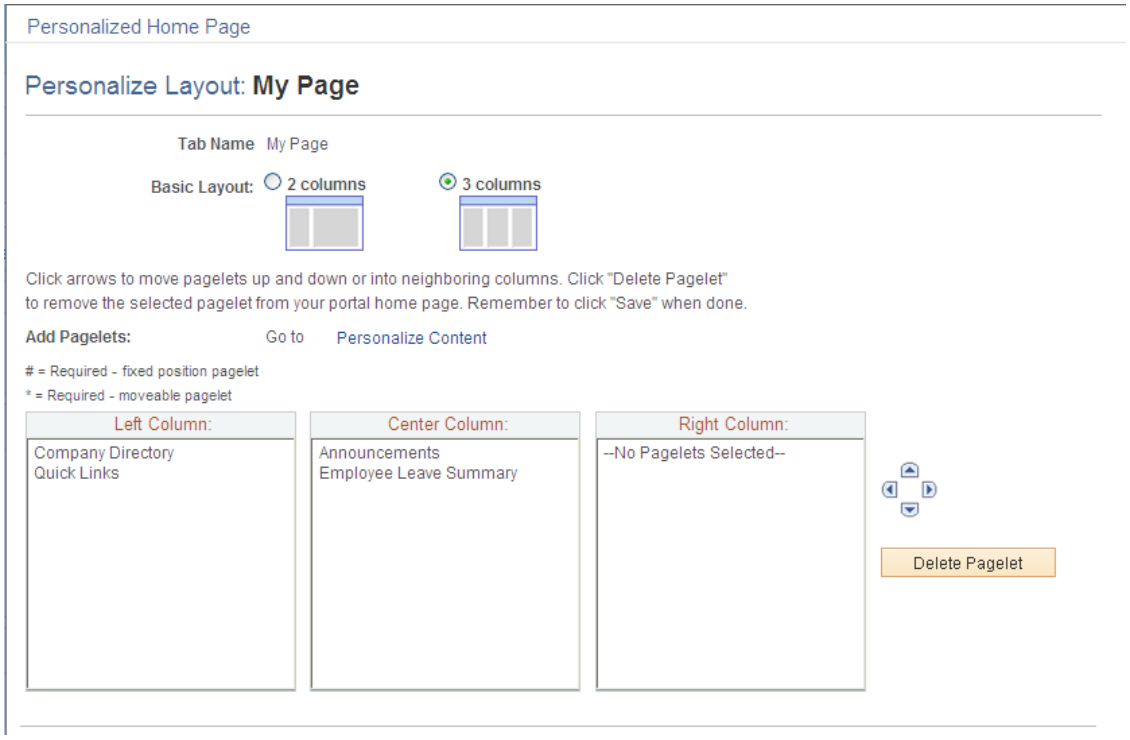
> **Note**
>
> You cannot move pagelets that the portal administrator configures as required-fixed. You also cannot move pagelets if you do not have the appropriate permissions to personalize the page.

See Portal Technology: Managing Homepages.

Using the Personalize Layout Page

Access the Personalize Layout page (from the homepage or dashboard, click the **Personalize Layout** link).

This example illustrates the fields and controls of the Personalize Layout page for an example homepage.



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Field or Control	Description
Basic Layout	Select to display the pagelets in either two or three columns on the homepage or dashboard. A two-column layout results in one narrow column on the left side of your homepage or dashboard and one wider column to the right. A three-column layout results in three narrow columns of equal width. If you place a wide pagelet in a narrow column, the column stretches to accommodate the wider pagelet. **Note:** The system moves required pagelets (indicated by an asterisk [*]) from the third to the second column when you switch from a three-column to a two-column layout.
Columns	The pagelets selected on the Content page are listed in the column sections. If the basic layout is two columns, the pagelets are divided into left and right columns. If the basic layout is three columns, the pagelets are divided into left, center, and right columns. **Note:** A number sign (#) indicates a required fixed position pagelet. An asterisk (*) indicates a required moveable pagelet. For example, #Signon indicates that the Signon pagelet cannot be moved to a different location on the homepage. You cannot assign required fixed pagelets to the right column in a three-column layout.
	Use to position the pagelets. Select the desired pagelet (or multiple pagelets) and then click the arrows to move the selected pagelet above a pagelet, below a pagelet, to the next column on the right, or to the next column on the left.
Delete Pagelet	Select the desired pagelet and then click this button to delete the pagelet from your homepage or dashboard.
Return to Home	Click to view your new choices. From the homepage or dashboard, you can choose to minimize a pagelet or remove it altogether. Use the minimize and remove buttons in the pagelet header to do so. When you minimize a pagelet, the system replaces the minimize button with the restore button. Click the restore button to fully open the pagelet again. Clicking the remove button opens the Removal Confirmation page for that pagelet. Select **Yes-Remove** or **No-Do Not Remove**.

To arrange the layout of a homepage or dashboard:

1. Select a basic layout option.
2. Select the pagelet name.
3. Click the directional arrow buttons to position the pagelets.
4. Click the **Save** button.

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Personalizing Pagelets

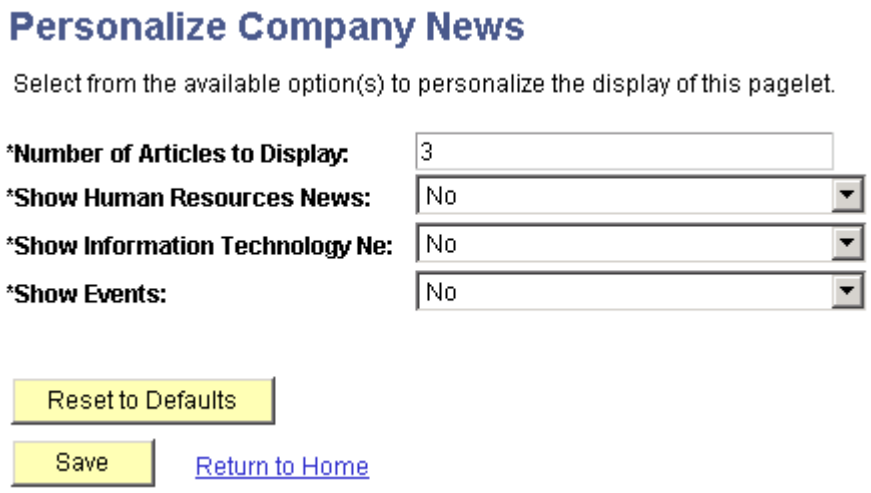
> **Note**
>
> The information provided in this topic applies to PeopleSoft Classic User Interface.

You can personalize many of the pagelets on your homepage to show only the information that you want to see. Each pagelet that allows personalization has different personalization options that are based on the type of information that appears in the pagelet. For example, on the Company News pagelet, you can use personalization options to show specific news categories from the list of those that are available or limit the pagelet to a specific number of articles. In the Tasks pagelet, you can choose to see all tasks, only personal tasks, only worklist tasks, and so on. These changes will appear only in your pagelet. Use one of the following methods to personalize a pagelet; the options that appear differ depending on which application version you use:

> **Note**
>
> Not all pagelets allow personalization. Your system administrator can disable the pagelet personalization feature.

Field or Control	Description
	Click the **Personalize** button on the pagelet title bar of a pagelet that supports personalization.
	Click to access the Pagelet Settings menu, then select Personalize.

This example illustrates the fields and controls on a sample Personalization page.



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Pagelet Behavior in Screen Reader Mode

When you interact with a portal pagelet in screen reader mode, the pagelet expands to a full-sized page. Use the Home link to return to the homepage.

Related Topics

- Portal Technology: Understanding Pagelet Wizard

Personalizing Pages

This section discusses how to personalize pages.

> **Note**
>
> The information provided in this section applies to PeopleSoft Classic User Interface.

Understanding Page Personalization

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

> **Note**
>
> Page personalizations may be superseded if the order of the grids in the underlying page definition is changed in Application Designer.

This example shows the pagebar.

Select the **Personalize Page** link to open the Page Personalization page for the current page.

This example illustrates the fields and controls on the Page Personalization page.

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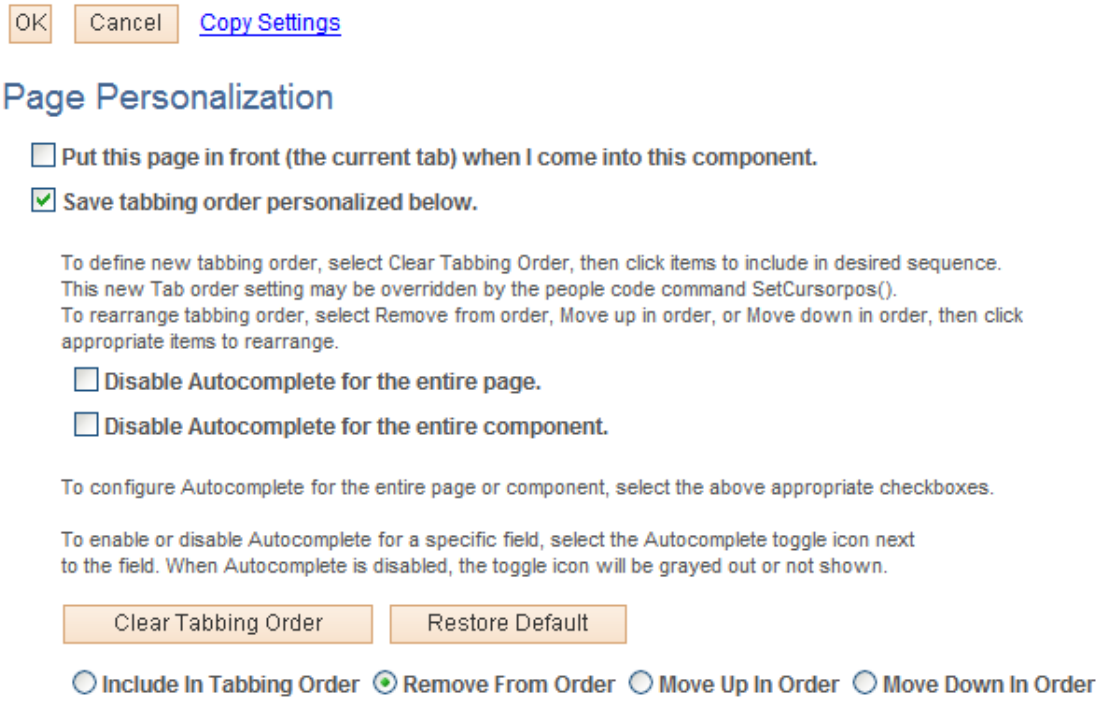
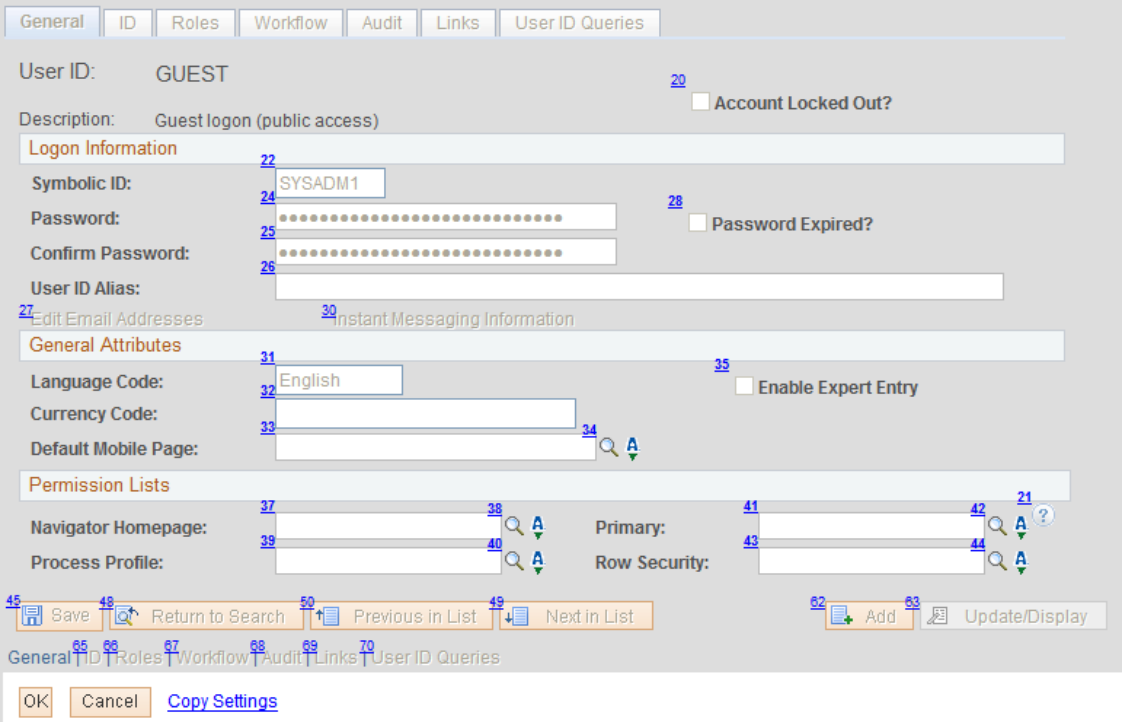


This example illustrates the fields and controls on the Page Personalization page.



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> **Note**
>
> Your system administrator can disable the page personalization feature. Disabling this feature may be necessary if your company is concerned about database growth.

Controlling Initial Page Display

The Page Personalization page includes four settings that enable you to control how the current page initially looks when you open it:

Field or Control	Description
Put this page in front (the current tab) when I come into this component.	Defines the current page as the initial default page for the component. Only one page within a component can be set as the *front* page. Search pages and secondary pages cannot be identified as front pages. This option appears only if the current component for the page contains more than one page based on your security profile. This option is deselected by default.
Save the state of the expanded/collapsed sections on this page.	Enables you to personalize the initial appearance of collapsible sections on the current page. Before selecting **Personalize Page** and then selecting this option, ensure that the collapsible sections on the page display exactly as desired. This option takes a snapshot of the current state of the collapsible sections on the page. You can also preserve the initial appearance of nested collapsible sections whether or not the parent collapsible section is expanded. This option is deselected by default. When it is disabled, the application determines the initial appearance of all collapsible sections unless you defined this option previously. This option only appears if the current page contains page elements that you can expand or collapse.
Save the state of the View All settings on this page.	Enables you to personalize the initial View All appearance of scroll areas and grids. This option takes a snapshot of the current View All status of the grids and scroll areas on the page. This option is deselected by default. When it is disabled, the application determines the initial View All display unless you defined this option previously. This option only appears if the current page contains a grid or scroll area with a View All setting. This option is not supported for grids in scroll areas.

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

Setting Autocomplete Options

By default, the system helps you enter data into fields using an autocomplete feature—that is, based on what you have entered, the system automatically matches existing values to help you complete your entry in a prompt field so that you don't have to type all of the characters into the field. For some prompt fields, this is a great benefit, while for others it can be unnecessary, and in many cases it depends on the user preference. The system enables you to decide if you want to enable or disable autocomplete (sometimes referred to as "type ahead") for an entire component (group of pages), a single page, or a single prompt field.

Field or Control	Description
Disable Autocomplete for the entire page	Turns off the autocomplete feature for all prompt fields on a single page.
Disable Autocomplete for the entire component	Turns off the autocomplete feature for all prompt fields, for all pages, within a single component (group of pages).
	Click to toggle between enabling and disabling autocomplete for a single prompt field.

Changing the Tabbing Order

The tabbing order is the order in which you move from page element to page element when you press the **Tab** key. You can change and save the default tabbing order of a page from the Page Personalization page, which displays an image of the current page with tabbing order numbers in the upper-left corner of each page element that you can change. (Page elements with smaller numbers precede page elements with larger numbers in the tabbing order.) You can modify collapsible section buttons and page elements within collapsed sections as long as the collapsed section is expanded when you select the **Personalize Page** option.

> **Note**
>
> Tab order numbering may not begin with 1 and may appear to have gaps for page elements that are not currently visible.

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Field or Control	Description
Clear Tabbing Order	Click this button to define a new tabbing order. Clicking this button clears the current tabbing order and replaces the numbers for each relevant element (any element that you can tab to) with an **X.** The **X** indicates that no tab sequence number is applied for that field. You can then assign a new tabbing order to the page elements using the **Include In Tabbing Order**, **Remove From Order**, **Move Up In Order**, and **Move Down In Order** buttons.
Restore Default	Removes all tabbing order personalizations defined for the page and restores the original tabbing order.
Include In Tabbing Order, **Remove From Order**, **Move Up In Order** and **Move Down In Order**	These options enable you to control the tabbing order. Click the appropriate radio button and then click the page element you want to change.

To change the tabbing order:

1. Select the **Clear Tabbing Order** button to remove all tabbing order settings for the page.

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

   The system numbers each field that you select sequentially, beginning with 1.
4. (Optional) If necessary, select the **Move Up In Order** or **Move Down In Order** radio buttons and click the page elements as needed to adjust the tab order you just set.

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

To remove specific fields from the current tabbing order:

1. Select the **Remove From Order** radio button.
2. Click each page element that you want to remove from the tabbing order.

   The tabbing order number for each element that you click is replaced with an **X.** At runtime, the system skips this page element as you tab through the page.

To save the new tabbing order:

1. Make sure the **Save tabbing order personalized below** option is selected.
2. Click the **OK** button.

   The original page appears with your new tabbing order and other personalizations applied.

Tabbing Order Exclusions

Tabbing order personalization applies only to elements within the page, such as edit boxes, grids, drop-down list boxes, push buttons, and so on. You cannot personalize the tabbing order for these elements:

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- Header icons.
- Browser elements.
- Page and related page links.
- HTML areas.
- Charts.
- Grid columns that you hid using the grid personalization feature.

  If you reveal a column after you set the tabbing order personalization, you must personalize the page again to include that field in the tabbing order.

Collapsible Sections

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

You can personalize the tabbing order of any allowed page elements within a collapsible area. However, if you then collapse this section, the system skips the page elements contained in the collapsed area. Collapsing an area effectively removes any of its page elements from the tabbing order.

Grids and Scroll Areas

Page elements within a grid are treated as a group at runtime, even if they are not numbered consecutively. For example, if a page has four fields, two of which are in a grid, then the tabbing sequence will keep the grid fields together regardless of the tabbing order that you specify. If fields A and B are outside the grid, fields C and D are inside the grid, and you set the tabbing order to be A, C, B, and D, then the system will automatically revert to an A, C, D, and then B tabbing order to keep the items within the grid (C and D) together.

> **Note**
>
> If you select View All from the navigation bar when multiple levels of scroll areas exist, then the page tabbing order may not behave as you would expect after tabbing through the page for the first time.

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

Oracle recommends that you do not include the add row ([+]) or delete row ([–]) buttons in the tab sequence; instead, use the Alt+7 and Alt+8 keys to navigate through these elements.

Copying, Sharing, and Deleting Page Personalization Settings

Access the Page Personalization page by clicking the **Personalize Page** link on the page you want to personalize. The page personalization toolbar at the top and bottom of the Page Personalization page enables you to save, cancel, copy, share, and delete your page personalization settings. The share and delete options appear only after you have personalized and saved the page.

This example illustrates the controls on the page personalization toolbar.

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Field or Control	Description
Copy Settings	Opens the Copy Settings secondary page, where you can copy the public profiles from other users. A lookup button enables you to search all available public profiles for that page. Selecting the **OK** button on the Copy Settings page copies the settings and returns you to the Page Personalization page. **Note:** You may need to adjust the tab order numbering if page elements based on your security profile are different from the public profile you are copying.
Share Settings	Opens the Share Settings secondary page, where you can publicly share the page personalization settings you created. You can make your profile **Public** or **Private.** The default setting is **Private**. If you make the personalization settings of one page in a component public, then all personalization settings for all pages in that component will be public. The **Name** field is only required if you choose to make your personalization settings public, in which case you must have a unique profile name. The profile name you enter is the same for all pages and shared grid personalizations across all components. If you modify the profile name, it will be modified for all pages and grid personalization settings across all components. After you save the first profile name, the **Name** field is pre-populated when you open the Share Settings page for other pages or grids. The **Name** field can be a string up to 30 characters long, for example, OSC_16AR. The system automatically converts alphabetical characters to uppercase.
Delete Settings	Opens the Delete Settings secondary page, where you can delete all page personalization settings for the page or component. Click the **Delete** button to delete the settings for the current page only. Select the **Delete Settings for All Pages within Component** check box and click **Delete** to remove all personalized settings for the entire component.

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

Changing Your Password

This section discusses how to modify your password and set up password reminder help.

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Changing Your Password

Depending on your system configuration, use 1 to 64 characters to create your password. Your administrator may implement additional password requirements.

Access the Change Password page (from the menu, select Change My Password).

1. Enter your current password in the **Current Password** edit box.
2. Enter your new password in the **New Password** edit box.

   Remember that passwords are case sensitive.

   The page displays the password policy set by the administrator. See Security Administration: Setting Password Controls.
3. Enter your new password again in the **Confirm Password** edit box.
4. Click **OK.**

For more information, see Security Administration: Changing Passwords.

Setting Up Forgotten Password Help

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

Access the General Profile Information page (from Classic Home, select My System Profile).

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

See Security Administration: Requesting New Passwords

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3

Retrieving Data Using Keys, Search Pages, and PeopleSoft Search Technology

Understanding Keys

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

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

A search record is the list of defined search keys that help you locate data. Search keys are the fields that you are prompted for on a search page. If you search and exactly specify the key fields, the system will always return only one (or no) result. Most transaction pages or components have search records associated with them. If you select other pages that have a common search record, such as pages within a component or an associated link, you are not prompted to enter search criteria again. You are prompted for new search keys only when you select a component that is based on a different search record.

Understanding Search Pages

When you select a content reference, the system often displays a search page. Search pages enable you to find and select the values that you want to work with on the transaction pages.

You can perform two types of searches on search pages:

- Basic searches.
- Advanced searches.

Basic Searches

A basic search enables you to search by just one field at a time, and then only using the **begins with** operator. To designate the search field, if more than one field is available, select the desired field from the **Search by** drop-down list box and then click the **Search** button to display the results of your search. You can narrow your search by first entering part of a value or description in the **begins with** text box. For instance, if you want to find all values beginning with the letters *PS,* you would enter *PS* in the **begins with** text box and then click **Search** or press the **Enter** key.

This example illustrates the fields and controls on the Permission Lists - Basic Search page.

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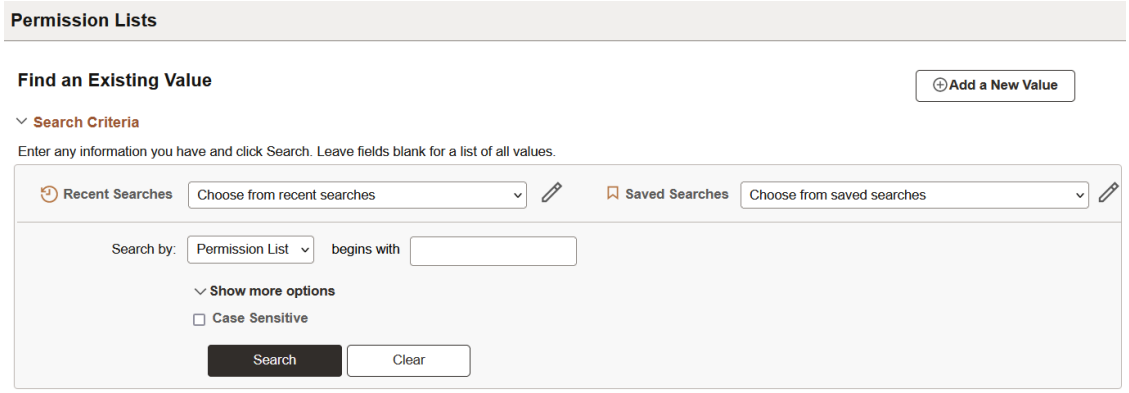


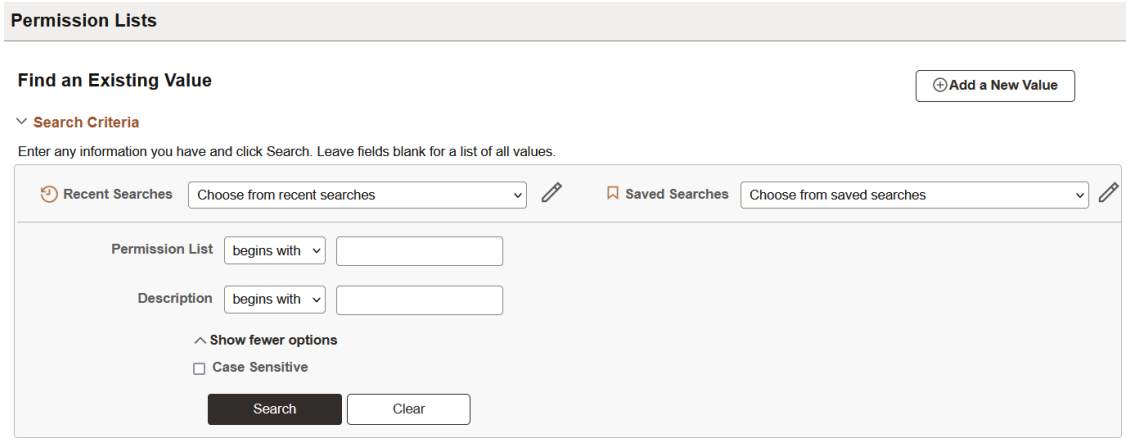
See Entering and Saving Search Criteria.

Advanced Searches

With advanced searches, you can further narrow your search, both by searching on multiple fields simultaneously and by using a variety of search operators. Select the **Show more options** operator to access advanced search options.

In some cases, search pages may display the **Include History** and **Correct History** options. In addition, search pages contain the **Case Sensitive** check box to enable you to perform case-sensitive searches.

This example illustrates the fields and controls on the Permission Lists - Advanced Search page.



Search Page Buttons

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

Term	Definition
Search	Click to process the search. You can select the **Search by** criteria and enter characters in the **begins with** edit box to limit your search.

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

Related Topics

- Working with Search in Fluid Applications
  This topic provides an overview and discusses:
- Search Technology: Understanding Configurable Search
- Search Technology: Working with Configurable Search

Using Search Pages to Retrieve Data

This section discusses how to:

- Enter and save search criteria.
- Use wildcard characters to find information.
- Retrieve historical data.
- Use autocomplete to suggest valid values.

Related Topics

- Using Effective Dates
  This section provides an overview of effective dates and discusses how to use page action options and effective dates.

Entering and Saving Search Criteria

This section discusses how to:

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

Entering Search Criteria

When specifying search criteria, you can enter a full or partial value for any key field. Based on what you enter, the system queries the search record, presents a list of possible matches or, if only one match exists, displays the page that you requested. Often, however, you do not have all of the information that you need. For example, you may want to find all administrator user profiles. If you enter the word *Administrator* in the **Description** field and the search criterion for that field is set to *contains,* then the system narrows the search by displaying all profiles that contain *Administrator* in the description. With this information, you might be able to determine which user profiles you want based on the results in the **Search Results** grid. Click any link in the row of the profile to access that profile in the **Search Results** grid.

This example illustrates specifying search criteria on an advanced search page.

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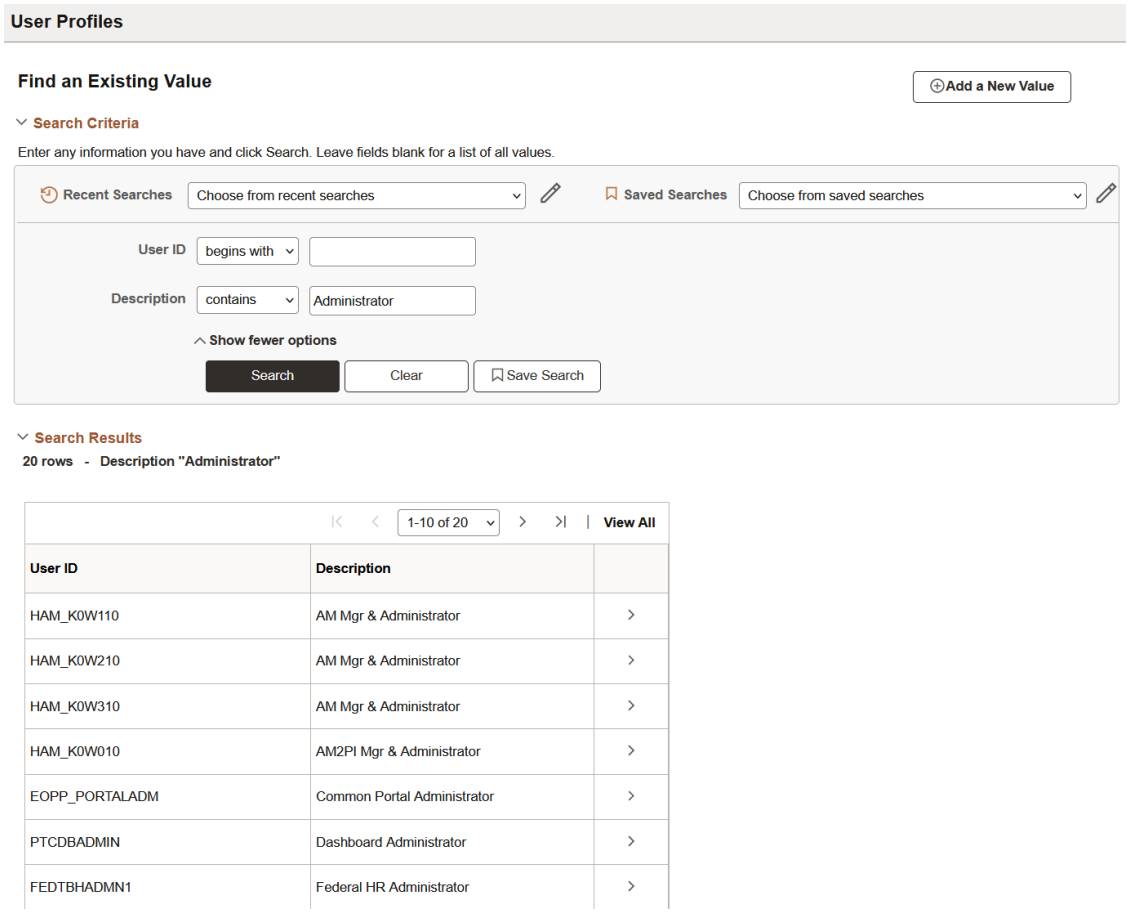

When browsing through a large number of search results, use the browser scroll bar to view all listings on the current page. If not all results appear at one time, you can click the **Show Next Rows** button (the right arrow) in the grid header to view the next set of rows, and you can click the **Show Previous Rows** button (the left arrow) to see previous sets of rows. You can also click the **First** and **Last** links to display the first and last sets of rows of search results. In addition, you might be able to click a **View All** or **View** *n* button to view all records at one time or to view a designated number of records. (The application developer configures the value of *n*.)

When you select a value and access a page, notice that the key fields from the row that you selected on the search page appear as the display-only fields in the upper section of the page, usually just below the page tab.

Using Operators

When performing an advanced search, you can use a variety of operators to narrow your searches. For example, you can hunt for customers by a particular first letter, by values that are less than or greater than a specified amount, and so on. You can use the following operators:

Operator	Field Use
begins with	Character fields.
contains	Character fields.
=	All field types.

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Operator	Field Use
not=	All field types.
<	All field types.
<=	All field types.
>	All field types.
>=	All field types.
between	All field types.
in	All field types.

Note

If you use the *in* operator to search for multiple items, separated by commas, and you enter a space after the comma, the search automatically strips out that space. (For example, if you search for *1000, 1001*, the search assumes that you are searching for *1000,1001*. If you actually do want to search for a character string that contains a space, include that string within double quotes, like this: 1000," 1001".

You can use an operator for more than one field to make your search even more specific. For example, you could narrow your search for courses with the word *orientation* in the name by selecting the "=" operator for the **Internal/External** field and selecting *Internal* from the drop-down list box, as shown in the previous example. This search will find only courses that meet both criteria: internal courses that include the word *orientation*.

Saving Search Criteria

If you are conducting an advanced search, you can click the **Save Search** button to name and save the specifics of your search. If you have saved one or more searches, you can use the **Choose from saved searches** drop-down list box to select a saved search. When you select a saved search, it populates the field values with the saved search criteria. Select the Search button to view search results matching the search criteria.

After you save a search, you can use that saved search in other search pages that use the same search record. You can use the pencil icon to display the **Manage Saved Searches** dialog box where you can rename or delete your saved searches.

This example illustrates the Permission Lists Advanced Search page showing the PTools saved search.

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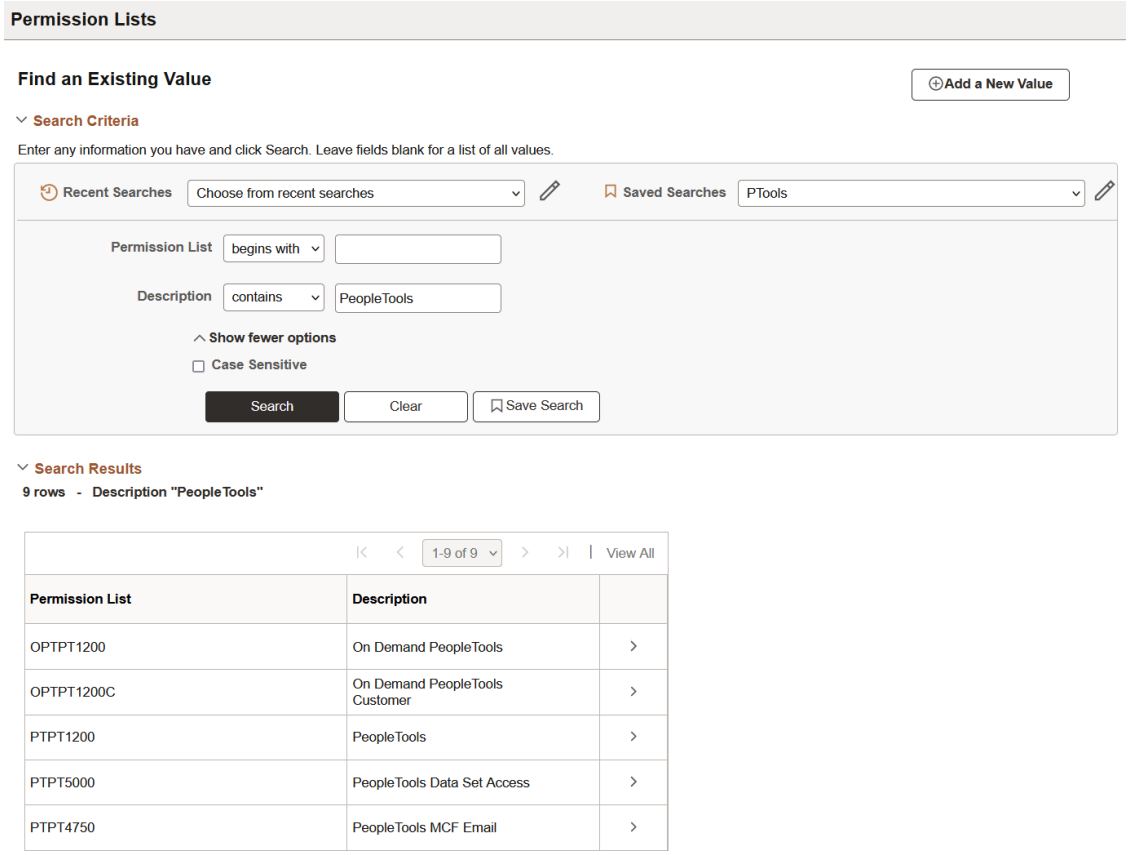

> **Note**
>
> The applications stores saved searches by user ID.

Using Wildcard Characters to Find Information

PeopleSoft applications support three wildcard characters to help you search for data in character fields. You can use these wildcard characters to find the information that you need. The % and _ wildcard characters work in all autocomplete fields. On search pages and look up pages, wildcard characters only work with the *begins with* and *contains* operators.

> **Note**
>
> Certain applications support wildcard characters that are specific only to that application. See your application-specific product documentation for details.

The supported standard wildcard characters are:

Wildcard	Search Action
% (percent symbol)	Match one or more characters.
_ (underscore)	Match any single character.

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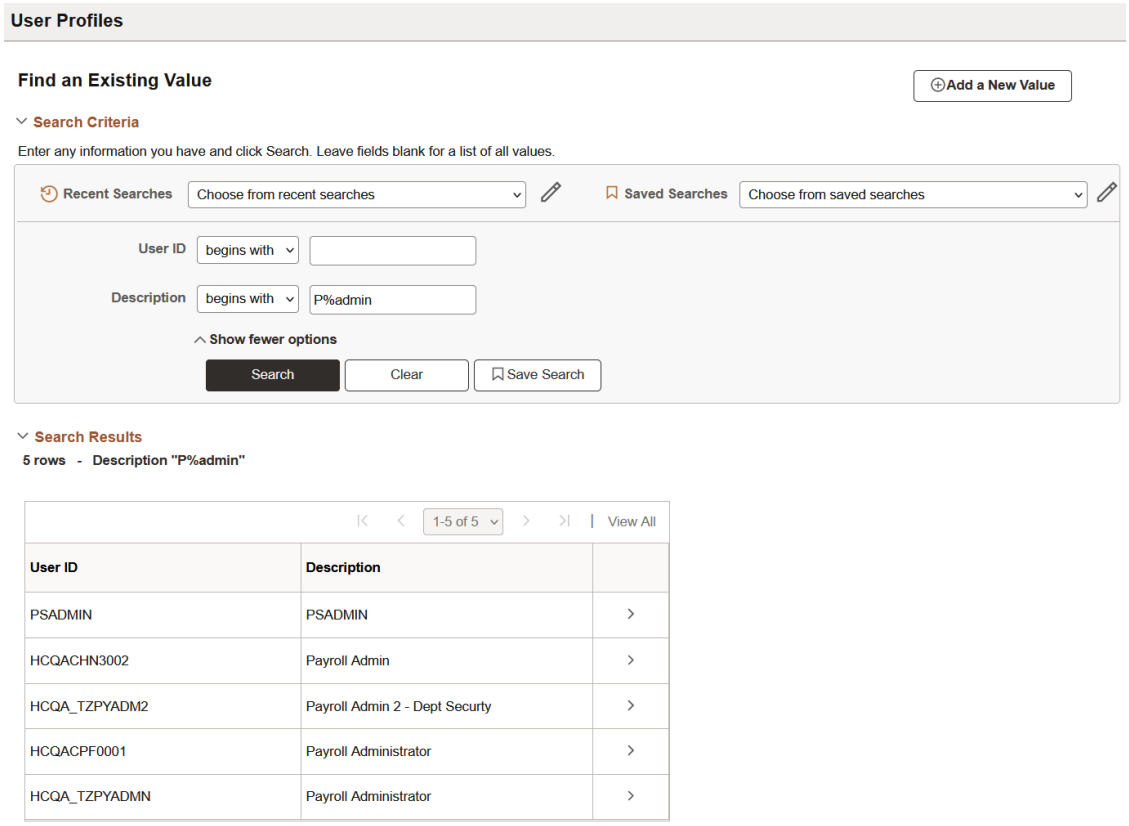
Wildcard	Search Action
\ (backslash)	Escape character; do not treat the next character as a wildcard.

For example, if you enter *P%admin* in the Description field for the User Profile, then the system returns a list of User Profiles that begin with *P* and contain '*admin*' as you can see in this example:

This example illustrates using wildcard characters on a search page.



Retrieving Historical Data

The presence of action mode fields on the search page indicate that the component uses PeopleSoft effective date logic.

This example shows the **Include History** and **Correct History** options on a search page.

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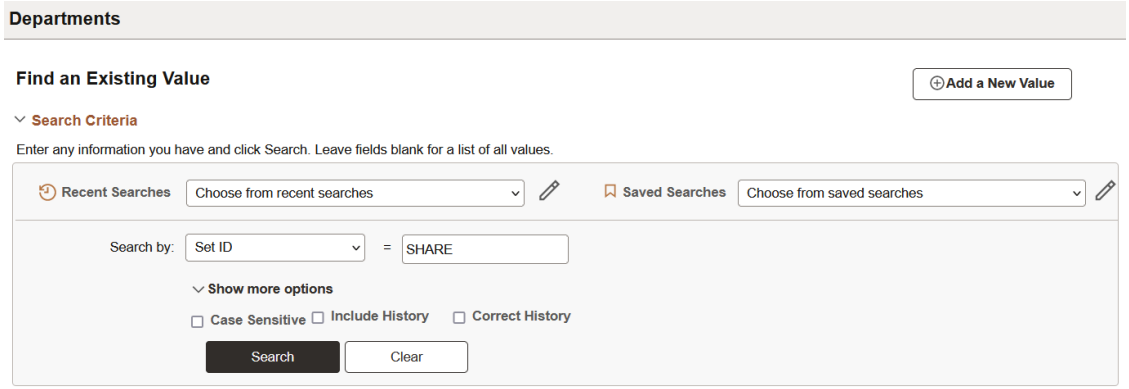

If you have the appropriate permissions for see and modify history records, then these two options can appear on a search page:

Field or Control	Description
Include History	Select to retrieve history records when the system processes the search.
Correct History	Select to retrieve and be able to correct history records when the system processes the search.

Detailed information about PeopleSoft effective date logic is available in the next topic in this documentation.

See Using Page Action Options and Effective Dates.

Using Autocomplete to Suggest Valid Values

Autocomplete (sometimes referred to as “type ahead”) provides a list of suggestions that match the data you enter in edit and prompt fields. Autocomplete lists can appear for two types of fields:

- Edit fields on search pages.
- Prompt fields.

Autocomplete fields support the use of the % and _ wildcard characters.

Edit Fields on Search Pages

When a search record field is autocomplete-enabled, as you type a letter into the field, and then pause, the autocomplete list appears and shows you values that match the letters you have entered to this point. The system returns the maximum number of allowed values, but it shows you a subset in the autocomplete window. An administrator sets the list limit, the list limit default is 50.

This example illustrates an autocomplete list.

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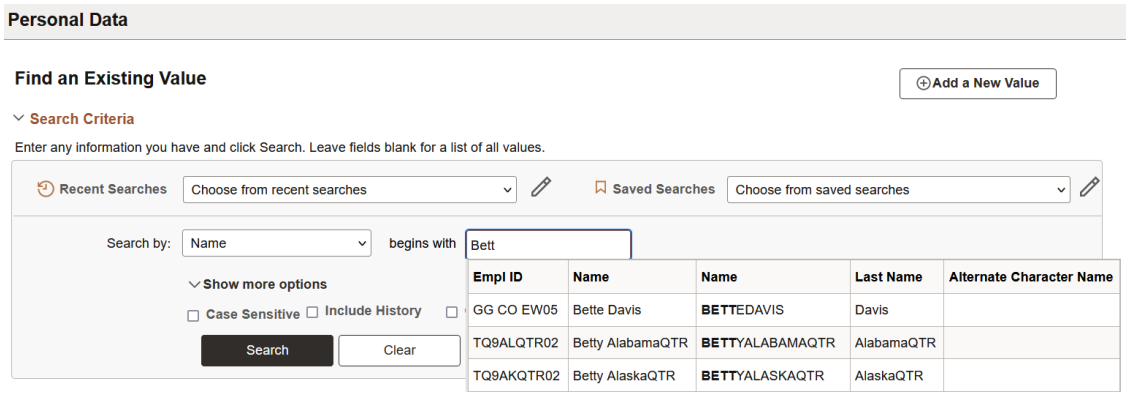
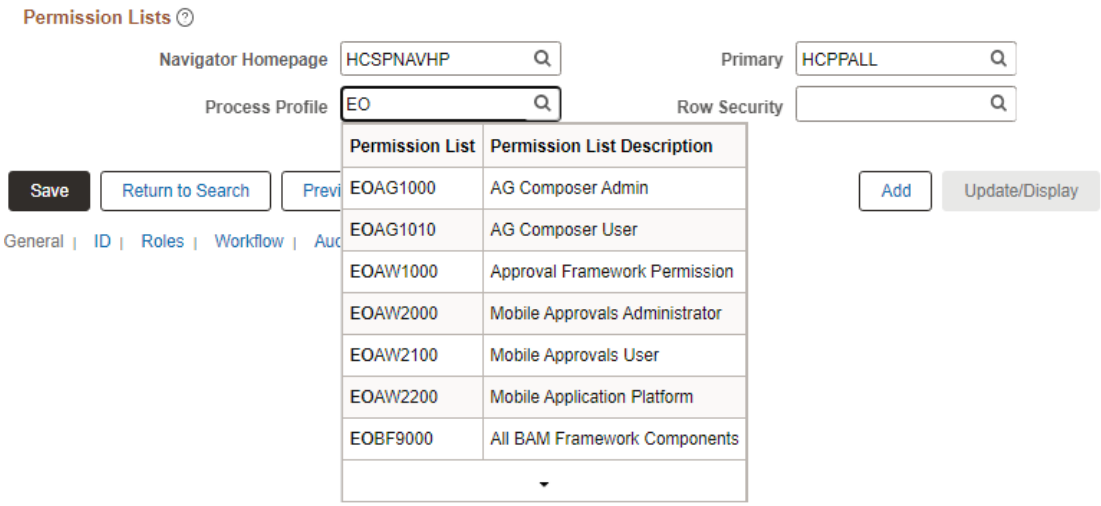


Prompt Fields

All prompt fields are autocomplete capable. When you enter data in a prompt field, the autocomplete results can vary slightly because you can configure the list to display up to five additional columns to assist in choosing the correct value.

This example shows an autocomplete list for the **Role Name** field.



The following example illustrates autocomplete on a prompt field. Both the % and _ wildcard characters were used to generate this autocomplete list.

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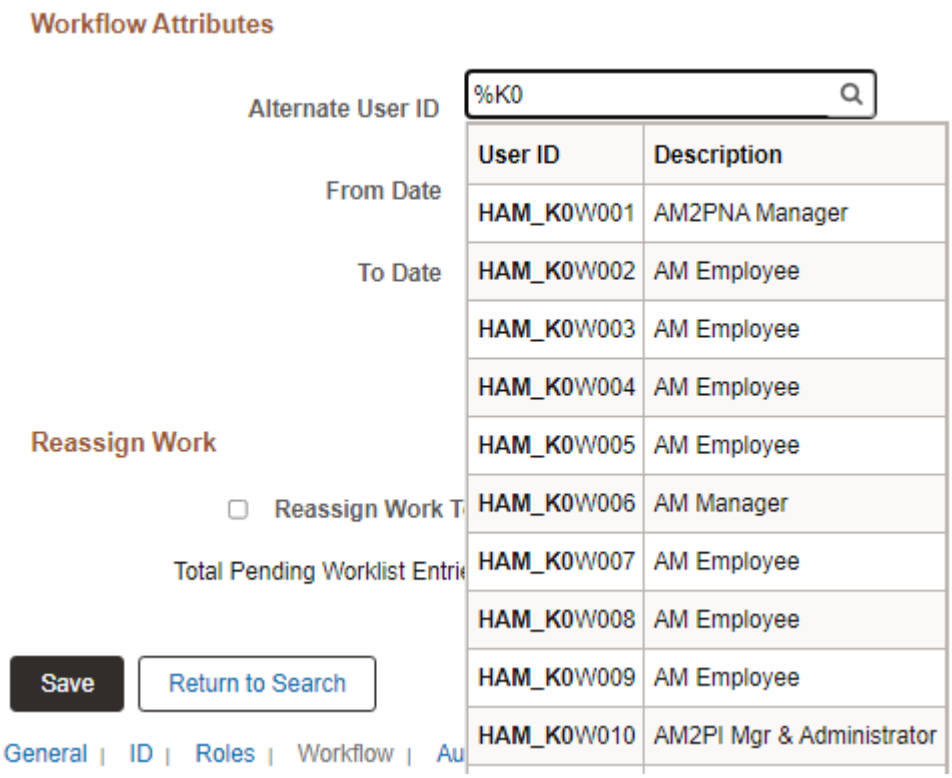

Related Topics

- Using Wildcard Characters to Find Information
  PeopleSoft applications support three wildcard characters to help you search for data in character fields. You can use these wildcard characters to find the information that you need. The % and _ wildcard characters work in all autocomplete fields. On search pages and look up pages, wildcard characters only work with the *begins with* and *contains* operators.
- Using Lookup Prompts
  You can perform a full or a partial search using lookup prompts.
- Portal Technology: Managing General Settings for Portals

Using PeopleSoft Search Technology to Retrieve Data

This section discusses how to search by keywords and work with search results.

Understanding PeopleSoft Search Technology

The options discussed in this section apply only to organizations that have implemented the PeopleSoft Search Framework and enabled these options for their end users. As such, you may or may not see these options available in your PeopleSoft application.

The PeopleSoft Search technology provides a way for you to retrieve data using a flexible, free-text approach to finding the data you need to view or update. The technology revolves around the OpenSearch search engine, which enables you to search for data similar to how you search for information using a typical internet search engine, such as Google. While you can still navigate to components and use the Find an Existing Value search page to retrieve

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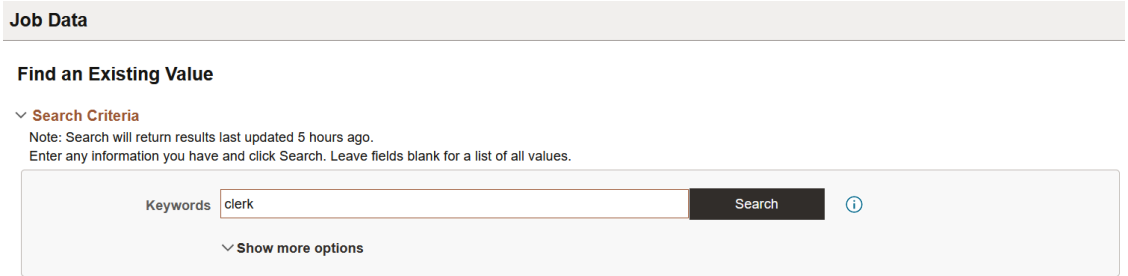
your data, using the PeopleSoft Search technology lets you access the same component without knowing the exact navigation.

For example, if you are in the HCM system, you can enter *Torres* as the search text, press Enter, scan the search results, and click the *Torres, Fernando* search result. The system then displays the employee information page, with the information displayed for Fernando Torres. Using this technique, you can access your business transaction, without knowing where the transaction is in the system or how to navigate to it.

Using the Keyword Search Page

If enabled for your PeopleSoft application, you can use the Keyword search page to perform a free-text search as an alternative to using the traditional Find an Existing Value search page when accessing a component.

This example illustrates the fields and controls on the Keyword Search page.



To use the Keyword Search page, add any keywords upon which you want to run your search, and click Search.

To display additional prompts for predefined search criteria, click Show more options.

Related Topics

- Search Technology: Understanding Configurable Search

Using the Global Search Bar

If enabled for your PeopleSoft application, the Global Search bar appears in the portal header.

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

The Global Search bar enables you to search across specific groups of *search categories.* Search categories organize similar application information into groups to help you narrow your searches. For example, to search information about jobs, you select the Job Data search category, and to search information about employees, select the Employee search category. For broader searches, you can also select the All category, which runs a search against *all* the categories to which you have access.

The Global Search Bar is comprised of these controls.

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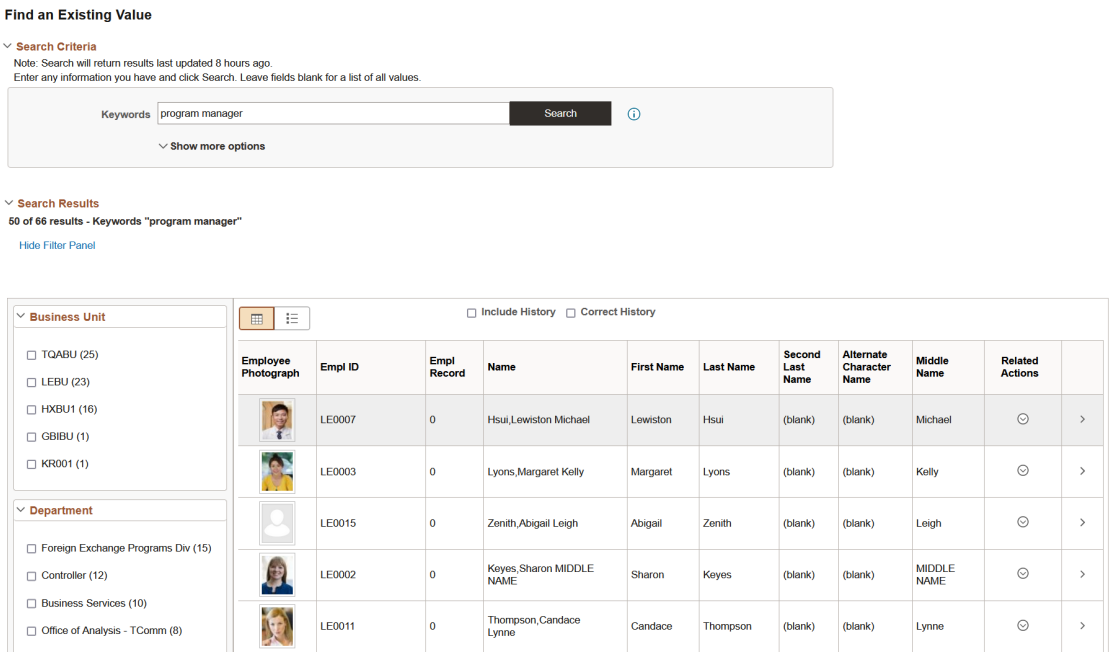
Field or Control	Description
Search category	Click the Global Search bar to display the search categories to which you have access. The contents of the search category can change, depending on where you are in the application. For example, you might see different items in the search category while on a portal homepage than you do while in a WorkCenter. Your system administrators can configure this so that only items relevant to your current application context will display.
Free-text search edit box	This is where you enter your free-text key words so that you can find the data you need.
Search button	Click this button to initiate your search.

Working with Search Results

The following example illustrates a typical set of search results generated by PeopleSoft Search.

This example illustrates the fields and controls on the Search Results page.



Field or Control	Description
Hide Filter Panel or Show Filter Panel	Use the Hide Filter Panel link and the Show Filter Panel link to toggle between hiding the facets panel and displaying the facets panel.

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Field or Control	Description
Facets	The area to the left of the search results, displays various filters and categories that you can use to drill into the results and reduce the result set.
Title	The title enables you to identify the search result and navigate to the associated component. Select or tap the row to display the page you use to view or modify the underlying data for the search result.
Summary	Displays a general overview of the target data to help you determine if this is the data you need.
Related Actions	If the component for this data has related actions associated with it, and you have security access to those related actions, you can navigate to those related actions from a search result. To navigate to a related action, click the related actions indicator, and click the desired link in the related action popup list. If you use configurable search to configure search for a component, you can choose whether to display related actions or not on the search results page. Administrators set this option on the Search Configuration page. See Search Technology: Working with Configurable Search.

Working with Filters

A filter (also called a facet) is a search attribute (field) that provides an alternate representation of the list of values for a given attribute. Filters are attributes used to filter and narrow down a set of search results. In many cases, the filter for search results will be hierarchical, meaning that as you drill into the results you navigate through various levels of results. For example, you can narrow searches by applying filters such as Country, State, Province, City, and so on, with each filter reducing the result set.

This example illustrates a filter.

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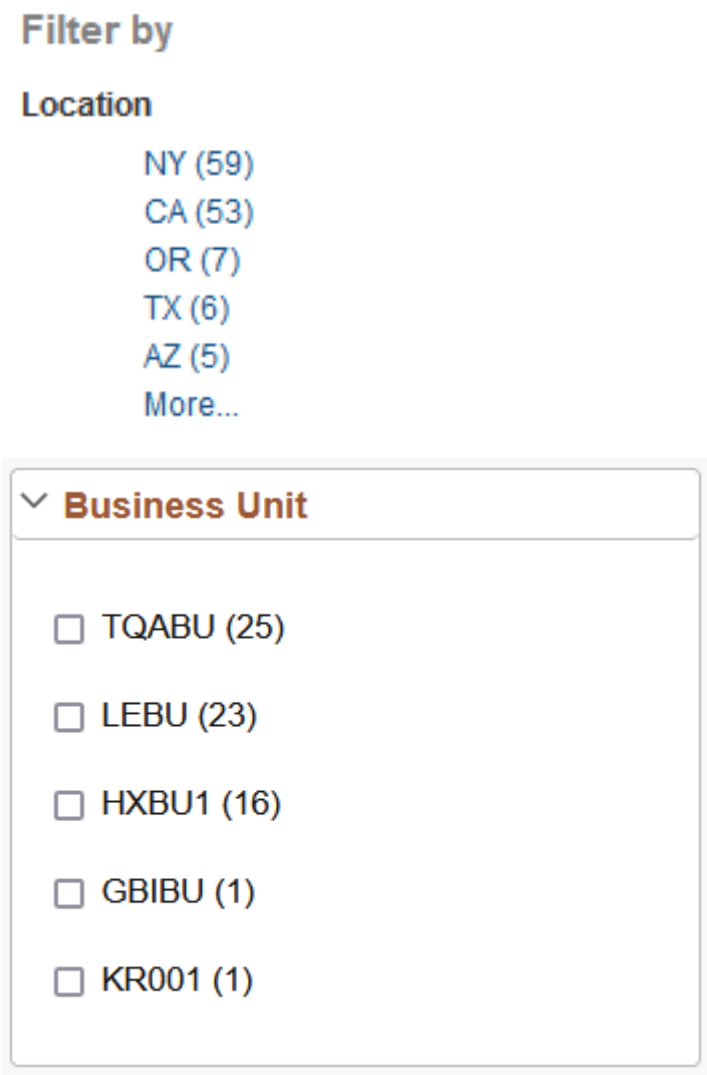
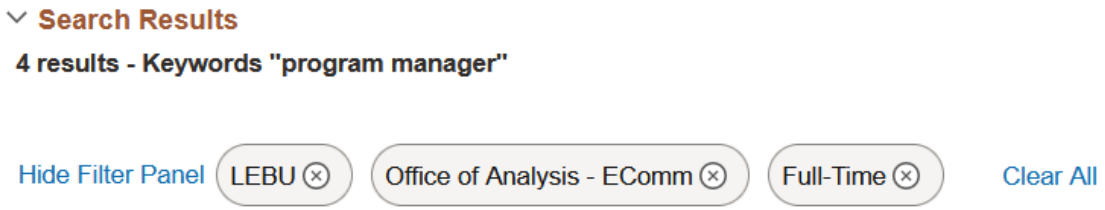


For a given filter, the system displays the values of that filter in a descending order determined by the number of each value. Five values display by default, but to see the remaining values, click *More.* By clicking a value, the system displays only the number of search results for that value. For example, if you clicked *LEBU* in the example above, only 23 results for LEBU would be displayed.

As you drill into a set of facets, your path is expressed in the form of a filtering navigation path.

This example illustrates a filtering navigation path.



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You can deselect the check box for a filter to remove its effect on the search results, or to reverse the direction of your filtering and expand the results.

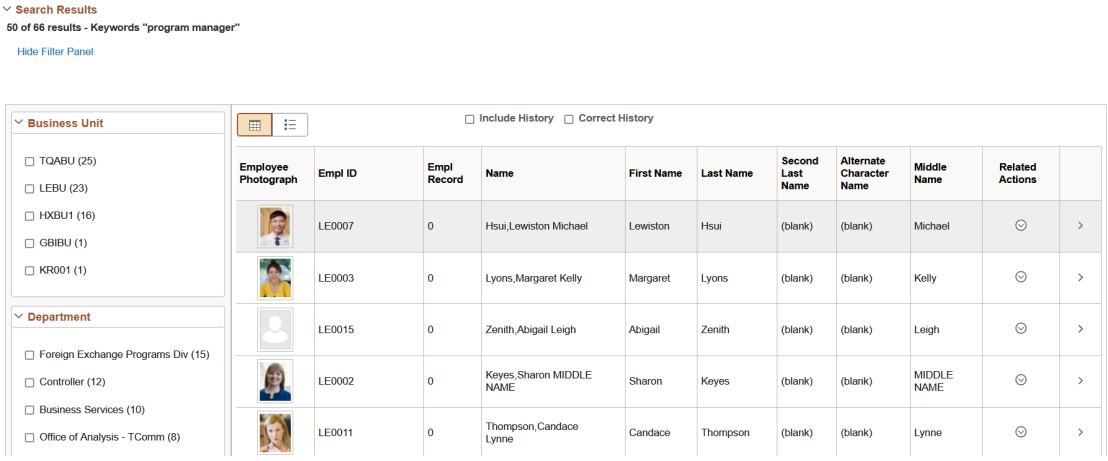
Click Clear All to remove all applied filters, returning the search results to the state prior to filtering.

Viewing Search Results With Grid Format and List Format

Use the grid and list buttons to toggle between the grid format and the list format for viewing search results.

Field or Control	Description
	Enables you to switch the view of the search results between list format and grid format. The icon representing the current view is greyed out.

This example shows search results in a grid format.



To navigate to the page loading the desired data, select the row.

The related actions indicator does not appear for search results in the grid format.

> **Note**
>
> The default search result display format for Keyword Search is the grid format.

The following example displays the list format:

This example shows search results in a list format.

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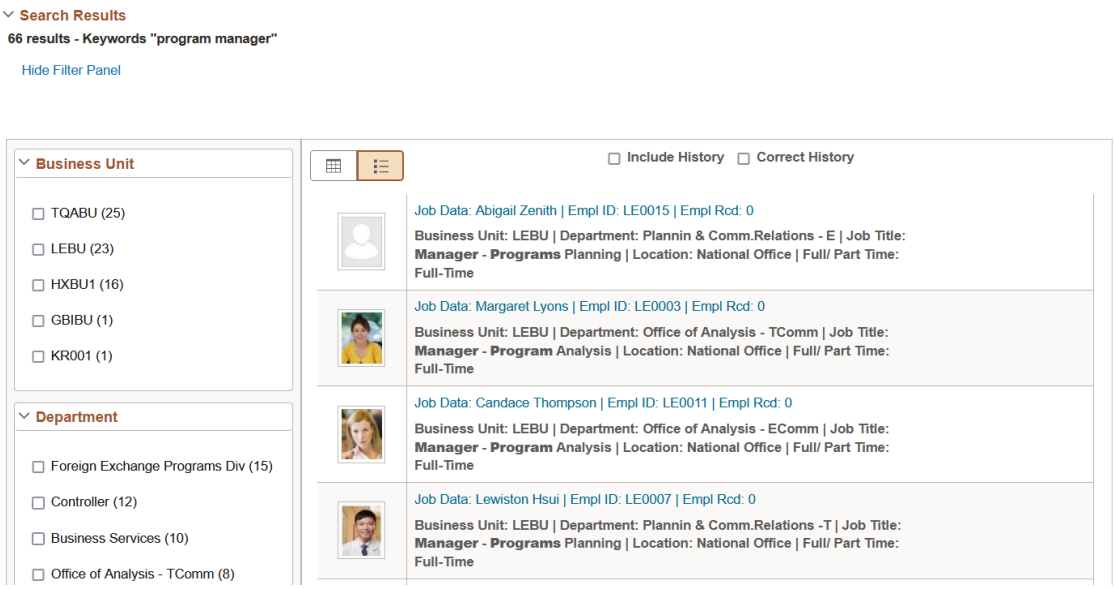

To navigate to the page loading the desired data, select the row.

The related actions indicator appears only for search results in the list format.

> **Note**
>
> The default search result display format for Global Search is the list format.

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4

Using PeopleSoft Application Pages

Understanding Pages

Pages are the primary graphical interface by which you access the data in your PeopleSoft application. In many cases, these pages are representations of rows of data in the database tables. You use pages to view, enter, and update data stored in application tables. Each page also includes buttons or links to help you navigate through the system. As you change or add information to the database, you need to be familiar with effective-dating logic and the various page action options as you work with historic, current, and future data. PeopleSoft applications use many different types of elements to organize information on pages and to enable you to enter data, including data-entry, functional, and data processing elements.

PeopleSoft applications limit server trips and perform partial page refreshes. With a partial page refresh, the browser refreshes the entire page only when you navigate to a new page. Much of the communication with the server happens in the background, and you notice only the spinning processing icon that lets you know that the system is processing information.

> **Important**
>
> While much of the communication with the server happens in the background, you must not interact with the page while the processing icon is displayed or while save processing is occurring. Doing so can mean that your data or field changes are lost once the server trip is complete and parts or all the page are refreshed.

Partial page refresh supports these actions:

- Changing a related field.
- Enabling and disabling fields.
- Hiding and revealing fields.
- Expanding and collapsing group boxes.
- Using scroll area and grid navigation links, such as Next, Previous, and so on.
- Inserting and deleting rows in scroll areas and grids.
- Saving a page.

Many PeopleSoft components run in deferred processing mode to reduce interaction with the server, thereby providing better performance. Therefore, when you use some pages in the browser you can enter data while interacting minimally with the server. If deferred processing mode is specified for a component, then a page within that component or a field on a page within the component also performs processing in deferred mode. Interactive mode is the opposite of deferred mode processing; it is necessary for pages that perform complex calculations, in situations where many fields are interrelated, and several other scenarios.

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> **Note**
>
> The terms *page*, *application page*, and *transaction page* are synonymous and used interchangeably throughout this book.

Related Topics

- Working with Fluid Pages and Controls
  PeopleSoft fluid applications are designed to provide a simple, sleek look and feel, resembling many of the web applications used today on tablets and smartphones. In addition to the contemporary user interface, a fluid page can also be rendered differently depending upon the device accessing it. For example, the same page can be accessed on a tablet or a smartphone, yet the page layout will be different for each device. On the tablet, more fields may appear, with more space between them, while on the smartphone fewer fields may appear, and the display will adjust to the smaller space available on the smartphone. Presented in this topic are some examples of the controls and the look and feel of PeopleSoft fluid applications.

Using Effective Dates

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

Understanding Effective Dates

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

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

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

Using Page Action Options and Effective Dates

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

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

Action	Rule
Update/Display	Retrieves only current and future rows. You can change future rows but not current rows. You can also add a new current row.
Include History	Retrieves all rows. You can modify only future rows. You can also add a new current row.
Correct History	Retrieves all rows and allows you to modify any row and insert new rows regardless of the effective date or sequence number. **Note:** This option is available only to users with the proper permission.

To see how these actions work together, take a look at four possible events, listed by effective date, in the career of employee Tom Sawyer. Assume that today is February 1, 2009:

Effective Date	History	Current	Future
Hired: January 1, 1994	X	–	–
Transferred: January 1, 2000	X	–	–
Promoted: August 1, 2005	–	X	–
Expected termination: December 31, 2009	–	–	X

The action type that you select dictates whether you can access certain fields and what you can do with each type of row. This table lists this information by action mode:

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

The page action buttons appear in the toolbar in the lower-right corner of any relevant pages. A shaded button icon indicates current mode for the page.

This example shows the Department page in Correct History mode.

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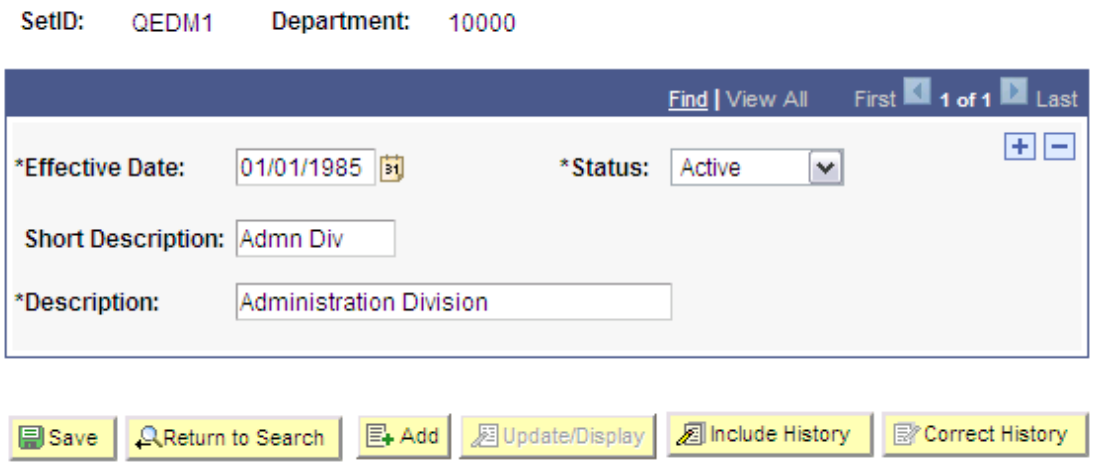

Update/Display Mode

When you select Update/Display, you can access only current and future rows; you cannot access history. Using the example, you can view only the current data, which is effective-dated August 1, 2001, and the future data, which is effective-dated January 1, 2006 (the employee's promotion and then the employee's termination).

You can also:

- Insert new rows with an effective date later than the date on the current row—that is, any date after August 1, 2001.
- Change the future-dated row, effective-dated January 1, 2006, and change any additional rows that you insert with a date later than today, February 1, 2005 (assumed to be today's date).

If you insert rows with effective dates between August 1, 2001, and February 1, 2005, you cannot change them if you return to the page in Update/Display mode.

Include History Mode

Select Include History to view any of Tom Sawyer's job data, from his hire date to the day on which he will be fired. However, as with Update/Display, you can update only future-dated rows, effective-dated February 2, 2005, and on. You can also insert new rows with an effective date later than the current row—that is, any date after August 1, 2001.

Correct History Mode

Select Correct History to access all data rows. This mode enables you to view, change, and insert rows of data, regardless of the effective date. You can view and edit any of Tom Sawyer's job data, from his hire date to the day on which he will be fired. You can also insert new rows with any effective date.

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

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Working With Page Elements

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

Understanding PeopleSoft Page Elements

PeopleSoft applications include three types of page elements: aesthetic, functional, and data-entry fields. Although you should be aware of all page element types, you interact mostly with data-entry fields as you work in your application.

Aesthetic Page Elements

Aesthetic elements help organize or emphasize different fields or information on a page. You do not use these elements to update data in the database; they are purely visual. This table describes aesthetic elements:

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

Functional Page Elements

Functional elements are controls, such as buttons and links, that perform a specific function. Aside from the standard toolbar buttons at the bottom of a page, your transaction page may include buttons and links that are not associated with a grid or scroll area. For example, a button next to a field may perform a calculation based on a value that you entered. You can activate this button by clicking it or by pressing the **Enter** key while the element has the focus. You can also activate links by pressing the **Enter** key.

Data-Entry Fields

Pages can include several types of data-entry fields, each designed to provide a simple way to enter and update data in your tables.

Using Data-entry Fields

Data-entry fields are always associated with specific database fields. These data-entry fields are commonly used:

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Field or Control	Description
Check boxes and **radio buttons**	Select a check box or radio button to enable an option. Typically, you select one by clicking within it or pressing the space bar when the box is highlighted. Click it again or press the space bar to disable the option. Check boxes correspond to fields with only two valid values. You can often select more than one check box in a related set. In contrast, a related set of radio buttons represents a group of mutually exclusive options; typically, you can only select one radio button within a related set.
Edit boxes	Enter characters or numbers into edit boxes. The character limit is determined by the length of the database field. Edit boxes for fields with prompt tables have a lookup button to the right. Edit boxes with spell check enabled have a spell check button to the right.
Long edit boxes	Enter longer strings of data, such as comments, into long edit boxes. These boxes store free-form text. If you type more lines than you can see at one time, use the scroll bar on the right to move through the text. Long edit boxes with spell check enabled have a spell check button in the upper-right corner. Long edit boxes that are rich text enabled have multiple formatting controls at the top of the edit box. See Working With Rich Text Editor Fields.
Drop-down list boxes	Select a value from a predefined list. Drop-down list boxes look like a data-entry field with a prompt button at one end. Click the prompt button to display a list of valid values from which you can select a single option.
Images	Insert photos or other images into a PeopleSoft application. The format of the image that you insert must match the image format defined for that field by the application developer. Acceptable formats include JPG, BMP, GIF, and DIB. For example, on the Employee Photo page, you can only insert JPG images into the employee photo field. If you try to upload an image of another format, the system displays an error message.

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Field or Control	Description
Grids and **scroll areas**	These data-entry fields serve as containers or organizers for multi-field data entry. Grids appear as a spreadsheet within a page. Scroll areas are like grids except that the fields are arranged in a free-form manner. Both contain rows of data that may include **Add**, **Multi-Row Insert**, or **Delete** buttons. Most include a navigation bar or footer with multiple control and configuration options. You can think of all of the fields in each of these controls as belonging to one table in your database. Each time that you add a new row, you are actually adding a new row of data to the database table, each of which shares the same high-level key. For example, for employee records, you may have more than one emergency contact listed for each employee. If you have two emergency contacts listed for an employee, each of those contacts has that employee's ID number as a key field. If you insert a new row, the system automatically copies the shared key data into the new row.

Moving Among Fields

To move among the data-entry fields on a page, press the **tab** key or click the field once. Pressing **tab** moves you one field at a time in a sequence determined in the page definition. Pressing **tab** also rests on prompts to give you the option of viewing the prompt table or calendar. To open a prompt or calendar, you can press **enter** or, to get to the next field, press **tab** again. Press **Shift+Tab** to move backward rather than forward in the tabbing order.

> **Note**
>
> Pressing **Tab** may yield different results if you have modified page tabbing behavior on the My Personalizations page.

> **Important**
>
> If you are entering data and moving through fields on a page quickly (using the TAB key for example), make sure to pay attention to the "processing" image that displays while the system interprets the data you entered previously. Do not enter data into another field until the system has processed the data for the previous field and the "processing" image no longer appears. Entering data too quickly and not allowing enough time for any system processing can result in page failure or data loss.

Required Fields

In most applications, required fields are marked with an asterisk. You must enter data into that field to continue to the next field or to save the page. When the developer has set deferred processing mode for the page, you may not be informed that a field is required until you attempt to save or leave the page. If you save the page without entering required data, the field

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turns red and an error message appears on the page. Click **OK** within the error message and then enter the correct data in that field. Required fields are often drop-down list boxes or are accompanied by a prompt button to help you enter the correct data.

Using Data-Entry Fields

This section discusses how to use various data entry fields.

Using Edit Boxes

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

This example shows an edit box.

Title:

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

```
[Lastname],[Firstname] [Initial]
```

This format is case sensitive. Also, note that there is no space between the comma after the last name and the first name. The complete PeopleSoft standard name convention is as follows:

```
[Lastname] [Suffix],[Prefix] [Firstname] [Middle name/Initial]
```

If a field is not case sensitive, the system converts what you type to uppercase before writing it to the database.

Other types of formatting include:

- Social security, social insurance, or other government ID numbers.
- Dates.
- ZIP codes or other postal codes.
- International phone numbers.

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

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

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> **Note**
>
> PeopleSoft applications are equipped with a spell check feature that you can use on data entered in edit boxes.

In interactive mode, if you enter a field value incorrectly, the system highlights the field in which an invalid value was added, and a warning message appears with an explanation of the problem.

Using Long Edit Boxes

You use long edit boxes to enter anecdotal information such as comments or free form informational text.

Move to and highlight a long edit box by pressing the **tab** key or by double-clicking and highlighting the text. You can type over existing highlighted text. If the text is not highlighted, you are inserting rather than replacing text. If you enter data that extends beyond the visible area of the long edit box, a scroll bar appears for you to navigate through the data.

This example shows a long edit box with the **Display in Modal Window** and **Spell Check** buttons.

> **Note**
>
> PeopleSoft applications are equipped with a spell check feature that you can use on data entered in long edit boxes.

> **Note**
>
> You can zoom a long edit box to a modal window if the Display in Modal Window icon is visible to the right of the long edit box.

Using Drop-Down List Boxes

To select a single item from the list, click the down arrow to display the list, scroll through the list until your choice is visible, and then click the desired list item. The list closes and the selected value appears in the list box. You can also type the first letter of an item to select it. If there is more than one choice for a letter, type the letter repeatedly to cycle through the list. In the following example, first click the down arrow, then, if you want to select Greek, type the letter *G* twice. Alternatively, press the **Down Arrow** key to select the field entry that you want. Once your choice is highlighted, press **Enter**.

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This example shows a drop-down list box.

Using Smart Drop-Down List Boxes

Application developers can configure drop-down fields to respond to user choices and list values based on the recently used items or frequently used items. Such drop-down fields are called smart drop-down list boxes.

Smart drop-down list values are separated into two sections, namely, **Most Relevant** and **Others**. The **Most Relevant** section displays the values based on your setting as specified on the My Preferences page. For example, if you select **Most frequent first**, then in the Most Relevant section of the drop-down list, the most frequently used items are listed first followed by the most recently used items. Similarly, if you select **Most recent first**, then in the Most Relevant section of the drop-down list, the most recently used items are listed first followed by the most frequently used items.

The **Others** section displays the remaining items of the drop-down values. Both the sections do not display duplicate values, that is, a value is displayed either in the Most Relevant section or in the Others section.

Initially, when you navigate to a drop-down field that is enabled for smart prompt, the drop-down list is not divided into the **Most Relevant** and **Others** sections. After you've selected values from the list, the smart drop-down list displays the **Most Relevant** and **Others** sections.The default value is always listed at the top.

If a drop-down list contains a blank value and a user selects it, the blank value is not added under the **Most Relevant** section.

For information on setting the smart drop-down option, see Specifying General Settings in My Preferences

For information on using smart drop-down list in grids and scroll area, refer to the Considerations for Using Smart Prompt and Smart Drop-Down in Grids and Scroll Areas section in Adding Rows.

The following example illustrates the display of smart drop-down list separated into the Most Relevant and Others sections.

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Working With Images

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

This section discusses how to:

- Insert an image.
- Delete an image.

Inserting an Image

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

To insert an image at runtime:

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

   A search page appears enabling you to search for the image that you want to insert. You can browse for the image from your desktop, your hard drive, or the network.

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3. Click the **Browse** button to search for and select the image you want to insert.
4. Click the **Upload** button.

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

Deleting an Image

To delete an image at runtime:

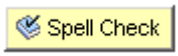
1. Open the page from which you want to delete the image.
2. Click the **Delete** button.

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

Using Spell Check

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

> **Note**
>
> On classic components where the Spell Check tool bar button is enabled, you can click Spell Check.

Field or Control	Description
	Click to activate spell check for the corresponding field. If no spelling errors are found, you will see the message “No misspellings found.” You can also activate spell check by pressing Alt+5 when the cursor is in the field.
	**Note:** The Spell Check tool bar button is supported on classic components only. Click the Spell Check tool bar button to activate spell check for all fields in the component that have been enabled for spell check, regardless of whether those fields have changed. The system checks each field and then proceeds to the next spell check field until all fields in the component have been checked. If no errors are found, the "No misspellings found" message will appear.

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

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

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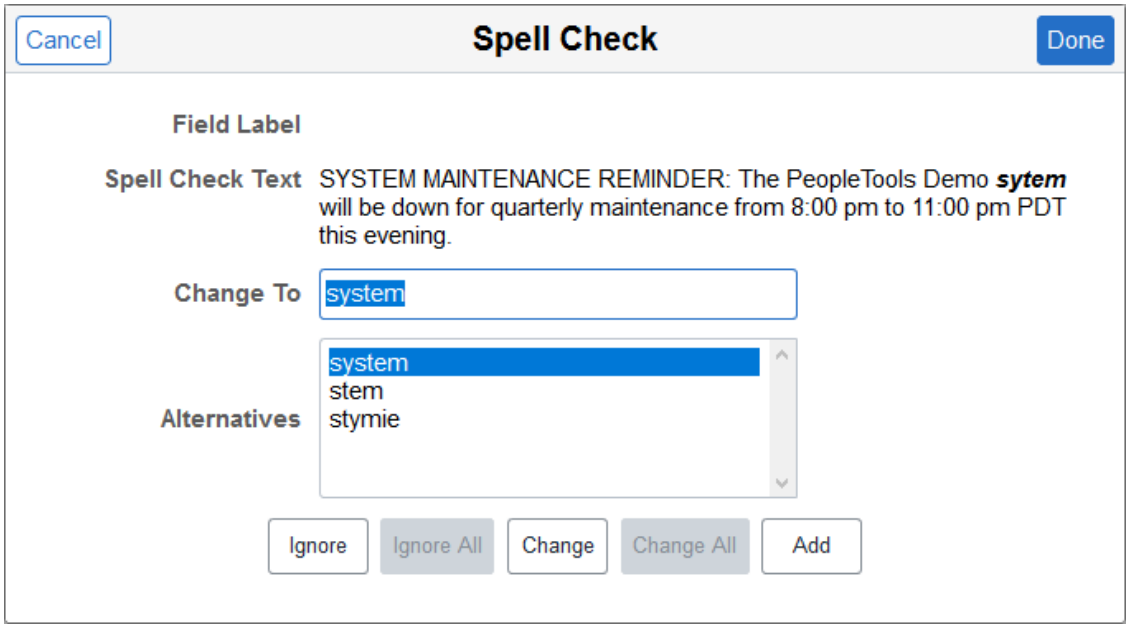

Field or Control	Description
Field Label	Displays the field label text of the field currently being checked.
Spell Check Text	Displays all of the text in the field being checked, highlighting the first misspelled word. This field is display-only. This field information is particularly important when multiple fields are being checked simultaneously by using the toolbar action or mandatory spell check.
Change To	Initially displays the first highlighted value in the **Alternatives** list. You can select a new value from the **Alternatives** list or enter a new word in the **Change To** field. The maximum length is based on the maximum field length, which is 40 characters. If you enter a new value, the system spell checks the entry when you click the **Change** or **Change All** buttons to verify the correct spelling. If the system does not find any alternative spellings, the **Change To** field is blank and the **Change** and **Change All** buttons are disabled.
Alternatives	Lists other possible spellings. The options listed match the case of the misspelled word.
Ignore	Click to leave the current spelling as is and locate the next misspelled word.
Ignore All	Click to leave the current spelling as is for all text in the field that exactly matches the original text. This action is case-sensitive; only exact matches are ignored.
Change	Click to correct the error to the value that appears in the **Change To** field. Users can either select one of the proposed alternatives or type in their own value. The system then moves to the next misspelled word.

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Field or Control	Description
Change All	Click to correct all occurrences of the error with the value in the **Change To** field. You can either select one of the proposed alternatives or type in your own value. The system then moves to the next misspelled word. Like **Ignore All,** this action is case-sensitive; only exact matches are changed.
Add	Click to add the highlighted misspelled word (as is) to your currently selected personal dictionary. The system then moves to the next misspelled word. Additions to the dictionary must be 40 characters or less. See Selecting a Spell Check Dictionary and Using the My Dictionary Page.

Mandatory Spell Check

> **Note**
>
> Mandatory spell check can be enabled on classic components only.

Certain pages, such as those that require an email response, have a mandatory spell check requirement. When you save these pages, the system automatically runs spell check on spell check enabled fields. A field is eligible for automatic spell check if you have changed its contents and you have not already run spell check for that field. If a page has more than one spell check field, spell check runs in succession. If no errors are found, the system saves the data without issuing a message.

Selecting a Spell Check Dictionary

Spell check supports numerous languages. Your current spell check dictionary is based on your setting in My Preferences.

To change your spell check dictionary:

1. Select **My Preferences** from the Actions menu.

   > **Note**
   >
   > Alternatively, My Preferences is also available at the root of the Navigator menu.

2. Expand the General Options section if it isn't already expanded.
3. Select a value for the Spell Check Dictionary.

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> **Note**
>
> The default value, *Use session language,* uses the dictionary associated with your signon language as specified on the Manage Installed Languages page.

4. Click Save.

> **Note**
>
> You do not need to sign out and sign in again for this change to take effect. Therefore, you can change the spell check language multiple times within the same signon session.

> **Note**
>
> Hyphenation for Hungarian is not currently supported.

Related Topics

- Specifying General Settings in My Preferences
  To define general user preferences, access the My Preferences - General Settings page.

Using the My Dictionary Page

Use the My Dictionary page to maintain a personal dictionary of spell check words by language.

Navigation:

Navigator menu, and then **My Dictionary**

This example illustrates the fields and controls on the My Dictionary page. You can find definitions for these options in this section.

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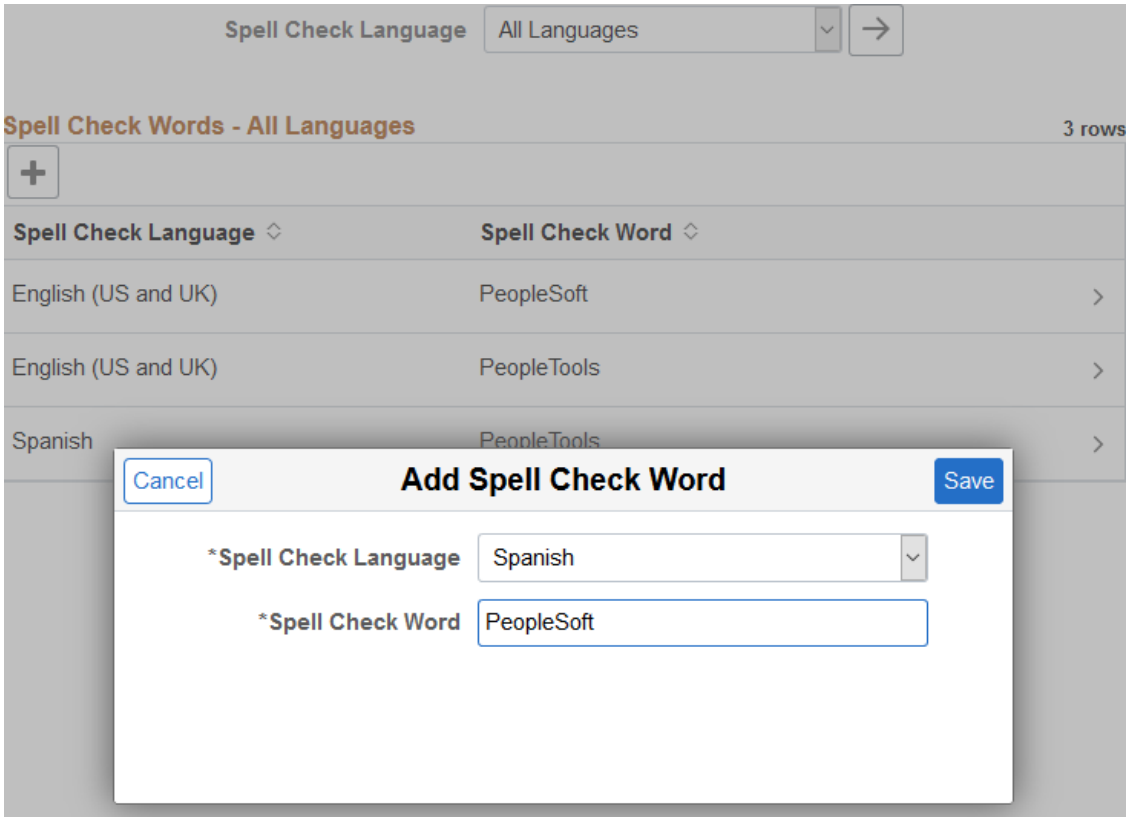

As you use spell check, you might need to add certain words or acronyms to your personal dictionary so that spell check does not continually attempt to correct them. You can add these words by clicking the Add button while you are spell checking or you can add several at once by using the My Dictionary page. This page enables you to add, update, and delete words by language. The words that you enter in your personal dictionary are attached to your user ID, so your personal dictionary is available to you no matter where you access it.

> **Note**
>
> The maximum number of words in the personal dictionary is 2882.

Field or Control	Description
Spell Check Language	Select the language to display in the grid. **Note:** Select *All Languages* to display all of the entries in your personal dictionary.
→	Click the Apply Language button to update the grid based on the currently selected language.
+ (or **Add Word**)	Click the Add Word button to add a new word to your spell check dictionary. **Note:** When the grid is empty, the Add Word button appears with those words as a label, and not as a + sign.

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Spell Check Words - *Selected Language*

Field or Control	Description
Spell Check Language	The spell check language selected for this word.
Spell Check Word	The word entered in your dictionary. Click the row in the grid to update the entry. You can change the spell check language, change the word, or delete the entry entirely.

Add Spell Check Word Page

Field or Control	Description
Spell Check Language	Select the language to which you want to add the word. To enter the same word in multiple languages, make a separate entry for each language. After saving a new word, the page and grid are refreshed to show only words entered in this selected language.
Spell Check Word	Enter the word or abbreviation that you want added to your personal dictionary. Entries must be 40 characters or less.

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

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

    Mixed case (WorkList) is incorrect.
- If the added word is all uppercase, such as CRM, then only an exact match is valid. Lowercase and mixed case are not valid.
- If the added word is in initial capitals, such as California, then only an exact match (California) and all uppercase (CALIFORNIA) are valid.
- If the added word contains an embedded capital letter, such as PeopleSoft, then only an exact match is valid.
- If case is not relevant to the validity of the word, then enter the word into your dictionary in all lowercase.

Working With Trees

PeopleSoft application pages use terminology derived from the concept of a family tree. The nodes that report to the root node are called its children, and the root node is their parent. Nodes that have the same parent are called siblings.

These terms refer to the relationship between nodes and are not permanent attributes of the nodes themselves. A single node can be a parent, child, and sibling at the same time. In the

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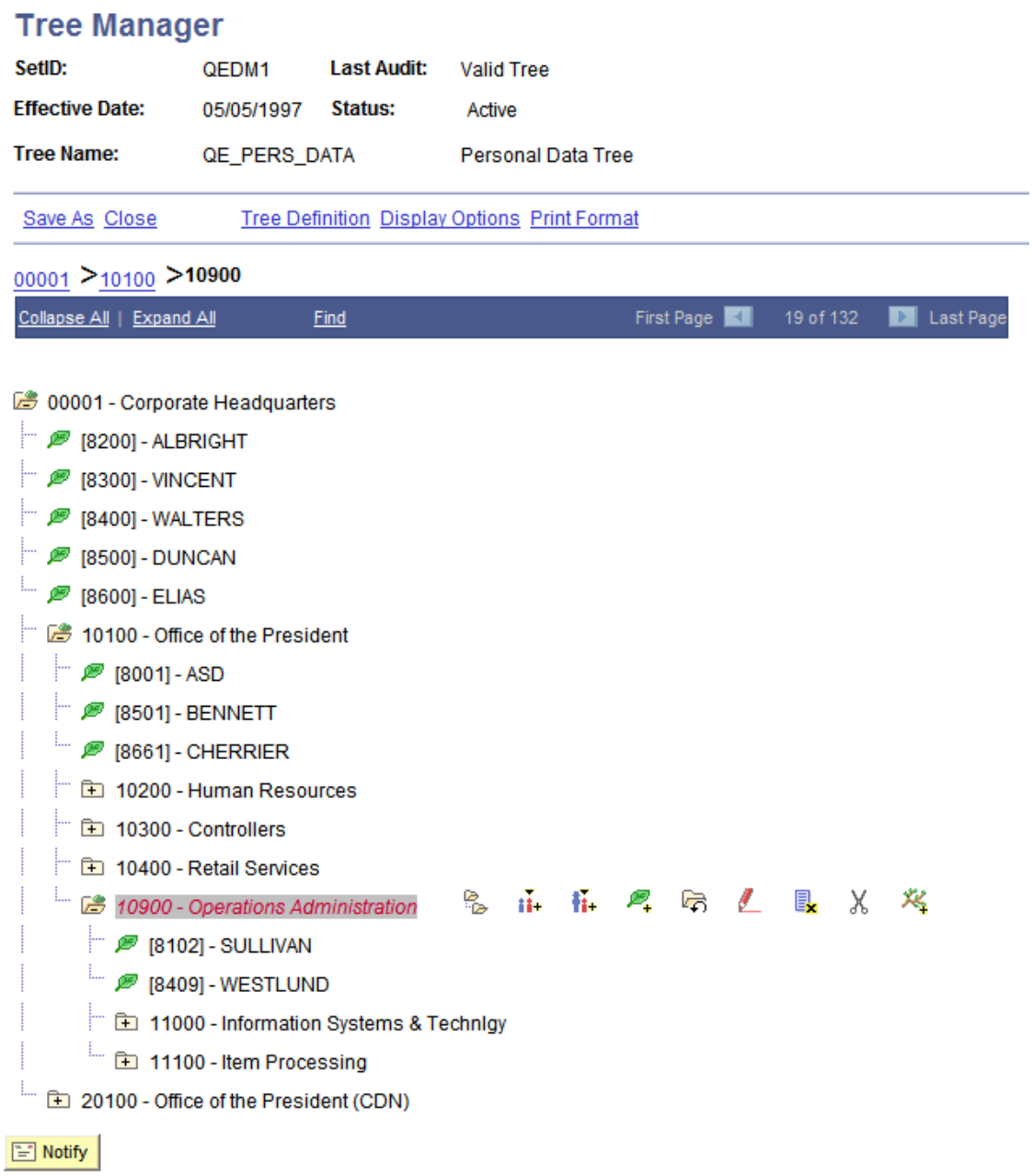
following example, Operations Administration is a child of Office of the President and a sibling of Human Resources, Controllers, and Retail Services.

This example illustrates the fields and controls on an HTML tree.



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

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Navigating Within an HTML Tree

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

Field or Control	Description
Collapse All	Click to close all of the visible nodes except for the root node. The root node is always expanded.
Expand All	Click to expand all of the nodes of the tree so that the entire tree or branch hierarchy is visible. Clicking this link expands all parent and child relationships, but the system still presents the tree hierarchy one page at a time. Use the next and previous page arrows to move forward and backward through the tree.
Find	Click to access the Find Value page, where you can search for nodes and detail values.

As you navigate a tree, navigation paths appear above the navigation bar. They show you a basic map of your route through the tree; you can also use them to jump to a previously visited node. These navigation paths represent nodes in the current branch (A type nodes) and the parent branch of the opened branch (B type nodes). In the example, node 00001 is the parent branch of C10100, and C10100 is the parent node of C10900.

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

Related Topics

- Tree Manager

Working With Rich Text Editor Fields

This section discusses how to use the rich text editor. PeopleTools 8.61 and later versions render the rich text editor based on CKEditor v5. The following topics describe the features of rich text editor and its use.

Important

To stay current with the latest information on rich text editor, subscribe to the following technical bulletin on My Oracle Support: Tech Update - Oracle Replaces CKEditor with ORTL for Rich Text Editing in Latest PeopleTools Releases (Doc ID 3022567.1)

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> **Note**
>
> Due to feature differences and data compatibility in the new CKEditor v5, existing rich text data (uploaded through v4 or earlier) may render with incomplete formatting in certain scenarios. For example, images or tables may render without existing formatting attributes such as alignment. If required, you are advised to update the formatting of the rich text data using the new v5 of the editor.
>
> For more information, see Data Compatibility with Updated Rich Text Editor Technology in PeopleTools (Doc ID 2945233.1)

Understanding the Rich Text Editor

The rich text editor extends the capability of a long edit box. It allows for the rich formatting of text content, including common structural treatments such as lists, formatting treatments such as bold and italic text, and drag-and-drop inclusion and image sizing. You use the rich text editor toolbar to apply additional formatting elements. The toolbar is extensible by means of a custom settings configuration file that application developers can create and implement. See Application Designer Developer's Guide: Modifying the Rich Text Editor User Interface.

> **Important**
>
> PeopleTools 8.61 and later versions render the rich text editor based on CKEditor v5, which does not include many features that were supported in CKEditor v4. See Application Designer Developer's Guide: CKEditor v4 Features Desupported in CKEditor v5 for more information.
>
> To stay current with the latest information, subscribe to the following technical bulletin on My Oracle Support: Data Compatibility with Updated Rich Text Editor Technology in PeopleTools (Doc ID 2945233.1).

> **Note**
>
> All rich text-enabled fields support multi-language entry.

The rich text editor provides an easy to use interface which should be familiar to users who work with common text editors such as Microsoft Word or Oracle Open Office. It consists of these distinct elements:

- Toolbar
- Editing area

The **Messages** scroll area contains an example of the rich text editor control showing the toolbar and editing area elements:

This example shows the rich text editor controls.

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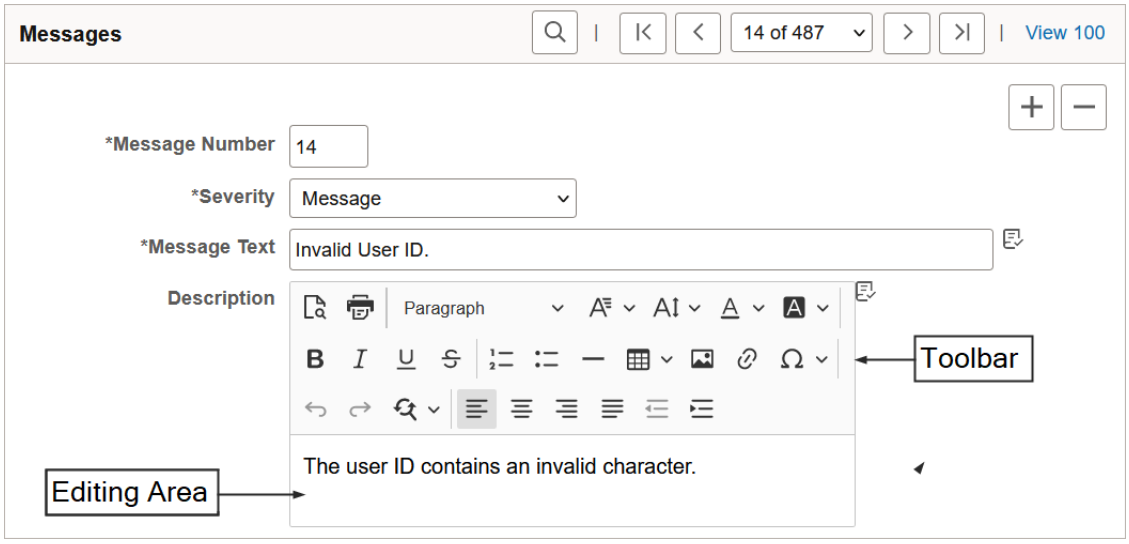

Toolbar

The toolbar, which is the area at the top of the editor, contains many different buttons that extend and activate a variety of editor functions. The toolbar is highly personalizable and can vary from field to field.

See Application Designer Developer's Guide: CKEditor v4 Features Desupported in CKEditor v5.

Editing Area

The editing area is directly below the toolbar. You enter text in this area.

Limitations

Note the following limitations for using the rich text editor:

- The PeopleTools SVG Administrator role is required to be able to upload SVG images via the rich text editor.
- When the Source button is enabled, <script> tags are not allowed in rich text editor content. If you include a <script> tag, then the entire content will be converted to text, including all HTML tags.
- When the Source button is enabled, you cannot include <link> tags—for example, to reference style sheets.

Related Topics

- Navigating in the Rich Text Editor Using Shortcuts
  This table lists the key or key combinations that you use to navigate to and from the rich text editor toolbar and the results of using those keys:

Using the Toolbar

The toolbar is the area in rich text editor where you can activate most of the editor features. Each button in the toolbar accesses a different function. Available functions are both simple, such as basic text formatting, and advanced, such as creating links and tables.

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To use the buttons in the toolbar, place your cursor over the button. The button highlights and hover text with information about the function of the button appears. Click the button to initiate its function. The graphics on the toolbar buttons are standard across many text editors, and you will probably find that you know how to use them intuitively. In addition to the toolbar buttons, toolbar drop-down list boxes are also available; they are white areas with an arrow on the side. You activate drop-down list boxes by clicking the white area or the arrow. After you click a menu, it expands so that you can select from the available options. To select an option, move your cursor to it and click it.

Entering, Formatting, and Modifying Text

Writing in the rich text editor is similar to writing in desktop word processor text editors such as Microsoft Word or Open Office with one important difference. You use desktop word processors primarily to create printed content, limited by physical pages. You use the rich text editor to create text that you publish on PeopleSoft application pages and read using web browsers.

To enter text, move your cursor to the editing area and enter the data using your keyboard. You can also paste text into the area.

To format text, click the button before you begin entering text or highlight text and click the button for the format that you want.

Inserting and Modifying Images

To insert an image into the text, click the **Image** button. The maximum image size is database dependent. Some database platforms support large image sizes while others limit the size to 32000 bytes. Consult your database documentation for more information. Use the Image Upload dialog box to upload an image file.

Uploading an Image

Access the Image Upload dialog box (click the **Image** button).

The following image types are supported: JPG, BMP, GIF, PNG, and SVG.

This example illustrates the fields and controls on the Image Upload dialog box.

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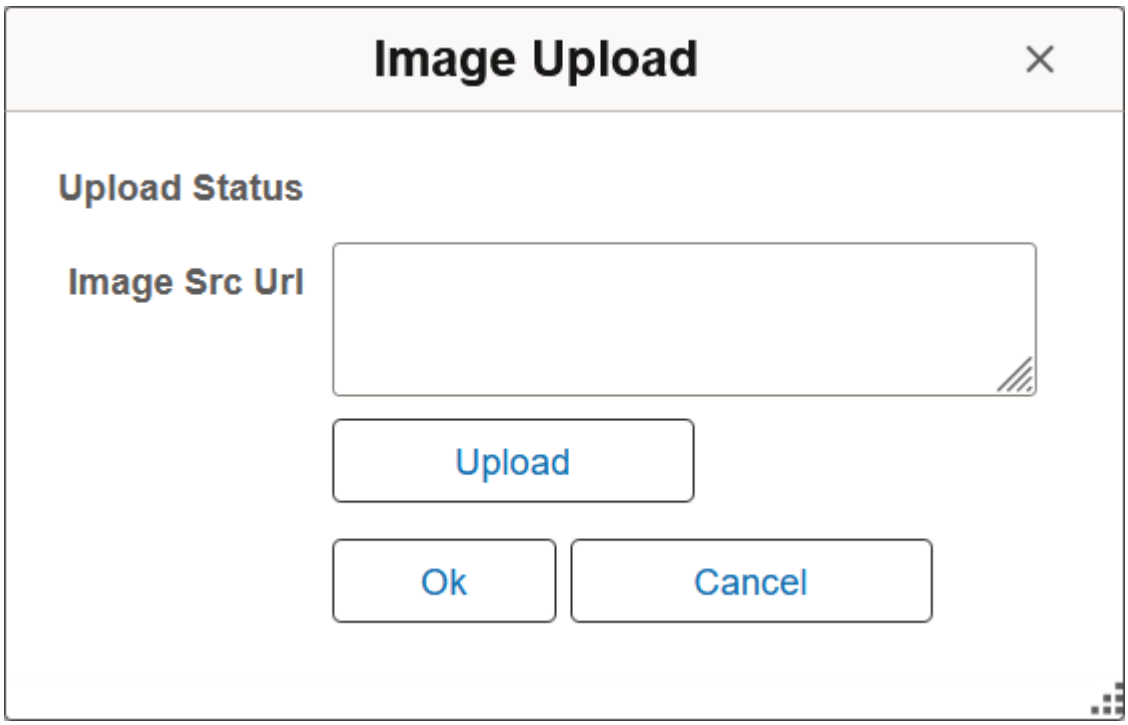

When you select the **Upload** button, the File Attachment dialog box appears.

Select the **Browse** button to locate the file that you want to insert into the text.

Select the **Upload** button to send the image to the database.

On successful completion of the upload process, the **Image Src Url** field is automatically populated with the URL ID for the image.

Modifying an Image

After inserting an image, you can modify the placement and size of the image and enter alternative text. Select the image to display the editing options.

> **Note**
>
> After upgrading to CKEditor v5, images that were uploaded through CKEditor v4 may display alignment and formatting issues. Therefore, after upgrading to CKEditor v5, you should reformat and readjust the images using CKEditor v5.

Related Topics

- CKEditor 5 Documentation

Using Spell Check

You can select the **Spell Check** button that is outside of the rich text editor field to perform spell check on the field content. Selecting this button invokes the current PeopleTools spell check functionality.

The HTML tags are stripped and only the text is considered for spell check.

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Working With Field-level Prompts and Validation

This section provides an overview of field-level prompts and validation and discusses how to use lookup and calendar prompts.

Understanding Field-level Prompts and Validation

Some edit box fields are linked to database prompt tables, which store values for information shared across your organization, such as department IDs, country codes, and state codes. These tables are called prompt or lookup tables because you prompt the system to look up and present a list of valid field values that reside in the prompt table. Prompt fields are defined so that the system compares the values that you enter to values that are in a prompt table to ensure that your values are valid.

Many fields validate against prompt tables. For example, currency codes and country codes are each stored in their own tables: the CURRENCY_CD_TBL and COUNTRY_TBL tables. Fields prompting against these kinds of prompt tables appear on the page as edit boxes with a lookup button to the right.

Term	Definition
	Click to open the Look Up page for the current field.
	Click to open a small calendar that displays the current month.

> **Note**
>
> Alternatively, you can press **ALT+5** while in a prompt or calendar field to open the lookup page or the calendar, respectively.

Using Smart Prompts

Application developers can configure prompt fields to respond to user choices and display prompt values based on the recently used items or frequently used items. Such prompt fields are called smart prompts.

Smart prompt values are separated into two sections, namely, **Most Relevant** and **Others**. The **Most Relevant** section displays the values based on your setting as specified on the My Preferences page. For example, if you select **Most frequent first**, then in the Most Relevant section of the prompt values, the most frequent items are listed first followed by the most recent items. Similarly, if you select **Most recent first**, then in the Most Relevant section of the prompt values, the most recent items are listed first followed by the most frequent items.

The **Others** section displays the remaining items of the prompt values. Both the sections do not display duplicate values, that is, a prompt value is displayed either in the Most Relevant section or in the Others section.

Initially, when you navigate to a prompt field that is enabled for smart prompt, the prompt values are not separated into the **Most Relevant** and **Others** sections. After you've selected values from the prompt and when you navigate to the same prompt field a second time, the smart-prompt values are displayed in the **Most Relevant** and **Others** sections.

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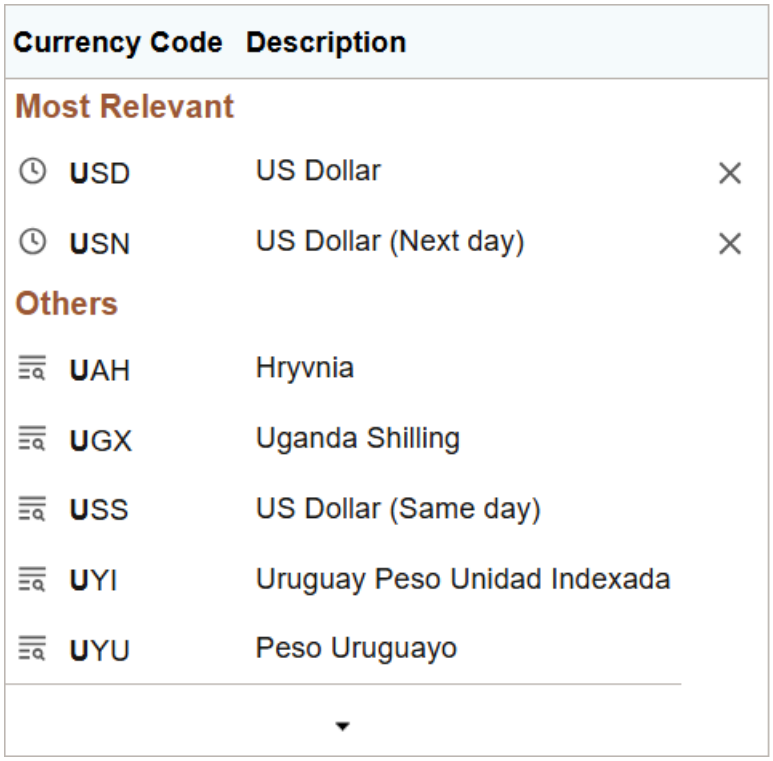
If you select any prompt value inadvertently, you can remove the prompt value from the **Most Relevant** section by using the delete (x) button.

For information on setting the smart-prompt options, see Specifying General Settings in My Preferences

For information on using smart prompts in grids and scroll area, refer to the Considerations for Using Smart Prompt and Smart Drop-Down in Grids and Scroll Areas section in Adding Rows.

The following example illustrates the display of smart prompt values under the Most Relevant and Others sections.



Considerations for Displaying the Others Section in Smart Prompt

The Others sections is not displayed in the following scenarios:

- Type ahead or auto-complete feature is not enabled for a field; in this case, only the Most Relevant section is displayed.
- Text is not entered in the prompt field (auto-complete enabled); in this case, only the Most Relevant section is displayed.

Using Lookup Prompts

You can perform a full or a partial search using lookup prompts.

To perform a full search, click the **Look Up** button. The Look Up page opens as a stationary modal page on top of the primary page. The primary page is grayed out and inaccessible while the prompt page is active. When the Look Up page opens, the **Search Results** grid displays all valid values for that field up to the maximum row count. Click the field title in the **Search Results** grid to change the field values sort direction. To narrow the search results, you can enter partial data and click the **Look Up** button. Click the **Advanced Look Up** link to narrow

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the search, both by searching based on more than one field at a time and by using a variety of search operators. When the field value that you need appears in the **Search Results** grid, click the value link to populate the prompt field on the primary page with the selection.

PeopleSoft applications support three wildcard characters (%, _, /) to help you search for data in character fields. On search pages and look up pages, wildcard characters only work with the *begins with* and *contains* operators.

The following example illustrates using a wildcard character on a Look Up page. Similar to prompt fields, use of the % and _ wildcard characters is supported.

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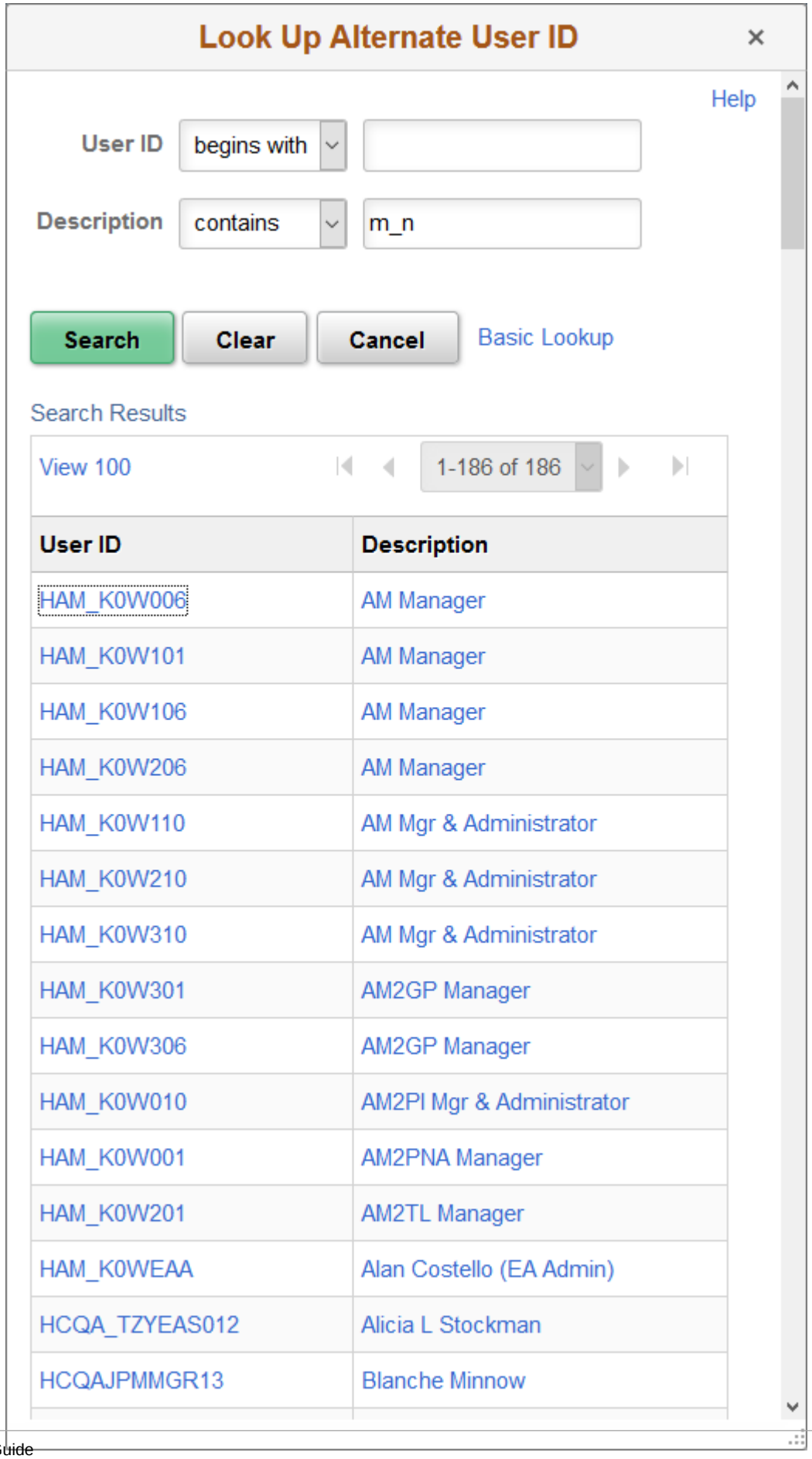

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> **Note**
>
> Your system administrator might exclude extremely large tables from automatically prompting for performance reasons.

> **Note**
>
> Application developers can use Application Designer to disable the partial search feature on lookup pages.

Look Up Page Properties

All Look Up pages share certain characteristics. All Look Up pages are modal and appear over the primary page, which is grayed out. When working with these pages, you can:

- Resize the page.
- Close the page from the title bar close icon.

> **Note**
>
> The **New Window, Personalize Page, and Copy URL** links do not appear on the modal prompt lookup page.
>
> Do not use the browser **Back** button when accessing prompt windows in AJAX mode. Use application links and buttons to navigate PeopleSoft applications. Clicking the browser **Back** button in some browsers can cause the spinning processing message to appear. To stop it, press the **Back** button again or click the browser **Stop** button and close the lookup prompt window.

Related Topics

- Using Wildcard Characters to Find Information
  PeopleSoft applications support three wildcard characters to help you search for data in character fields. You can use these wildcard characters to find the information that you need. The % and _ wildcard characters work in all autocomplete fields. On search pages and look up pages, wildcard characters only work with the *begins with* and *contains* operators.
- Application Designer Developer's Guide: Setting Record Field Use Properties

Using Calendar Prompts

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

This example shows the calendar window that appears when you click the calendar prompt button.

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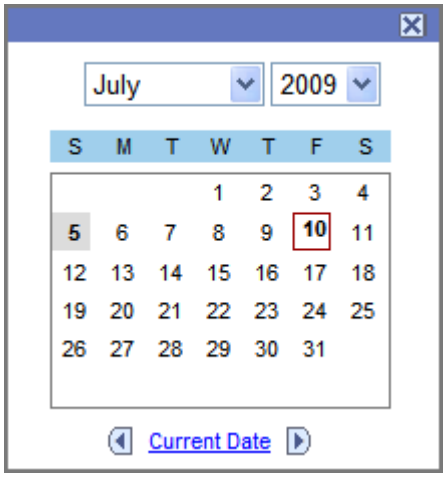

To change the calendar month, select the drop-down list box arrow for the month. To change the year, select the drop-down list box arrow for the year. Click the correct day of the month to select the day. Press **Esc** to cancel and close the calendar.

Accessing Related Content and Actions

In addition to the primary data on transaction pages, some pages include access to contextually relevant information called related content. Related content can be analytics, other PeopleSoft components, external web sites, discussions, wiki pages, UPK topics, and a variety of other content that you find helpful in performing your tasks. You can work with the related content just as you would any other PeopleSoft page. Related content is configured and secured by an administrator.

PeopleSoft applications divide related content services into two major categories—related content and related actions—based on where the content appears when the user accesses the service.

- Related content only appears in one of two Related Content frames, which appear at the bottom or to the right of the primary transaction page.
- Related actions appear outside of the Related Content frames. Target locations include modal windows, in new browser windows, or in the existing browser window replacing the current transaction page.
- Fluid related content and analytics appear in the right panel. See Pivot Grid: Accessing from the Unified Related Content Analytics Pane.

Contextual Menus

Related content can appear at the component, page, and field levels. You access the content at all levels similarly: through links that appear in contextual menus.

You work with these types of contextual menus in PeopleSoft applications:

- The Related Content menu, which displays only *related content.*

  The Related Content menu appears in the page bar at the top of the transaction page.

  The following example shows two services in the Related Content menu:

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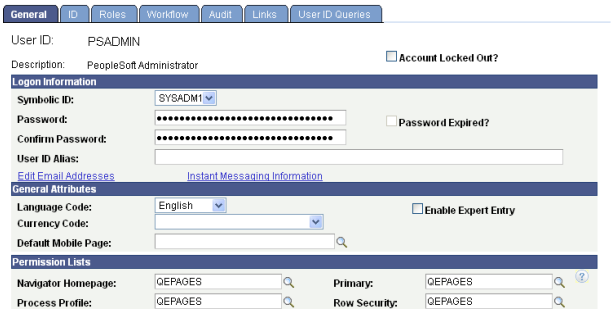
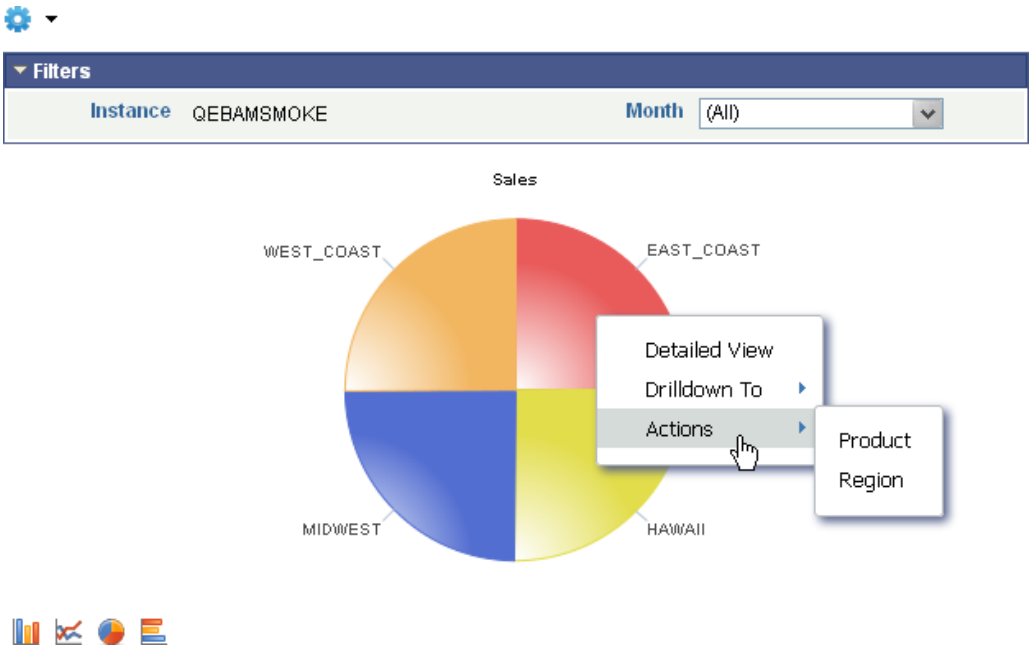


- The related actions menus, which displays only *related actions.*

  The related actions menus can appear as:

  – An Actions menu on a pivot grid chart.

    This example shows an Actions menu on a pivot grid chart:



  – A free-standing Actions button on any page.

> **Note**
>
> The label on the Actions button is configurable within PeopleSoft Application Designer.

    This example shows a free-standing Actions button that has been added to the page to display a list of related actions:

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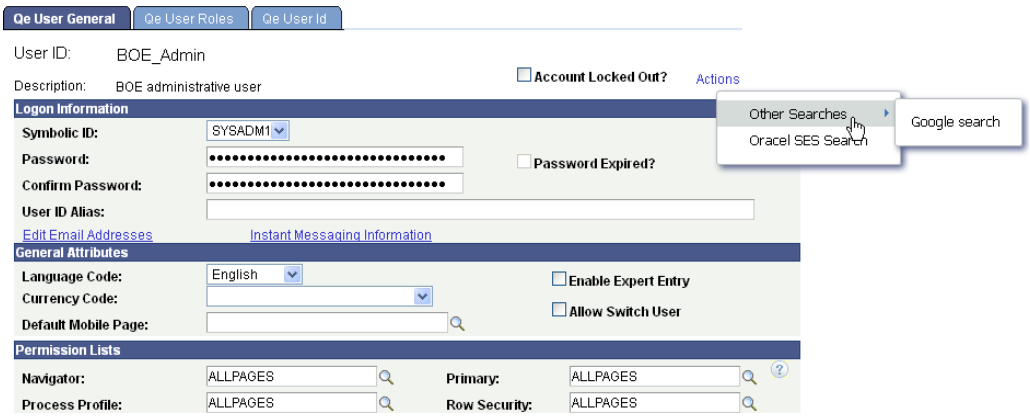
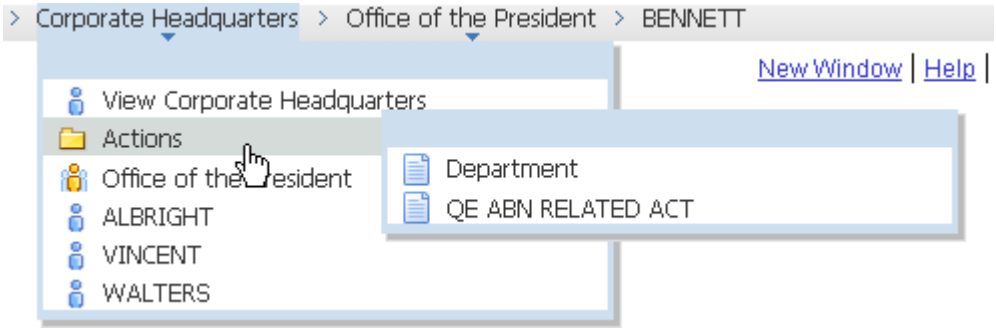


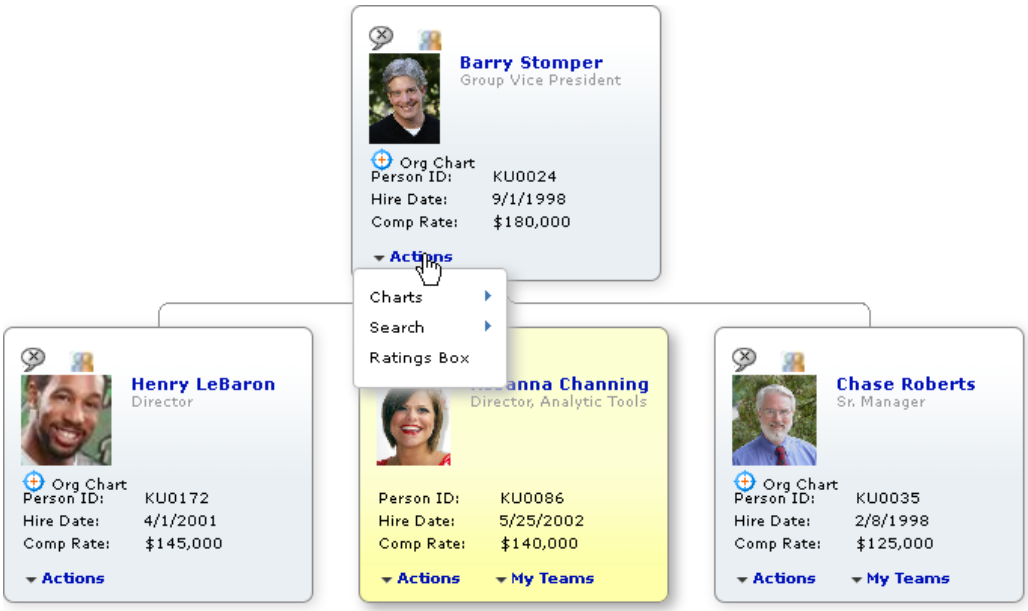
– An Actions folder in drop-down SmartNavigation menus.

This example shows the Actions folder in a drop-down SmartNavigation menu:



– A drop-down **Actions** menu on chart nodes of SmartNavigation charts.

This example shows a drop-down Actions menu on a chart node of a SmartNavigation chart:



– As pop-up related actions in the search results of a keyword search.

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The following example shows pop-up related actions links in the search results of a keyword search:

- Page field contextual menus, which can combine both *related content* and *related actions.*

  Page field contextual menus appear when you click the red page-field glyph.

Using Related Content Frames

The Related Content frame appears at the bottom or to the right of the page.

Bottom Frame

Note these points about the Related Content frame when it appears at the bottom of the page:

- The frame extends across the width of the transaction page.
- The visible area increases and decreases when you drag the handle on the upper edge of the frame in a vertical direction.
- The frame appears and disappears when you click the **Expand/Collapse** button on the left side of the frame header.
- The frame reloads when you click the **Refresh** button in the frame header .
- The frame loads the current active service in a new window when you click the **Zoom** icon.
- The frame closes when you click the **Close** button.
- Open the active service in another window by clicking the zoom button in the frame header.

Note these points about the *services* that appear in the bottom frame:

- Only one service can be active and have focus at a time.
- Multiple services appear as tabs across the top of the frame.
- You click the tab to bring the service into focus.

The following example shows a transaction page with related content in the Related Content frame at the bottom of the page:

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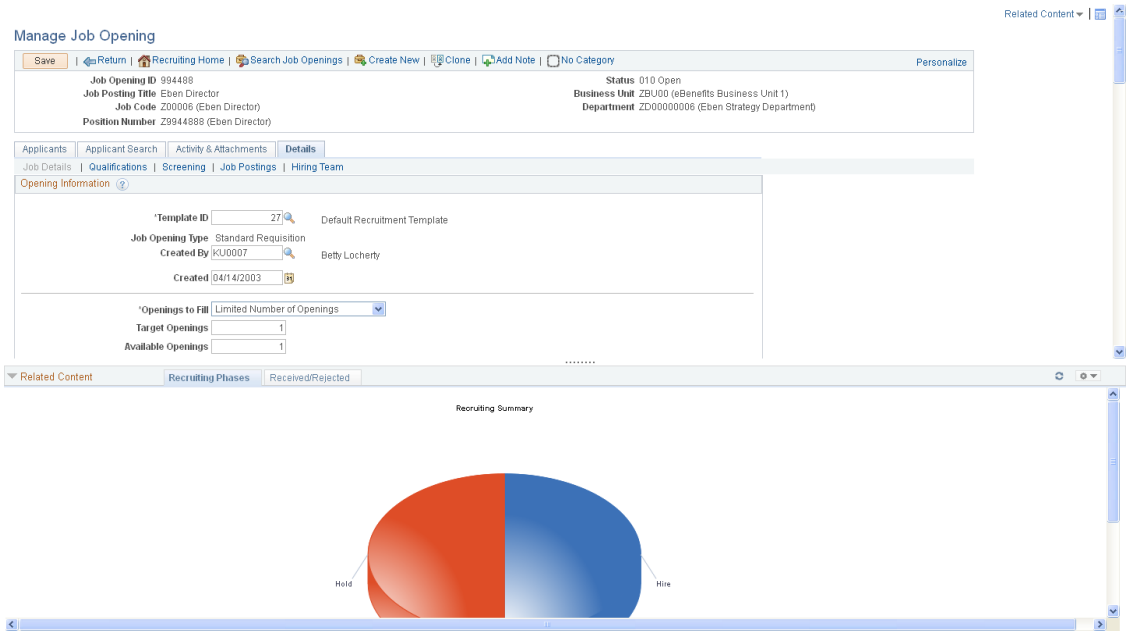

Right Frame

Note these points about the Related Content frame when it appears at the right of the page:

- The frame extends down the length of the transaction page.
- The visible area increases and decreases when you drag the left edge of the frame in a horizontal direction.
- The frame appears and disappears when you click the **Maximize** and **Minimize** buttons on the left border of the frame.
- The frame divides the visible area equally among all open pagelets.
- The bottom of the frame displays a More menu, which you use to access minimized pagelets.

Note these points about the *services* that appear in the right Related Content frame:

- Each service exists as a self-contained pagelet inside the Related Content frame.
- Any number of services can open be active and in the expanded state simultaneously.
- All maximized service pagelets divide the available space equally and always share the same vertical and horizontal dimensions. As users maximize and minimize other service pagelets in the frame, any service pagelets that remain open resize automatically so that the space appears equally divided.
- Each pagelet header can contain:
  - A **Zoom** button that you click to display the service in a new window.
  - A **Refresh** button that you click to reload the service.
  - A **Maximize/Minimize** button that you click to toggle the service between the expanded and collapsed states.

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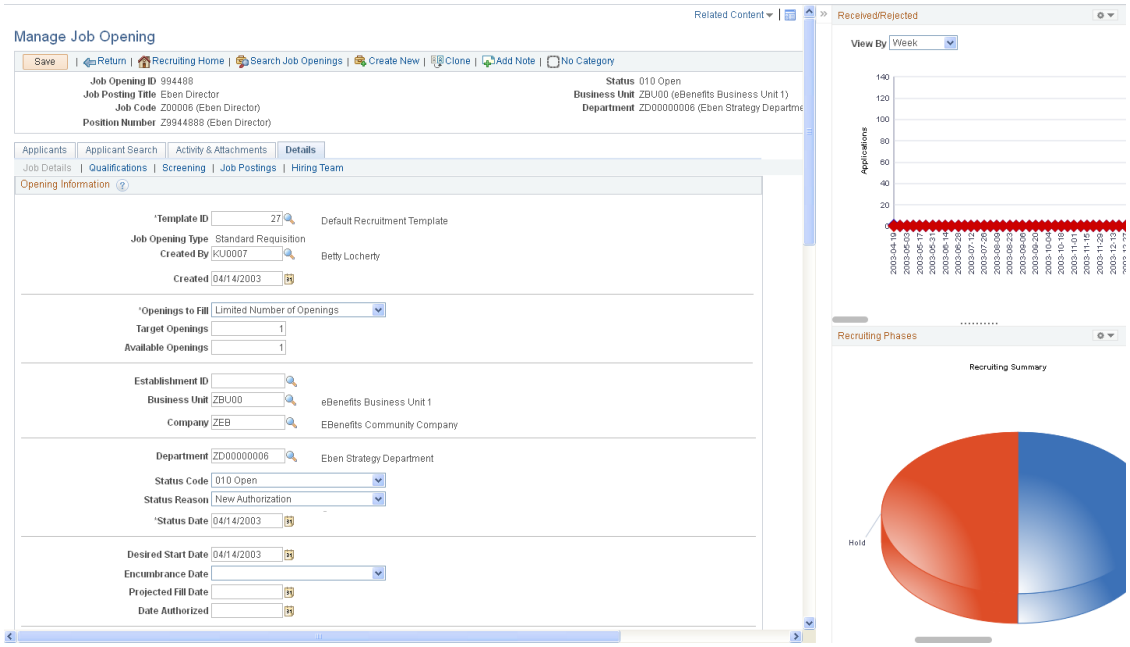
> **Note**
>
> The state of each pagelet persists based on the state from your last session.

- Scroll bars appear on the right and bottom of a service pagelet if it is too small to fully display the content.

The following example shows a transaction page with related content in the Related Content frame at the right of the page:



Using WorkCenter Pages

PeopleSoft WorkCenter pages provide you with streamlined access to commonly performed tasks. WorkCenter pages are intuitive and can be designed and targeted based on the various needs of multiple business roles. For instance, executives demand intuitive applications with analytics and summaries at the organization level for applications such as Compensation. Human resources clerks, focused on applications such as Payroll, Time & Labor, and Benefits, require consolidated navigation collections for the business process pages and components needed to complete their work and to ensure that all the information goes properly to other systems. WorkCenter pages are robust and flexible enough to accommodate these and other types of demands from the different users and roles within your organization.

WorkCenter pages address your need for a more streamlined user interface—one that will reduce time-consuming and complex navigations and increase productivity by providing a central place from which to do day-to-day work.

Working with WorkCenter Pages

WorkCenter pages divide the browser window into two frames:

- A pagelet area.

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- A target content area.

These two areas of the WorkCenter interact; they pass information back and forth by using an event-driven model. The actions in the pagelet area determine the content in the target area. When you click a link in the pagelet area, it triggers the appropriate transaction, and passes values from the pagelet area so that the application can display the appropriate content in the target content area or in a new browser window.

Pagelet Area

The pagelet area, which is always accessible for WorkCenter pages, aggregates related transactions as navigation collection pagelets, query pagelets, activity guide pagelets, component-based pagelets, and analytics pagelets and makes them constantly available for instant access. Your pagelet area might be divided into groups indicated by tabs at the top of the pagelet area; the pagelets appear below the tabs. Pagelets can be based on queries, navigation collections, or components. Pagelets can include folders, links, and even charts. If you click a navigation collection folder, the folder opens and only the contents of that folder are visible in the pagelet. If you click a link, the transaction is started in the target content area or a new browser window.

This table describes the icons that can appear in the WorkCenter header and the pagelet area headers. The pagelets and pagelet area are highly configurable; not all icons appear for all users, and they may differ from those shown here.

Field or Control	Description
WorkCenter Settings	Click to access the WorkCenter Settings menu, and select an option. Possible options are reload, personalize, and configure.
Pagelet Settings	Click to access the Pagelet Settings menu, and select an option. Possible options are minimize, expand, and personalize.
Help	Click to show the help information associated with the pagelet.
Reload	Click to reload a pagelet.
Hide	Click to hide the WorkCenter frame and associated pagelets. Use this option to maximize the size of the target area.
Show	Click to restore the WorkCenter frame and associated pagelets.
Resize	Click and drag up or down to resize a pagelet.

Target Content Area

The target content area displays the object that is associated with the link that you click in the pagelet area. When you click a link or button in the pagelet area, it launches in the target content area and is ready for you to start the task. This area is the primary area for performing any transaction. You complete your task in this area just as you would in a standard PeopleSoft page.

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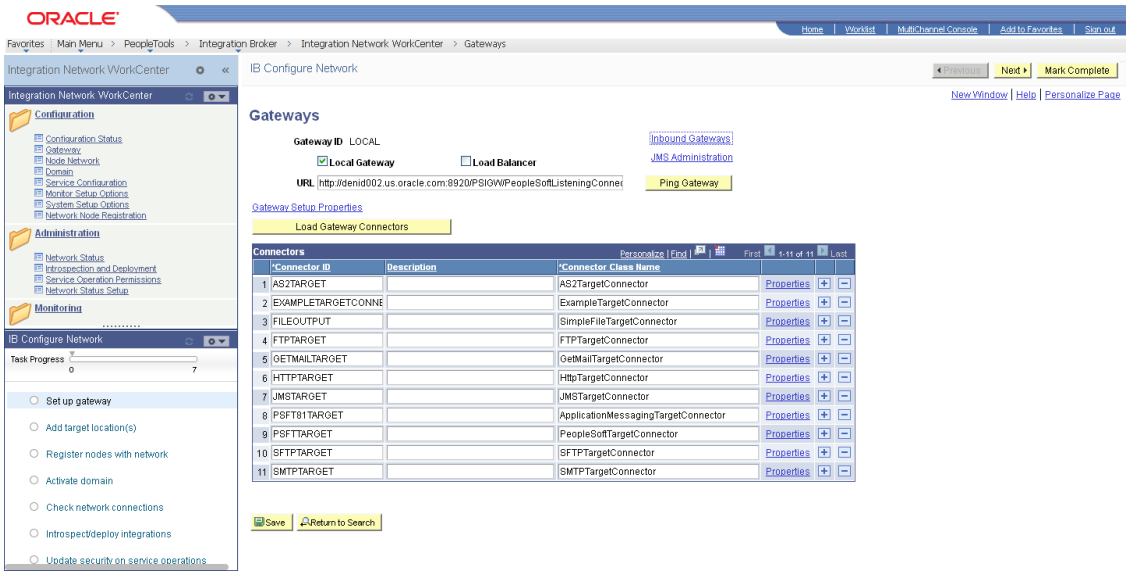
> **Note**
>
> Developers and administrators can design tasks to launch in a new browser window, a modal pop-up page, or to take you out of the WorkCenter page and to a standard PeopleSoft application page.

WorkCenter Examples

This section shows several WorkCenter examples.

The following example illustrates the main parts of a WorkCenter page. On the left, the pagelet area displays two pagelets configured to display in this WorkCenter. On the right, the target area displays the current transaction page as selected in a WorkCenter pagelet. The standard portal header, including the drop-down menu and navigation breadcrumbs, appears above the WorkCenter page.



This example shows the Time and Labor WorkCenter. The pagelet area includes three groups: Main, Reports/Processes, and Others. Here you see the three pagelets for the Main group: My Work, Announcements, and Links.

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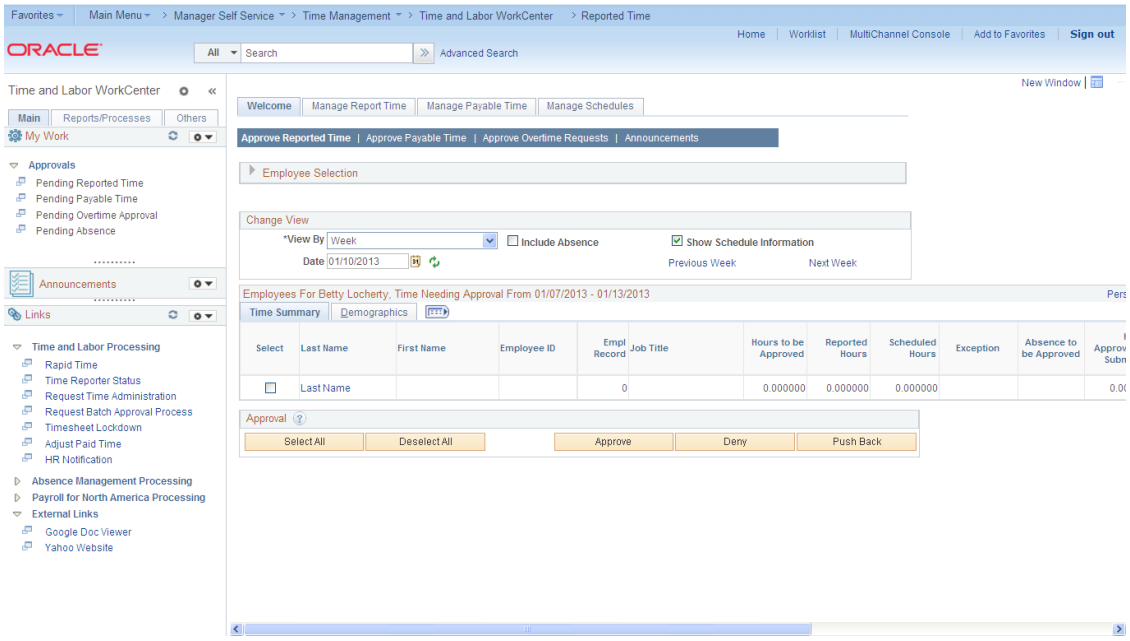

Delivered WorkCenters

This table lists PeopleTools-delivered WorkCenters:

WorkCenter	Link to Product Documentation
Integration Network WorkCenter	See Integration Broker Administration: Accessing the Integration Network WorkCenter
Setup Activity Guide	See Portal Technology: Using the Setup Activity Guide WorkCenter
Search Administration	See Search Technology: Understanding the Search Admin Activity Guide
Search Designer	See Search Technology: Understanding the Search Designer Activity Guide

Personalizing Your Pagelet Area

You can set preferences to personalize your WorkCenter page experience. Changes are visible when you click the **Save** button.

Access the Personalize page (select the **Personalize** option from the Pagelet Settings menu).

> **Note**
>
> Your page title reflects the label that your WorkCenter administrator enters. The page name always begins with *Personalize*.

This example illustrates a sample Personalize page.

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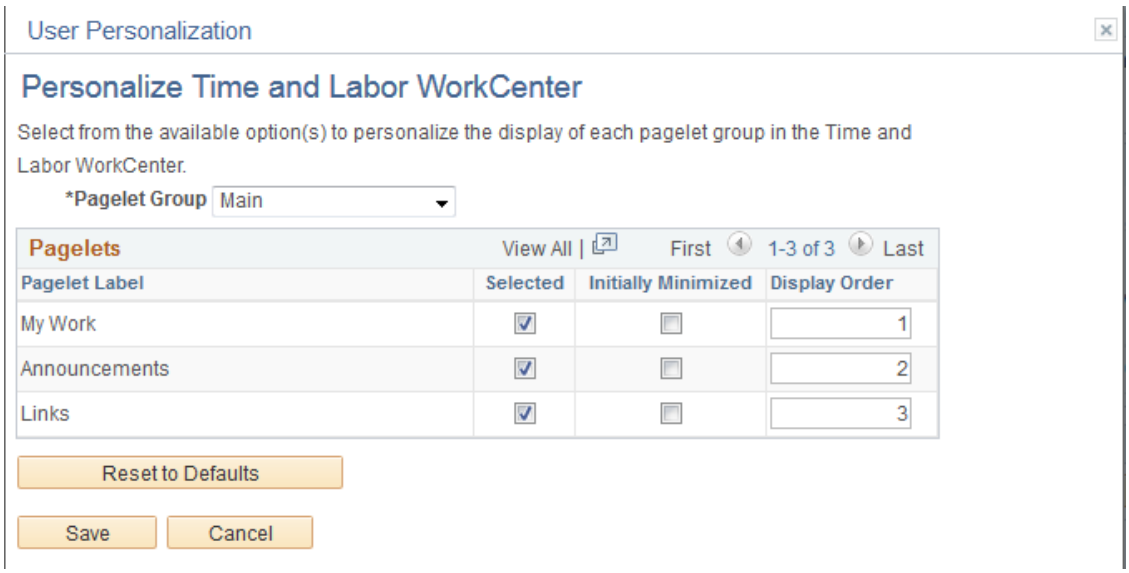

Field or Control	Description
Pagelet Group	Select the tab (group) for which you want to set your preferences.
Pagelet Label	Displays the names of the pagelets in the group.
Selected	Select to make the pagelet visible in this pagelet group. Deselect the check box to hide the pagelet. Deselecting this check box does *not* remove the pagelet from the group. The check box is disabled if the administrator requires that the pagelet appear.
Initially Minimized	Select to collapse the pagelet so that only the pagelet header is visible when you access the WorkCenter page.
Display Order	Enter a number between 0 and 999 to specifically determine the position of the pagelets in the group. This field is empty by default and pagelets appear in the order configured by the administrator. Pagelets for which you leave the **Display Order** field blank precede pagelets for which the field contains a value.
Reset to Defaults	Click to set all fields to their original settings as specified by the administrator who configured the WorkCenter page.

Using Activity Guides

Activity guides are a PeopleTools feature that allow your application developers to define guided procedures for a user or group of users to complete. An activity guide presents the guided process as a series of tasks or steps. It enables users to see exactly where they are in a process as they progress towards completion. Activity guides track the status of your tasks or steps. Activity guides can be useful in a number of procedural scenarios. For example:

- The on-boarding of a new employee.

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- Benefits enrollment.
- A life change event, such as a marriage or the birth of a child.
- Period end closing.
- System or feature configuration.

There are several mechanisms for users to access and display an activity guide:

- Classic activity guides require an activity guide pagelet, which is the interface that presents the activity guide and its tasks to a user. The pagelet lists tasks in order and can optionally include a status bar indicating completion progress. Activity guide pagelets must be accessed through a classic WorkCenter.
- Fluid activity guides can be accessed in a number of ways including:
  - Through a tile that opens the specified activity guide instance.
  - Through a related action link.
  - Through a tile that opens the My Activity Guide Instances page listing all activity guide instances for that template that the user is contributor to.
  - Through a menu item.
  - Through a button or link that programmatically generates the URL for the activity guide.

Activity Guide Process Types

There are seven activity process types. Depending on the process type used by the developer to create the activity guide, the display and use of the activity guide will differ.

Activity Guide Template Type	Description
Horizontal optimized guided sequential	• Presents the numbered steps horizontally. • Uses the activity guide subbanner to present navigation buttons. • Used for simple sequential procedures.
Vertical optimized guided sequential	• Presents the numbered steps vertically in the left panel. • Uses the activity guide subbanner to present navigation buttons. • Used for complex sequential procedures.
Vertical optimized guided non-sequential	• Presents unnumbered steps vertically in the left panel. • Uses the activity guide subbanner to present navigation buttons. • Used when users can complete the tasks in which ever order they choose or as events dictate.
Vertical optimized non-guided non-sequential	• Presents unnumbered tasks vertically in the left panel. • Displays the standard fluid banner without navigation buttons.
Vertical non-optimized guided sequential	• Presents the numbered steps vertically in a drop-down list in the guide mode banner. • Uses the activity guide subbanner to present navigation buttons.

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Activity Guide Template Type	Description
Vertical non-optimized guided non-sequential	• Presents unnumbered steps vertically in a drop-down list in the activity guide subbanner. • Uses the activity guide subbanner to present navigation buttons.
Vertical non-optimized non-guided non-sequential	• Presents unnumbered steps vertically in a drop-down list in the fluid banner. • Displays the standard fluid banner without navigation buttons.

Using Activity Guides

Activity guides provide a hierarchical organization of dependent and sequential tasks. An activity guide lists the tasks, also referred to as steps, that you need to complete. Each task is linked to a specific local or remote transaction or external URL. Some activity guides may include a questionnaire that includes questions used to determine which steps or tasks will be included in the activity guide.

How the lists and navigations is presented on the page depends on whether you are accessing a classic activity guide or a Fluid activity guide.

- Classic – As you use an activity guide, you see the lists of tasks that you need to complete in the pagelet area. When you click a task, the associated page appears in the target content area of the WorkCenter. To complete a task, complete the associated page, and save your work; the status of the task will update to complete. The activity guide pagelet remains visible as you move from step to step, with the current step highlighted, and you can see your progress by viewing the Task Progress bar, if included, that is located at the top of the activity guide pagelet. An icon appears next to each activity item to indicate its status.

  A navigation frame appears above the target content area, which includes buttons that enable you to navigate through each task. **Next** and **Previous** buttons are provided; additional buttons and controls may also appear, if defined by the Activity Guide developer, such as the **Mark as Complete** button that you see in some of the examples we provide below. Typically, these additional buttons enable you to mark a task as complete or cancel your actions.

- Fluid — Tasks may be displayed either vertically or horizontally on the page depending on the activity guide template used by the developer to create the page.

  Guided activity guides include Next and Previous buttons for navigation in the activity guide subbanner. Non-guided activity guides do not include any default navigation buttons. Both types can include custom buttons in the activity guide subbanner.

Tasks can include the following characteristics:

- Tasks can be required or optional.

  An asterisk designates a required task. For an activity guide status to be designated as complete, all *required* tasks must have a complete status.

- Tasks can be organized hierarchically with a parent (summary) task composed of child (detail) tasks.

  All required child tasks must be complete *before* the parent task is considered complete.

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> **Note**
>
> Parent tasks are collapsible/expandable headings which groups related tasks; they do not load content in the target area when clicked.

- Tasks can be date-dependent and include required start or completion dates.
- Tasks can include dependencies; for example, one task can be set to be dependent on the status of another task.
- Task access can be controlled by role. If you do not have permission to access a task, it will be disabled and you will not be able to access it.

Using Classic Activity Guides

Classic activity guides require an activity guide pagelet, which is the interface that presents the activity guide and its tasks to a user. The pagelet lists tasks in order and can optionally include a status bar indicating completion progress. Classic activity guides and pagelets must be accessed through a classic WorkCenter.

Activity Guide Icons and Controls

This table describes the icons and controls for a classic activity guide:

Field or Control	Description
Task is not started	Indicates the task has not been started.
Task is visited	Indicates you have visited the task and it is in progress, but it is not complete yet.
Required	A red asterisk displays to the left of each required task. If a step is not required, the status can be changed from *Not Started* to *Visited*.
Task is completed	Indicates you have completed the task.
Task is in progress	Indicates that a required task is not yet complete. In addition, it designates a summary task that has required detail tasks that are not yet complete.
Task is overdue	Indicates a task that is past its due date.
Task is dependent	Indicates that the task is dependent on the completion of one or more tasks or steps and cannot be started yet. Click the task to view the dependencies.
Expand	Click to expand a summary (parent) task, and view its subordinate tasks.
Collapse	Click to collapse a summary (parent) task, and hide its subordinate tasks.
Next	Click this button to navigate to the next step.
Previous	Click this button to navigate to the previous step.

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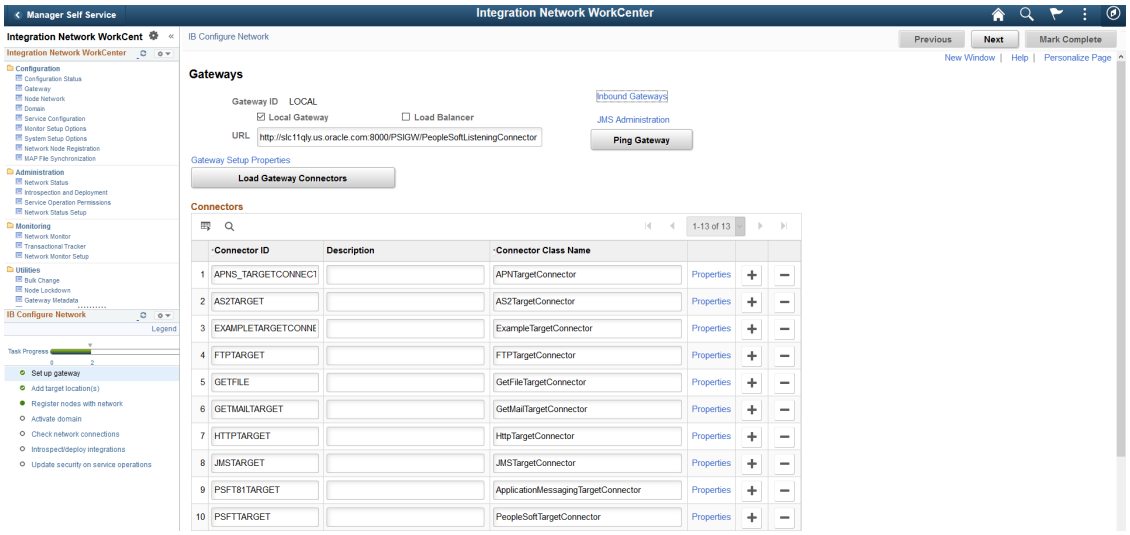
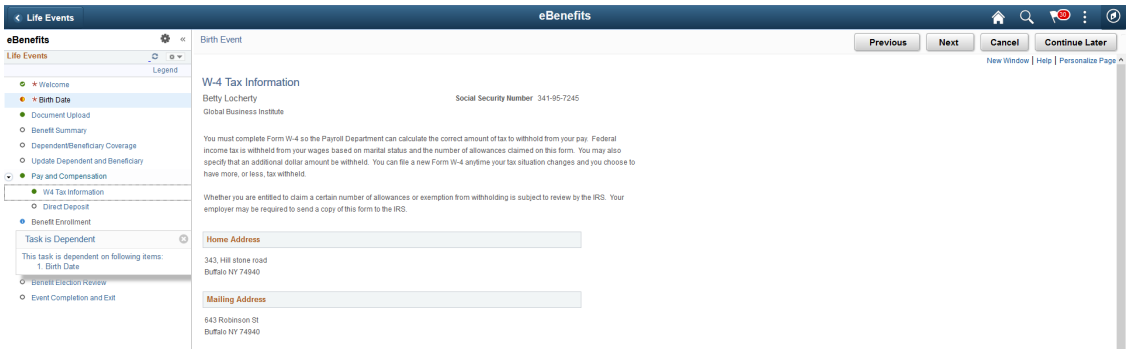
Classic Activity Guide Examples

This section shows several examples of classic activity guides.

This activity guide contains tasks to configure Integration Broker (IB). In this example, the IB Configure Network Activity Guide pagelet appears in the pagelet area of the Integration Network WorkCenter page, with the Gateways page in the target content area. In this example, the first task has been completed, but none of the other tasks has been visited.



This example shows a Life Events activity guide. This activity guide includes required tasks, which are indicated by an asterisk, as well as the summary task Pay and Compensation (expanded) and a dependent task, Benefit Enrollment. The Benefit Enrollment task is dependent on the completion of Birth Date task, which is currently in progress.



Using Fluid Activity Guides

For guided processes, the activity guide subbanner displays the standard Next and Previous navigation buttons. Custom navigation buttons are displayed in the activity guide subbanner for all activity guide types.

Fluid Activity Guide Icons and Controls

This table describes the icons and controls for fluid activity guides:

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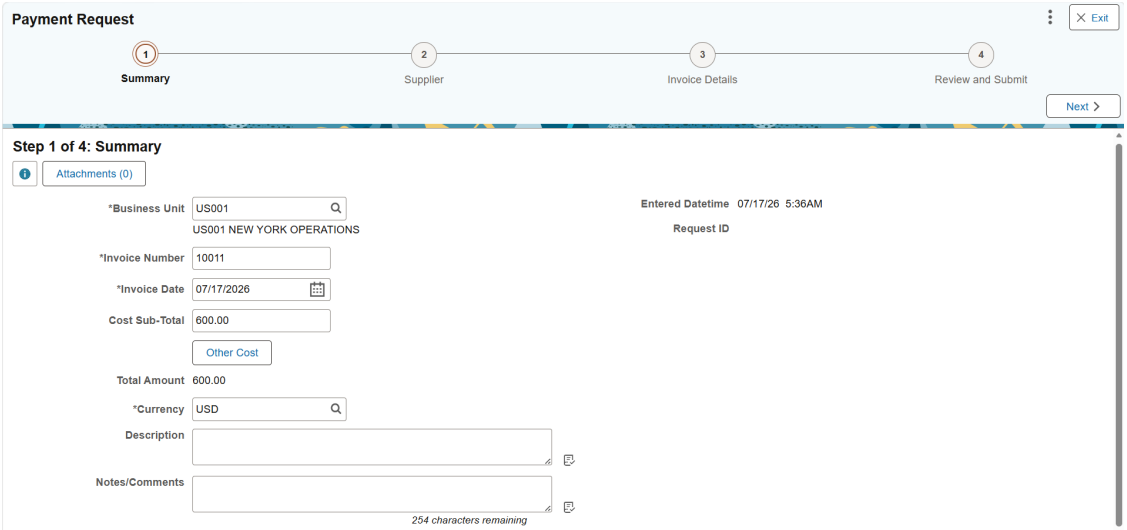
Term	Definition
or **Next**	Click this button to navigate to the next step.
or **Previous**	Click this button to navigate to the previous step.
Activity Guide Navigation Area	When viewing on small form factor device, the task list will be hidden. Click the left panel tab button to display the tasks or steps in the activity guide.

Examples of Horizontal Guided Sequential Activity Guides

In a horizontal sequential guided activity guide, the steps are presented across the top of the page. When the activity guide is displayed on a phone or tablet, the task progress bar will show the current progress and the step number.

The Payment Request activity guide is an example of a horizontal guided sequential activity guide. Each task must be completed in order. Click the Next button to move to the next task.



The final step or task in a horizontal guided sequential activity guide may include a Submit button if one has been configured for the guided process.

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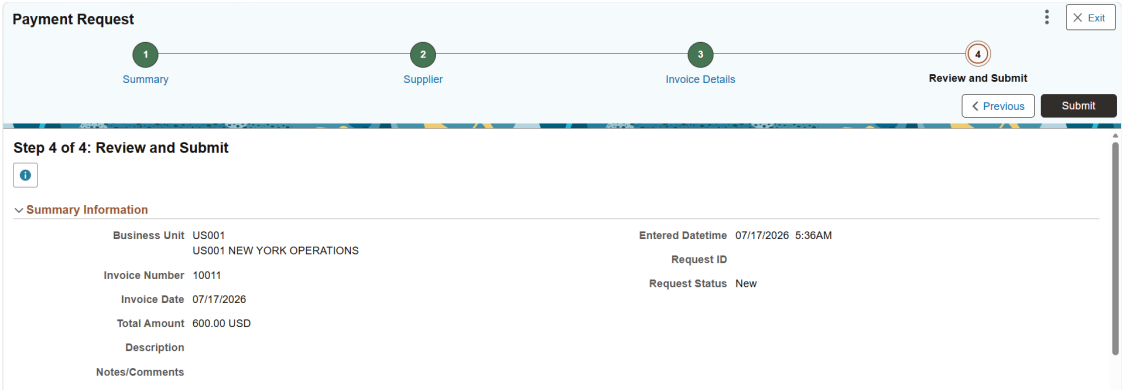
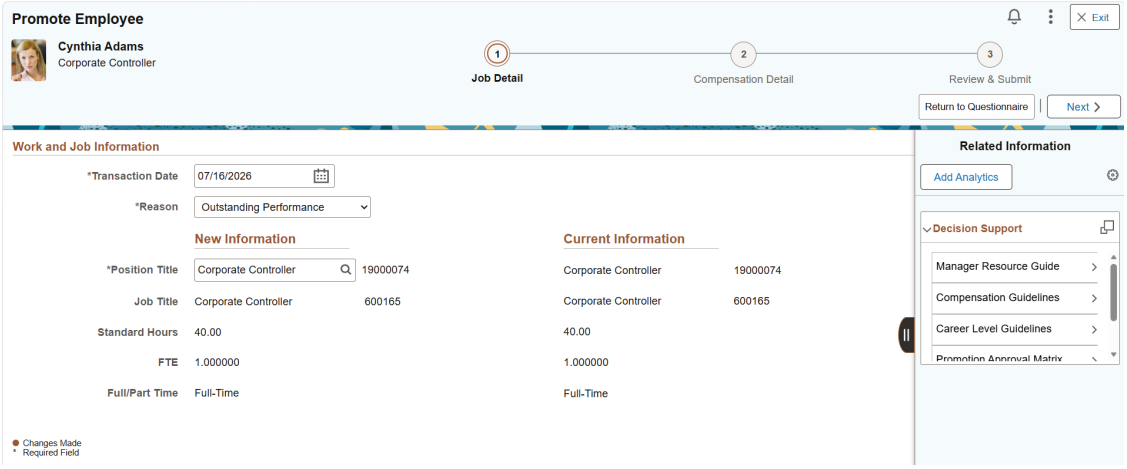
This example shows the last task for a Payment Request, when all of required information has been entered, the navigation bar contains a Submit button that has been configured for this guided process.



This example illustrates a horizontal guided sequential activity guide that contains a supplementary decision support information displayed in the Related Information panel.

> **Note**
>
> If the activity guide has related content, use the Supplementary Panel button to expand the right panel when the activity guide is displayed on a phone.



Examples of Vertical Guided Sequential Activity Guides

In a vertical guided sequential activity guide the numbered steps are presented vertically in the left panel. The current step is highlighted and the step status is displayed for each step. When the page is displayed on a phone or tablet, the left panel is collapsed and the progress bar is displayed at the top of the page along with the step number.

This example illustrates a vertical guided sequential activity guide. In this example, the tasks are displayed vertically on the left-hand side of the page. When you complete the task and click Next, the next task will be displayed.

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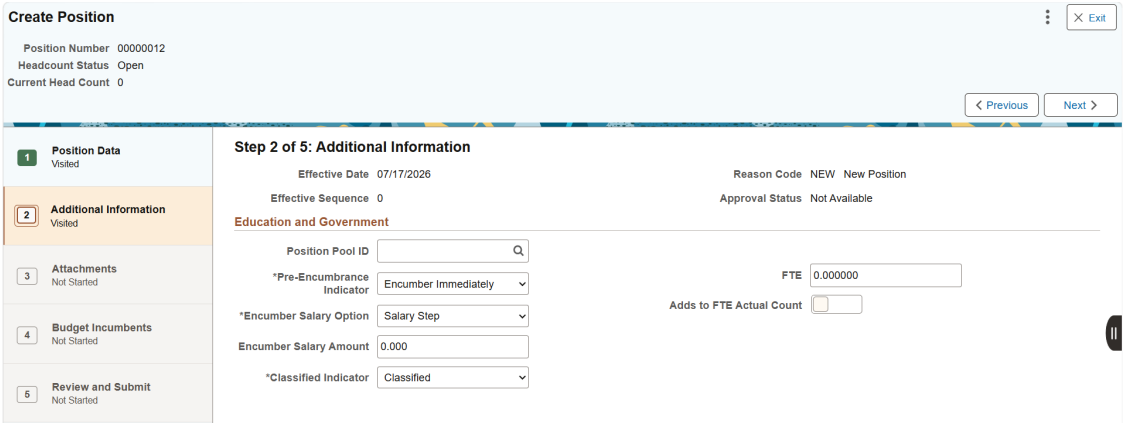
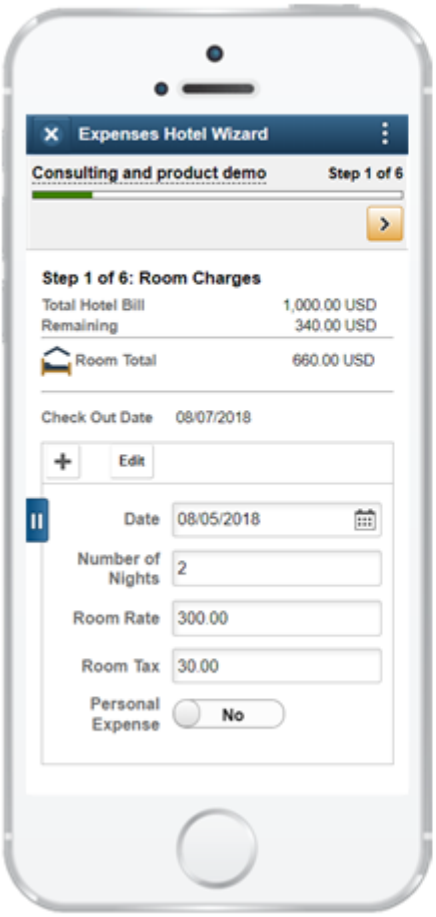
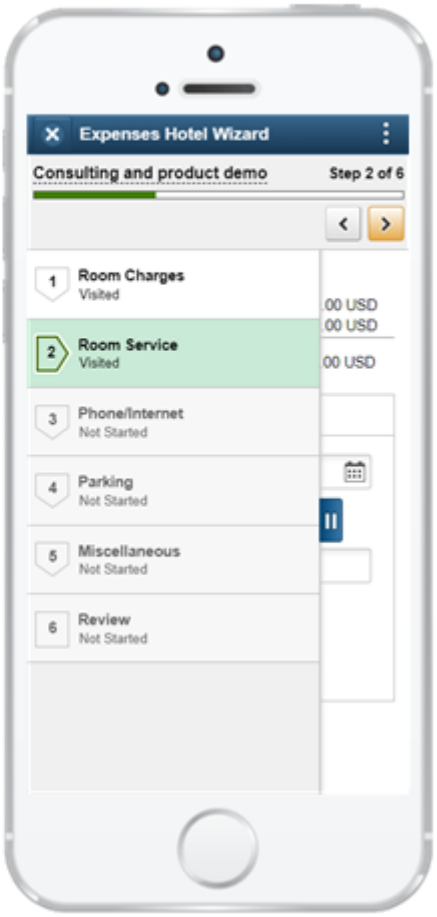


This example illustrates a vertical guided sequential activity guide as it is displayed on a smart phone. On the left, the left panel is collapsed and the task list is not visible. On the right, the left panel is expanded, and the tasks are visible. The progress bar visually indicates completion progress along with the step number.

Left panel collapsed



Left panel expanded



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Example of a Vertical Guided Non-Sequential Activity Guide

In a vertical guided non-sequential activity guide the steps are presented vertically in the left panel. The current step is shaded in green and the step status is displayed for each step. When the page is displayed on a phone or tablet, the left panel is collapsed.

The following icons and controls are used with the vertical guided non sequential activity guides:

Term	Definition
Not Started	Indicates the task has not been started.
Visited	Indicates you have visited the task, but not completed it.
In Progress	Indicates that a required task is not yet complete. In addition, it designates a summary task that has required detail tasks that are not yet complete.
Complete	Indicates you have completed the task.
Required	A red asterisk displays to the left of each required step. If a step is not required, the status can be changed from *Not Started* to *Visited*.
Expand	Click to expand a summary (parent) task, and view its substeps.
Collapse	Click to collapse a summary (parent) task, and hide its substeps.
Locked	Steps that have a dependency will be grayed out and the status will indicate *Locked (View Dependency)*. Click or tap on the step and a modal will open to show the dependencies.
Pending Approval	Indicates the task or step is waiting for approval through the approval framework.

This example illustrates a vertical guided non-sequential activity guide. Required tasks, such as Birth Date, are indicated by an asterisk. Dependent tasks, such as Benefit Summary, are grayed indicating that they cannot be started until one or more tasks have been completed; click the task to view the dependencies..

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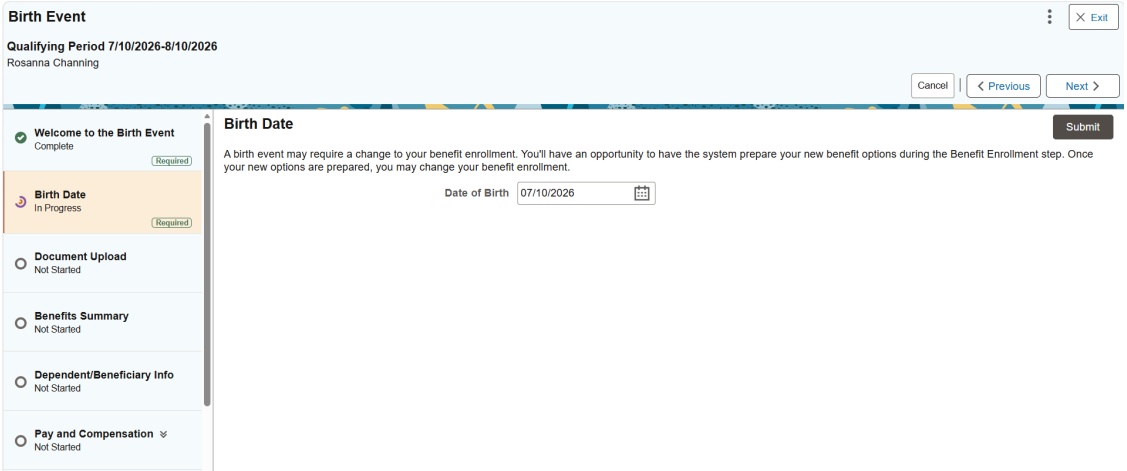
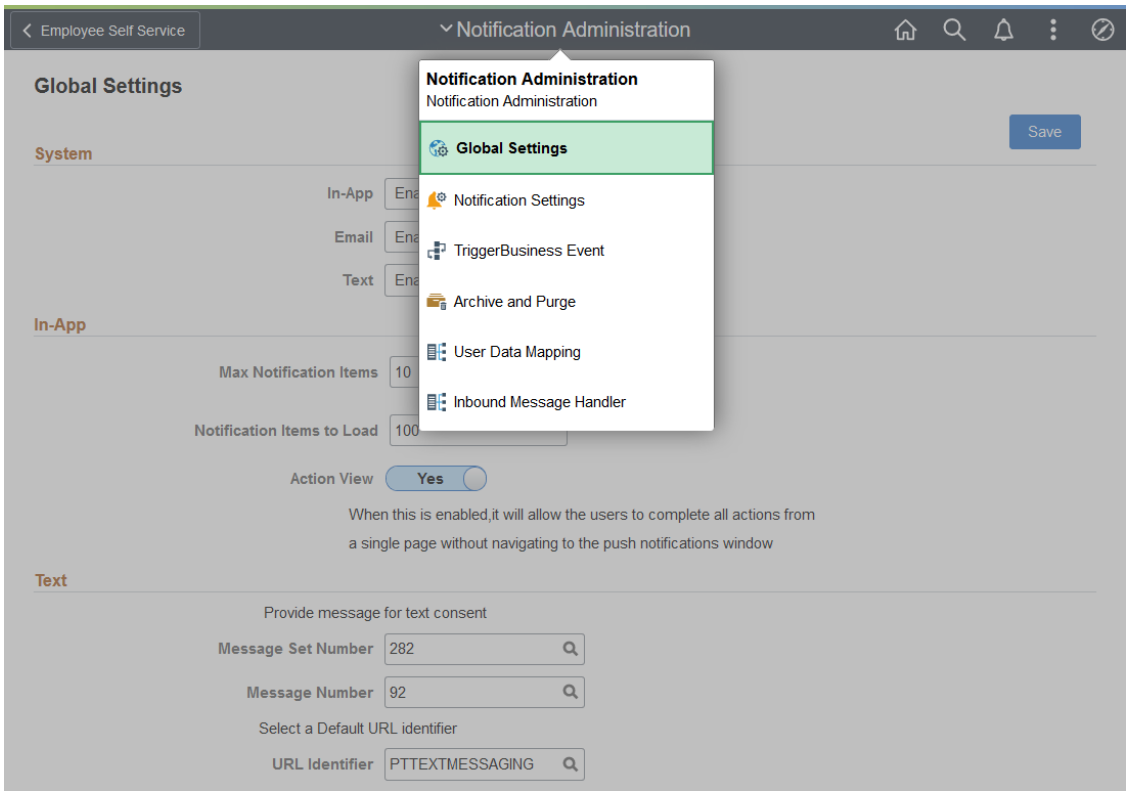


Example of a Non-Optimized Activity Guide

Non-optimized activity guides list the steps or tasks in a drop-down selector from the middle of the banner versus in the left panel.

This example illustrates how a non-optimized activity guide is displayed. This example uses a navigation collection instead of an actual activity guide.



Examples of Pages Associated with Custom Actions

Fluid activity guides can be configured with custom actions such as grant, notify, and overview among others.

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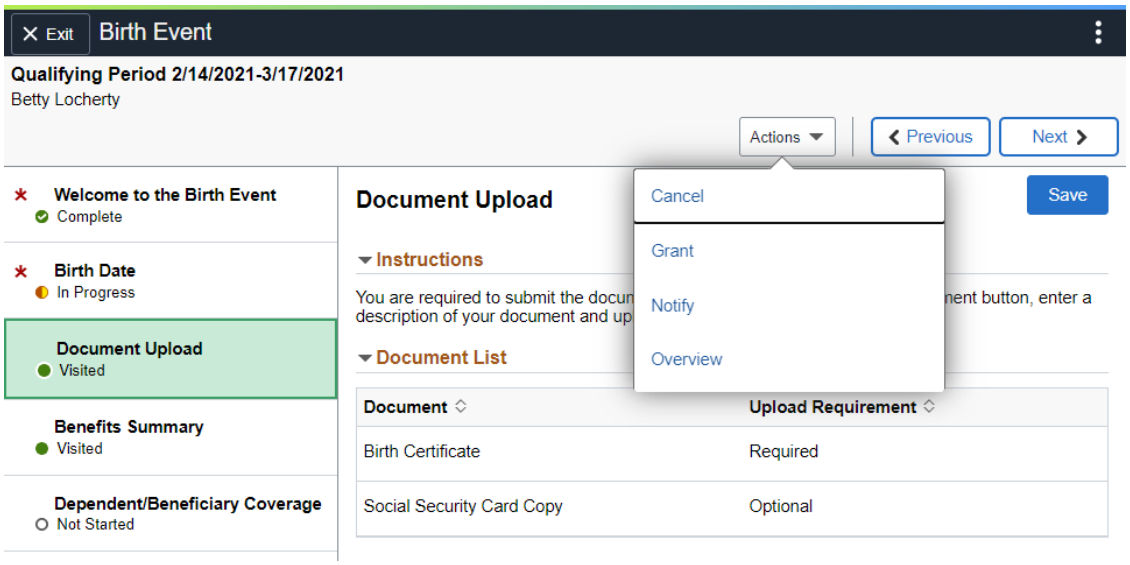
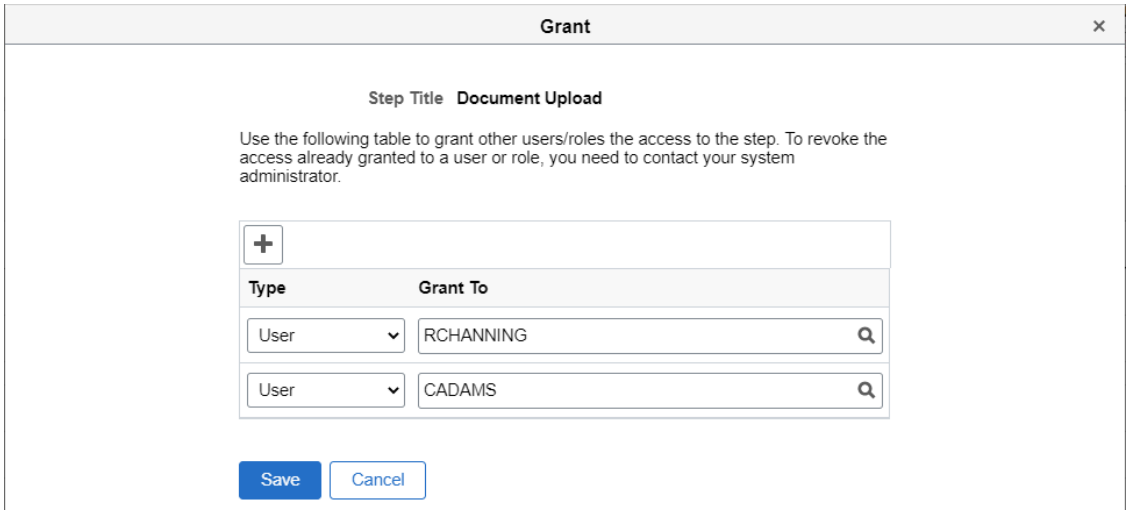
When configured, these custom actions are displayed under the Actions drop-down menu in the activity guide subbanner.

> **Note**
>
> The labels for the custom actions are also configurable.



The grant action enables you to grant access to an activity guide step to other users or roles who are also assigned as contributors on this activity guide.



The notify action allows you to send an ad hoc notification to specified users, roles, or email addresses. Depending on how activity guide notifications have been configured on your PeopleSoft system, the notification may be delivered as an in-app alert in the recipient's Notifications panel or via different delivery option. You can select the notification priority as well as specify whether a URL link to the activity guide is included in the notification.

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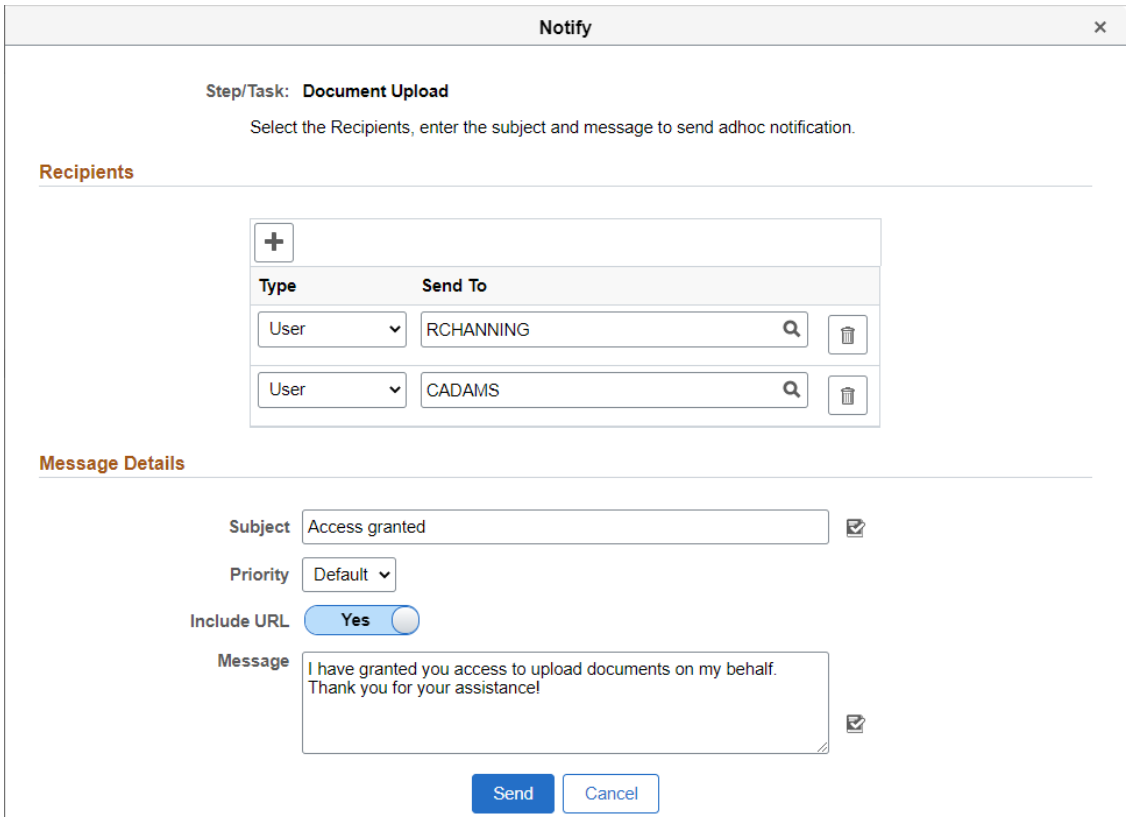
> **Note**
>
> If the recipient is not a contributor on this activity guide, then the link URL is not provided to that recipient.



Use the overview custom action to display an overview of the activity guide steps and their statuses.

> **Note**
>
> Depending on the configuration of the overview custom action, certain steps can be hidden and not displayed for certain users.

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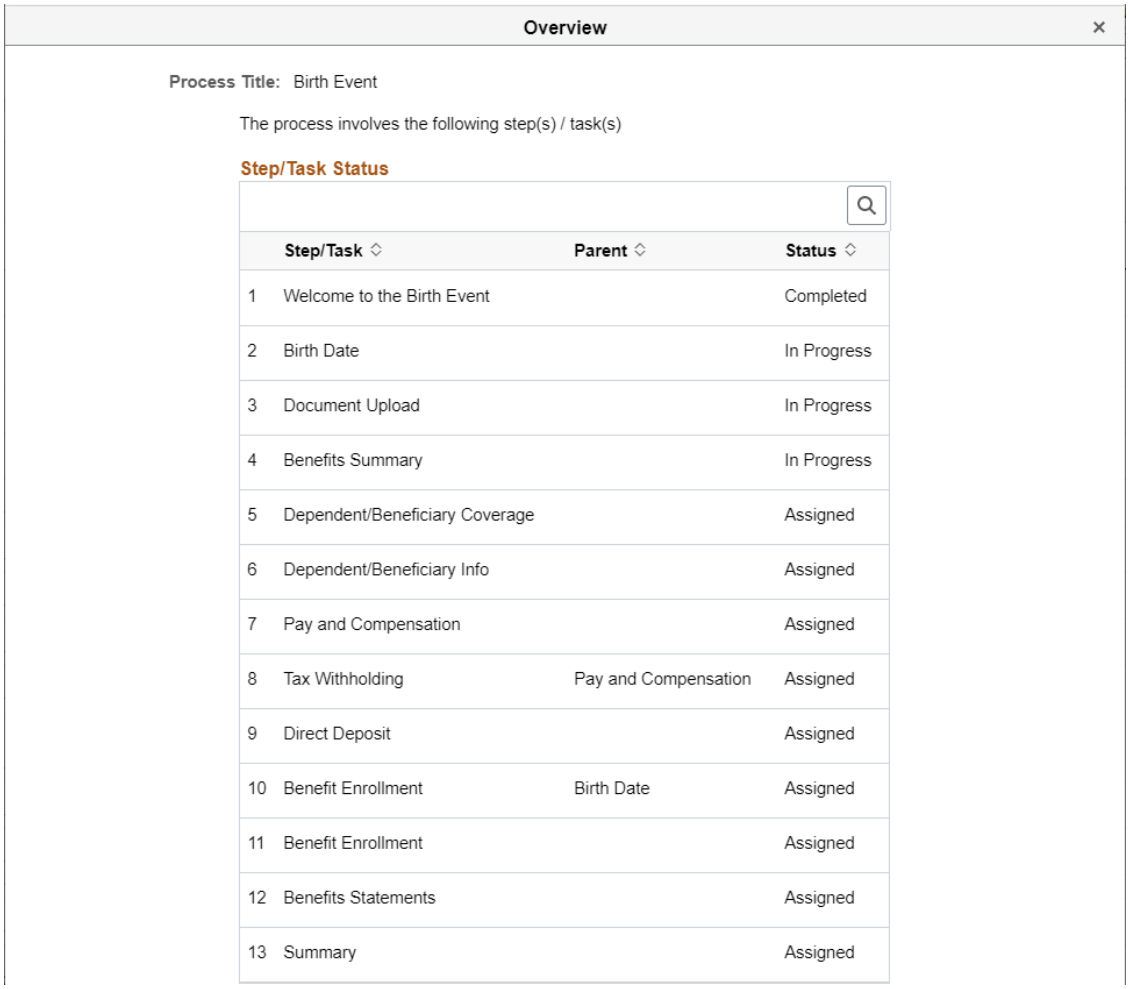

	Step/Task	Parent	Status
1	Welcome to the Birth Event		Completed
2	Birth Date		In Progress
3	Document Upload		In Progress
4	Benefits Summary		In Progress
5	Dependent/Beneficiary Coverage		Assigned
6	Dependent/Beneficiary Info		Assigned
7	Pay and Compensation		Assigned
8	Tax Withholding	Pay and Compensation	Assigned
9	Direct Deposit		Assigned
10	Benefit Enrollment	Birth Date	Assigned
11	Benefit Enrollment		Assigned
12	Benefits Statements		Assigned
13	Summary		Assigned

Delivered Activity Guides

This table lists PeopleTools-delivered activity guides:

Activity Guide	Link to Product Documentation
Application Services Registration Wizard	See Application Designer Developer's Guide: Understanding the Registration Wizard
IB Configure Network	See Integration Broker Administration: Accessing and Navigating the Integration Broker Configuration Activity Guide
IB On Demand	Not in use
Navigation Collection - Non-Optimized	See Portal Technology: Manually Creating Tile Definitions to Launch Fluid Navigation Collections
Navigation Collection - Optimized	See Portal Technology: Manually Creating Tile Definitions to Launch Fluid Navigation Collections
Setup Activity Guide	See Portal Technology: Using the Setup Activity Guide WorkCenter

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Activity Guide	Link to Product Documentation
Search Administration	See Search Technology: Understanding the Search Admin Activity Guide
Search Designer	See Search Technology: Understanding the Search Designer Activity Guide

Working With Mouse Over Pop-up Pages

PeopleSoft applications provide mouse over pop-up pages, which display additional, read-only, context- sensitive information that would otherwise clutter the main page. Pop-up pages are small pages that appear or *pop up* when you move your cursor over a pop-up-enabled edit field or link. Fields that have associated pop-up pages are indicated by a dashed underline.

Pop-up pages hover over the main page as long as you leave your mouse over the activating control. When you move your mouse, the pop-up window disappears.

When using the keyboard to tab through page fields, the hot key to open a mouse over pop-up is Ctrl+ Alt + P. To close the pop-up, press the escape button (Esc).

For a user in screen reader mode, for every mouse over control, the system displays an additional image that looks like an exclamation point ("!"). The screen reader user can click the image to display the mouse over popup page. The user can press the escape button (Esc) to close the mouse over pop-up page.

This example illustrates a sample pop-up page.

Accessing Embedded Help

Some scroll areas, grids, and group boxes display a question mark icon, which indicates that the page element has an embedded help message that is stored in the message catalog. Click the icon to make the help message appear in a pop-up page. The availability of embedded

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help is controlled by the application developer. Not all scroll areas, grids, and group boxes are configured for embedded help.

See Application Designer Developer's Guide: Configuring Embedded Help for Scroll Areas, Grids, and Group Boxes.

This example illustrates the embedded help icon in the scroll area and group box headers on a sample page.

Embedded help differs from the **Help** link in the navigation bar. If your system is configured for online help, clicking the **Help** link in the navigation bar causes a browser window to open and access page-specific product documentation. Clicking the embedded help icon causes a pop-up page to appear and display information that it retrieves from the Message Catalog. This information is generally more granular and specific to the functionality of the scroll area, grid, or group box that contains the embedded help icon. Embedded help pop-up pages can also contain active links that you click to access PeopleSoft application documentation, or any internal or external URL. When you have finished reading the information on the pop-up page, click the **Close** button on the pop-up page to dismiss it.

> **Note**
>
> Only one embedded help pop-up page can be open at a time. Clicking the help icon associated with another control will close any open pop-up page before opening a new one.

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5

Working With Grids and Scroll Areas

Understanding Grids and Scroll Areas

Scroll areas and grids serve as containers or organizers for multi-field data entry. You can think of all of the fields in each of these controls as belonging to one table in your database. In scroll areas, the fields appear on the page in a free form manner. In grids, fields appear as columns similar to those on a spreadsheet. Most scroll areas appear with even and odd rows in different colors. This enables you to visually distinguish rows at a glance. Additionally, when you select a row with the mouse, the row changes color to distinguish a selected row from other rows.

Three types of grid layouts appear in PeopleSoft applications:

- Original grids.
- Scrollable grids.
- Analytic grids.

Original Grids

Original grids are the standard grid layout in releases prior to PeopleTools 8.50. With original grids, you can see navigation headers and footers; insert, multi-row insert, and delete buttons; and grid separator tabs. If the Personalize link is enabled by the developer, you can search for data within the grid, sort grid data; and rearrange, freeze, and hide columns to personalize your grids.

See Viewing Data in Original Layout Grids.

Scrollable Grids

Unlike original grids, scrollable grids take advantage of AJAX technology, which enables you to change the grid structure and content directly on the grid. You can make changes to scrollable grids directly from the transaction page without using the Personalize link. Additionally, scrollable grids can be configured to scroll data within the grid control so as to keep frozen columns or column headers from scrolling out of view and scrollable grids enable you to navigate from cell to cell vertically and horizontally.

See Viewing Data in Scrollable Layout Grids.

Analytic Grids

Analytic grids look and function differently than original and scrollable grids. Analytic grids specifically retrieve data from the analytic server and display it in a grid format on a PeopleSoft Pure Internet Architecture page. The analytic grid is the centerpiece for the Analytic Calculation Engine user interface, enabling end users to view, edit, and drag and drop data from an analytic model cube collection.

Working with Analytic Grids

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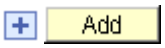
Navigating Through Data

Scroll areas and grids contain similar navigation structures . You can use navigation buttons, links, and grid scroll bars to navigate through data. Buttons and links appear in the navigation header, within the row itself, or to the right of the tabs in a tabbed grid, as appropriate. Certain options, such as embedded horizontal and vertical scroll bars, the **Personalize** link, and the zoom and download to spreadsheet icons, appear only on grids.

Using Navigation Buttons and Links

You can view data in grids and scroll area by using navigation buttons and links. The following table describes the buttons and links that might appear in a grid or scroll area.

Field or Control	Description
	Click to insert one new row after the current row.
	Click to insert multiple rows. Specify the number of rows (1 to 99).
	Click to delete the current row of data.
	(Show Next Row) Click to display the next row or set of rows of data. **Note:** The Show Next Row and Show Previous Row buttons are disabled if you are viewing all rows of data.
	(Show Previous Row) Click to display the previous row or set of rows of data.
	(Show All Columns) In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.
	(Show Tabs) In a tabbed grid only, click to return the expanded grid to its tabbed state.
Personalize	Click to access the personalization page for that grid, which enables you to sort by column and reorder, hide, and freeze columns.
	(Download to Excel) Click to download the grid contents to an Excel spreadsheet. **Note:** The downloaded file is named `PS_COMPONENT_NAME-datetime.xlsx`
	(Zoom) Click to display the grid in a modal window.
View All	Click to display the maximum number of rows available to be viewed at once on a page. When this feature is enabled, the link changes to read **View** *x* so that you can return to the original setting. The value of *x* can change, and the application developer sets it.
Find	Click to find a row of data containing a specified search string.

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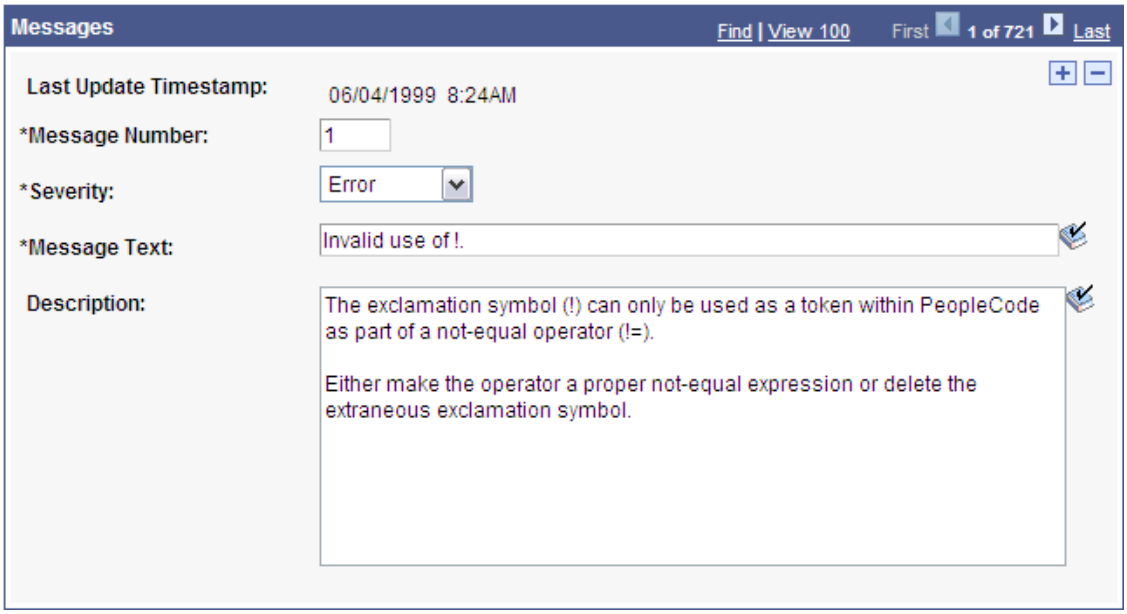
Field or Control	Description
First	Click to access the first row or set of rows of data. **Note:** The **First** and **Last** links are not available if you are viewing all rows at once, in which case you scroll to see your data.
Last	Click to access the last row or set of rows of data.

Keyboard shortcuts are also available for certain buttons. See Using Keyboard Shortcuts.

In addition to these links and buttons, rows use a numbering system. For example, if a grid or scroll area were set to view only one row at a time, then the navigation header might read *1 of 2* or *1 of 20*, depending on how many entries there were. If the grid or scroll area were set to view three rows of data at a time, it might read *1-3 of 20.* Click the arrows to view the next or previous series of rows. In the **Messages** scroll area, for example, the count indicates that it contains 721 total rows of data, displaying just one row at a time. Select **View 100** to see the rows in groups of 100 at a time.

This example shows a sample scroll area.



The example shows **View 100** instead of **View All** because of the personalization that limits the number of rows that appear in View All mode. Setting it too high could affect performance; the default setting is 100.

> **Note**
>
> Be aware of the differences between the grid and scroll area navigation header, which can appear as a header and a footer in any grid or scroll area control, and the **universal navigation header,** which appears in the upper-right corner of every page.

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Adding Rows

You can click the **Add** or **+** button to add an empty row following the current row.

In some cases, you can add several rows at once to your grid or scroll area by clicking the **+...** (multi-row insert) button. When you click this button, the system prompts you to specify the number of rows needed. You can add up to 99 rows at once. This option is not available unless configured by the application developer.

When a grid or scroll area references a table with no data in it, the runtime system presents a dummy row to allow the user to access the add row button. This row might have default data in some fields, but it has no instantiation on the database unless the user enters data in this row and clicks the **Save** button. Deleting the dummy row results in a new dummy row being added to the display.

> **Note**
>
> If you do not insert a new row, any data that you enter overwrites the existing data in the current row. However, the changes that you make do not take effect until you save the page. If you exit the page without saving, the original data remains intact. When working with effective-dated tables, you can only make changes to existing data when in Correction mode.

Considerations for Using Smart Prompt and Smart Drop-Down in Grids and Scroll Areas

Application developers can configure drop-down and prompt fields to respond to user choices and list or prompt values based on the recently used items or frequently used items. For more information on smart prompt and smart drop-down, refer to Using Drop-Down List Boxes and Using Smart Prompts.

The following considerations are applicable when you add a new row or when you edit an existing row.

In grids and scroll areas, the values displayed in the **Most Relevant** section are not specific to a row. When a user selects a value in any of the rows, this value is displayed in the **Most Relevant** section for any other rows too.

Note the following regarding default values and dynamic prompt tables in grids and scroll areas:

- If grid columns have different default values on page load, the user-selected values in the **Most Relevant** section will be the same for the entire column. However, the default value that appears within the **Most Relevant** section may differ based on the initial default value for each row.
- When a prompt table for a column changes dynamically based on another column (for example, Column 1 determines whether Column 2 prompts for a User or a Role option), smart prompt maintains uniqueness among rows that use the same prompt table.

Deleting Rows

You can also delete rows of data from a grid or scroll area. To delete a row of data, click the **Delete** or **–** button associated with the row you want to delete. The system confirms the deletion by asking if you want to proceed. It also reminds you that the row will not be deleted from the database until you save the transaction; however, the row is automatically removed

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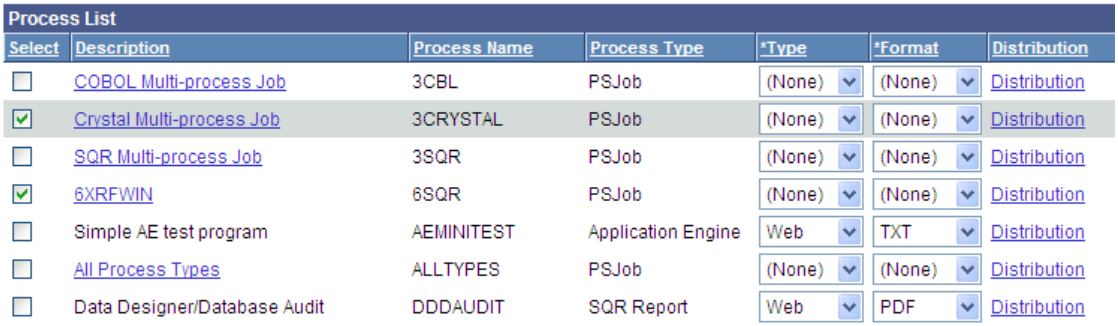
from the grid or scroll area. To retrieve the row, click the **Back** button in your browser. You can also retrieve the deleted row by closing the transaction without saving your changes, however, all changes to the entire component since the last save are lost.

Selecting Rows

For certain grids and scroll areas, you can select a single row or multiple rows in case you need to batch a number of processes. Single-row selection is available when the system displays a radio button to the left of each grid row or in the upper-left corner of a scroll area. Select a row by selecting one of the radio buttons in front of the row. Multiple-row selection is available when the system displays a check box to the left of each grid row and in the upper-left corner of a scroll area. Select as many rows as you need by selecting each check box. This option must be enabled by the application developer.

In this example, the **Process List** grid shows check boxes, which enable you to select multiple rows for processing.

This example illustrates using the **Select** check box to select rows.



Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☐	COBOL Multi-process Job	3CBL	PSJob	(None)	(None)	Distribution
☑	Crystal Multi-process Job	3CRYSTAL	PSJob	(None)	(None)	Distribution
☐	SQR Multi-process Job	3SQR	PSJob	(None)	(None)	Distribution
☑	6XRFWIN	6SQR	PSJob	(None)	(None)	Distribution
☐	Simple AE test program	AEMINITEST	Application Engine	Web	TXT	Distribution
☐	All Process Types	ALLTYPES	PSJob	(None)	(None)	Distribution
☐	Data Designer/Database Audit	DDDAUDIT	SQR Report	Web	PDF	Distribution

Finding Data

The find feature on grids and scroll areas enables you to locate specific data. This feature is particularly useful if your table contains hundreds of rows. Note that this feature enables you to search the data within a specific grid or scroll area only. It does not search for any data outside the control. The find feature looks for matches in edit boxes, display-only fields, disabled or shaded fields, dynamic links, and text in long edit boxes. It does not find column headings, field labels, text values on icons, static links, and hidden fields. It also does not search HTML areas that are on the grid or scroll area. Find starts looking in the current row in a grid on fluid pages and in the next row after the current row on classic pages. On all page types, a subsequent find with the original search string will skip a second and any additional occurrences of the search string in the same row.

The **Find** link or the Find button (on fluid grids) represents the find feature in the navigation bar of your grid or scroll area. Clicking this link displays a dialog box prompting you to enter your search string. In standard grid mode, the find feature searches through all rows of data in the buffer and brings the first occurrence in your search string to the top of the row list in the grid. In a fluid grid, focus is placed on the found search string regardless of whether the field is editable. In a classic grid, the row containing the string is displayed at the top of the row list in the grid. If the found search string is on a field that is editable, focus is set on that field. If the field with the found search string is not an editable field, focus is placed on the first editable field in the row; if no fields on the row are editable the row containing the string is displayed at the top of the row list in the grid without focus on any field.In View All grid mode, the find feature searches through all rows of data in the buffer, however it does not bring the first

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occurrence in your search string to the top of the row list in the grid. Instead it highlights the found row. If you are in a scroll area that displays only one row of data at a time, the find feature opens that row of data. To find the next occurrence, click the **Find** link and enter your search string again.

If your search string does not appear in the currently visible rows, the find feature opens a new display of rows so that the row containing the search string appears in the grid.

On tabbed grids, the find feature searches all tabs to locate the search string. If your search string does not appear in the currently active tab, the find feature moves to the tab where the row containing the search string appears in the grid and makes active the tab where the string is found.

Each grid or scroll area control, if it is set up to perform a find, has a separate **Find** link in the navigation header of that control. If a scroll area has nested grids or scroll areas, the find feature searches only the current scroll level; it does not search the nested lower-level data.

> **Note**
>
> Your browser may also have a find feature. This tool, however, does not search through data in the entire data buffer for the grid or scroll area. It searches the HTML code for what appears on the current open page only. Thus, it searches field headings, read-only text, and headings in grids, group boxes, and scroll areas only.

Viewing Data in Scroll Areas

This section provides an overview of data in scroll areas and discusses how to collapse and expand scroll areas.

Understanding Data in Scroll Areas

In a scroll area, each self-contained occurrence represents one row of data in a database. Within a scroll area, the fields might be randomly arranged rather than arranged like a spreadsheet. These field groupings, although not necessarily displayed in a row, should still be considered as rows of data in a database.

A scroll area looks like a group box with navigation buttons and links in the navigation header. Scroll areas do not contain scroll bars. Instead, you use the buttons and links in the navigation header to scroll through the data rows.

You click the Insert Row (+) and Delete Row (-) buttons to enter data and remove data from the database tables.

See Navigating Through Data.

This example illustrates the Messages scroll area.

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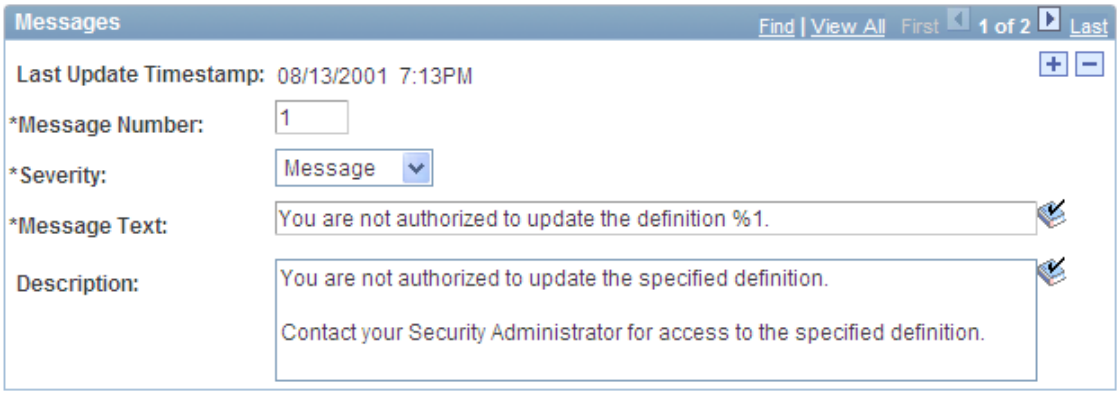
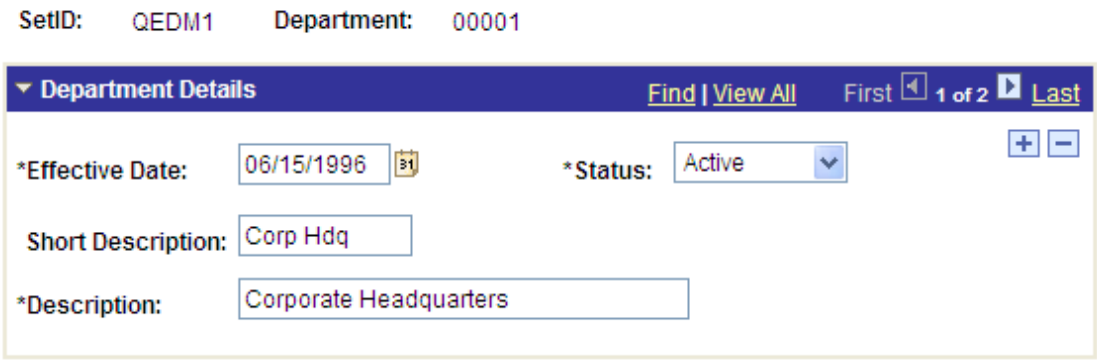


Collapsing and Expanding Scroll Areas

Some scroll areas are configured so that you can collapse them so that only the header shows. This capability is indicated by a triangle that appears at the right-most side inside the navigation header. Click the triangle to toggle between the expanded (visible) and collapsed (hidden) views.

These examples show both the collapsed and expanded states of the Department Details scroll area:

This example illustrates the Department Details scroll area in the expanded state.



This example illustrates the Department Details scroll area in the collapsed state.

> **Note**
>
> Application developers set whether the initial state of the grid is collapsed or expanded in Application Designer.

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See Application Designer Developer's Guide: Using Scroll Areas and Scroll Bars.

Viewing Data in Original Layout Grids

Original layout grids offer several functional benefits that scroll areas do not. This section discusses how to work with original layout grids.

Working with Grid Tabs

If the number of columns in a grid precludes you from viewing all of the grid data simultaneously without the page being cluttered, developers might design the grid so as to group and separate columns with tabs. This section discusses:

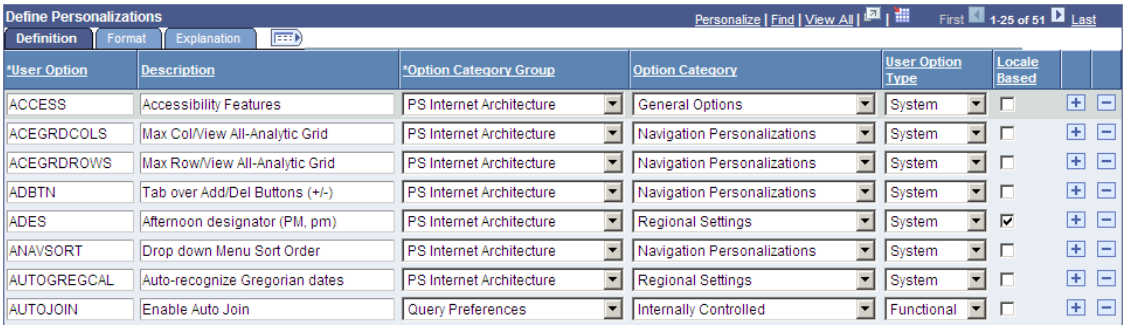
- Grid tabs
- Cell navigation

Grid Tabs

Grid tabs enable you to view groups of data columns simultaneously with little or no scrolling of the entire page to the right.

In this example, you see the **Define Personalizations** grid and the Definition, Format, and Explanation tabs. Notice the **Show All Columns** button to the right of the Explanation tab.

This example illustrates the Define Personalizations grid showing three tabs.



*User Option	Description	*Option Category Group	Option Category	User Option Type	Locale Based
ACCESS	Accessibility Features	PS Internet Architecture	General Options	System	☐
ACEGRDCOLS	Max Col/View All-Analytic Grid	PS Internet Architecture	Navigation Personalizations	System	☐
ACEGRDROWS	Max Row/View All-Analytic Grid	PS Internet Architecture	Navigation Personalizations	System	☐
ADBTN	Tab over Add/Del Buttons (+/-)	PS Internet Architecture	Navigation Personalizations	System	☐
ADES	Afternoon designator (PM, pm)	PS Internet Architecture	Regional Settings	System	☑
ANAVSORT	Drop down Menu Sort Order	PS Internet Architecture	Navigation Personalizations	System	☐
AUTOGREGCAL	Auto-recognize Gregorian dates	PS Internet Architecture	Regional Settings	System	☐
AUTOJOIN	Enable Auto Join	Query Preferences	Internally Controlled	Functional	☐

To view all columns without tabs:

1. Click the **Show All Columns** button just below the navigation header of the grid.

   Showing all columns can expand the width of the web page so that a browser scroll bar appears at the bottom of the browser window.

   Alternatively, some grids may have an **Expand All** button to the right of the tabs, which enables you to expand the grid columns to the right so that no tabs appear.

2. You use the browser scroll bar to scroll left and right to view the data columns.

> **Note**
>
> When in the expanded view, you cannot freeze columns because the entire grid moves with the page.

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To restore the grid to its original state, click the **Show Tabs** button.

Cell Navigation

In original grids, you can navigate through cells in these ways:

- Press **Tab** to move one field or page element to the right.

  Movement continues from row to row and outside the grid.
- Press **Shift + Tab** to move one field or page element to the left.

  Movement continues from row to row, into the column headers, and outside the grid.

Moving, Freezing, and Resizing Columns

You can only move and freeze columns by using the **Personalize** link.

Only application developers can resize columns in an original layout grid by accessing the grid properties in Application Designer.

See Personalizing Grid Column Appearance.

See Application Designer Developer's Guide: Inserting and Resizing Grid Controls.

Changing Column Sort Order

You can change the sort order of a grid column directly on a transaction page. Sorts persist only as long as you are on a page. You can toggle between ascending and descending order by repeatedly clicking the column header. The last column header that you click becomes the primary sort for the grid. Grids enable you to have primary, secondary, and tertiary sorts. Original layout grids have no visual cue to indicate the sort order.

> **Note**
>
> Sorting is disabled on columns consisting of radio button fields.

You can also change the sort order by using the **Personalize** link. This type of sort persists until you change it by using the **Personalize** link again.

See Personalizing Grids.

See Removing User-Specific Grid Settings.

Removing User-Specific Grid Settings

You can remove user-specific settings such as sorts and column changes, which restores the default grid settings. To remove user-specific grid settings:

1. Click the **Personalize** link.
2. On the Personalize Column and Sort Order page, click the **Delete Settings** link.

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> **Note**
>
> If no **Delete Settings** link is available, click the **OK** button to restore the default settings.

3. On the Delete Settings page, click the **Delete** button.
4. On the Personalize Column and Sort Order page, click the **OK** button to restore the default settings.

Downloading Grid Data

Some grids enable you to download grid data to a Microsoft Excel spreadsheet. The download feature extracts all active, non-hidden rows, regardless of whether the rows are visible on your screen.

To download grid data, click the **Download** button in the navigation bar of the grid.

Depending on your browser setting, a download dialog window may open and prompt you to save the downloaded spreadsheet.

> **Note**
>
> Ensure that you disable any pop-up blockers in your browser.

Date and DateTime data are downloaded in the canonical format and Excel honors the regional settings of the user's machine while displaying Date and DateTime.

> **Note**
>
> The system downloads all field types (columns) with the exception of images. Hyperlinks are downloaded as quoted text of the field labels, even though the labels may contain numeric values. If any numeric calculations are to be performed based on hyperlink, you must manually convert the text strings to numeric values after downloading the spreadsheet.

Subscribe to the following technical bulletin on My Oracle Support for the latest information: PIA Grids Download to Excel Functionality (Doc ID 2988403.1).

Note the following characteristics when you download the grid data as a Microsoft Excel (.xlsx) file:

- The downloaded Excel file name follows this format: PS_<Component>_<TimeStamp>.xlsx.
- Date and DateTime values are exported in a canonical format, which aligns with the regional settings of the user's machine.
- Dates in the Excel file use the short Date format (regional settings of the user's machine).
- DateTime in the Excel file uses the Custom format. The date part uses short date format and the time part uses the long time format (regional settings of the user's machine).

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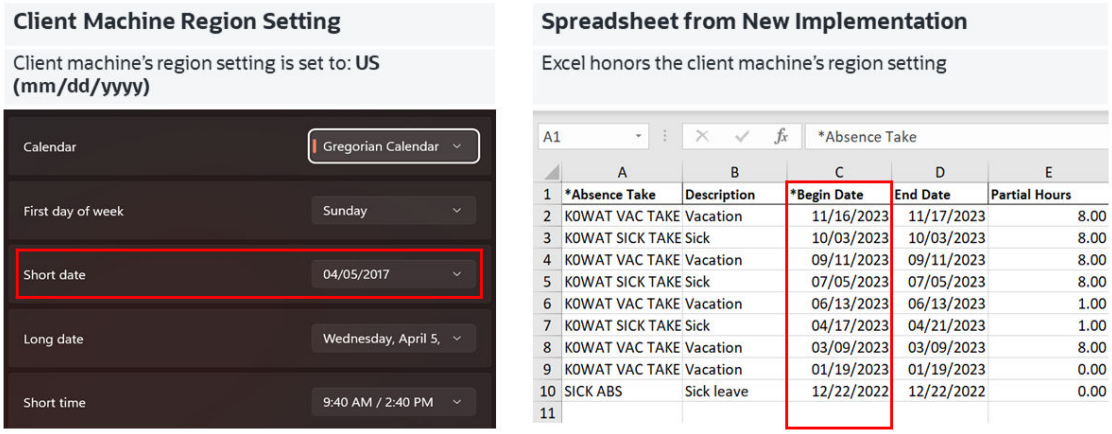
- Character fields are exported as-is, even if they contain numeric values. Leading zeros are preserved.
- If a DateTime field in the grid includes timezone information, it is exported as a DateTime value without the timezone; the date and time information is retained, but milliseconds are not displayed.
- Currency symbols, thousand separators, and decimal separators are preserved.

The following screenshot highlights the regional settings in the downloaded spreadsheet (xlsx).

Client machine regional setting supported in spreadsheet



The download to Excel feature requires the fontconfig package.

See PeopleSoft 9.2 Application Installation for your database platform, "Completing the Installation," to install the fontconfig package.

Fallback Mechanism

If you encounter any issues preventing the use of the .xlsx file, you can use the .xls format as a fallback by setting the Download to Excel as XLS option on the PeopleTools Feature Options page. You can follow these steps:

1. Navigate to PeopleTools, Utilities, PeopleTools Feature Options.
2. Set the **Download to Excel as XLS** option to Yes. The default is .xlsx format.

For information on the .xls format, refer to the Download to Excel (.xls extension) section on this document PIA Grids Download to Excel Functionality (Doc ID 2988403.1).

Collapsing Grids

You might also encounter grids that you can collapse or expand. Click the right-pointing triangle in front of the grid heading to expand a grid that is hidden from view (collapsed).

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

This image illustrates the Component Interfaces grid in the collapsed state.

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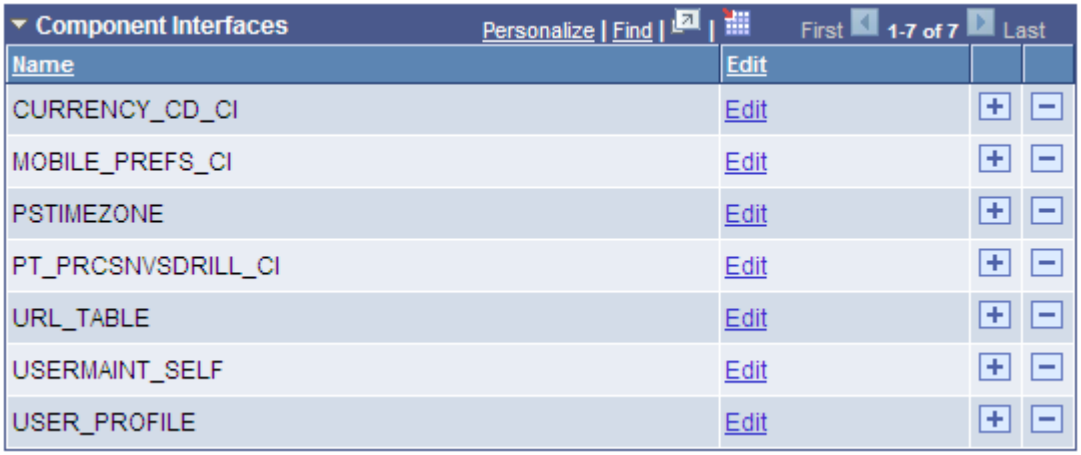
This image illustrates the Component Interfaces grid in the expanded state.



> **Note**
>
> Application developers set whether the initial state of the grid is collapsed or expanded in Application Designer.

See Application Designer Developer's Guide: Using Scroll Areas and Scroll Bars.

Displaying Grids in Modal Windows

Some grids enable you to zoom the grid to a modal window. When you click the **Zoom** icon, the grid and its data appear in a modal window over the main page, which is grayed out.

While in the modal window, you can work with the grid just as you would if the grid were on the primary page, for example, you can insert and delete rows. You must return to the primary page to save any changes to your data.

To return to the primary page, click the **Return** button at the bottom of the grid in the modal window.

> **Note**
>
> You can disable the Display in Modal Window functionality for a grid by changing its properties in Application Designer.

See Application Designer Developer's Guide: Using Grids

Viewing Data in Scrollable Layout Grids

Scrollable grids offer several functional benefits that original grids and scroll areas do not. This section discusses how to work with scrollable grids:

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Working with Grid Tabs and Scroll Bars

Developers might design the grid so as to group and separate columns with tabs. Developers might also include vertical and horizontal scroll bars in the grid control. Both grid tabs and scroll bars enable you to view all data columns and have some advantages when used together in scrollable grids. This section discusses:

- Grid tabs
- Grid scroll bars
- Cell navigation

Grid Tabs

Grid tabs enable you to view groups of data columns without scrolling to the right. By clicking the **Show All Columns** button just below the grid's navigation header, you can view all columns in the grid. Showing all columns, if used in conjunction with grid scroll bars, cause a horizontal grid scroll bar to appear.

To view all columns without tabs:

1. Click the **Show All Columns** button just below the grid's navigation header
2. When the grid expands, use either the horizontal grid scroll bar, if enabled, or the browser scroll bar to scroll left and right to view the data columns.

> **Note**
>
> If the expanded grid has many frozen columns, the page might expand so that the horizontal browser scroll bar appears and must be used to view all columns.

To restore the grid to its original state, click the **Show Tabs** button.

Grid Scroll Bars

On scrollable grids, developers can configure horizontal and vertical scroll bars to appear within the grid control, which enables you to scroll through data within the grid. Note these points about grid scroll bars:

- An advantage of grid scroll bars is that frozen columns and column headers are stationary.
- Another advantage is that you can scroll data within the grid without having to use the browser scroll bar, thus other data on the page stays in view.
- Application developers can configure a scrollable grid to display the horizontal and vertical scroll bars independently of one another.
- Application developers can configure grid scroll bars and grid tabs to work together or separately.

In this example, you see the **Define Personalizations** grid showing the Definition, Format, and Explanation tabs. Notice the horizontal and vertical scroll bars inside the grid control.

This example illustrates grid scroll bars in the Define Personalizations grid.

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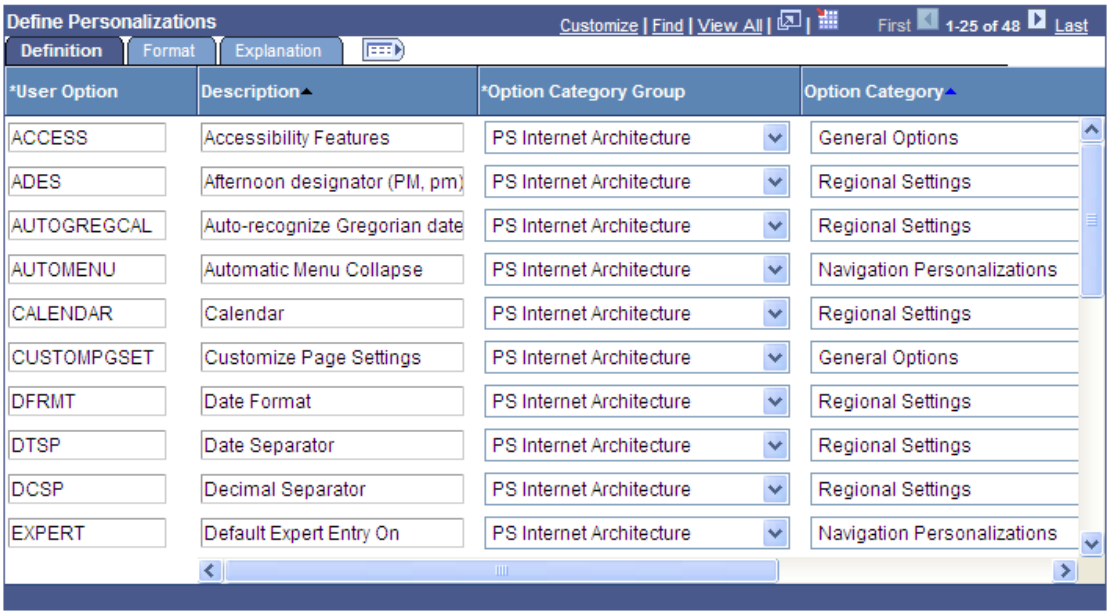


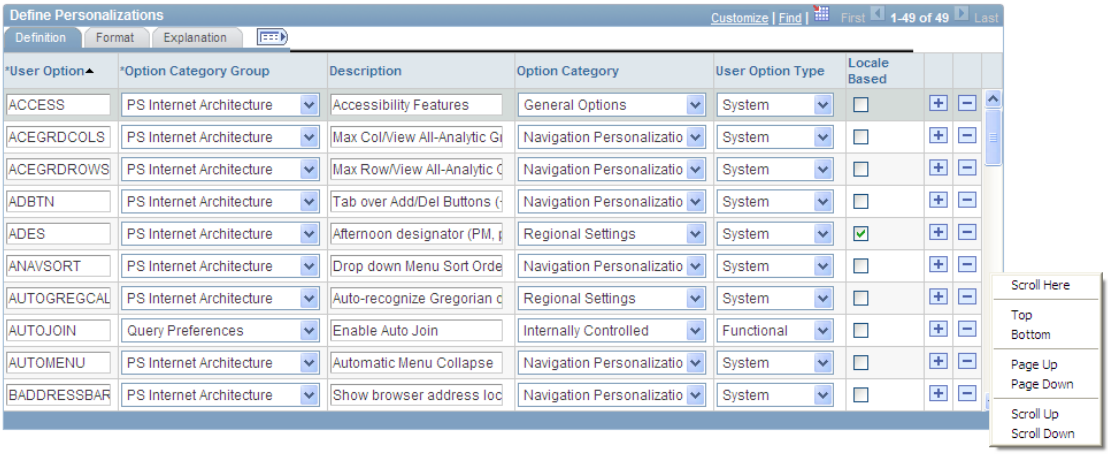
> **Note**
>
> Be aware that the horizontal and vertical scroll bars for the grid appear at the far right and bottom sides within the grid control; the horizontal and vertical scroll bars for the browser appear at the far right and bottom sides of the browser window.

See Application Designer Developer's Guide: Using Grids.

Grid Scroll Bar Pop-up Menus

If you right-click on the horizontal and vertical grid scroll bars, contextual pop-up menus appear.

This example illustrates a scroll bar contextual pop-up menu.



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This table describes the contextual pop-up menu options:

Field or Control	Description
Scroll Here	Select to move the scroll slider so that the center of the slider is located under the cursor.
Left Edge	Select to move the horizontal scroll slider to the far left of the grid.
Right Edge	Select to move the horizontal scroll slicer to the far right of the grid.
Top	Select to move the vertical scroll slider to the top of the grid.
Bottom	Select to move the vertical scroll slider to the bottom of the grid.
Page Up	Select to move the rows up the length of one visible set of rows. For example, if 12 rows are showing in a grid, then selecting this option moves the rows in increments of 12 rows at a time. The bottom row becomes the top row.
Page Down	Select to move the rows down the length of one visible set of rows. For example, if 12 rows are showing in a grid, then selecting this option moves the rows in increments of 12 rows at a time. The top row becomes the bottom row.
Page Left	Select to move the columns to the left the width of one visible set of columns. The far right column becomes the left-most column in view.
Page Right	Select to move the columns to the right the width of one visible set of columns. The far left column becomes the right-most column in view.
Scroll Up	Select to move the rows up one row.
Scroll Down	Select to move the rows down one row.
Scroll Left	Select to move the scroll slider five pixels to the left.
Scroll Right	Select to move the scroll slider five pixels to the right.

Cell Navigation

In scrollable grids, you can navigate through cells in these ways:

- Press the **Shift + Up Arrow** keys to move up one cell.

  Movement ceases at the top of the column.
- Press the **Shift + Down Arrow** keys to move down one cell.

  Movement ceases at the bottom of the column.
- Press the **Shift + Right Arrow** keys to move right one cell.

  Movement ceases at the end of the row.

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> **Note**
>
> If you do not hold down the **Shift** key, the cursor moves only within the current field.

- Press the **Shift + Left Arrow** keys to move left one cell.

  Movement ceases at the beginning of the row.

> **Note**
>
> If you do not hold down the **Shift** key, the cursor moves only within the current field.

- Press the **Tab** key to move one field or page element to the right.

  Movement continues from row to row and outside the grid.
- Press the **Shift + Tab** keys to move one field or page element to the left.

  Movement continues from row to row, into the column headers, and outside the grid.

> **Note**
>
> When using these methods to navigate, the cursor will move to fields within the grid. If grid scroll bars are present, the cursor will cause the grid to scroll as it moves through rows. If grid tabs are present, the cursor will *not* cause the tab to change as it moves through rows.

> **Important**
>
> If the grid navigation header is not present or if the **Personalize** link is not present in the navigation header, then cell navigation is identical to that of the original layout grid.

Moving, Freezing, and Resizing Columns

You can change the column order, freeze columns, and resize columns in a scrollable grid directly within the grid control. Moved and frozen columns persist until you change them. Resized columns persist until you leave the page.

> **Important**
>
> If the grid navigation header is not present or if the **Personalize** link is not present in the navigation header, you cannot move, freeze, or resize grid columns.

Moving Grid Columns

To move columns:

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1. Place the cursor on the column header label.

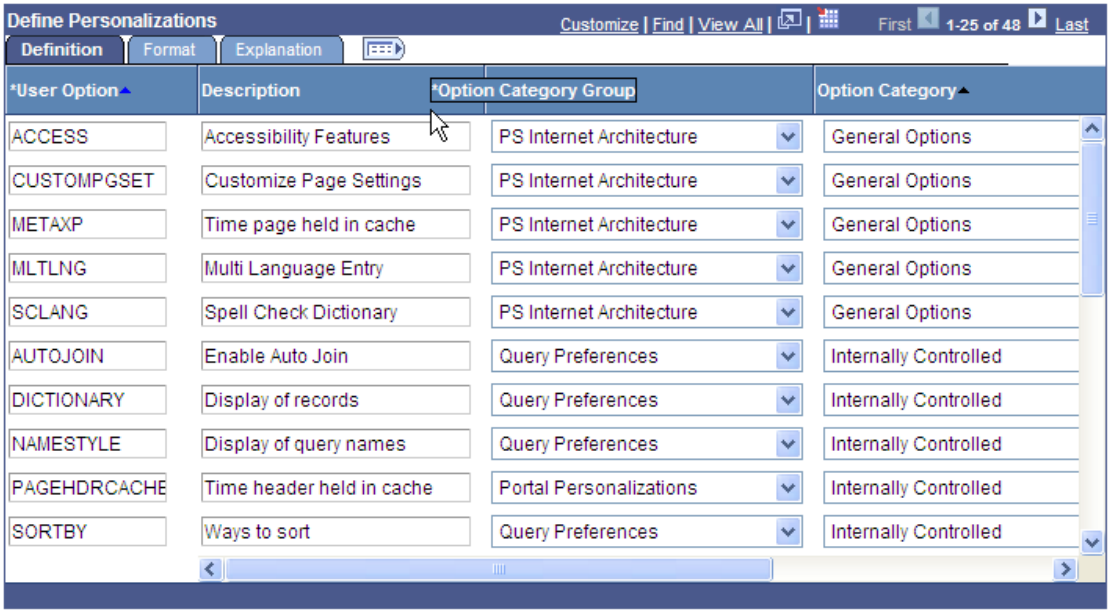
   The cursor image becomes a hand.

2. When the cursor changes shape, click the column label and drag the column to its new location.

   As you drag the column, a border appears around the column header label, and the label moves with the cursor.

3. When you have the column in the desired location, release the mouse to drop the column.

This example illustrates moving the Option Category Group column.



You can also change the column order by using the **Personalize** link.

> **Note**
>
> Drag-and-drop functionality is enabled only if the grid can be personalized. If you do not see the **Personalize** link in the grid header, you cannot drag and drop columns.

Freezing Grid Columns

A grid can be divided into left and right panes. If the grid is divided, the left pane contains the frozen columns and right pane contains the other columns. If enabled, a horizontal scroll bar appears in the right pane if the columns are wider than the right panel width. If the grid has frozen columns, you can freeze other columns on the transaction page.

To freeze grid columns:

1. Place the cursor on the column header label.

   The cursor image becomes a hand.

2. When the cursor changes shape, click the column label and drag the column to its new location.

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As you drag the column, a border appears around the column header label, and the label moves with the cursor.

3. When you have the column in the frozen column area (to the left of the leading edge of the horizontal scroll bar), release the mouse to drop the column.

You can unfreeze columns by dragging them out of the frozen area.

> **Note**
>
> If the grid has only one frozen column, the grid does not allow you to unfreeze that column by dragging it. You must use the **Personalize** link. Likewise, if you see no frozen columns, you cannot drag a column to freeze it; you must use the **Personalize** link.
>
> If the grid has multiple tabs, you can drag a column into the frozen area on the first tab only.

> **Note**
>
> Drag-and-drop functionality is enabled only if the grid can be personalized. If you do not see the **Personalize** link in the grid header, you cannot drag and drop columns.

Resizing Grid Columns

To resize grid columns on a transaction page.

1. Move the cursor into the column header.
2. When the mouse changes to a hand, click and drag to resize the column.
3. When the column is the size you want, release the mouse.

> **Note**
>
> You cannot resize columns to be smaller than the column header width.

This example illustrates resizing the **Description** column.

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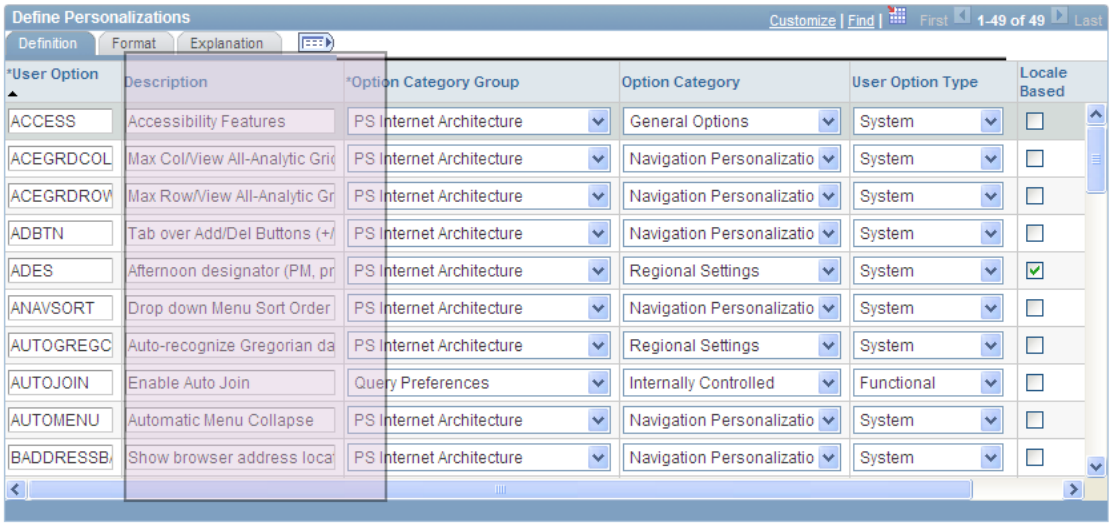

Removing User-Specific Grid Settings

You can remove user-specific settings, thereby restoring the default grid settings. To remove user-specific grid settings:

1. Click the **Personalize** link.
2. On the Personalize Column and Sort Order page, click the **Delete Settings** link.
3. On the Delete Settings page, click the **Delete** button.
4. On the Personalize Column and Sort Order page, click the **OK** button.

Related Topics

- Personalizing Grids
  This section discusses how to personalize grids.

Changing Column Sort Order

You can change the sort order of grid columns without leaving the transaction page. Click a single column header to toggle between ascending and descending order. Click multiple column headers in the reverse order that you want to sort them with the last column header that you click becoming the primary sort for the grid. Grids enable you to have primary, secondary, and tertiary sorts. A dark blue arrow to the right of a column header indicates a primary sort; a light blue arrow indicates a secondary or tertiary sort. Any sort changes that you make to a grid remain in place until you change them.

> **Note**
>
> Sorting is disabled on columns consisting of radio button fields.

See Removing User-Specific Grid Settings.

In this example of the **Define Personalizations** grid, the **Description** field displays the primary descending sort, the **Option Category Group** field displays the secondary descending sort, and the **Option Category** field displays no sort:

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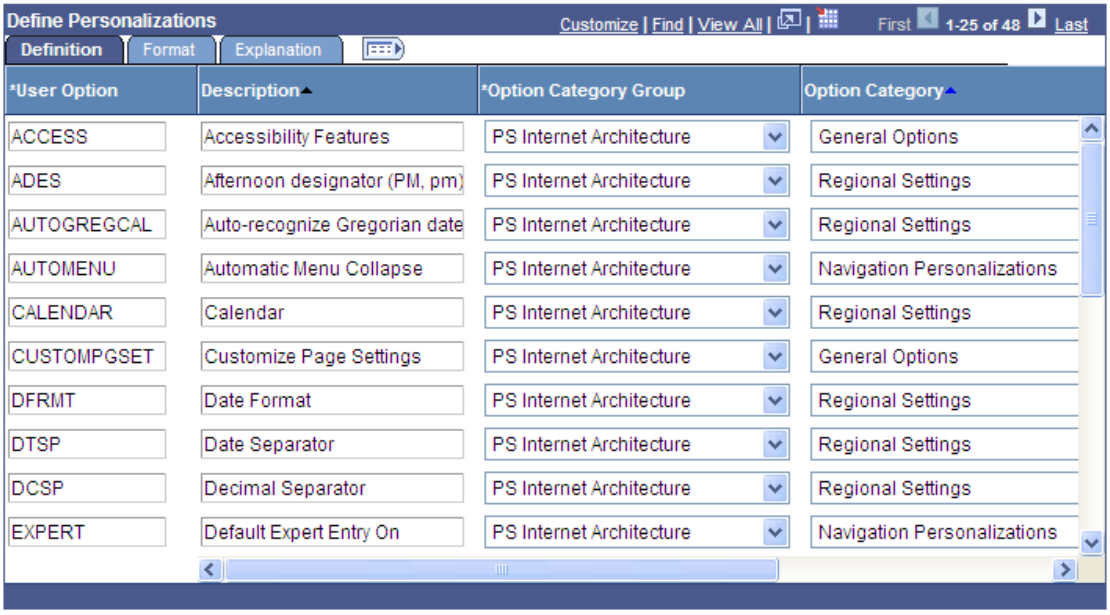
This example illustrates the user-specified sort order on the **Define Personalizations** grid.



You can also change the sort order by using the **Personalize** link.

Related Topics

- Personalizing Grids
  This section discusses how to personalize grids.

Downloading Grid Data

Some grids enable you to download grid data to a Microsoft Excel spreadsheet. The download feature extracts all active, non-hidden rows, regardless of whether the rows are visible on your screen.

To download grid data, click the **Download** button in the navigation bar of the grid.

Depending on your browser setting, a download dialog window may open and prompt you to save the downloaded spreadsheet.

> **Note**
>
> Ensure that you disable any pop-up blockers in your browser.

Date and DateTime data are downloaded in the canonical format and Excel honors the regional settings of the user's machine while displaying Date and DateTime.

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> **Note**
>
> The system downloads all field types (columns) with the exception of images. Hyperlinks are downloaded as quoted text of the field labels, even though the labels may contain numeric values. If any numeric calculations are to be performed based on hyperlink, you must manually convert the text strings to numeric values after downloading the spreadsheet.

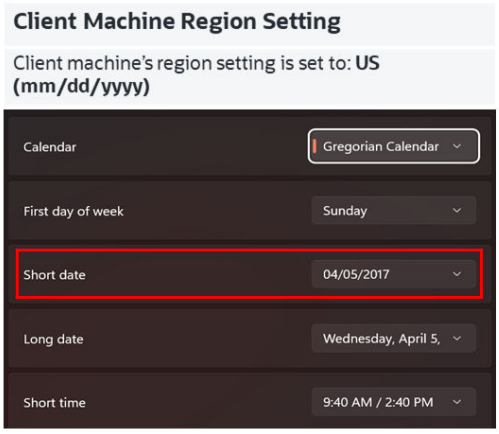
Subscribe to the following technical bulletin on My Oracle Support for the latest information: PIA Grids Download to Excel Functionality (Doc ID 2988403.1).

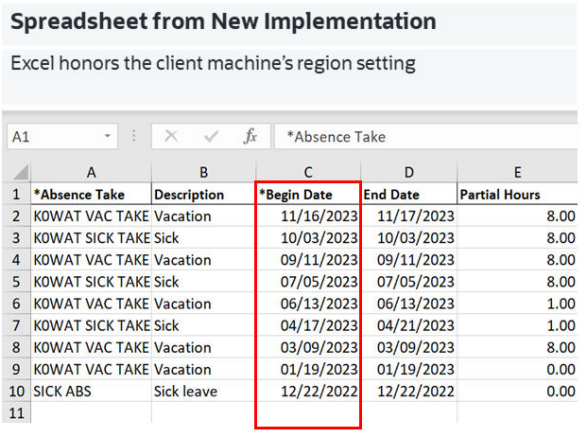
Note the following characteristics when you download the grid data as a Microsoft Excel (.xlsx) file:

- The downloaded Excel file name follows this format: PS_<Component>_<TimeStamp>.xlsx.
- Date and DateTime values are exported in a canonical format, which aligns with the regional settings of the user's machine.
- Dates in the Excel file use the short Date format (regional settings of the user's machine).
- DateTime in the Excel file uses the Custom format. The date part uses short date format and the time part uses the long time format (regional settings of the user's machine).
- Character fields are exported as-is, even if they contain numeric values. Leading zeros are preserved.
- If a DateTime field in the grid includes timezone information, it is exported as a DateTime value without the timezone; the date and time information is retained, but milliseconds are not displayed.
- Currency symbols, thousand separators, and decimal separators are preserved.

The following screenshot highlights the regional settings in the downloaded spreadsheet (xlsx).

Client machine regional setting supported in spreadsheet





The download to Excel feature requires the fontconfig package.

See PeopleSoft 9.2 Application Installation for your database platform, "Completing the Installation," to install the fontconfig package.

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Fallback Mechanism

If you encounter any issues preventing the use of the .xlsx file, you can use the .xls format as a fallback by setting the Download to Excel as XLS option on the PeopleTools Feature Options page. You can follow these steps:

1. Navigate to PeopleTools, Utilities, PeopleTools Feature Options.
2. Set the **Download to Excel as XLS** option to Yes. The default is .xlsx format.

For information on the .xls format, refer to the Download to Excel (.xls extension) section on this document PIA Grids Download to Excel Functionality (Doc ID 2988403.1).

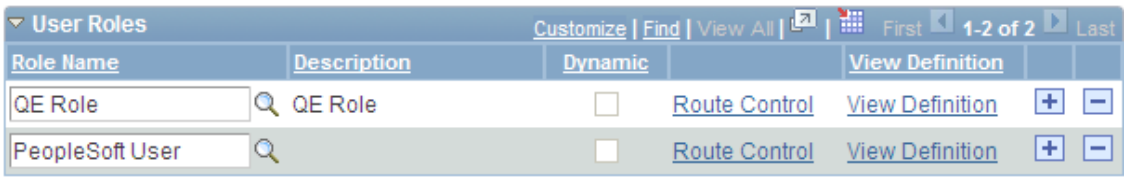
Collapsing Grids

You might encounter grids that you can collapse or expand. Click the right-pointing triangle in front of the grid heading to expand a grid that is hidden from view (collapsed).

These examples show both the collapsed and expanded states of the **User Roles** grid:

This example illustrates the **User Roles** grid in the collapsed state.

This example illustrates the **User Roles** grid in the expanded state.



> **Note**
>
> Developers set the initial state of the grid in Application Designer.

Application Designer Developer's Guide: Using Grids

Displaying Grids in Modal Windows

Some grids enable you to zoom the grid to a modal window. When you click the Zoom icon, the grid and its data appear in a modal window over the main page, which is grayed out.

While in the modal window, you can work with the grid just as you would if the grid were on the primary page, for example, you can insert and delete rows. You must return to the primary page to save any changes to your data.

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To return to the primary page, click the Return button that you find at the bottom of the grid in the modal window.

> **Note**
>
> You can disable the Display in Modal Window functionality for a grid by changing its properties in Application Designer.

Application Designer Developer's Guide: Using Grids

Personalizing Grids

This section discusses how to personalize grids.

Understanding Grid Personalization

For most grids, including some analytic grids, you can use the **Personalize** link to change the order of the columns, the sort order, which columns are frozen, and which columns are hidden. You can also share your grid personalization with other users or copy another user's settings. You control these settings on the Personalize Column and Sort Order page, which you open by clicking the **Personalize** link in the navigation header of the grid. Any personalizations that you make to a grid remain in place until you change them.

> **Note**
>
> Sorting is disabled on columns consisting of radio button fields.

After you've personalized the columns in a grid and saved your settings, if your system administrator inserts a new column in that grid, the system preserves the column personalization in the grid and displays the newly inserted column as the last column in the grid.

If the grid contains tabs, then the system preserves the column personalization in the grid and displays the newly inserted column as the last column in the tab, the same tab in which the system administrator inserted the new column.

Access the Personalize Column and Sort Order page (click the **Personalize** link on a grid).

This example illustrates the fields and controls on the Personalize Column and Sort Order page.

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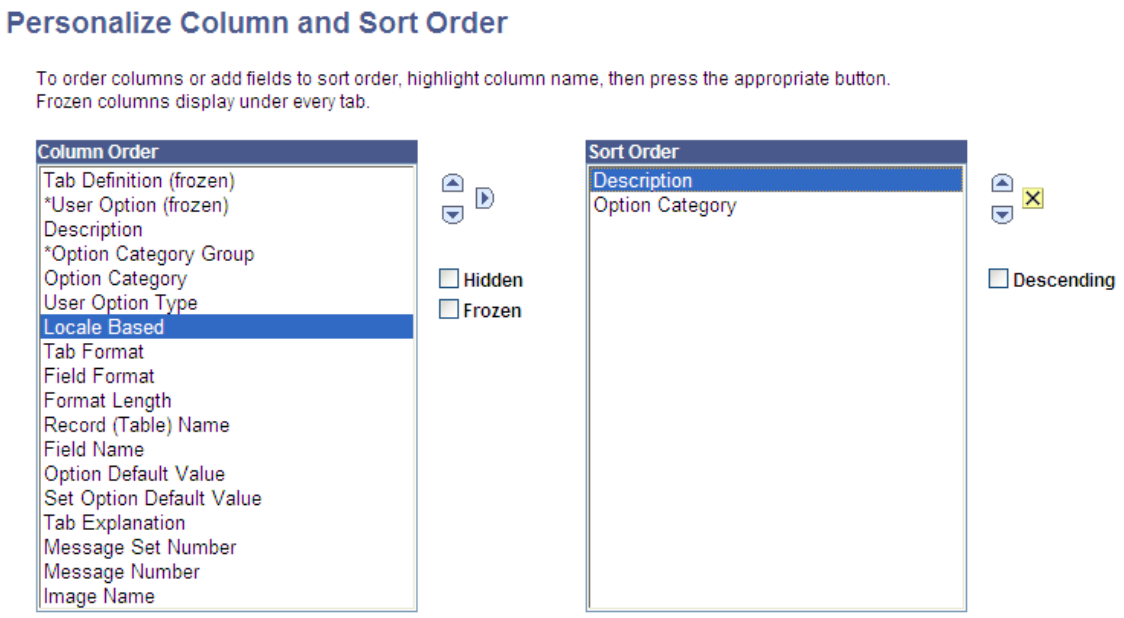

> **Note**
>
> If a page has grid tabs, they remain active so that you can view all sample data.

Use the following toolbar buttons to personalize a grid:

Term	Definition
OK	Click to save your personalization settings and return to the transaction page with the changes in effect.
Cancel	Click to cancel any personalization settings that you made and return to the transaction page.
Preview	Click to preview any personalization settings that you made.
Copy Settings	Opens the Copy Settings secondary page, enabling you to copy the public profiles from other users. You can use the **Lookup** button to search all available public profiles for that grid. Selecting the **OK** button on the Copy Settings page copies the settings for the selected profile and returns you to the Personalize Column and Sort Order page.

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Term	Definition
Share Settings	Available if you have created and saved grid personalizations. Opens the Share Settings secondary page, which you can use to enable public sharing of the grid personalization settings that you created by making your profile **Public.** (The default setting is **Private**.) If you make the personalization settings of your grid public, all of your personalization settings for all components will be public. The **Name** field is only required if you make your personalization settings public. Each user who shares personalization settings must have a unique profile name. The profile name you enter is the same for all pages and shared grid personalizations across all components. If you modify a profile name, it is modified for all pages and grid personalization settings across all components. After you save the first profile name, the **Name** field is pre-populated when you open the Share Settings page for other pages or grids. The **Name** field can be any string of up to 30 characters long, for example, OSC_16AR. The system automatically converts alphabetical characters to uppercase.
Delete Settings	Available if you created and saved grid personalizations. Opens the Delete Settings secondary page, where you can delete all grid personalization settings for the current grid. Select the **Delete** button to delete the settings for the current grid only and to restore the default grid settings. Select the **Cancel** button to retain your settings and return to the grid personalization page.
Hidden	Select a column and select this check box to hide the column in question. **Note:** It is recommended not to hide the columns in a grid that are used for sorting.
Frozen	Select a column and select this check box to freeze the column in question. When you freeze a column, the column appears in all tabs within the grid.
Descending	Select a row from the Sort Order list and select this check box to sort the row in descending order rather than in ascending order, which is the default.

Personalizing Grid Column Appearance

When personalizing the grid column appearance, you can:

- Change the column order.
- Hide columns.
- Freeze columns.

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Changing the Column Order

To change the column order:

1. Under **Column Order**, select the column that you want to move.

   To select multiple adjacent columns, press and hold the **Shift** key as you select additional column names. To select multiple nonadjacent columns, press and hold the **Ctrl** key as you select additional column names.

   If the grid contains tabs, the system displays the tab separators in the Column Order list. You can move the tab separator just as you would a regular column, thus altering the number of columns that the system displays on a particular tab at one time.

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

   If you move a frozen column below an unfrozen column, the system disables the frozen setting.

3. Repeat Steps 1 and 2 to move additional columns.
4. Click **OK** to save your changes and return to the transaction page.

Hiding Columns

To hide columns:

1. Under **Column Order**, select the column that you want to hide.

   To select multiple adjacent columns, press and hold the **Shift** key as you select additional column names. To select multiple nonadjacent columns, press and hold the **Ctrl** key as you select additional column names.

2. Select the **Hidden** check box.

   > **Note**
   >
   > When you use the find feature in the grid, the system will not search any columns that you set as hidden.

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

   > **Note**
   >
   > It is recommended not to hide the columns in a grid that are used for sorting.

Freezing Columns

To freeze columns:

1. Under **Column Order**, select the column that you want to freeze.

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

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2. Select the **Frozen** check box.

   The system automatically freezes the selected column and all columns above it. If you move a frozen column after an unfrozen column, the system disables the frozen setting.

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

Frozen columns appear on all the tabs within the grid.

Manipulating Grid Column Sort Order

Under **Sort Order** on the Personalize Column and Sort Order page, you can alter the grid column sort order. Any sort order changes that you save remain in place until you change them again.

To specify a persistent sort order for a grid:

1. Under **Column Order**, select the column on which you want to sort.

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

   - Tab separators.
   - Images.
   - Buttons or links.
   - HTML areas.

2. Click the right arrow to display that column under **Sort Order**.

   To select multiple adjacent columns, press and hold the **Shift** key as you select additional column names. To select multiple nonadjacent columns, press and hold the **Ctrl** key as you select additional column names.

3. If you have moved more than one column to Sort Order, you can select a column and click the up and down arrow button to alter the sort hierarchy.

   You can sort multiple columns at one time. The system considers the first column in the list the primary sort, the second the secondary sort, and so on.

4. To sort columns in descending order (instead of ascending order, which is the default), select the **Descending** check box for the highlighted column.

   The *(desc)* text appears next to the column name to indicate which columns are sorted in descending sort order.

5. Click **OK** to save your changes and return to the transaction page.

   The system saves your sort settings until you change them again or until you click the **Restore Defaults** button in the Personalization page.

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

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Using Effective-Dated Grids and Scroll Areas

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

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

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

Because the system date is at or after the new effective-dated row that you created, the new information becomes the current row, and the previous row becomes historical information. If you returned to this page and clicked the **Update/Display** button, which displays only current and future rows, you would see only the last data row that you entered. If you also wanted to see older data rows, you would have to click the **Include History** button.

To correct incorrect data already in the system, click the **Correct History** button. (You should take this approach rather than inserting a row with corrected data.)

Related Topics

- Using Effective Dates
  This section provides an overview of effective dates and discusses how to use page action options and effective dates.

Using Multiple Grids and Scroll Areas on a Page

Some PeopleSoft applications include pages that contain multiple grids and scroll areas. These scroll areas and grids may be one above the other, side by side, or contained within each other (nested). The fields controlled by one scroll area or grid are associated with only one database table. Pages with multiple scroll areas or grids read from and write to multiple tables.

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

This example illustrates two grids side-by-side.

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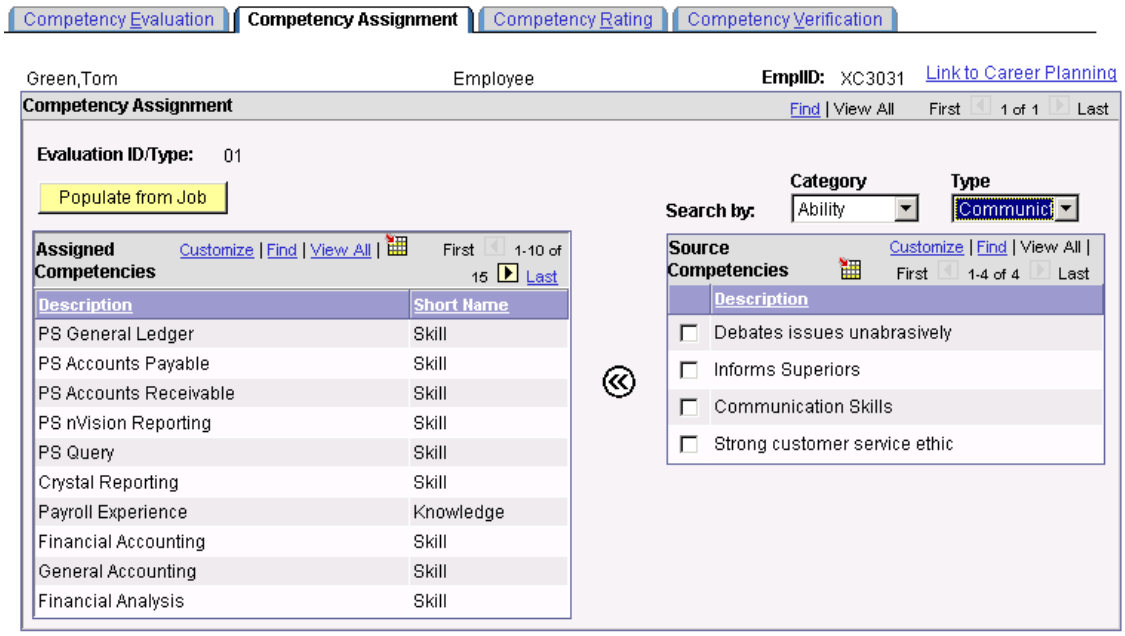
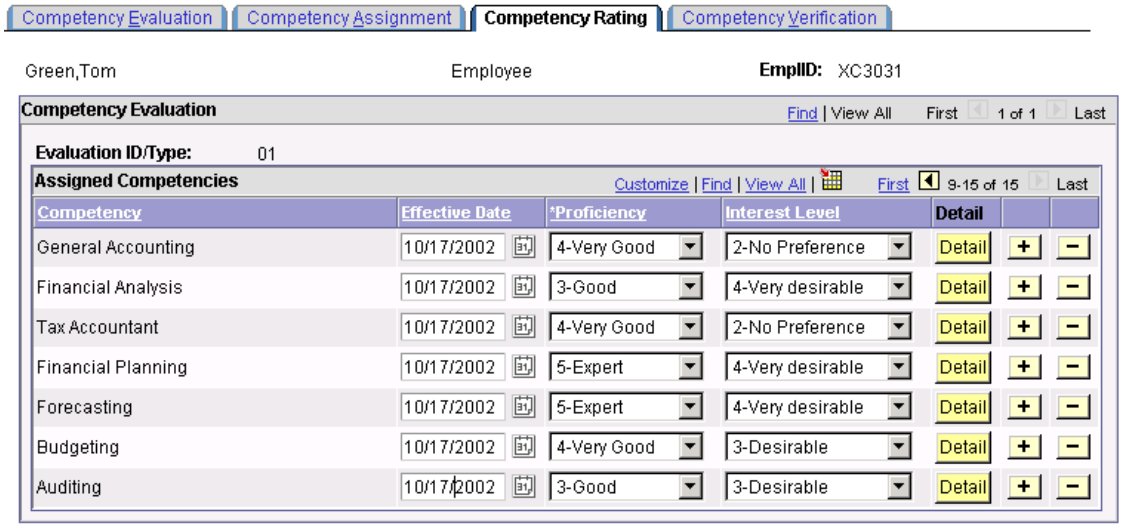


After you have assigned competencies to the evaluation, you can evaluate Tom using the Competency Rating page. The Competency Rating page in the following example contains the **Assigned Competencies** grid nested within the **Competency Evaluation** scroll area:

This example illustrates a nested grid in a scroll area.



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

Another way of looking at nesting is to think of the scroll area and grid as having a parent and child relationship. The table that stores information about individual competencies is a child of the table that stores information about particular evaluations. Child tables share the same key structure as the parent tables, plus one or more additional keys to uniquely identify individual rows.

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Generating Charts Using Grid Data

Some grids enable you to generate a chart from grid data.

On a grid, use the View Chart button to generate a chart. When you select the View Chart button, a page displays where you configure and generate the chart.

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

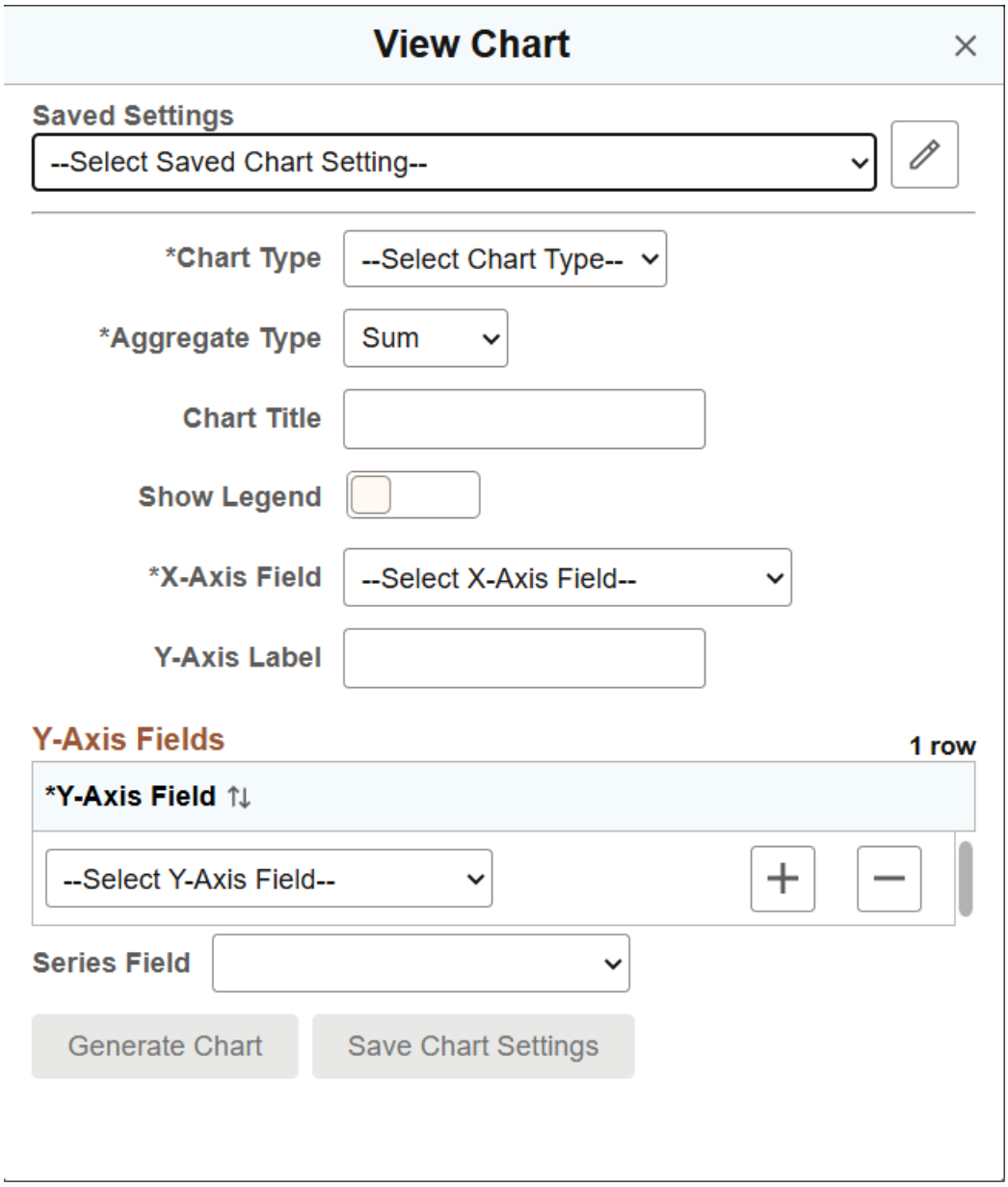

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Table 5-1 Fields or controls and descriptions for the View Chart page

Field or Control	Description
Saved Settings	Select a previously saved chart configuration. When you select a saved configuration, the system populates the chart options with the saved settings.
Edit Saved Settings	Rename or delete a selected saved chart configuration.
Chart Type	Select the type of chart to generate. Available chart types: • Bar • Line • Histogram • Pie The available chart options change depending on the chart type that you select.
Aggregate Type	Select the calculation that the system uses to summarize the data. Available values are Sum, Count, and Average. **Note** When you select Sum or Average, the Y-axis field must contain numeric data.
Chart Title	Enter an optional title to display at the top of the chart.
Show Legend	Select to display a legend for the chart. By default, the legend is hidden. The legend cannot be displayed when the selected Y-axis field contains non-numeric data and the aggregate type is Sum or Average.
X-Axis Field or **Series Field**	Select the grid column to use for the X-axis. Only eligible grid fields are available for selection. The page field label appears in the drop-down list. For more information on the X-axis field, see the X-axis and Y-axis Field Considerations table later in this topic. The label is changed to **Series Field** when the Pie chart type is selected.
Y-Axis Label	Enter an optional label for the Y-axis. If you select multiple Y-axis fields, entering a Y-axis label is recommended. The system displays a warning if multiple Y-axis fields are selected and no label is provided.

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Table 5-1 (Cont.) Fields or controls and descriptions for the View Chart page

Field or Control	Description
Y-Axis Field or **Value Field**	Select one or more grid columns to plot on the Y-axis. You can select up to four fields. Only eligible grid fields are available for selection. The page field label appears in the drop-down list. For more information on the Y-axis field, see the X-axis and Y-axis Field Considerations table later in this topic. The label is changed to **Value Field** when the Pie chart type is selected. Only one value field can be selected.
Series Field	Optionally select a grid column to group chart data into separate series. This field is available only when a single Y-axis field is selected and the chart type is not Pie.
Generate Chart	Generate the chart using the selected settings. This button is enabled only after all required fields have valid values. The chart display is hidden whenever a required field changes, indicating that the displayed chart no longer reflects the current settings.
Save Chart Settings	Save the current chart configuration for future use. Configuration names must be unique for the user and grid, and names are limited to 60 characters. Saved chart settings are private to each user, and you can save multiple configurations for the same grid.
View as PDF	Select to generate a PDF version of the chart. This button is enabled only after a chart is generated.

> **Note**
>
> Charts are generated based on current grid values, including values that have not yet been saved. Similarly, charts for tabbed grids also use the current grid values across all tabs.

When you specify the X-axis and Y-axis fields for a chart, you should note the following field considerations.

Table 5-2 X-axis and Y-axis Field Considerations

Field	X-Axis Behavior	Y-Axis Behavior
Hidden fields	Fields on hidden tabs and hidden fields are excluded, except fields hidden through Grid Personalization. Personalized hidden fields remain available because personalization can later change field visibility.	Same as X-axis.

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Table 5-2 (Cont.) X-axis and Y-axis Field Considerations

Field	X-Axis Behavior	Y-Axis Behavior
Non-data column fields	Grid columns without underlying data are excluded, including HTML areas, images, push buttons, tab separators, and group boxes.	Same as X-axis.
Missing labels	Grid columns without field labels are excluded.	Same as X-axis.
Masked fields	Masked grid column fields are excluded. If any row for the field is masked, the field is excluded from the drop-down list.	Same as X-axis.
Label length	Labels longer than 60 characters are truncated because the X-axis fields on the chart are limited to 60 characters.	Same as X-axis.

Working with Analytic Grids

This section discusses how to interact with analytic grids.

Understanding Analytic Grids

Analytic grids are specific to PeopleSoft Analytic Calculation Engine, which is the PeopleSoft multidimensional reporting tool. Within PeopleSoft Analytic Calculation Engine, analytic models define the rules for calculating data. Analytic models consist of data cubes and dimensions. Data cubes are categories of data; you create one for each kind of information in your analytic model; for example, one for sales, one for rent, and one for salary. Dimensions are a list of one kind of data that can span various contexts; for example, months or product codes. You organize data cubes and dimensions into cube collections. Single members of data cubes or dimensions—such as one month—are known as members.

When the analytic grid is in Freeze Column mode, you can load into it data that does not come from the Analytic Calculation Engine.

PeopleSoft Pure Internet Architecture pages containing analytic grids display data from cube collections. You can use the analytic grid to edit data, pivot data cubes and dimensions (you move them between the row and column axis of the grid) to gain a different view of data, and view selected slices of data. Within an analytic grid, you can expand and collapse dimensions with a hierarchical structure; you can also drill down into such dimensions. Finally, you can modify preferences within an analytic grid and then save a particular layout that you have created or return to the default grid layout.

See Analytic Calculation Engine.

This example illustrates the components of an analytic grid.

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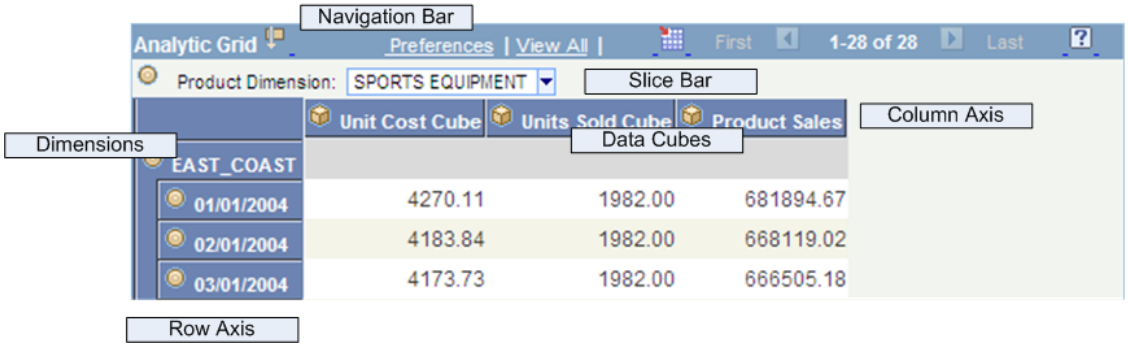

Navigating Through Analytic Grid Data

Usually, the navigation bar at the top of an analytic grid is much like the one associated with an ordinary grid.

See Navigating Through Data.

However, in an analytic grid you can also:

- Collapse or expand the slice bar by clicking the arrow to the right of the analytic grid name (the name is Analytic Grid by default), which appears in the upper-left corner of the grid.
- Collapse and expand the entire grid if the application developer has activated this feature via the **Collapsible Data Area** check box on the Use tab of the Analytic Grid Properties dialog box. To do so, you use the arrow to the left of the analytic grid title, which is Analytic Grid by default.
- Collapse or expand dimensional data by clicking the expand node or the expand all icons.

Editing Analytic Grid Data

Editing data in an analytic grid is somewhat different from editing data in a standard grid:

- Some cells are editable, but some cells may be designated as read-only.
- Calculated cells are read-only.
- In hierarchies (trees), only the lowest level is potentially editable.
- The root and total cells are not editable.

Downloading Analytic Grid Data

You can download the contents of an analytic grid to a Microsoft Excel spreadsheet, much as you download data from a regular grid.

See Viewing Data in Scroll Areas.

Dragging and Dropping Data Cubes and Dimensions

This table describes the ways in which you can drag and drop data within an analytic grid:

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Location	Drag-and-Drop Possibilities
Row axis	You can drag from here to the column axis or the slice bar.
Column axis	You can drag from here to the row axis or the slice bar.
Slice bar	You can drag from here to the row or column axis. You cannot, however, drag to rearrange objects within the slice bar.
Dimensions	You cannot drag to rearrange objects within dimensions, whether they are hierarchical or not.
Data cubes	You cannot reorder data cubes, either on the column axis or the row axis.

Note

If an application developer specifies No Drag Drop mode for an analytic grid, you cannot drag or drop any item in the analytic grid. In addition, if Freeze Column Mode is specified, you cannot move frozen columns.

Pivoting Data Cubes and Dimensions

Using drag-and-drop functionality, you can easily change the orientation of data cubes and dimensions within an analytic grid to get a different perspective on your data. For example, if your analytic grid initially displays the Month dimension across the columns and the Products data cube down the rows, you could pivot the report to display the Months dimension down the rows and the Products data cube across the columns.

Adjacent to the navigation elements is an icon that provides help text for novice users to perform drag-and-drop operations successfully. Clicking the icon toggles the appearance of the help text.

This example illustrates help text for an analytic grid before completing a pivot operation.

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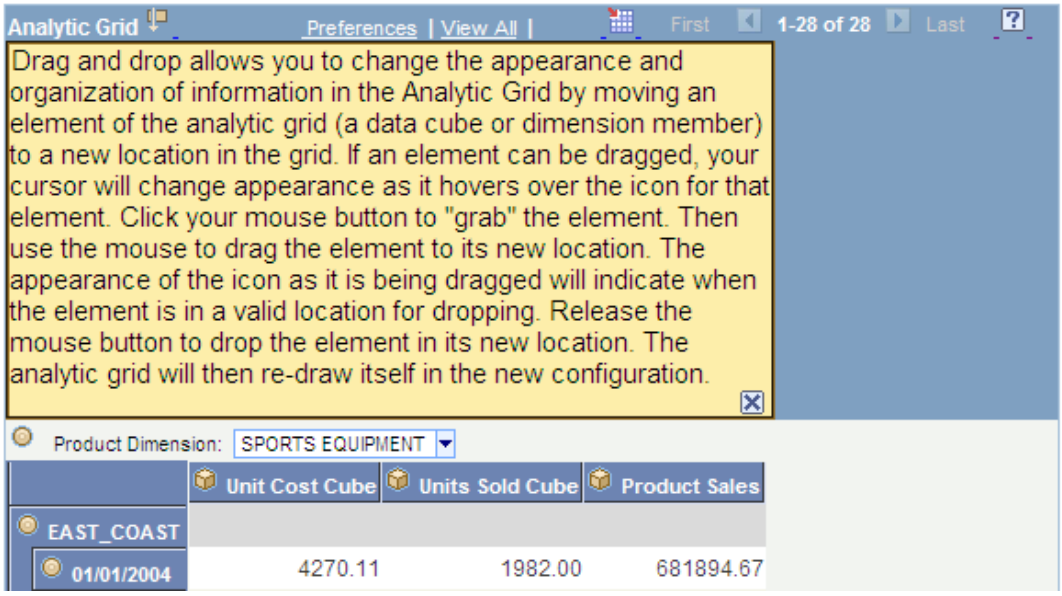
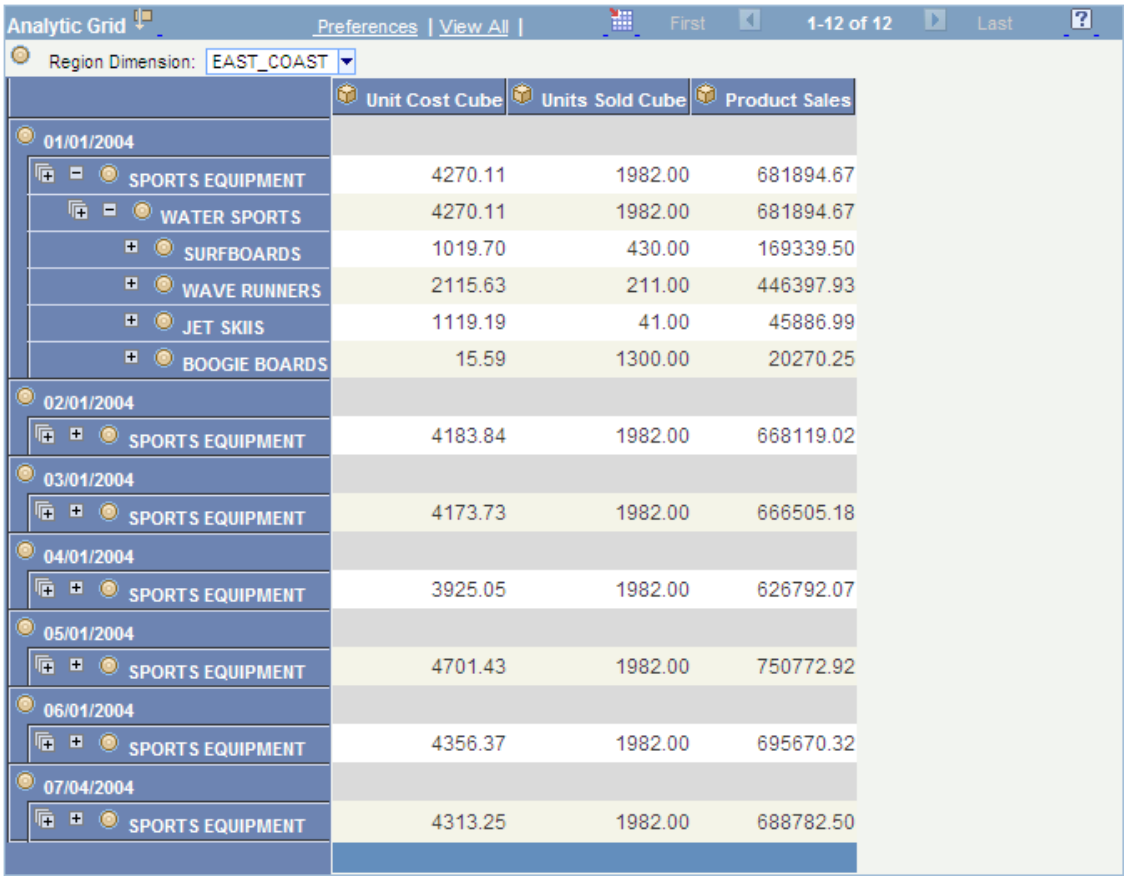


This example illustrates an analytic grid after completing a pivot operation.



To pivot cubes and dimensions within an analytic grid:

1. Move the mouse pointer over the bullet icon representing a dimension or the cube icon representing a data cube.

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The mouse pointer turns into a move cursor (a four-headed arrow) with an associated grabber hand.

2. Drag the bullet or cube icon from a column heading to a row heading or vice versa.

   As you drag, the grabber hand will turn into an international no sign (circle with a slash) when you are over locations where you cannot drop. You will see a bullet icon (for dimensions) or cube icon (for data cubes) when you drag over locations where you can drop the data cube or dimension.

> **Note**
>
> You can drop data cubes and dimensions onto the row axis, the column axis, and the slicer bar.

Slicing Analytic Grid Data

Slicing allows you to view a subset of your data. You can slice your data by choosing from any list—representing data cubes or dimensions—that appears on the slice bar by default. In addition, you can add data cubes or dimensions to the slice bar and use them to view alternate slices of your data. You can place multiple data cubes or dimensions on the slice bar. You can also slice your data further (viewing subsets of subsets) by choosing members from various data cubes and dimensions upon which to slice.

> **Note**
>
> You can add as many data cubes or dimensions to the slice bar as you want. Three fit per row, so if you add more than three, the fourth and so on are added to a second row on the slice bar. However, note that you can place only a single data cube on the slice bar. When you do so, the analytic grid reflects the data for that data cube only.

This example illustrates a slice that shows only February data.

To slice your data based on a data cube or dimension that already appears on the slice bar:

1. Use the list box on the slice bar to display the values for the relevant data cube or dimension.

   For example, a Months dimension would contain a list of months.

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2. Select the desired value from the list box.

   The analytic grid changes to show only data related to that value. For instance, if you select the month of March, you will see only data for that particular month.

To add a data cube or dimension to the slice bar and use it to slice your data:

1. Drag the desired data cube or dimension to the slice bar.
2. Select a member.

   You will now see data related to that member only.

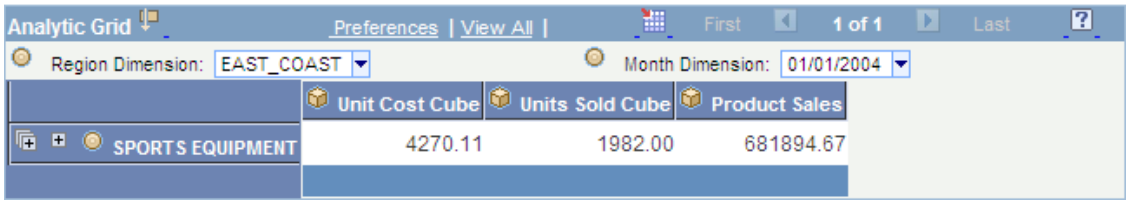
Dimensions that have filter functions applied will behave differently depending on whether they reside on the column axis, row axis, or slice bar.

See Analytic Calculation Engine: Filter User Functions.

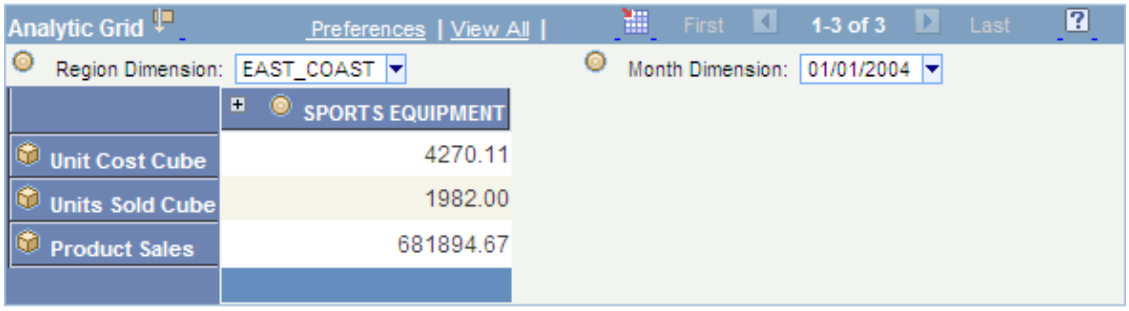
Working with Hierarchical Dimension Data

Some dimension data has a hierarchical structure. When this is the case, you can expand and collapse dimension data within the analytic grid. In addition, you can drill down into the hierarchy to get a closer look at a particular subset of the data.

This example shows a collapsed analytic grid with multiple nodes to expand.



This example shows a collapsed analytic grid.



This example shows an expanded analytic grid.

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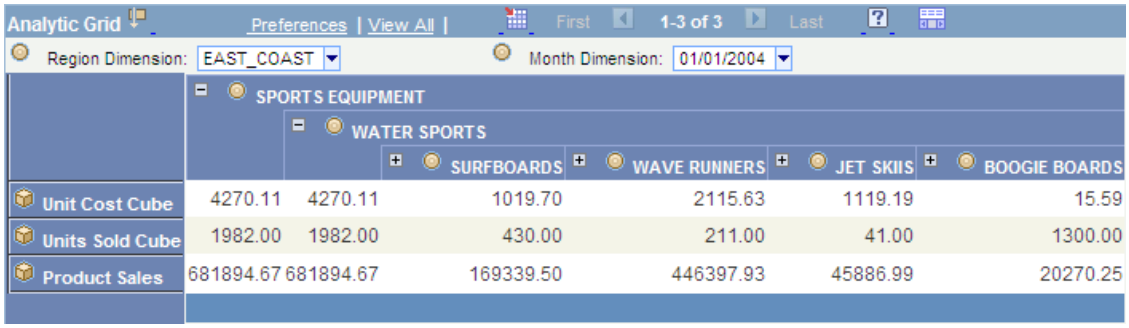


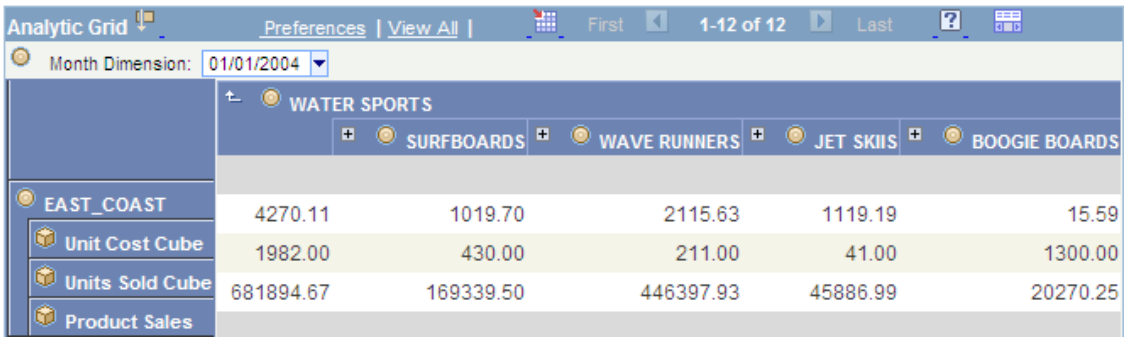
To expand or collapse dimension data:

1. Click the plus sign to the left of the dimension name to expand that dimension, showing all subdimensions immediately beneath it.

   This approach expands the dimension one level at a time. If you click the multiple plus sign to the left of the single one, then all the dimensions are expanded.

2. Click the plus sign to the left of any subdimensions to expand them.
3. Click the minus sign to the left of any dimension to collapse it.

This example illustrates drilling in to see just the water sports information.



To drill into and out of dimension data:

1. Click any dimension or subdimension that has elements beneath it in the hierarchy (it is underlined and has a plus or minus sign to its left).

   The plus or minus sign changes to a **Drill out this node** arrow, and you see only the dimension or subdimension you clicked plus any elements directly beneath it in the hierarchy.

2. Click the **Drill out this node** arrow to drill back out within the hierarchy.

   The dimension now shows the node that you clicked plus one level above it.

Saving Personalized Analytic Grid Layouts

You have learned how to personalize the initial layout of the analytic grid by pivoting data cubes and dimensions, viewing selected slices of your data, and more. In addition, you can save your personalizations and return to them later. If you have saved a personalized layout, you can also easily return the analytic grid to its original settings.

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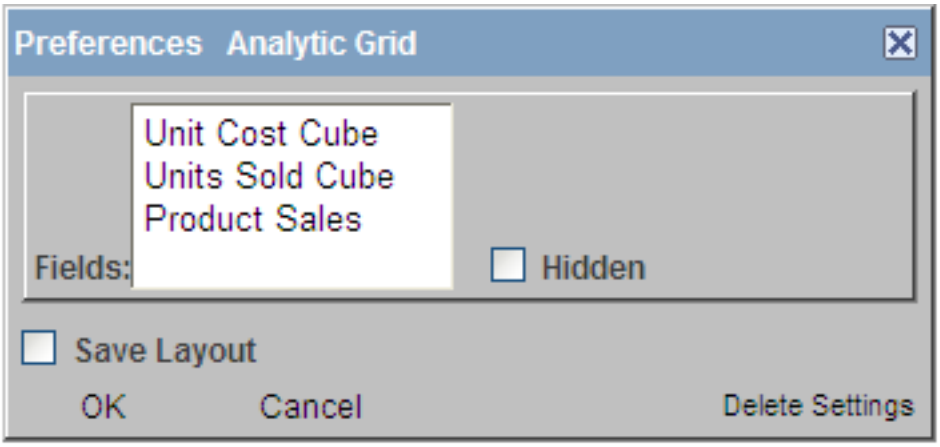
> **Note**
>
> The configuration of the Preferences dialog box changes depending upon whether a cube is in the column header. If a cube is in the header, then you have the option to hide non-dimensional fields. If not in the header, then this option is not available.

This example illustrates the fields and controls on the Preferences dialog box.



To save a personalized analytic grid layout:

1. Modify the grid layout as desired.
2. Click the **Preferences** link.

   The Preferences dialog box appears.
3. If applicable, select which non-dimensional fields to hide by selecting them and clicking the **Hidden** check box.

   You can hide all non-dimensional fields but one. For example, if you have three, you can hide two; if you have four, you can hide three; and so on.
4. Select the **Save Layout** check box and click **OK**.

To restore the default settings of an analytic grid:

1. Click the **Preferences** link.

   The Preferences dialog box appears.
2. Click **Delete Settings**.

> **Note**
>
> Clicking **Delete Settings** restores the default layout of the analytic grid and also reveals hidden non-dimensional fields.

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6

Working With the PeopleSoft Fluid User Interface

Working with Fluid Homepages and Dashboards

This topic contains an overview and introduces the concepts involved with using fluid homepages and dashboards.

PeopleSoft Fluid User Interface Concepts

Understanding Fluid Homepages

A fluid homepage is a PeopleSoft page that aggregates related information and displays tiles that can provide both snapshots of actionable information as well as navigation to fluid applications. A fluid homepage is displayed when you sign in to a PeopleSoft system. Fluid homepages are the equivalent of classic homepages; similarly, tiles can be compared to pagelets used in classic homepages.

A fluid homepage and the tiles it displays typically share a common purpose or apply to a specific role, such as employee, manager, clerk, and so on. When working with tiles on a homepage, you can select (click or tap) the tile to access the underlying application and perform routine tasks. Tiles typically have a graphic on them, portraying the purpose of the underlying application, which helps you to identify the tile and associate it with the application. Some tiles also display up-to-date information, making you aware of high-level information for decision making or monitoring.

Based on your business requirements, Portal Administrators can group tiles into sections and create sectionalized homepages. See Understanding Fluid Sectionalized Homepages and Dashboards.

This example illustrates the appearance of a fluid standard homepage with a number of tiles that you can select to view information or complete a task. For descriptions of the elements and usage of the homepage, see Working with Fluid Homepage Controls.

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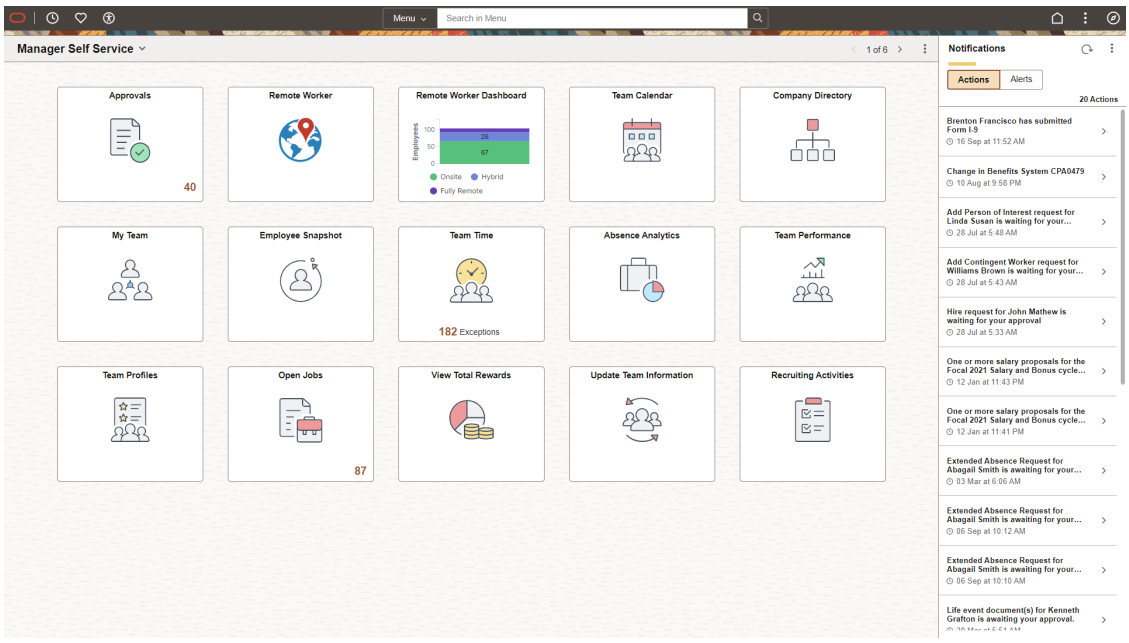

Understanding Tiles

Tiles can be compared to pagelets, which are available on classic homepages. Tiles provide:

- Quick navigational access to targeted transactions.
- An overview of the status of a transaction (for example, your last pay date, the number of approvals requiring your attention, and so on).
- A graphical overview of a pivot grid or PeopleSoft Insights dashboard.

When working with tiles, consider:

- Any number of tiles can be added to a fluid homepage; dashboards are limited to just those tiles made available by the dashboard administrator.
- You can personalize fluid homepages and dashboards by adding, deleting, and moving tiles.
- Tiles can be used to link to fluid applications or classic applications.

Understanding Fluid Dashboards

A fluid dashboard is the fluid equivalent of a classic dashboard. Similar to classic dashboards, fluid dashboards do not appear automatically after sign in; instead, you access a fluid dashboard by clicking a content reference link, which can appear anywhere in the menu structure. Similar to a fluid homepage, a fluid dashboard aggregates related information and displays tiles that can provide both snapshots of actionable information as well as navigation to other applications. A fluid dashboard and the tiles it displays typically share a common purpose or apply to a specific role, such as employee, manager, clerk, and so on. While you can personalize a fluid dashboard, you can add only those tiles that have been configured for use on the dashboard by the dashboard administrator.

Based on your business requirements, Dashboard Administrators can group tiles into sections and create sectionalized dashboards. See Understanding Fluid Sectionalized Homepages and Dashboards.

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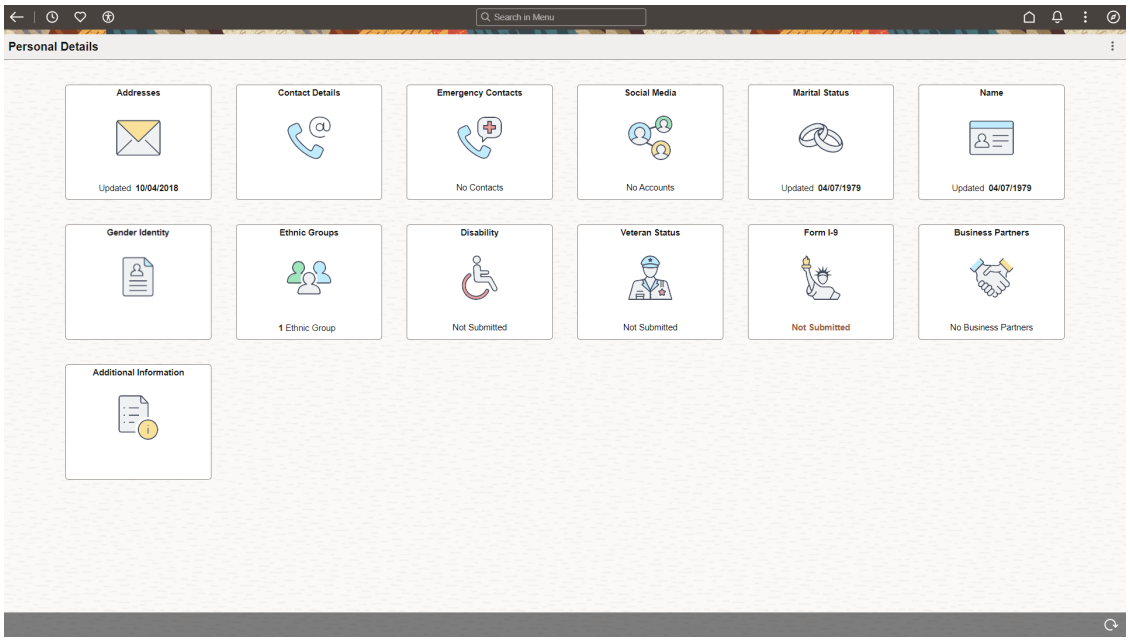
This example illustrates the appearance of a standard fluid dashboard. For descriptions of the usage of the controls in the fluid banner at the top of the dashboard, see Working with Fluid Homepage Controls.



Delivered Dashboards

This table lists PeopleTools-delivered dashboards:

Dashboard	Link to Product Documentation
My Update Manager Dashboard	See Change Assistant and Update Manager: Update Manager Dashboard Overview
Update Manager	See Change Assistant and Update Manager: Update Manager Dashboard Overview

Understanding Fluid Sectionalized Homepages and Dashboards

Portal administrators and Dashboard administrators can sectionalize a fluid homepage and dashboard, respectively. A section is a collection of tiles under a categorization label that generalizes the purpose of the tiles in that section. It improves the usability and user experience of a homepage or dashboard. Sections provide administrators greater control over the sequence of tiles on a homepage or dashboard. A homepage can have multiple sections.

> **Note**
>
> Sectionalized homepages and dashboards do not allow end-user personalization. See Managing Fluid Homepages.

Sectionalized homepages and dashboards provide:

- Quick navigational access to a group of tiles that serve a general purpose.

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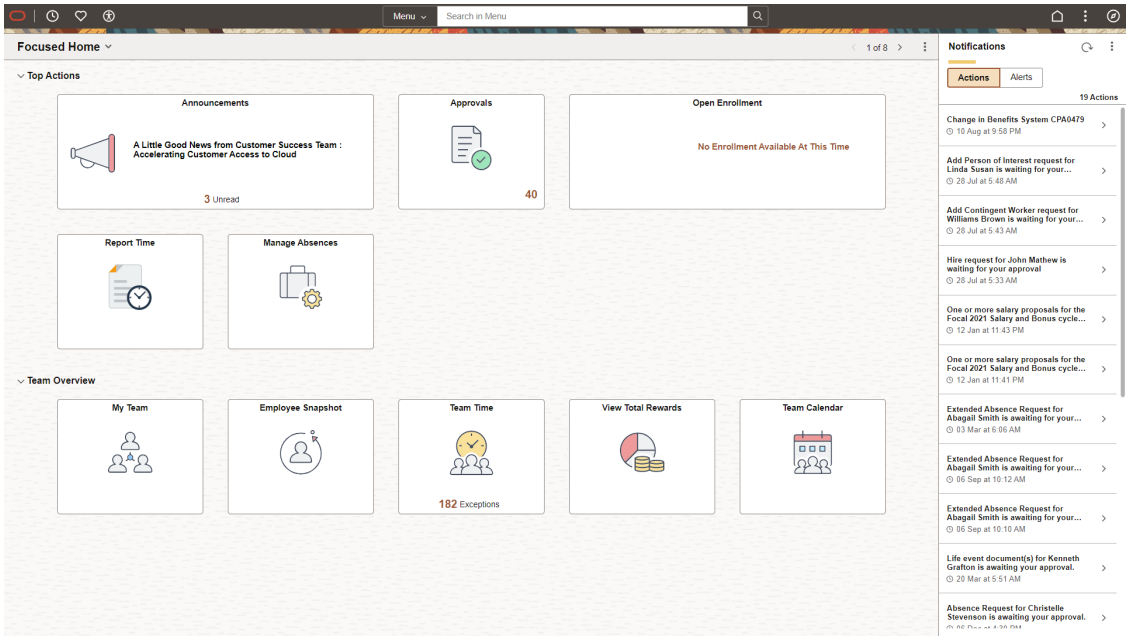
- The ability to collapse and expand the sections.

When working with sectionalized homepages and dashboards, consider:

- A section can contain several tiles.
- If a section does not contain any tiles, the section is not displayed on the homepage.
- User personalization is not available on sectionalized homepages and dashboards and considered locked. Therefore, the options to delete or add tiles are not available in these sections. However, you can copy a tile from a locked homepage. See Managing Fluid Homepages.

This example illustrates the appearance of a fluid sectionalized homepage.



Working with Fluid Homepage Controls

The following list describes the controls that appear on fluid homepages and fluid dashboards. (Many of these controls are also displayed on fluid pages, classic pages, and classic homepages.) Which controls are displayed in the banner varies depending on the width of the browser window. As the width decreases, controls are moved from the banner to become links in the Actions menu.

Term	Definition
	Back button (unlabeled). Use the Back button to navigate back to the previously visited component, homepage, activity guide, navigation collection, or WorkCenter. See Using the Back Button. **Note:** Displayed on fluid dashboards and transaction pages only; not displayed on fluid homepages.

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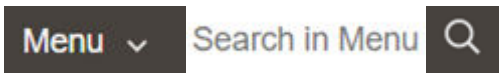
Term	Definition
	Use the Global Search bar to perform global searches. See Working with Global Search.
	Home button. Use the Home button to return to your default homepage, which is the homepage that you arrive at directly upon signon.
	Global Search button. Displayed on small form factor devices (fluid homepages, dashboards, and other pages). Use the Global Search button to open the Global Search bar in the banner. **Note:** Displayed on large form factor devices (fluid homepages, dashboards, and other pages) only when the browser width does not permit display of the Global Search bar.
	Notifications button (without the new notifications indicator). Use the Notifications button to open the Notifications panel displaying any pending actions and alerts. See Using the Notifications Panel. **Note:** Displayed on fluid dashboards; also displayed on fluid homepages when the Notifications panel is hidden either when the browser width is 1280 pixels or less or through personalization. See Managing Fluid Homepages.
	Actions button. Use the Actions button to display the Actions menu. See Using the Actions Menu.
	Homepage Actions button. Use the Homepage Actions button to display the menu specific to the homepage. See Using the Actions Menu. **Note:** On small form factor devices, the Homepage Actions menu does not appear and the items are integrated in the Actions menu.
	NavBar button. Use the NavBar button to display the NavBar (sometimes referred to as the navigation bar). See Working with the NavBar.
	Homepage drop-down selector. When there are multiple homepages to which you have access, use this drop-down list to select a different homepage. Alternatively, you can use the left and right arrows of the homepage navigator to navigate through your homepages. **Note:** Displayed on fluid homepages only.

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Term	Definition
< 2 of 6 >	Homepage navigator. When there are multiple homepages to which you have access, use the left and right arrows of the homepage navigator to navigate through your homepages. The homepage navigator displays the numerical position of the current homepage as well as the total number of homepages. **Note:** Displayed on fluid homepages only.
	Recently Visited button (in the quick access bar). Use the Recently Visited button to display your recently visited items in the quick access bar. See Using the Quick Access Bar.
	Favorites button (in the quick access bar). Use the Favorites button to display your favorite items in the quick access bar. See Using the Quick Access Bar.
	Accessibility button (in the quick access bar). Use the Accessibility button to enable screen reader mode, display a list of keyboard shortcuts, and access information on how to enable and use the accessibility layout features within the application. See Using the Quick Access Bar and Accessibility Guide: Using the Accessibility Button in Fluid.
	Refresh button. Use the Refresh button to refresh the fluid dashboard, manually, so that all live tiles display the most current representation of the underlying data if you've been on the dashboard for a period of time. **Note:** Individual tiles can be configured to refresh at specific rates. **Note:** Displayed on fluid dashboards only. On fluid homepages, a Refresh link is displayed in the Actions menu.

Using the Quick Access Bar

The quick access bar (QAB) appears in the banner and provides quick access to your recently visited items and your favorites. These items displayed in the quick access bar are the same as those displayed via the Recently Visited and Favorites tiles displayed in the NavBar. The quick access bar is displayed by default on all fluid homepages, dashboards, and transaction pages; however, it can be disabled system-wide by your system administrator.

On the quick access bar, you can also access the Accessibility button which you can use to enable screen reader mode, view keyboard shortcuts, and access additional Accessibility Help information configured within the application. See Accessibility Guide: Using the Accessibility Button in Fluid.

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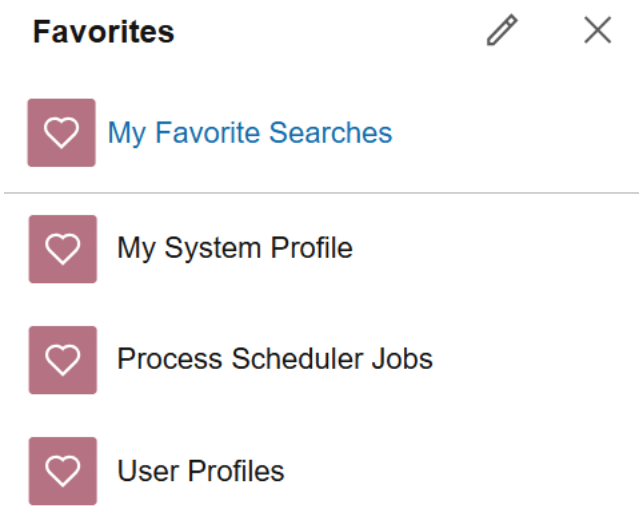
> **Note**
>
> The Accessibility button is not available in QAB on classic pages, activity guide-based components, navigation collections, and on search pages.

By default, the recently visited, favorites, and accessibility items appear in QAB. However, your system administrator can individually disable these items so that they do not appear in QAB system-wide, that is, on all fluid homepages, dashboards, transaction pages, and classic pages (which by default does not show the accessibility button) where QAB is displayed. For example, if the recently visited or favorites item is included as a section on your homepage, the system administrator may choose not to present it in QAB. These changes do not affect the display of recently visited or favorites items on the NavBar.

The quick access bar can be reverted to appear on the left of the homepage (similar to PeopleTools 8.59); however, it can be performed by your system administrator. See Portal Technology: Assembling Branding Themes.

For example, your favorites are available in the quick access bar:



> **Note**
>
> On small form factor devices, the quick access bar is displayed at the bottom of the page instead of on the banner and the Accessibility button is available only on the homepage.

Related Topics

- Working with Recently Visited Items
- Working with Favorites
  In the Actions menu, click the Add to Favorites link to add the current page as a favorite.

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Managing Fluid Homepages

This section discusses these topics:

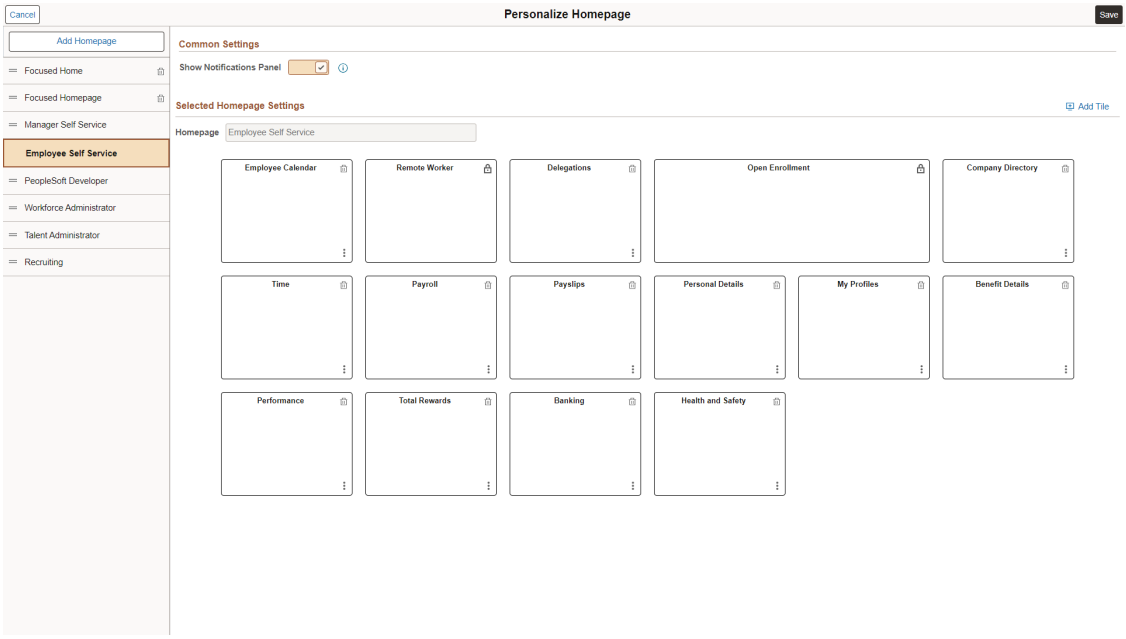
- Accessing the personalization page.
- Showing or hiding the Notifications panel.
- Adding a fluid homepage.
- Deleting a fluid homepage.

Accessing the Personalize Homepage Page

Use the Personalize Homepage page to manage your fluid homepages:

1. Navigate to any fluid homepage.
2. Select the Actions menu.
3. Select Personalize Homepage.

This example illustrates the options on the Personalize Homepage page, used for personalizing the content on a fluid homepage.



Administrators can disable end-user personalization on any homepage or dashboard. Homepages where end-user personalization is disabled are considered locked, that is, you cannot rename the homepage, add tiles to the homepage, move tiles to other homepages, and delete tiles. You can, however, reorder your homepages on the left panel. In this release, sectionalized homepages and dashboards do not allow end-user personalization.

In previous releases, you could re-order tiles directly on a homepage or dashboard, but from PeopleTools 8.61, you can personalize a homepage or dashboard only through the Personalize Homepage or Personalize Dashboard page.

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> **Note**
>
> The labels of system-defined homepages and dashboards are translatable; however, personalized labels of homepages and dashboards are not translatable—this applies to personal fluid homepages as well as the personalized labels of fluid homepages, fluid dashboards, classic homepages, and classic dashboards.

Showing or Hiding the Notifications Panel

To show or hide the Notifications panel:

1. From any fluid homepage, select Personalize Homepage in the Actions menu.
2. Select the desired Show Notifications Panel option.

> **Note**
>
> The Notifications panel is displayed by default on fluid homepages unless this setting has been configured differently on your system.

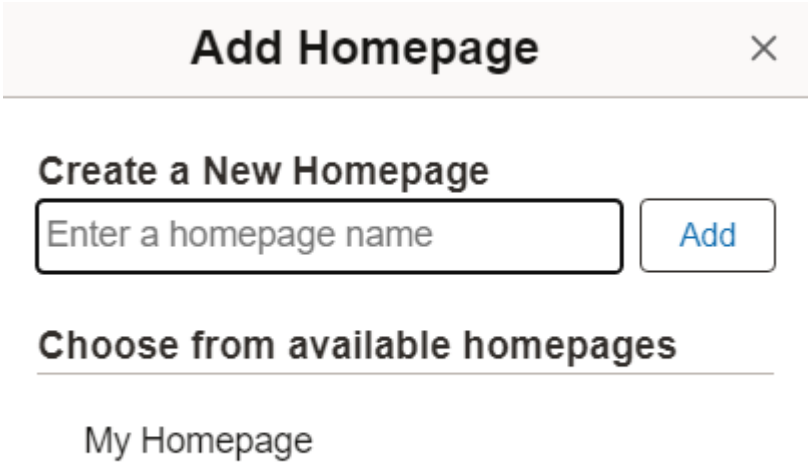
3. Click Save.

Adding a Fluid Homepage

To add a homepage:

1. On the Personalize Homepage page, click the Add Homepage button.

   Use the Add Homepage page to create new personal homepages or add system-defined homepages.



2. On the Add Homepage page, do one of the following:
   - Enter the name of your new personal homepage in the Create a New Homepage edit box, and click Add.

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> **Note**
>
> The system imposes a limit of 10 personal homepages.

- Select a system-defined homepage from the list of available homepages.

3. Click Save in the Personalize Homepage header.

Deleting a Fluid Homepage

To delete a homepage:

1. On the Personalize Homepage page, locate the homepage in the left panel.
2. Click the Delete button (a trash can icon) for that homepage.

> **Note**
>
> The Delete button is not available on homepages that are disabled for end-user personalization.

3. Click Save in the Personalize Homepage header.

Managing Tiles on Fluid Homepages and Dashboards

This section contains an overview and discusses:

- Adding tiles.
- Using the Add To Homepage feature.
- Deleting tiles.
- Copying or moving tiles to other fluid homepages.

> **Note**
>
> You cannot copy or move tiles between fluid dashboards.

- Dragging and dropping tiles to reposition them.

Adding Tiles

To add tiles to a fluid homepage or dashboard:

1. Navigate *directly* to the desired fluid homepage or dashboard.

> **Note**
>
> You can personalize a fluid dashboard only after navigating directly to the dashboard; it cannot be personalized when displayed inside an activity guide, fluid navigation collection, or master/detail wrapper.

2. From the Actions menu, select Personalize Homepage (or Personalize Dashboard).

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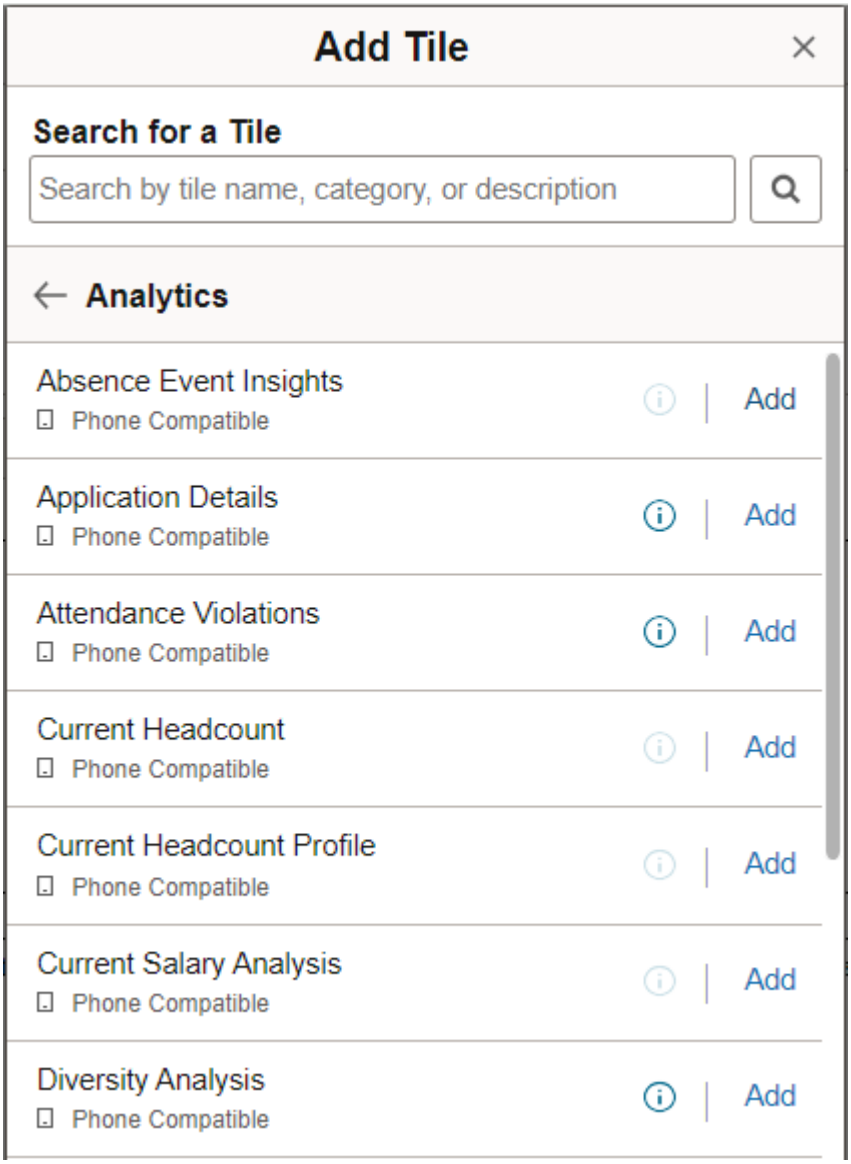
3. On the personalization page, click the Add Tile button.

> **Note**
>
> The Add Tile button is not available on homepages and dashboards that are disabled for end-user personalization.

This example illustrates the Add Tile dialog box, which you use to find and add tiles to fluid homepages and dashboards.



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Term	Definition
Phone Compatible	Indicates that a tile is displayed on a homepage accessed from a small form factor device such as a smartphone. If this icon does not appear next to a tile, you will not be able to see the tile when accessing the homepage using a smartphone. In addition, the tile will not be available for you to add when you are personalizing the homepage using a smartphone. However, you will see the tile on other devices, such as a tablet, laptop computer, or desktop computer. In the example above, Enter Time would not appear on the homepage if it is accessed using a smartphone and it would not appear in the Add Tile dialog box.
	Selecting the Description icon opens a window with a description of the tile and indicating that it can be accessed from a small form factor device. This icon appears only if the tile is compatible with a small form factor device.
Add	Select Add to add the tile to the homepage or dashboard.

4. Find the desired tile using the Add Tile page. You have these options:
   - Enter the name or partial name of the tile in the search box, and click the Search button.
   - Browse through the folders to find the tile.
5. Select the tile to be added.

   The tile is added to the end of the list of tiles on that fluid homepage or dashboard.
6. Optionally, move the tile to a different position on the homepage or dashboard by dragging and dropping it. See “Dragging and Dropping Tiles to Reposition Them” in a following section for more information.
7. Click Save on the personalization page.

Using the Add To Homepage Feature

You can also add tiles to fluid homepages on an ad hoc basis using the Add To Homepage link in the Actions menu.

> **Note**
>
> No actual tile definition will be created for these tiles if one does not exist already. The information is stored in the system as personalization data only.

When you add a tile to a fluid homepage on an ad hoc basis, you can edit and personalize the label for the item. For example:

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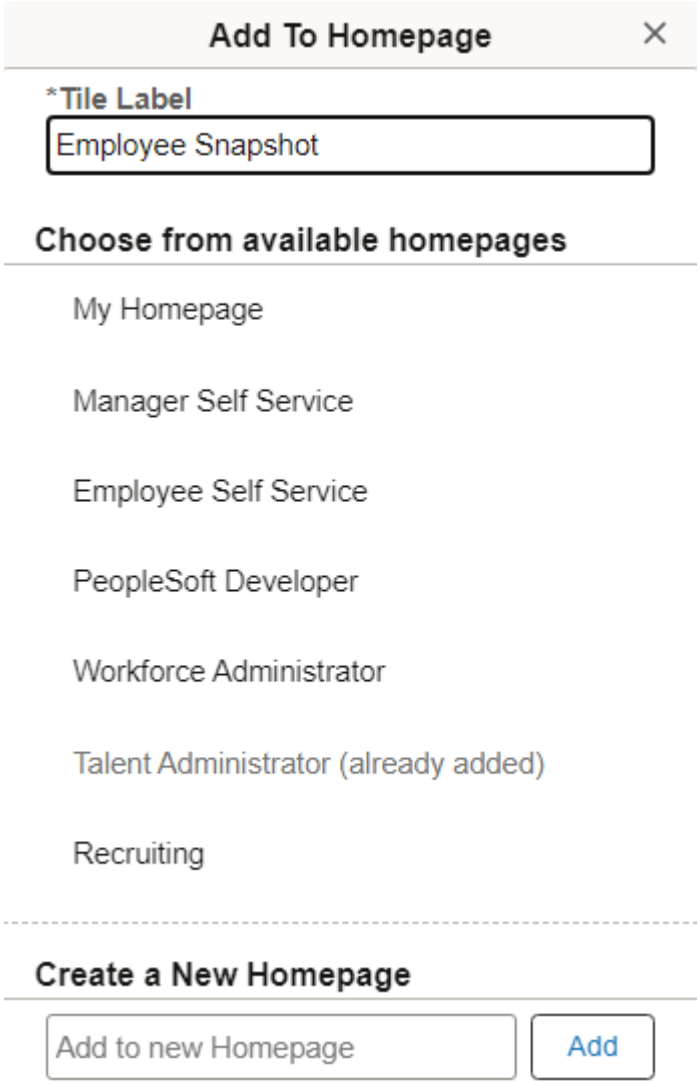

Deleting Tiles from Homepages or Dashboards

To delete tiles from a fluid homepage or dashboard:

1. Navigate to the desired fluid homepage or dashboard.
2. From the Actions menu, select Personalize.
3. Locate the tile you want to delete from the homepage.
4. Click the Delete button (the trash can icon).

> **Note**
>
> The Delete button is not available on tiles that are included in homepages and dashboards that are disabled for end-user personalization.

5. Click Save on the personalization page.

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Copying or Moving Tiles to Other Fluid Homepages

> **Note**
>
> You cannot copy or move tiles between fluid dashboards.

To copy tiles to other fluid homepages:

1. Navigate to the desired source homepage.
2. From the Actions menu, select Personalize Homepage.
3. Locate the tile you want to act on.
4. Click the action button in the bottom, right-hand corner of the tile.
5. On the Select Action prompt, select either:
   - Copy To

     > **Note**
     >
     > When you select the Copy To option on a tile, the system displays a list of possible targets where you can copy the tile. The options on this list include all the homepages where end-user personalization is enabled and where the tile is not already present.

   - Move To

     > **Note**
     >
     > The Move To option is not available on tiles that are included in homepages and dashboards that are disabled for end-user personalization.

6. In the prompt, select the target homepage.
7. Click Save on the Personalize Homepage page

Dragging and Dropping Tiles to Reposition Them

To drag and drop tiles to reposition them on a fluid homepage or dashboard:

1. Navigate to the desired fluid homepage or dashboard.

   > **Note**
   >
   > You can only drag and drop tiles on the homepage or dashboard if you are within the personalization page. You can no longer drag and drop directly on the homepage or dashboard presentation.

2. Click on the tile you want to reposition.
3. Drag it to the desired location—that is, the current position of another tile.

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> **Note**
>
> You must drop a tile onto another tile for the tile to be repositioned. Dropping the tile into empty space does not trigger the drop function.

4. Drop the tile by releasing it.

To drag and drop tiles to move them to a different fluid homepage:

1. Navigate to the desired homepage.
2. From the Actions menu, select Personalize Homepage.
3. Click on the tile you want to move to a different homepage.
4. Drag the tile and hover it over the desired homepage in the left panel, where each homepage is listed.
5. When the desired homepage is highlighted, release the tile to drop it.
6. Click Save.

> **Note**
>
> Alternatively, you can use the keyboard to reposition tiles. First, highlight the tile that you want to reposition, press **Ctrl + M** to select the tile, use the **Tab** or the arrow keys to highlight the drop location, and then press **Ctrl + Alt + M** to drop the selected tile.

Working with Tiles on Small Form Factor Devices

Tiles are the navigational and display construct created specifically for small form factor devices such as smartphones. Tiles provide application content from PeopleSoft systems and other sources. Designed to be more than just a navigation button, a tile leverages the ability to display dynamic information from PeopleSoft components, pivot grids, and other information sources.

> **Note**
>
> A tile is conceptually similar to a pagelet, previously delivered on PeopleSoft classic homepages.

This example illustrates the layout of tiles in a single column on a smartphone in portrait orientation.

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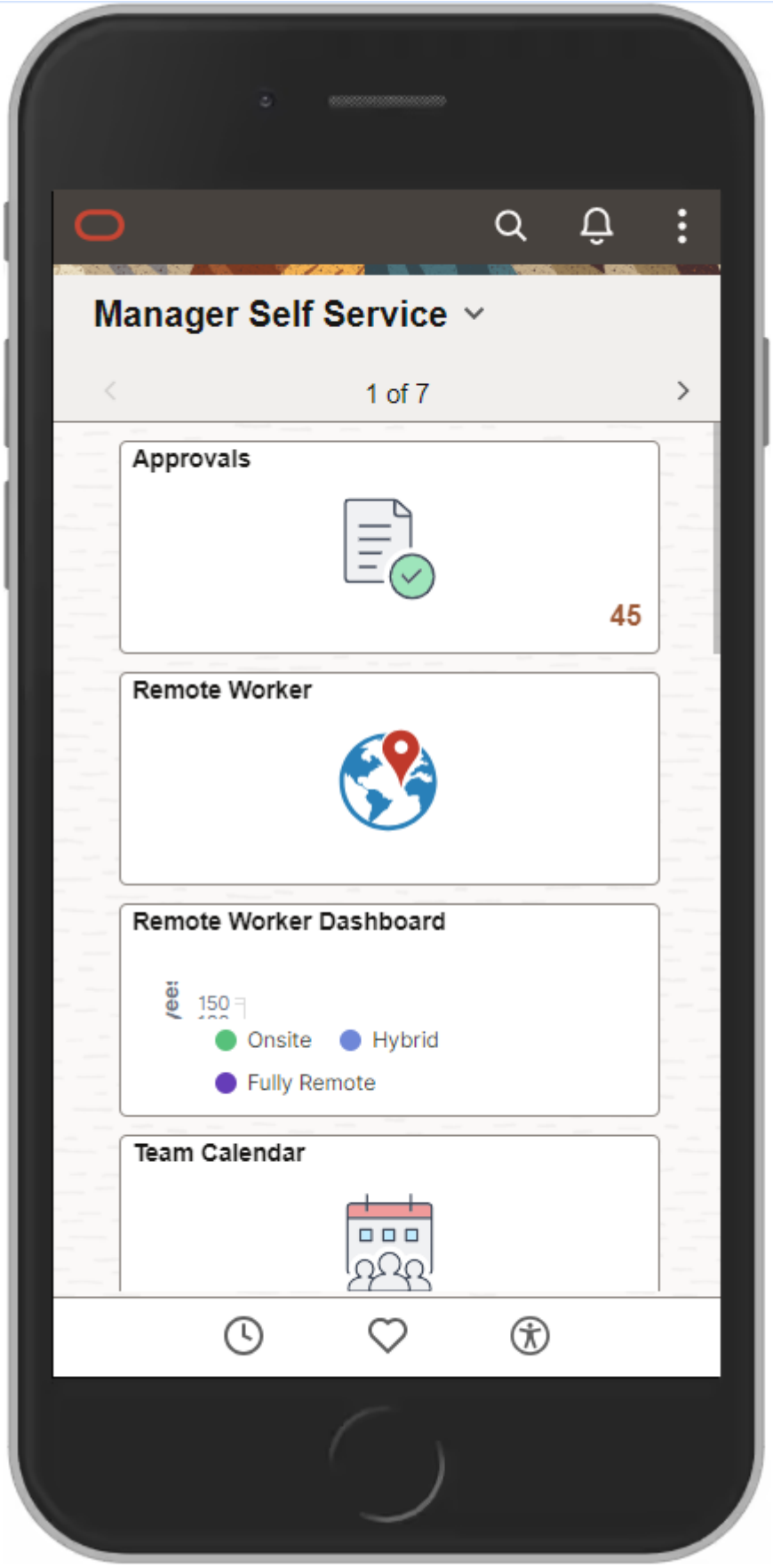

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> **Note**
>
> On a smartphone, the quick access bar is displayed at the bottom of the page. See Using the Quick Access Bar for more information.

> **Note**
>
> On small form factor devices, the Accessibility button is available only on the homepage.

However, not all tiles appear on fluid homepages or dashboards when accessed by small form factor devices such as smartphones. For instance, if the application tile would not be suitable to be displayed on a smaller device—many classic applications, for example—the tile is not designated as “optimized” for small form factor. When you use the Add To Homepage feature on a classic page, the tiles you add in this ad hoc manner are not optimized for small form factor. From the Personalize page, you can determine which tiles will not display on a smartphone by looking for the following icon and message on the tile:

Term	Definition
	Tile is not supported on this device

This example illustrates the Personalize homepage page when accessed by a smartphone. Note that the system is indicating that the Absence Analytics tile will not be displayed on the homepage when accessed by a smartphone.

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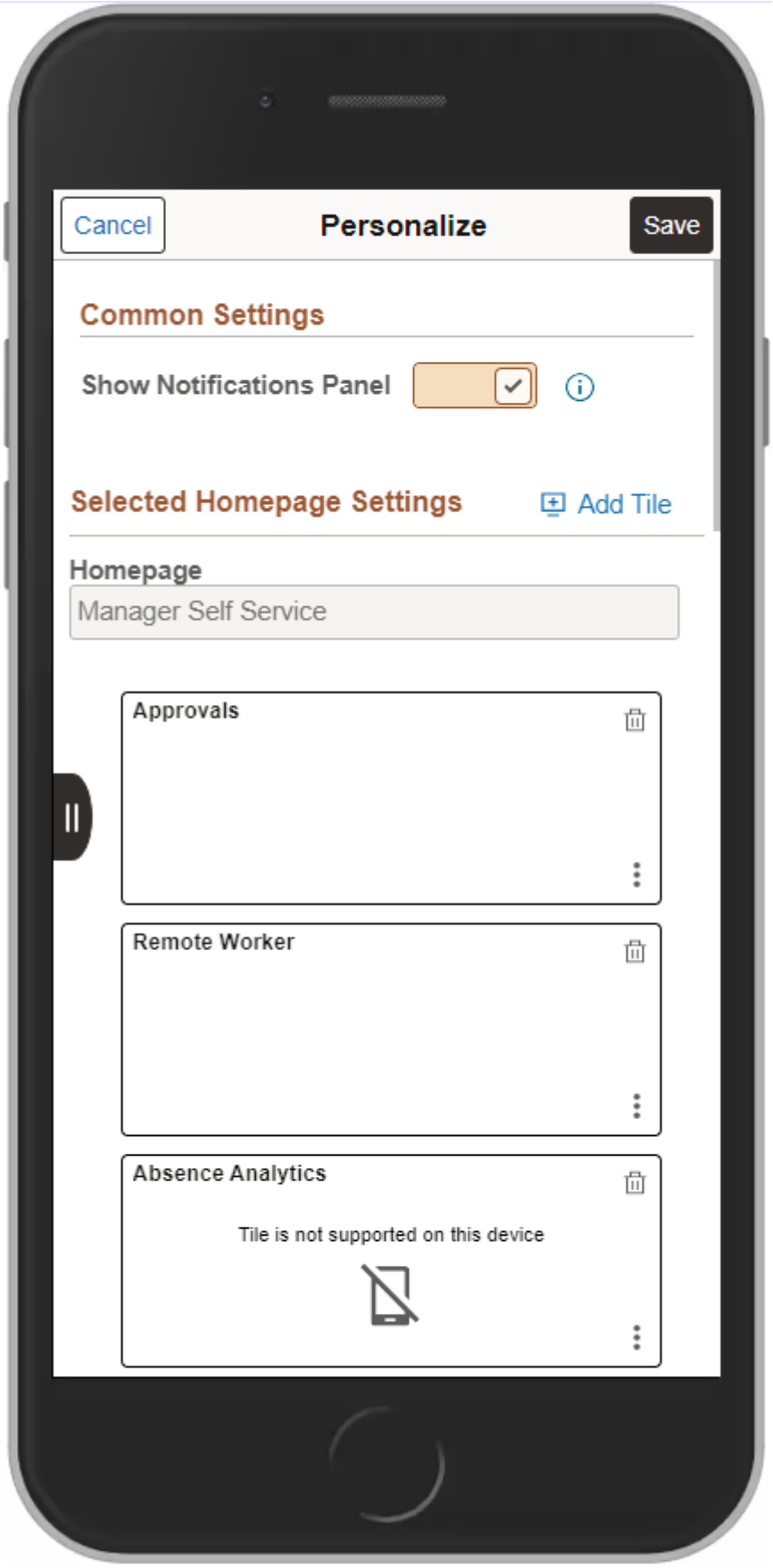

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Working with Fluid Pages and Controls

PeopleSoft fluid applications are designed to provide a simple, sleek look and feel, resembling many of the web applications used today on tablets and smartphones. In addition to the contemporary user interface, a fluid page can also be rendered differently depending upon the device accessing it. For example, the same page can be accessed on a tablet or a smartphone, yet the page layout will be different for each device. On the tablet, more fields may appear, with more space between them, while on the smartphone fewer fields may appear, and the display will adjust to the smaller space available on the smartphone. Presented in this topic are some examples of the controls and the look and feel of PeopleSoft fluid applications.

Gestures Used with Mobile Devices

When you use a mobile device to access your PeopleSoft applications, your interactions will differ from how you interact when using a browser on a desktop or laptop computer. In part, this is due to the gestures used to interact directly with the mobile device. In addition, this can be due to how PeopleSoft applications are displayed on mobile devices.

Mobile devices use an interface that enables you to use finger gestures to interact with the device and its applications. This table describes the common gestures that you use to interact with PeopleSoft applications on mobile devices.

Gesture	Description	Purpose
Tap	Quickly touch your finger to the display and release.	Use to click a link or select a page control or item.
Drag	Touch, hold, and then slide your finger on the page.	Use to scroll the page vertically, or pan the page horizontally. **Note:** The term scrolling indicates vertical movement, while the term panning indicates horizontal movement.
Swipe (or flick)	Place your finger on the screen and quickly swipe it in the desired direction.	Use to scroll or pan quickly. On a fluid homepage, swipe left or right to move through your available homepages.
Two-finger drag	Touch and hold two fingers to the display, and then slide both fingers.	Use to scroll through scrollable grid rows, to pan through scrollable grid columns, or to scroll through content in an element with overflow capability (such as a long edit box in a grid).
Double-tap	Quickly tap and release your finger two times.	Use to zoom quickly in on a section of the page and to zoom out if you are zoomed in currently.
Pinch open	Touch two fingers to the page then, spread the fingers apart.	Use to zoom in.
Pinch close	Touch two fingers to the page then, bring the fingers together.	Use to zoom out.

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Related Topics

- Using PeopleSoft Applications with Mobile Devices
- PeopleTools Browser Compatibility Guide (Doc ID 704492.1)

Working with the Controls in the Fluid Banner

The fluid banner is displayed on every fluid application page and contains many of the same controls displayed on fluid homepages. However, the controls displayed within the fluid banner can vary from component to component, depending on component settings, system settings, where you navigated from, and so on. In addition, which controls are displayed in the banner varies depending on the width of the browser window. As the width decreases, controls are moved from the banner to become links in the Actions menu.

The fluid banner is displayed on all fluid homepages and application pages. The fluid banner is divided into two sections. The upper section of the banner contains controls such as the back button, quick access bar items, global search, the home and notifications buttons, the actions menu, and the Navbar. The controls displayed within the lower section of the fluid banner include the title of the content you're viewing and the contextual actions in the More Actions menu. See Using the Actions Menu.

The title of the homepage, dashboard, component, or transaction page appears in the lower section of the banner. The title is left justified and is wrappable.

However, small factor devices display an integrated banner and a single Actions menu on the banner.

> **Note**
>
> Classic pages also display a fluid-like portal header with similar buttons and controls. This fluid-like portal header creates a consistent look and feel between classic and fluid applications.

This example illustrates the fluid banner on a fluid application page. You can find definitions for the fields and controls in the banner later on this page.

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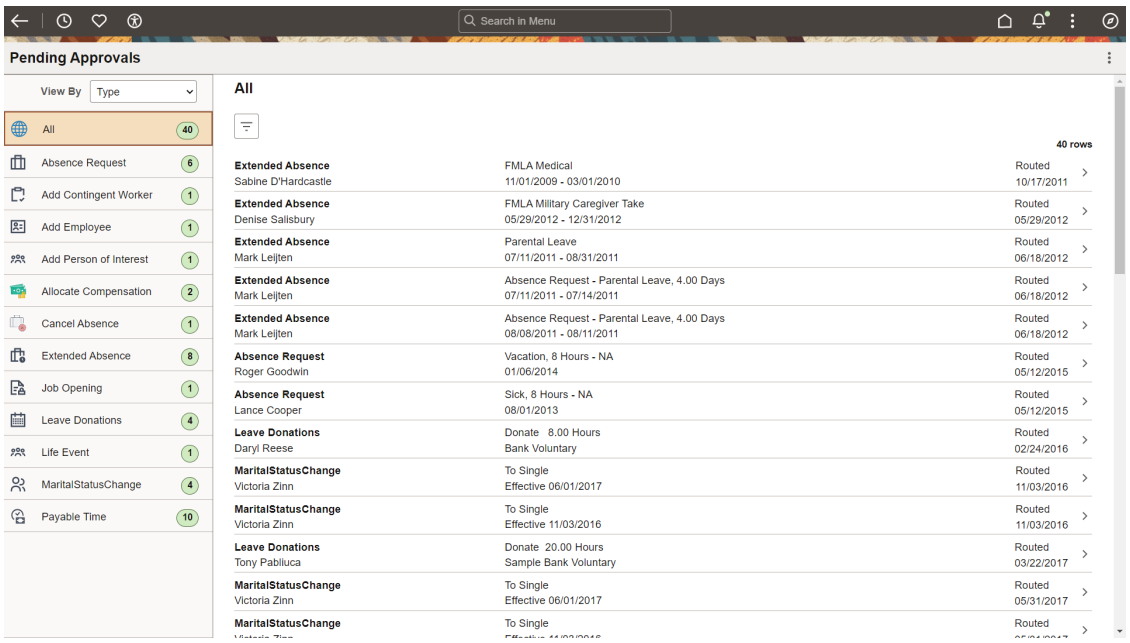
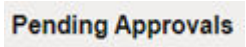


Term	Definition
	Back button (unlabeled). Use the Back button to navigate back to the previously visited component, homepage, activity guide, navigation collection, or WorkCenter. See Using the Back Button.
	Recently Visited button (in the quick access bar). Use the Recently Visited button to display your recently visited items in the quick access bar. See Using the Quick Access Bar and Working with Recently Visited Items.
	Favorites button (in the quick access bar). Use the Favorites button to display your favorite items in the quick access bar. See Using the Quick Access Bar and Working with Favorites.
	Accessibility button (in the quick access bar). Use the Accessibility button to enable screen reader mode, display a list of keyboard shortcuts, and access information on how to enable and use the accessibility layout features within the application. See Using the Quick Access Bar and Accessibility Guide: Using the Accessibility Button in Fluid.
	Page title (display only). There is no action associated with clicking the page title.
	Home button. Use the Home button to return to your default homepage, which is the homepage that you arrive at directly upon signon.

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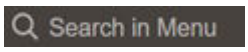
Term	Definition
	Global Search bar. Use the Global Search bar to perform global searches. See Working with Global Search. **Note:** When displayed on fluid dashboards and pages, the Global Search bar is muted and is activated when selected.
	Notifications button (displaying the new notifications indicator). Use the Notifications button to open the Notifications panel displaying any pending actions and alerts. See Using the Notifications Panel.
	Actions button. Use the Actions button to display the Actions menu. See Using the Actions Menu.
	More Actions button. Use the More Actions button to display the a list of menu items specific to the dashboard you are viewing. See Using the Actions Menu. **Note:** On small form factor devices, the More Actions menu does not appear and the items are integrated in the Actions menu, similar to PeopleTools 8.59.
	NavBar button. Use the NavBar button to display the NavBar (sometimes referred to as the navigation bar). See Working with the NavBar.

Using the Back Button

The Back button is displayed on the left side of the fluid banner (or the left side of the fluid-like portal header on classic pages). Use the Back button to navigate back to the previously visited item (for example, component, homepage, activity guide, navigation collection, or WorkCenter).

> **Warning**
>
> In PeopleSoft applications, never perform back navigation using the browser's or your smartphone's back button. You will bypass standard component processing causing data loss, corrupt the navigation history stack used by the Back button, and possibly cause other processing errors.

Standard Behavior

The navigation history stack tracks navigation from component to component, including navigation from standard components, homepages, dashboards, activity guides, navigation collections, classic WorkCenters, and MAP applications. When you navigate from one of these items, the Back button will be labeled appropriately and will point back to that item. However, page transfers within a component are not tracked in the navigation history stack, unless overridden by the application developer.

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In screen reader mode, the aria-label attribute for the Back button is: `Back to Back_button_label`.

> **Note**
>
> Application developers can override the default Back button behavior (for example, specifying a custom Back button label or indicating that a specific transfer is to be ignored) using the SetTransferAttributes PeopleCode function, which alters the entries written to the navigation history stack. In addition, component property settings or the SetTransferAttributes function can be used to enable tracking of page-to-page transfers within a component.

When the Back Button Is Not Displayed

The Back button is not displayed on:

- Fluid homepages, classic homepages, and classic dashboards. Navigating to any of these items is considered a navigation reset, and the navigation history stack is cleared.
- Fluid activity guides. Instead, an Exit button is displayed, which allows you to exit the activity guide and return to the item visited before entering the activity guide.
- Any component in which the Back button has been disabled in the component's properties.
- Any page displayed in a new browser window or tab, either as the result of clicking the New Window link or as the result of a PeopleCode program. This new window has a separate session and navigation history stack.
- Similarly, any other initial content displayed to you (for example, as the result of clicking a link in an email or any other link to a component that requires you to login first).

The Back Button Within Two-Panel Items Constructs

> **Note**
>
> While the pagelet area and target content area of classic WorkCenters and classic activity guides are not "panels" strictly speaking, they function much in the same way as their fluid counterparts. For the purposes of this discussion of the Back button, classic WorkCenters and classic activity guides will be referred to as "two-panel constructs."

When you access content that is displayed in any type of two-panel construct (classic WorkCenters, classic activity guides, fluid navigation collections, master/detail components, or 8.54 implementations of a two-panel fluid component), the Back button points to the item visited prior to accessing the two-panel construct. When you select a link from the left panel, the content is replaced in the right panel. However, the Back button is not affected and still points to the item visited prior to accessing the two-panel construct. When you navigate out of the two-panel construct, then the Back button points back to the two-panel construct. Clicking the Back button at this point will return you to the two-panel construct in its *initial state*—that is, you do not return to the last item visited within the two-panel construct.

Related Topics

- Fluid User Interface Developer's Guide: Working with the Back Button

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- Application Designer Developer's Guide: Setting Internet Properties
- PeopleCode Language Reference: SetTransferAttributes function

Using the Actions Menu

The Items in the Actions menu are divided between two lists, one in the upper and one in the lower section of the banner. The upper section contains the Actions menu which lists system-wide items. The lower section of the banner contains the More Actions menu with an additional list of action items specific to the homepage, dashboard, component, or transaction page that you are viewing.

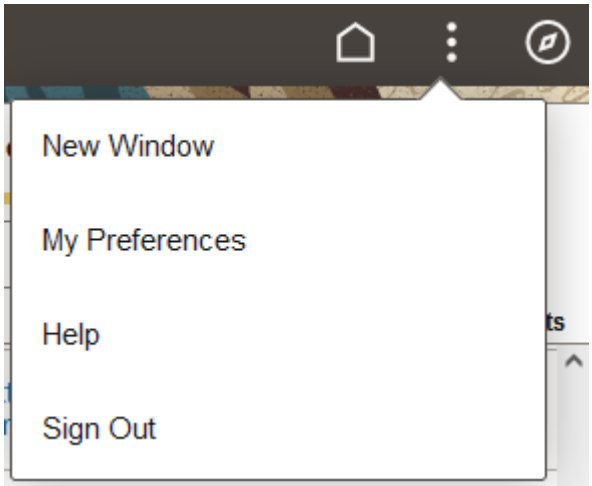
> **Note**
>
> On small factor devices, the menu items are integrated under a single Actions menu on the banner.

Actions Menu

Press the Actions button in the upper part of the banner to reveal the Actions menu, which contains a list of actions you can take. The list of menu items depends on your permissions to perform certain actions.

For example, a fluid homepage contains menu items (New Window, My Preferences, Help, and Sign Out) that pertain specifically to the context of a fluid homepage. Some users, such as guest users, may not have the permission to set preferences on the homepage.

This example illustrates the options appearing on the Actions menu while accessing a fluid application homepage.



When you access the Actions menu from a dashboard or transaction page, the list of menu items displayed is specific to the dashboard or transaction page and based on the permissions associated to your user role.

This example illustrates the options appearing on the Actions menu while accessing a fluid application page.

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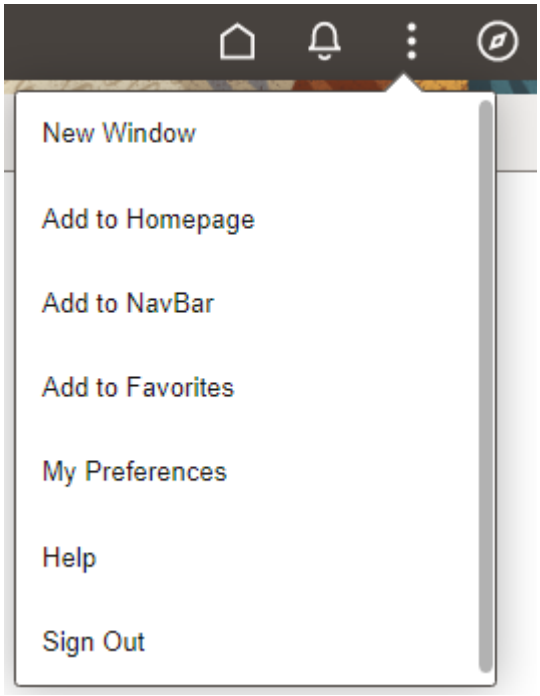

Field or Control	Description
New Window	Opens the currently displayed fluid component or fluid navigation collection in a new browser tab (or window). See Opening New Windows for more information on what is displayed in the new window. Whether the New Window menu item is displayed is determined by: • The component properties for standalone fluid components. • The component properties for the currently displayed fluid component within a master/detail wrapper. • The content reference definition for fluid navigation collections. In addition, when update of the fluid banner and Actions menu is allowed, the visibility of the New Window menu item can be changed by PeopleCode.
My Preferences	Opens the My Preferences component, where you can modify settings that control a variety options in the PeopleSoft system based on your preferences. See Defining User Preferences.
Help	Opens the section in PeopleSoft Online Help for the current component in a new browser window. The Help menu item is displayed only if the Help option is configured in the component properties *and* Help has been configured for the system on the web profile.
Sign Out	Signs you out of the system, returning you to the PeopleSoft sign-in page.

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Field or Control	Description
Add To Homepage	Adds a tile on an ad hoc basis to the selected fluid homepage, enabling you to access the page directly from that homepage. See "Using the Add To Homepage Feature" in Managing Tiles on Fluid Homepages and Dashboards. Add To links enable you to personalize application navigation by adding access to any fluid or classic page as needed for your user experience. When you add a tile on an ad hoc basis to a homepage or the NavBar, or when you add a favorite, you can edit and personalize the label for the item.
Add To NavBar	Adds a tile on an ad hoc basis to the left-hand side of the NavBar, enabling you to access to that page directly from the NavBar. See "Using the Add To NavBar Feature" in Working with the NavBar. Add To links enable you to personalize application navigation by adding access to any fluid or classic page as needed for your user experience. When you add a tile on an ad hoc basis to a homepage or the NavBar, or when you add a favorite, you can edit and personalize the label for the item.
Add To Favorites	Adds a link to the Favorites section of the NavBar and the quick access bar, as well as the Favorites menu folder available from a classic homepage. See Working with Favorites. Add To links enable you to personalize application navigation by adding access to any fluid or classic page as needed for your user experience. When you add a tile on an ad hoc basis to a homepage or the NavBar, or when you add a favorite, you can edit and personalize the label for the item.

Homepage Actions Menu

On fluid homepages, press the Homepage Actions button to reveal the Homepage Actions menu, which contains a list of actions specific to the homepage. The list of menu items depends both on what has been configured in the system as well as your permissions to perform certain actions.

For example, a fluid homepage contains menu items (Personalize Homepage, Publish Homepage, and Refresh) that pertain specifically to the context of a fluid homepage as well as the permissions granted to the signed on user. Some users, such as guest users, are not granted the permission to personalize homepages. Other users, such as portal administrators, are granted special permission to publish a personal homepage as a system homepage.

This example illustrates the options that appear while accessing a fluid application homepage.

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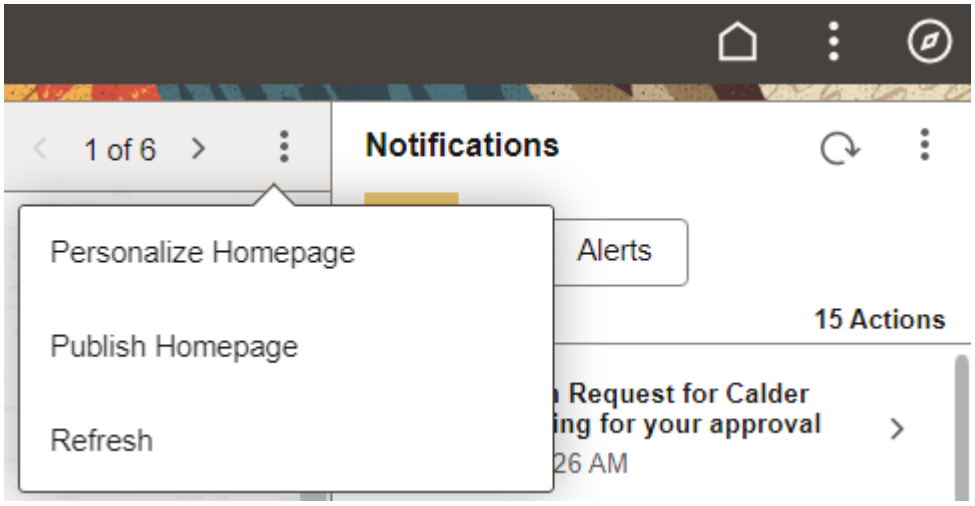

Field or Control	Description
Personalize Homepage	Allows you to personalize your fluid homepages, which can include: • Adding, deleting, and rearranging tiles on homepages. • Creating personal homepages. • Deleting and rearranging the order of homepages when that is allowed. • Changing the title of homepages when that is allowed. See Managing Fluid Homepages.
Publish Homepage	For users with permissions, allows you to publish a personal homepage as a system homepage. See Portal Technology: (Fluid only) Publishing Personalizations as a New Fluid Homepage for more information.
Refresh	Refreshes the homepage content including refreshing the content of the tiles.

Dashboard Actions Menu

On fluid dashboards, press the Dashboard Actions button to reveal the Dashboard Actions menu, which contains a list of actions specific to the dashboard. The list of menu items depends both on what has been configured in the system as well as your permissions to perform certain actions, for example, personalizing your dashboard.

This example illustrates the options that appear while accessing a fluid application dashboard.

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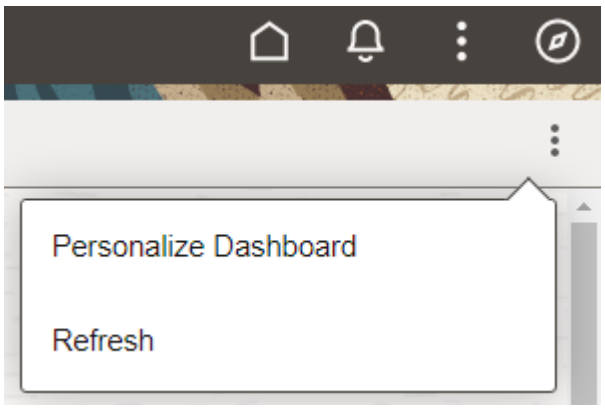
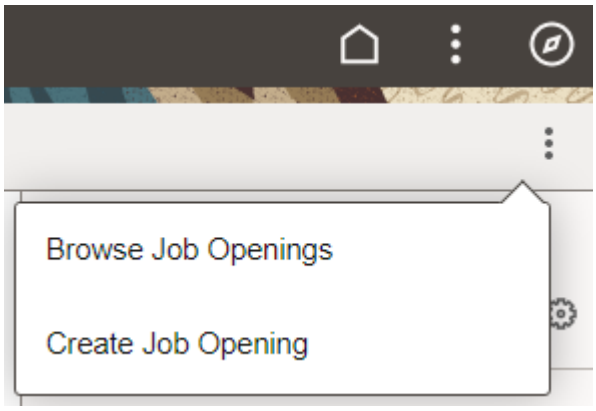


More Actions Menu

On fluid transaction pages, press the More Actions button to reveal the More Actions menu, which contains a list of actions specific to the transaction page. The list of menu items depends both on what has been configured in the system as well as your permissions to perform certain actions.

The More Actions menu lists items that are specific to the content you're viewing, so the items vary depending on where you navigate. Application developers can change the label of the More Actions menu as per their business requirements. See PeopleCode API Reference: Banner Class Methods.

This example illustrates the options appearing on the More Actions menu while accessing a fluid transaction page.



Working with the NavBar

After clicking the NavBar button, the NavBar side page appears. Use this page to access additional navigational options.

This example illustrates how the NavBar appears after it is first selected. It hugs the right side of the page, displaying the available tiles and options. These items are discussed in the following sections.

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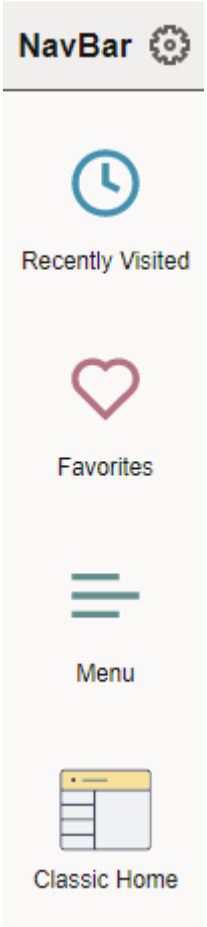
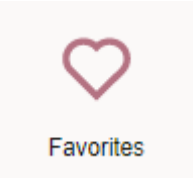


Field or Control	Description
	Use to personalize the menu, and to add, reorder, or remove tiles from the NavBar. Such tiles are referred to as *NavBar tiles*, whereas those appearing on the homepage are *homepage tiles*. See Personalizing the NavBar for more information.
	Select the Recently Visited tile to view your recently visited items. See Working with Recently Visited Items for more information.
	Select the Favorites tile to view your favorites. See Working with Favorites for more information.

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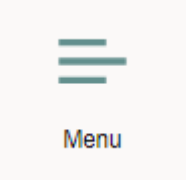
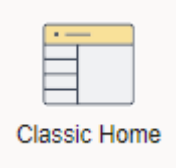
Field or Control	Description
	Select the Menu tile to browse the menu structure and navigate to menu items. See Working with the Menu in the NavBar for more information.
	Select the Classic Home tile to navigate to your default classic homepage. **Note:** This tile is labeled Classic Home when the default system homepage is defined as fluid. However, this tile is labeled Fluid Home only when the default system homepage is defined as classic. In that case, selecting Fluid Home takes you to your default fluid homepage. **Important:** When a classic content reference is selected as the default custom homepage tab by your system administrators or through user personalization, you must add the Homepages tile to the NavBar in order to be able to navigate to any fluid homepages.

Personalizing the NavBar

This example illustrates the options available for personalizing the NavBar. Descriptions of the options appear after the example.

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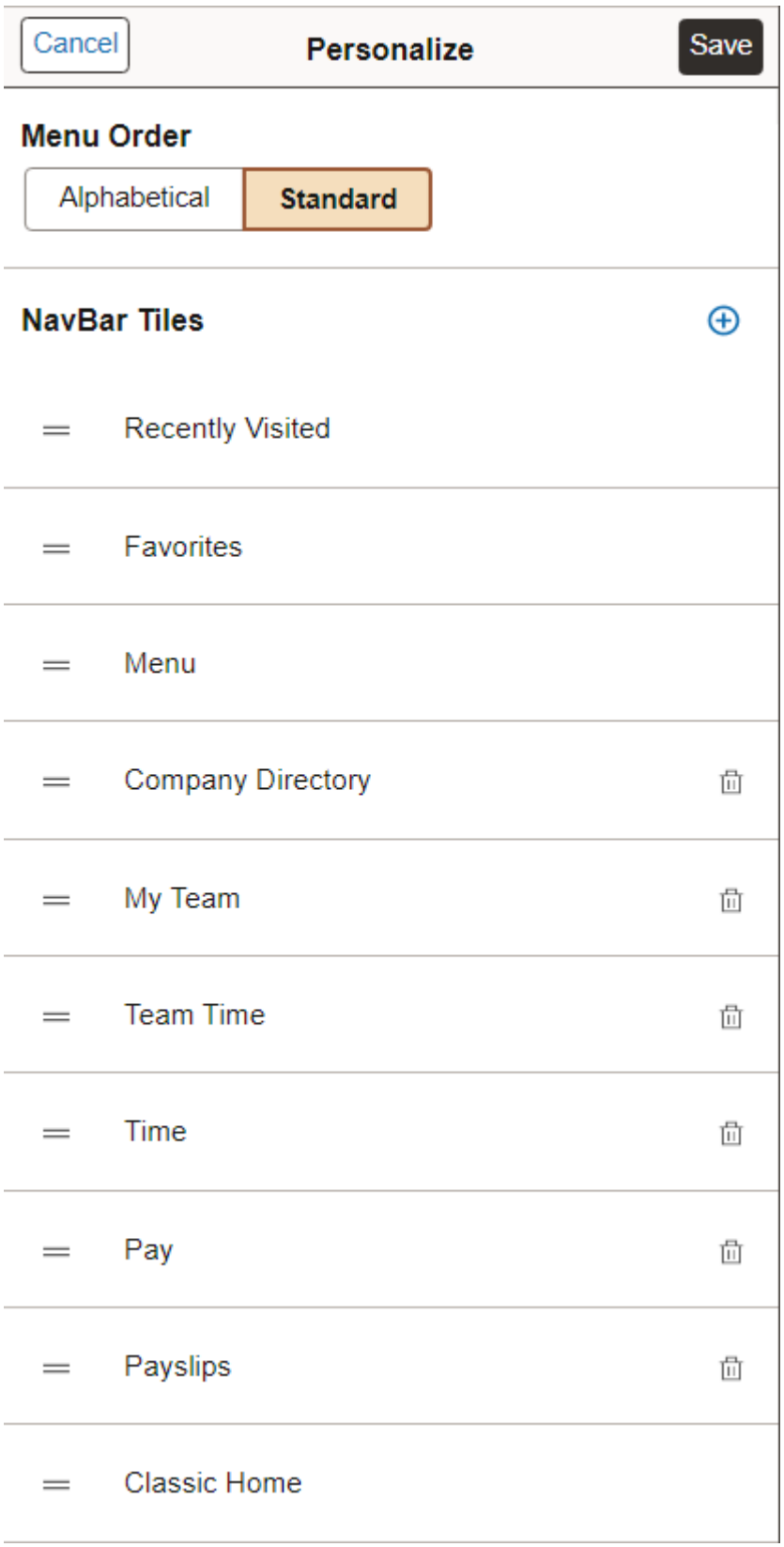

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Field or Control	Description
Cancel	Cancel the current selections and close the page.
Save	Save your personalization selections and close the page.
Alphabetical	When using the Menu tile, display the menu folders and items in alphabetical order. **Note:** Not all supported languages support alphabetical ordering of the menu. Your system administrator can configure additional languages disable menu sorting. See Portal Technology: Managing General Portal Settings for more information.
Standard	When using the Menu tile, display the menu folders and items in the order that was standard prior to PeopleTools 8.59.
⊕	Add a tile to the left pane of the NavBar. For more details on selecting tiles, see Managing Tiles on Fluid Homepages and Dashboards.
🗑	Delete a tile from the NavBar.

You can change the sequence in which the tiles appear in the NavBar using drag and drop. Click to select the tile, drag it to the desired position over another NavBar tile, then drop it. The dotted line indicates the tile you are dragging, and the solid line indicates the location where you are dropping the tile.

> **Note**
>
> Alternatively, you can use the keyboard to reposition NavBar tiles. Use the **Tab** key to highlight the tile you wish to reposition, press **Ctrl + M** to select it, use **Tab** or **Shift + Tab** to highlight the drop location, and then press **Ctrl + Shift + M** to drop it.

Using the Add To NavBar Feature

You can also add tiles to the NavBar on an ad hoc basis using the Add To NavBar link in the Actions menu.

> **Note**
>
> No actual tile definition will be created for these tiles if one does not exist already. The information is stored in the system as personalization data only.

When you use the Add To NavBar feature to add a tile to the NavBar, you can edit and personalize the label for the item. For example:

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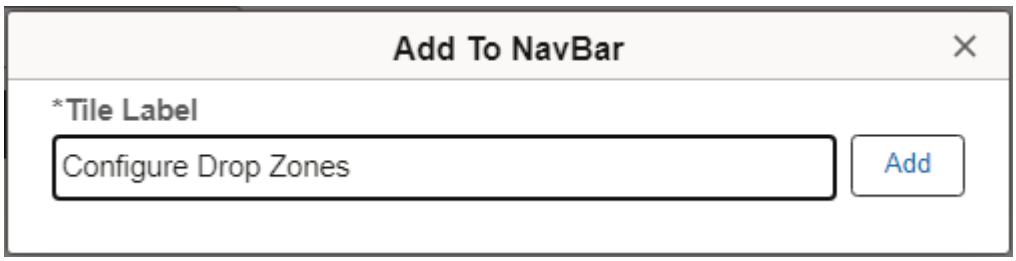
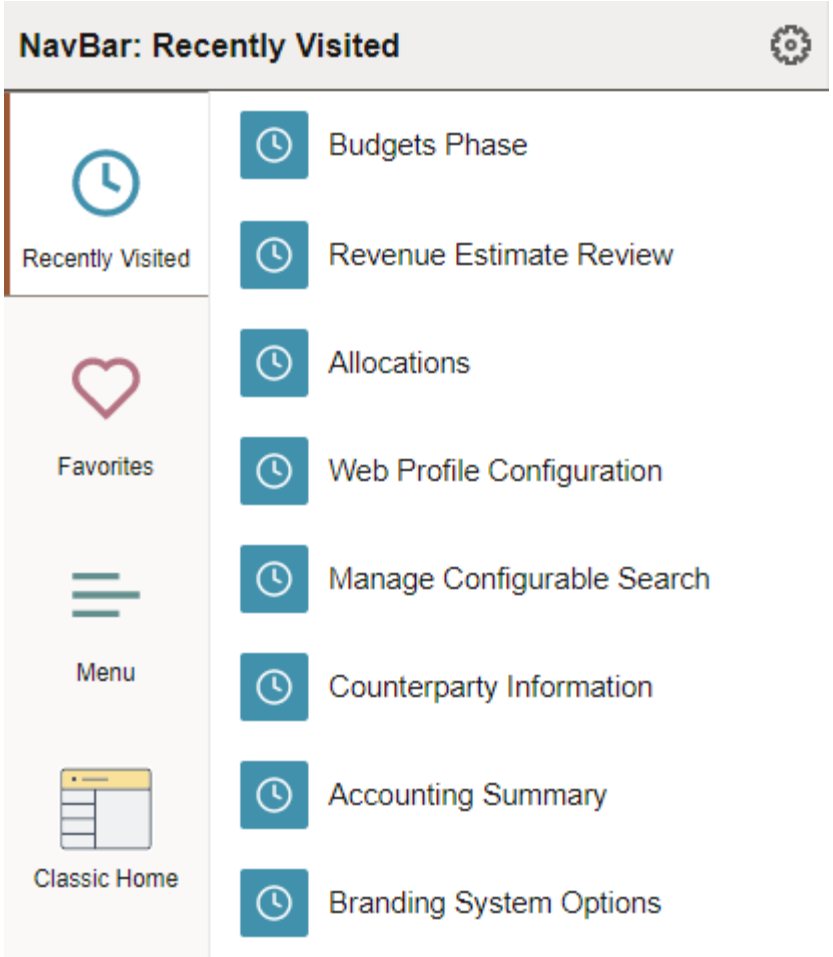


Working with Recently Visited Items

This example illustrates selecting Recently Visited from the NavBar. This tile displays the 10 most recent places in the PeopleSoft system you have been. Using this subset of links enables you to quickly choose from the application pages you have visited most recently.



The recently visited items displayed in the NavBar are the same as those displayed via the Recently Visited button in the quick access bar on fluid homepages.

Related Topics

- Using the Quick Access Bar
  The quick access bar (QAB) appears in the banner and provides quick access to your recently visited items and your favorites. These items displayed in the quick access bar are

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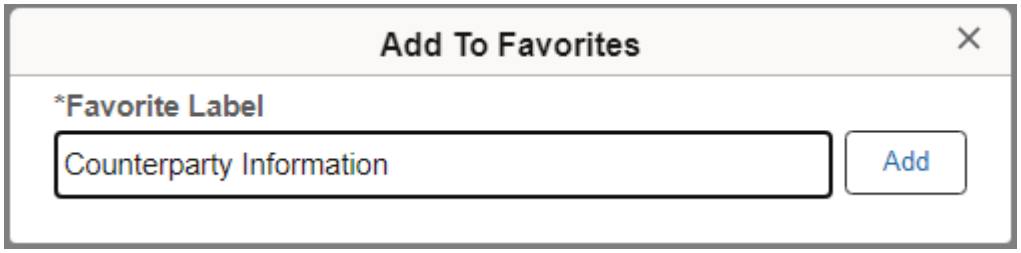
the same as those displayed via the Recently Visited and Favorites tiles displayed in the NavBar. The quick access bar is displayed by default on all fluid homepages, dashboards, and transaction pages; however, it can be disabled system-wide by your system administrator.

Working with Favorites

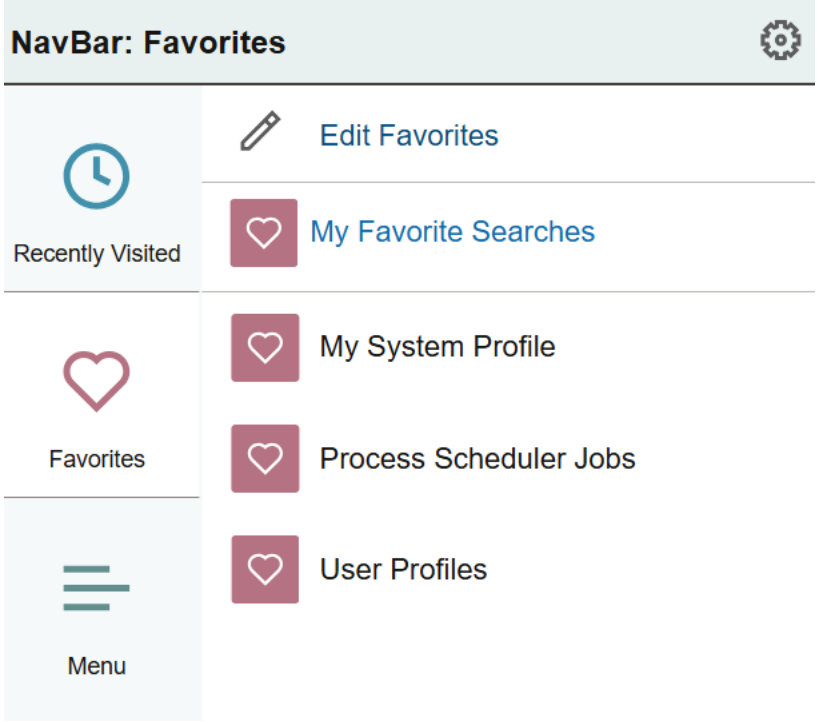
In the Actions menu, click the Add to Favorites link to add the current page as a favorite.

When you add a favorite, you can edit and personalize the label for the item. For example:



In the NavBar, click the Favorites tile to display your list of favorite pages and a link to the My Favorite Searches page which displays a list of all your favorite saved searches. See Search Technology: Viewing Favorite Searches.

This example illustrates links added to Favorites:



The favorites displayed in the NavBar are the same as those displayed via the Favorites button in the quick access bar on fluid homepages.

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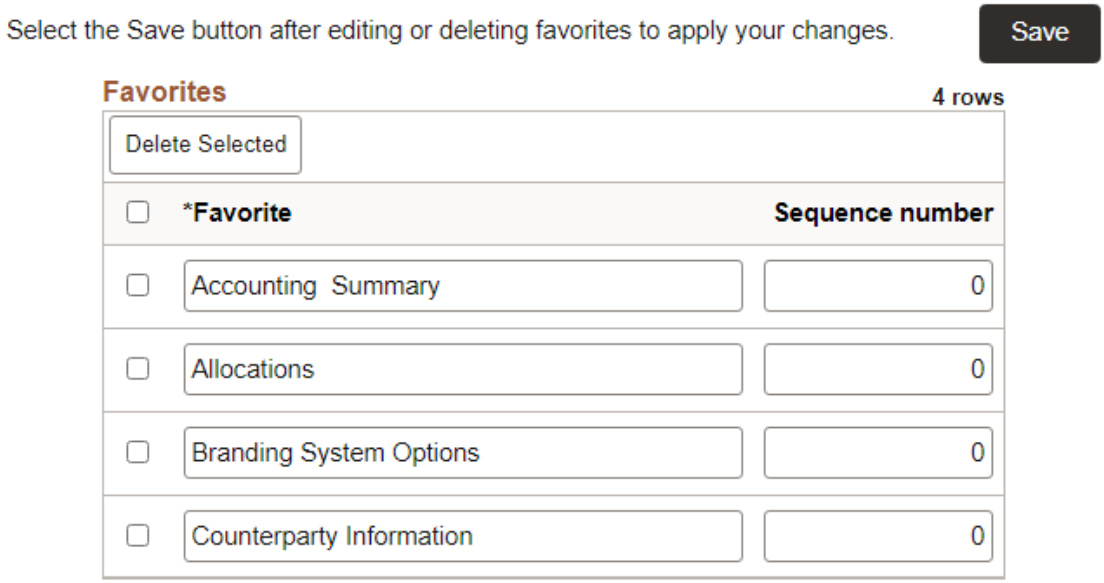
Click the Edit Favorites link to access the Edit Favorites page. On the Edit Favorites page you can re-label favorites, delete favorites, or modify the sequence in which they appear under Favorites.

This example illustrates the fields and controls on the Edit Favorites page.



The Edit Favorites page displays a grid with the favorites that you've added and their sequence numbers.

Related Topics

- Using the Quick Access Bar
  The quick access bar (QAB) appears in the banner and provides quick access to your recently visited items and your favorites. These items displayed in the quick access bar are the same as those displayed via the Recently Visited and Favorites tiles displayed in the NavBar. The quick access bar is displayed by default on all fluid homepages, dashboards, and transaction pages; however, it can be disabled system-wide by your system administrator.

Working with the Menu in the NavBar

The Menu tile allows you to browse the menu structure and navigate to the selected menu item.

> **Note**
>
> NavBar personalization allows you to display the menu in alphabetical order (for supported languages that support alphabetical ordering) or in sequence number order, which was the standard order prior to PeopleTools 8.59. See Personalizing the NavBar for more information.

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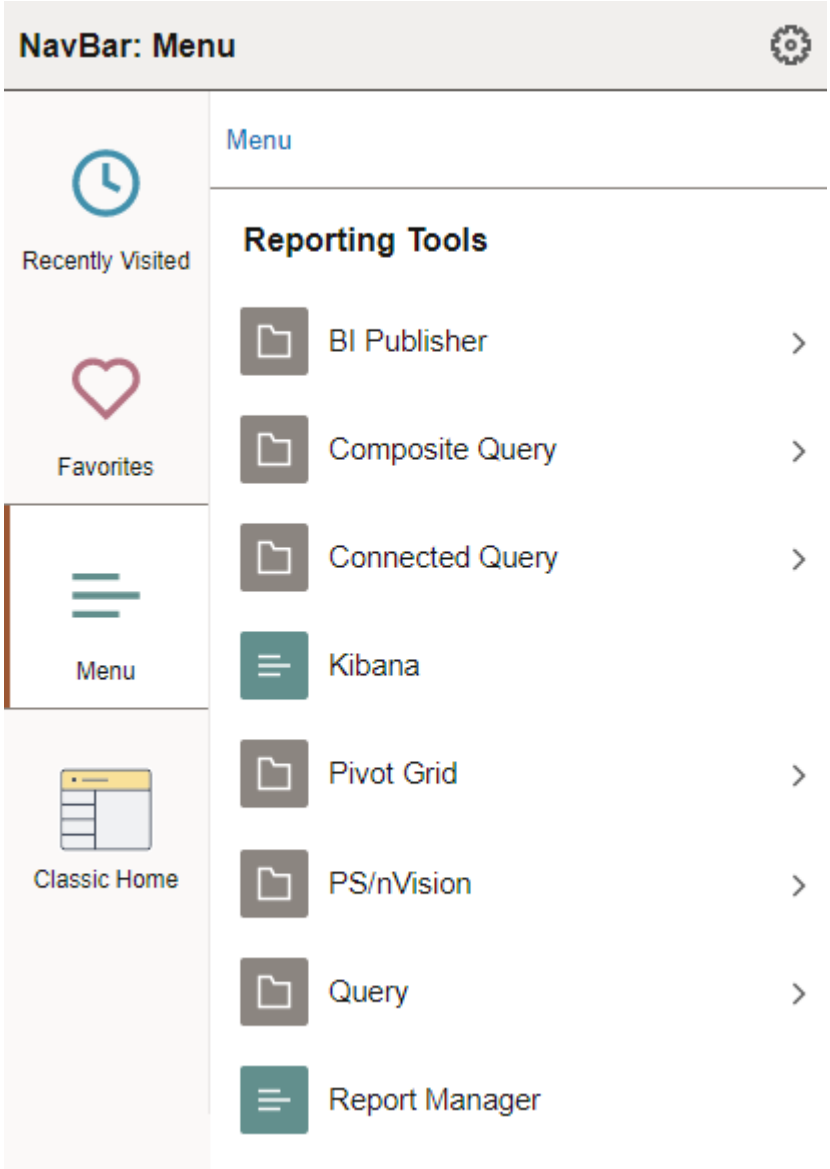
This example illustrates using the menu, which is displayed here in alphabetical order. You can navigate through the menu folders and menu items.



Field or Control	Description
Menu	Click the Menu link in the breadcrumbs to navigate to the root of the menu structure. Click any other link in the breadcrumbs to browse the contents of the menu folder.
	Select a menu folder to open the folder and browse its contents.
	Select a menu item to navigate to that item.

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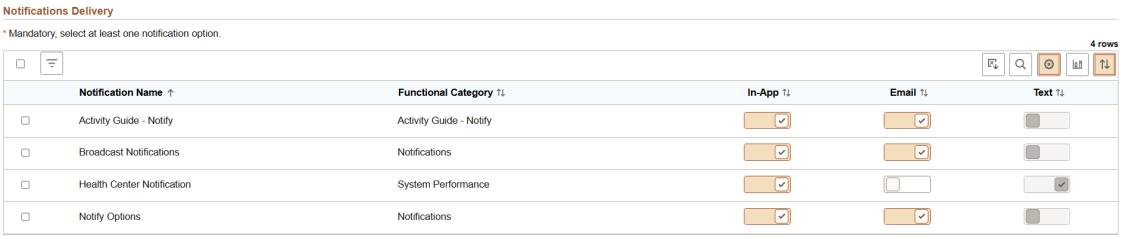
Related Topics

- Using the Keyboard with the NavBar
  The NavBar (navigation bar) is a control that provides quick access to tiles, folders, and pages in your PeopleSoft system. The NavBar contains tiles on the left that, when clicked, display a list of associated items on the right. The list items can be folders, links, or other objects. Users can use the list of items to access a page.

Working with Fluid Grids

This example illustrates the appearance of a grid on a fluid page.



Term	Definition
	Select All button Click to select all or deselect all rows in the grid. **Note:** The state displayed by the Select All button reflects the last user interaction with the button, and not interactions with individual grid rows. A server trip will clear the Select All button, but not the settings for individual rows.
	Filter button Click to open the Filter dialog box to allow you to select one or more filter criteria to limit the grid rows displayed.
	Download to Excel button. Click to download the grid contents to an Excel spreadsheet. **Note:** The downloaded file is named `PS_COMPONENT_NAME-datetime.xlsx`
	Find button. The find feature looks for matches in edit boxes, display-only fields, disabled or shaded fields, dynamic links, and text in long edit boxes. It does not find column headings, field labels, text values on icons, static links, and hidden fields. It also does not search HTML areas that are on the grid or scroll area. See Finding Data for more information.

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Term	Definition
	Personalize button. Click to display the Grid Settings page in a modal window. See the following section, “Personalizing a Grid,” for more information. When no grid personalization is in effect, the button background color is white; when grid personalization is in effect, including a simple user sort, the button background color is brown. **Note:** The Personalize button does not appear on a "stacked" grid because personalization is disabled on a “stacked” grid.
	View Chart button. Click to generate a chart using the grid data. See Generating Charts Using Grid Data
	Sort button. Click to display the Sort pop-up menu. See the following section, “Sorting a Grid,” for more information. When the default sort is in effect, the button background color is white; when a user sort is in effect, the button background color is brown.
Grid Column Heading	Click a grid column heading to sort or resort the grid data. An up or down arrow indicates the direction of the active sort. **Note:** Sorting is disabled on columns consisting of radio button fields.

Personalizing a Grid

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

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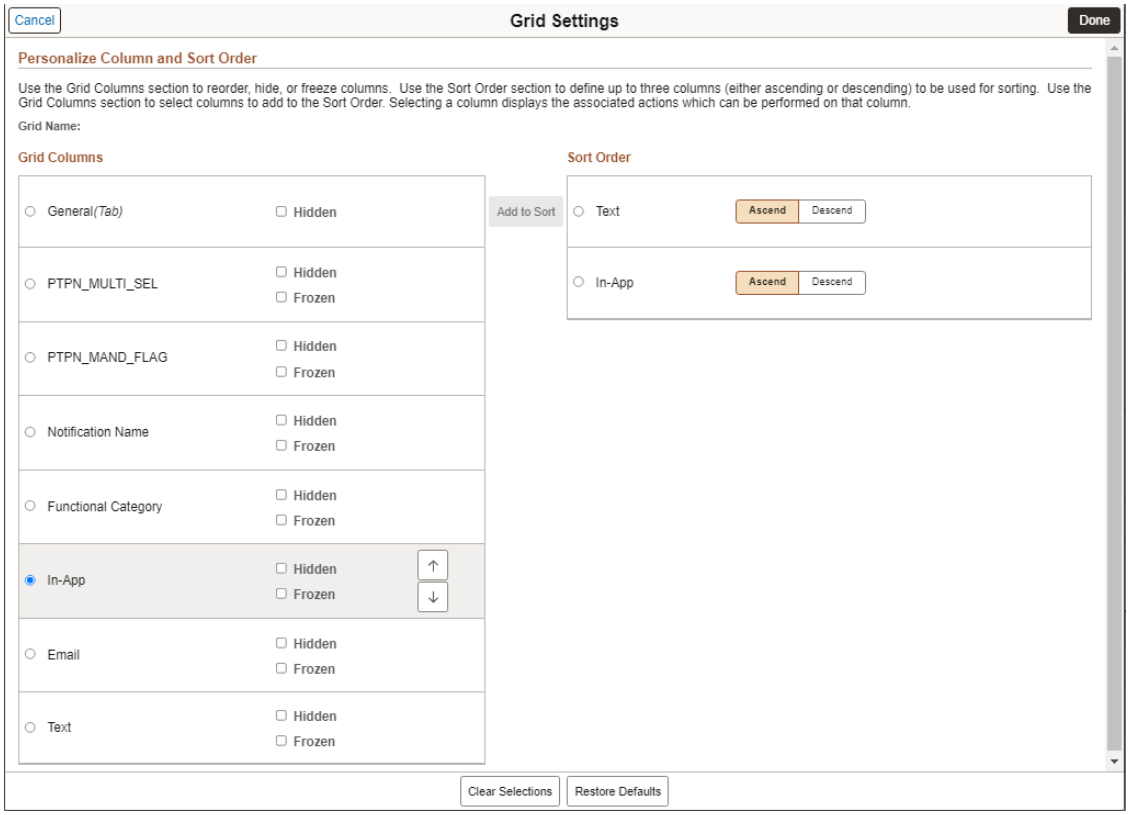

In both sections, selecting a column displays the associated actions which can be performed on that column. Use the Grid Columns section to reorder columns, hide or show columns, freeze or unfreeze columns, and to add columns to the Sort Order section. Use the Sort Order section to define up to three columns (either ascending or descending) to be used for sorting the grid.

Term	Definition
Hidden	Select this option to hide a grid column. **Note:** It is recommended not to hide the columns in a grid that are used for sorting.
Frozen	Select this option to freeze a grid column so that it appears on all tabs of a tabbed grid. **Note:** This option appears only on tabbed grids.
Add to Sort	When a column is selected in the Grid Columns section, use the Add to Sort button to add the column to the Sort Order section.
Clear Selections	Click the Clear Selections button to deselect all selected items in both the Grid Columns section and the Sort Order section.
Restore Defaults	Click the Restore Defaults button to restore the default column order, default sort order, and whether columns are visible.

After you've personalized the columns in a grid and saved your settings, if your system administrator inserts a new column in that grid, the system preserves the column personalization in the grid and displays the newly inserted column as the last column in the grid.

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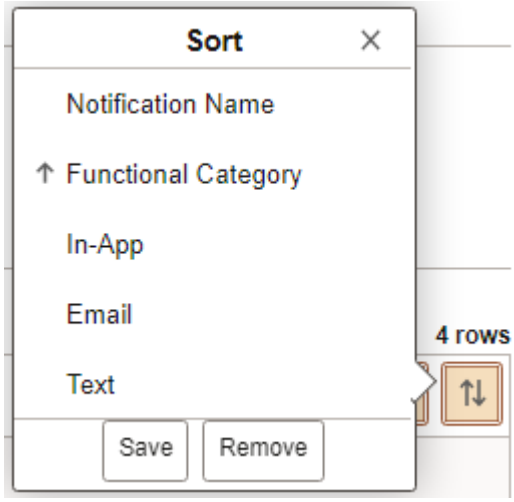
Sorting a Grid

This example illustrates the fields and controls on the Sort pop-up menu when save sort has been enabled. You can find definitions for the fields and controls later on this page.



Term	Definition
Grid Column Heading	Click a grid column heading to sort or resort the grid data. An up or down arrow indicates the direction of the active sort. On a stacked grid, personalization is disabled, but you can use the sort button to sort multiple columns. The sort indicator arrow only appears on the primary sort column, but users can sort up to three columns. For example, if you want to sort two columns, you should first perform a sort on the secondary sort column and then on the primary sort column. You can then save the sort and the sorting on both columns will be saved. Any time a column is sorted on, it becomes the primary sort. Any previously sorted columns (in the same session) become secondary and tertiary sorted columns. In this way, you can sort multiple columns. **Note:** Sorting is disabled on columns consisting of radio button fields.
Save	**Note:** The Save button is available only when personalization has been enabled for the grid. The Save button is displayed only after a user sort is in effect. Click the Save button to save a user sort.
Remove	**Note:** The Remove button is available only when personalization has been enabled for the grid. The Remove button is displayed only after a user sort has been saved. Click the Remove button to remove a saved user sort.

Working with Fluid Pages and Controls

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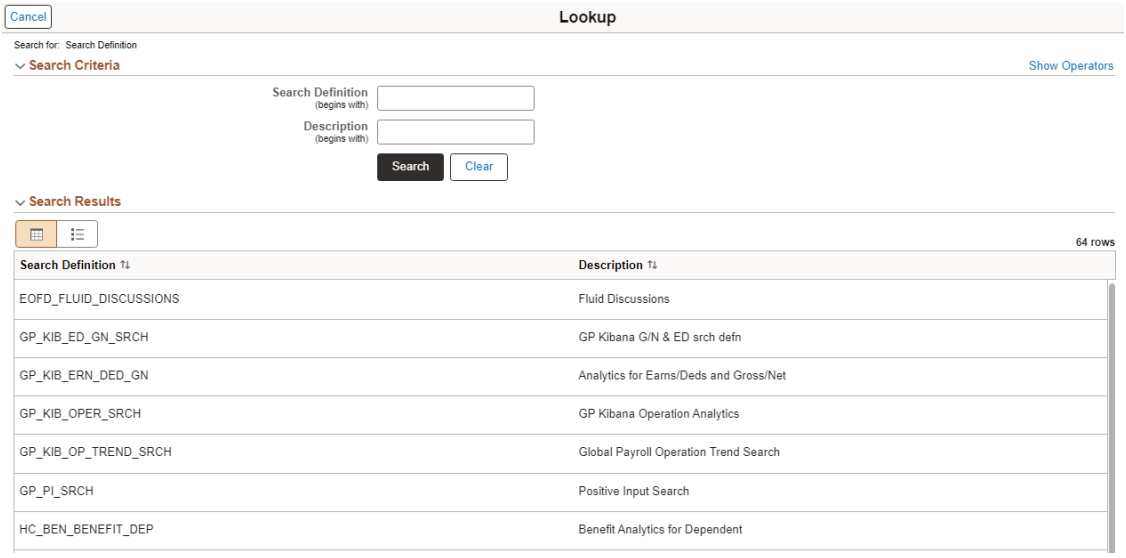
Working with Fluid Lookup Pages

A prompt or lookup button opens a lookup page in your browser populated with available values for that field. You can either select the desired value from the list or refine your search further.

This example illustrates the look and feel of the controls on a fluid lookup page.



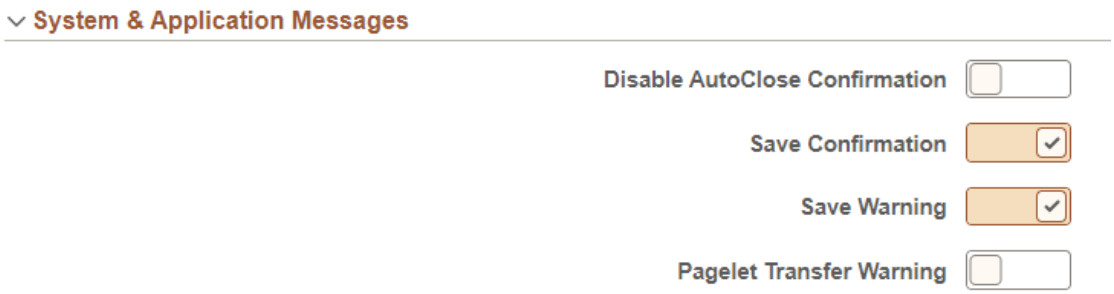
On the My Preferences page, you can configure the display settings for the Search Criteria section to appear collapsed or expanded when the prompt page is opened or after a search is performed.

On the My Preferences page, you can also select the option to display the search operators in the search criteria as changeable drop-down list values or as read-only text.

See Specifying General Settings in My Preferences.

Working with Toggle Switches

This example illustrates the use of contemporary controls widely used in modern web applications, specifically the toggle switch to indicate Yes/No values by tapping on the control.



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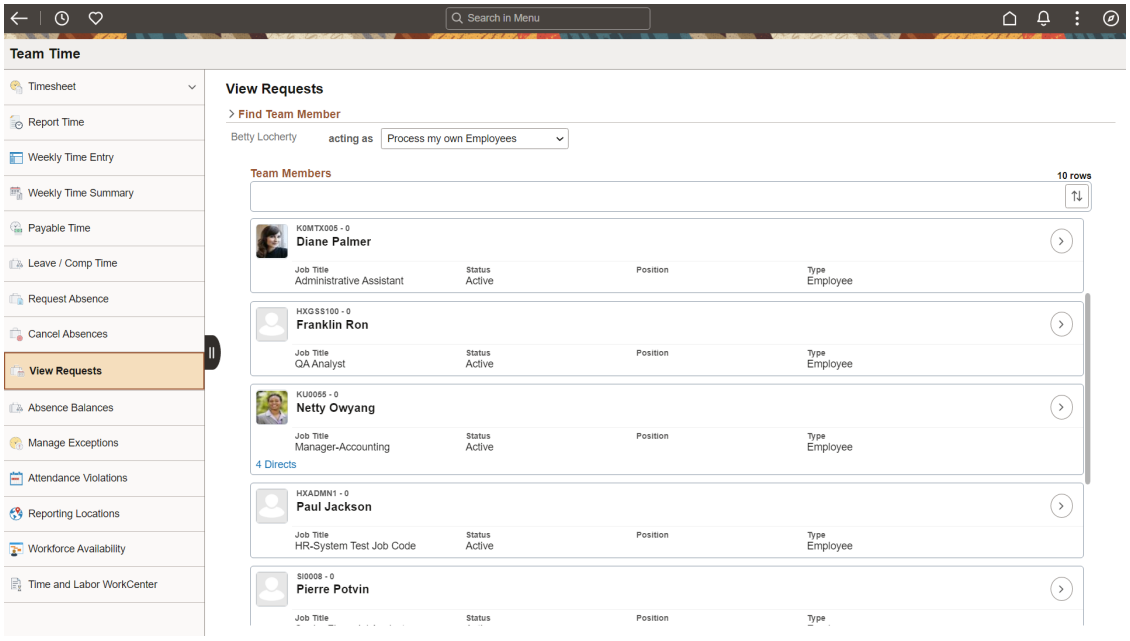
Working with the Slide-out Left Panel

The “slide-out” left panel is a feature that enables you to reveal the left panel of an outer, fluid wrapper (master/detail component, fluid activity guide, or fluid navigation collection) when the currently displayed component includes its own left panel.

When the slide-out left panel is enabled and an inner component *without* its own left panel is displayed, the left panel of the outer, fluid wrapper is displayed normally; there is no need for a slide-out left panel.



When the slide-out left panel is enabled and an inner component *with* its own left panel is displayed, the left panel of the outer, fluid wrapper is initially minimized as shown in the following example. The navigation links displayed are those from the inner component:

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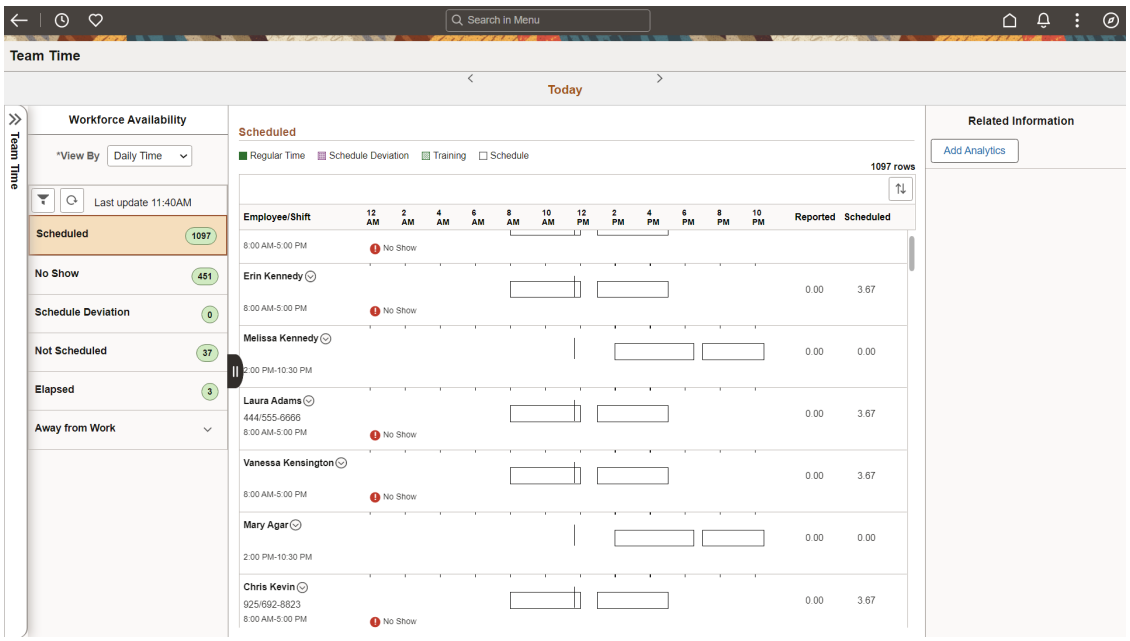
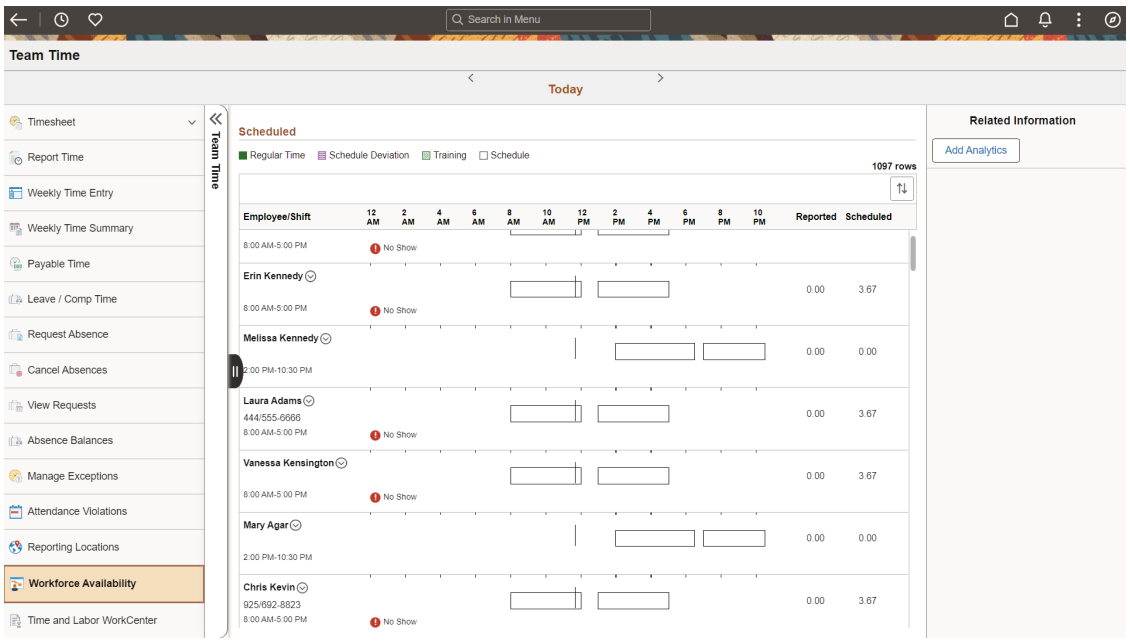


Clicking anywhere on the tab divider (labeled Detail, in this example) will slide open the left panel of the outer, fluid wrapper. The navigation links displayed are those from the outer, fluid wrapper:



Working with Search in Fluid Applications

This topic provides an overview and discusses:

- Working with global search.
- Working with fluid component search and keyword search.

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Understanding Fluid Search Features

Fluid applications provide search features very similar to the search features you use in classic applications. With fluid applications you can search for application data using:

- Global search
- Component search
- Keyword search

For more information on the search features provided in classic applications see Using PeopleSoft Search Technology to Retrieve Data and Using Search Pages to Retrieve Data.

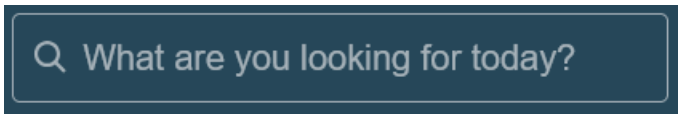
Working with Global Search

Global search is available wherever you are working in the PeopleSoft system: on fluid homepages, fluid application pages, classic application pages, and classic homepages.

Working with the Global Search Bar

The Global Search bar is open by default on fluid homepages. On smartphones, and non-small form factor devices, when the browser width is too small and does not permit display of the global search bar, global search appears as an icon. Click the Global Search button in the banner to reveal the global search bar.

When displayed on fluid dashboards and transaction pages, the Global Search bar is muted and is activated when selected.



When you click in the keyword input field, search suggestions are displayed immediately. As you type, the suggestions are updated to reflect the search term or terms you have entered. Click a search suggestion, either recently visited or any other suggestion, to navigate directly to that item.

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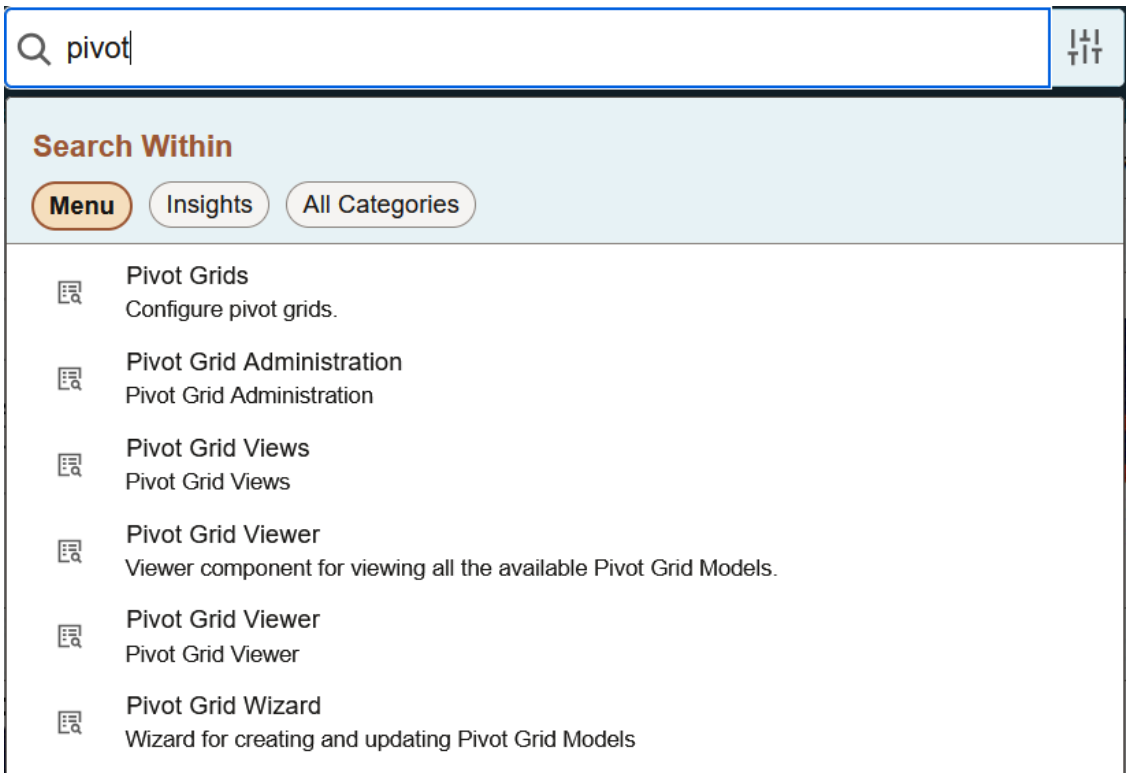

Term	Definition
	Use the Search Category selector to select the global search category. The search categories available to you vary based on the PeopleSoft application and your permissions. The *Menu* category is selected by default.
	Click in the keyword input field to automatically display search suggestions and to enter search terms. As you type, search suggestions are updated to reflect the search term or terms you've entered.
	Click the Advanced Search button to execute the search and review the complete result set on the Search Results page. There, you can filter results, apply advanced search criteria, perform related actions, and so on. See the next section, "Working with the Advanced Search Results Page," for more information.
	The recently visited icon indicates items in this search category that you have recently visited. You can click any recently visited or other suggestion to navigate to that item.
	The item icon indicates other search suggestions. You can click any recently visited or other suggestion to navigate to that item.

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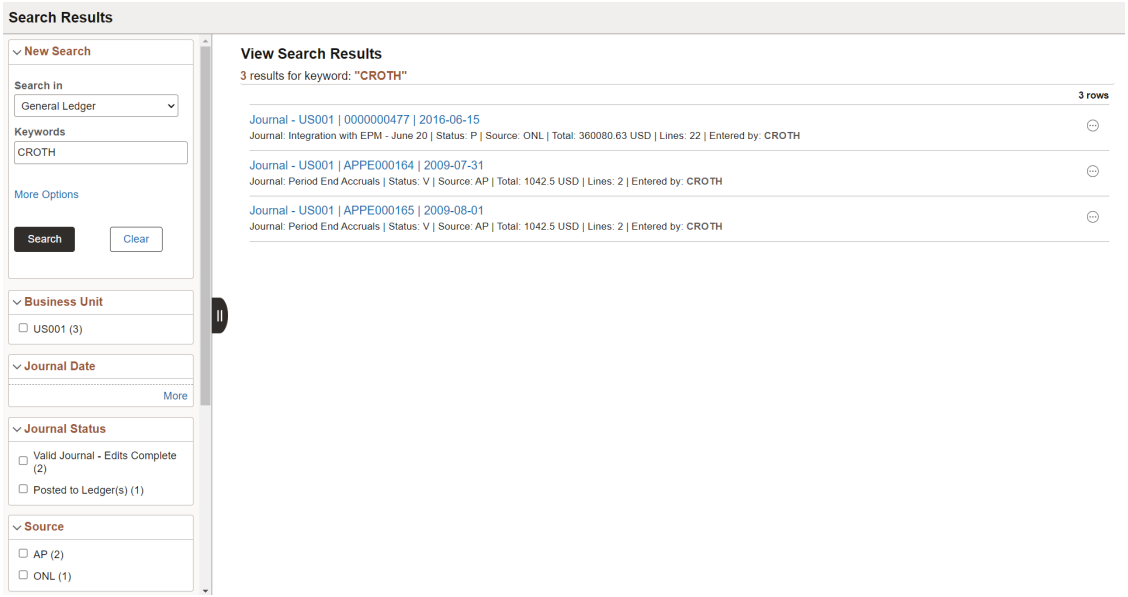
Working with the Advanced Search Results Page

Use the Search Results page to review the complete results of a search you executed using the Global Search bar.

This example illustrates the fields and controls on the Search Results page.



Use the Search Results page to filter results, apply advanced search criteria, perform related actions, execute a new search, and so on.

Term	Definition
Search in	Select the global search category. The search categories available to you vary based on the PeopleSoft application and your permissions.
Keywords	Enter one or more search terms.
More Options	Click to display advanced search options that allow you to search on an exact phrase, to exclude search terms, and to search within specific fields among others.
Search	Click to execute the search.
Clear	Click to clear all search criteria including the search category, keywords, advanced search options, and selected facets.
☐ New Jersey (2)	Select one or more facets to filter the search results displayed.

Working with Fluid Component and Keyword Search

With component search, you run searches against application data in the database using search keys that you can enter on the fluid component search page. Using keyword search, you can run a free text search against indexed data in the PeopleSoft Search Framework search engine.

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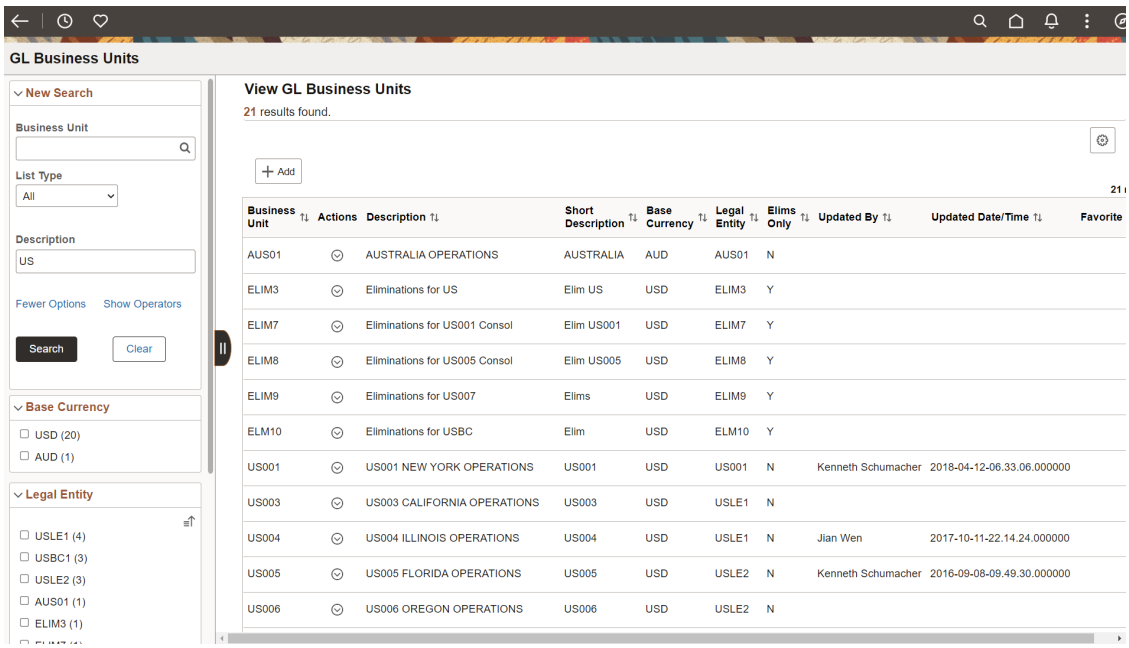
You can use configurable search to configure the presentation of search pages for an individual component or system-wide. PeopleTools delivers a default search page for fluid components, which you can configure to suit your business requirements.

Refer to the documentation on configurable search Search Technology: Understanding Configurable Search.

The following example illustrates searching for data in a fluid component.



To submit a keyword search, click the Global Search button in the fluid banner. The search category selector will display the search category associated with the current component. Enter your keyword search item in the search keyword input field. Click the Advanced Search button to perform the search.

Search results for both the component search and the keyword search appear on the same search results page.

Working with Push Notifications

The Push Notification Framework helps in disseminating and consolidating notifications from events in the PeopleSoft system in real time. When you login to the PeopleSoft system, you can see your notifications in the Notifications panel. On desktop browsers and device widths greater than 1280 pixels, the Notifications panel is open by default on your fluid homepages. On device widths of 1280 pixels or less, such as on a smartphone, and on all transaction pages, the Notifications panel is available by clicking the Notifications button in the header. The system continues to update notifications as they occur in real time while you are working on your tasks and even as you're working on notifications themselves.

Using the Notifications Panel

In the Notifications panel, administrators can choose whether to display both Actions and Alerts, or display only Actions, or only Alerts.

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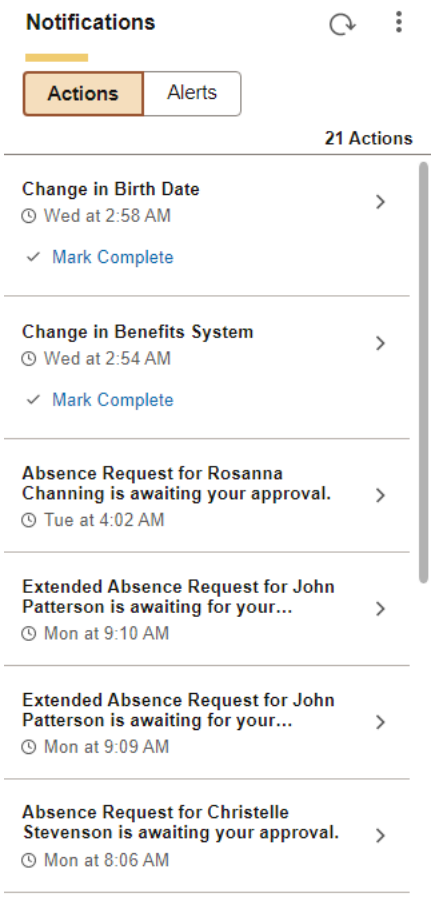
This example illustrates the display of both Actions and Alerts on the Notifications panel. You can find definitions for the fields and controls later on this page.



This example illustrates the display of Actions in the Notifications panel.

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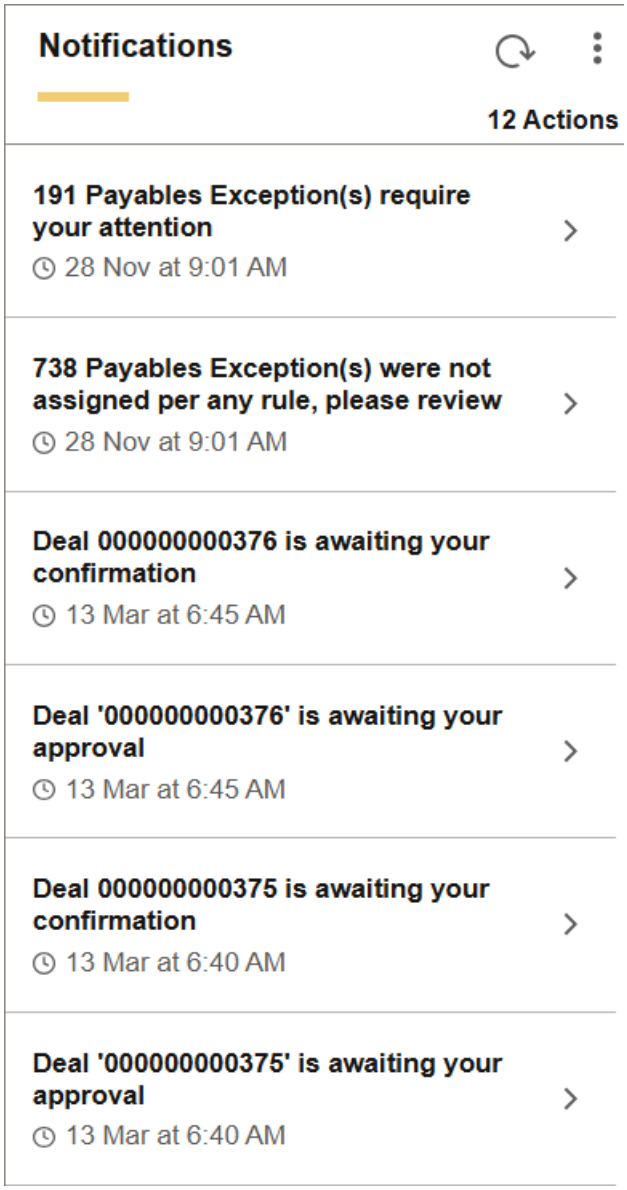

This example illustrates the display of Alerts in the Notifications panel.

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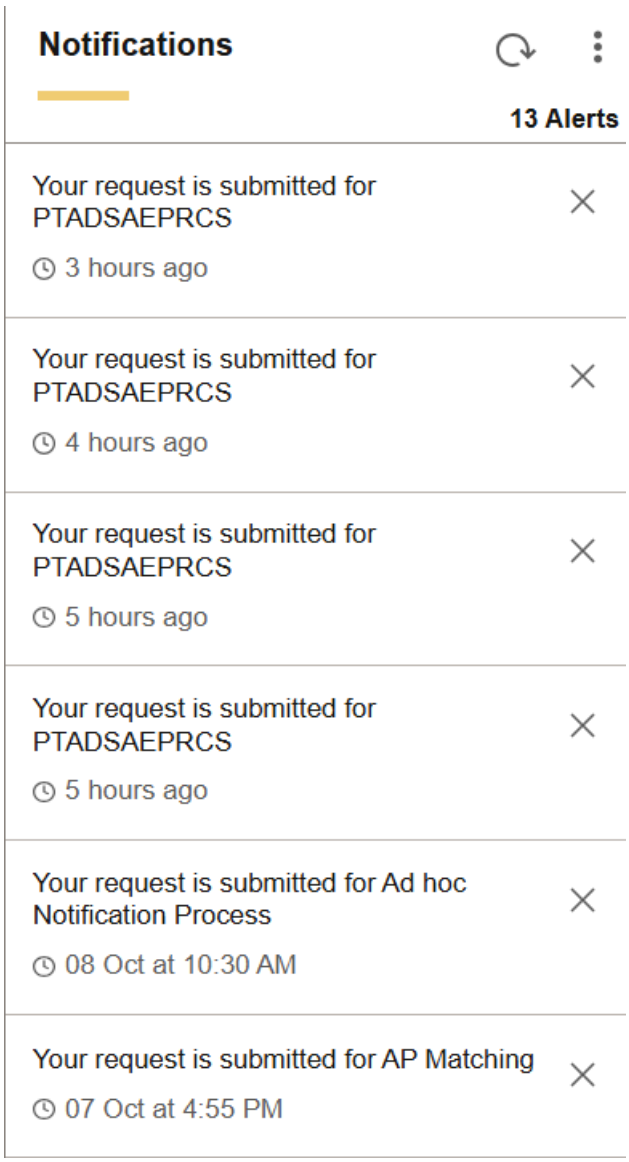

Field or Control	Description
	Refreshes the Notification window to add all new notifications. The Refresh button displays a blue dot when a new notification arrives.

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Field or Control	Description
⋮	The Notification menu includes these links: • Open Action View – Click this link to review all of your actionable items in the two-panel action view. See Using the Two-Panel Action View. **Note:**This link is displayed only when you are viewing the Actions section. • View All Notifications – Click this link to go to View All Notifications page. See Viewing All Notifications. • Settings – Click this link to personalize the Notifications panel using the Notification Settings page. See Personalizing the Notifications Panel and Your Notifications
Actions	Select this section to see a list of all of your actionable items. A timestamp for each of the actions item is displayed.
Alerts	Select this section to see all of your informational alerts (non-actionable items). A timestamp for each of the alerts item is displayed.
View All	If the number of actions or alerts exceeds the value specified on the Notification Settings page, a View All link is displayed to allow you to view all of your actions or alerts in New, Unread, and Read state on the View All Notifications page. See Personalizing the Notifications Panel and Your Notifications
›	Click a link to open the transaction for that notification.
Mark Complete	Click this button to mark the action as complete and remove it from the Notifications panel. For more information, see the Marking an Action as Complete section later in this topic.
Alert link title	For certain alerts, you can click the alert link to view more information.
×	Dismisses an alert. This button is displayed only for alerts in the **Alert** section.

Note

Notifications are generated in the language of the notification approver, which is specified on the General tab of the User Profiles page (PeopleTools, Security, User Profiles, User Profiles). For example, if the notification approver's language is set to English, the notifications will be displayed in English. When a notification is generated, the notification remains in that language and does not change to reflect the user's language preferences or current session language.

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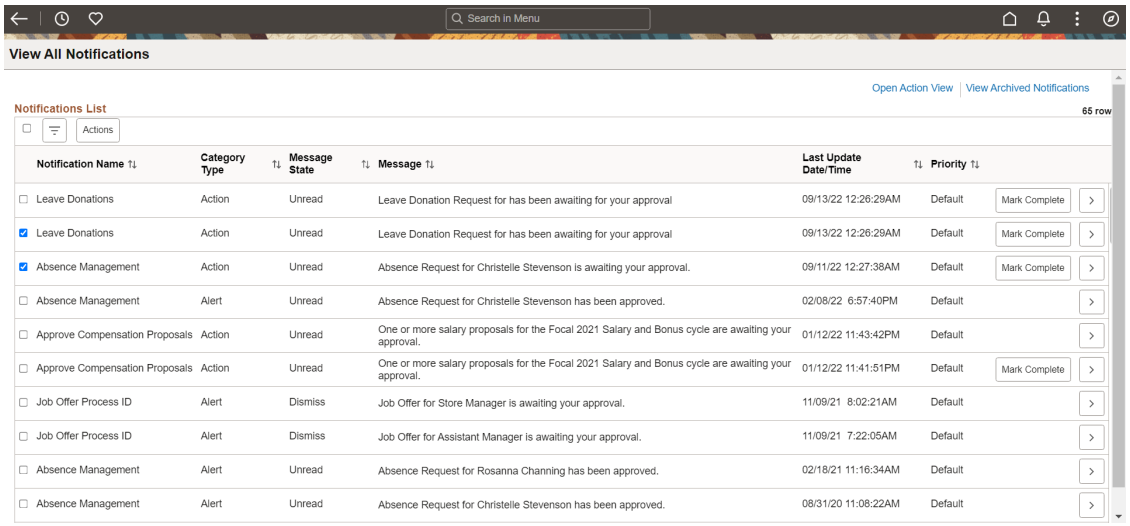
Marking an Action as Complete

You can mark selected actionable notifications as complete and remove them from the Notifications panel without navigating to the transaction page by clicking the **Mark Complete** button. This option is available in the Actions section of the Notification panel on the homepage as well as on the View All Notifications page. After you mark the item as complete, it disappears from the Notifications panel and is displayed as 'Completed' in the Notifications List in the View All Notifications page.

When you select more than one actionable notification in the View All Notifications page, an Actions button becomes available on the page. Select this button and then select **Mark as Completed** to perform a bulk action and mark all the selected notifications as complete.

The following image illustrates the 'Mark Complete' option in the View All Notifications page.



> **Note**
>
> This feature is available for selected actionable notifications only.

See PeopleCode API Reference: SetCategory method: PTNotification class.

Using the Two-Panel Action View

Use the two-panel action view to view and *act on* all of your actionable notifications.

Navigation:

From the Notifications panel, **Notifications Menu button**, and then **View Actions in Panel link**

This example illustrates the fields and controls on the two-panel action view.

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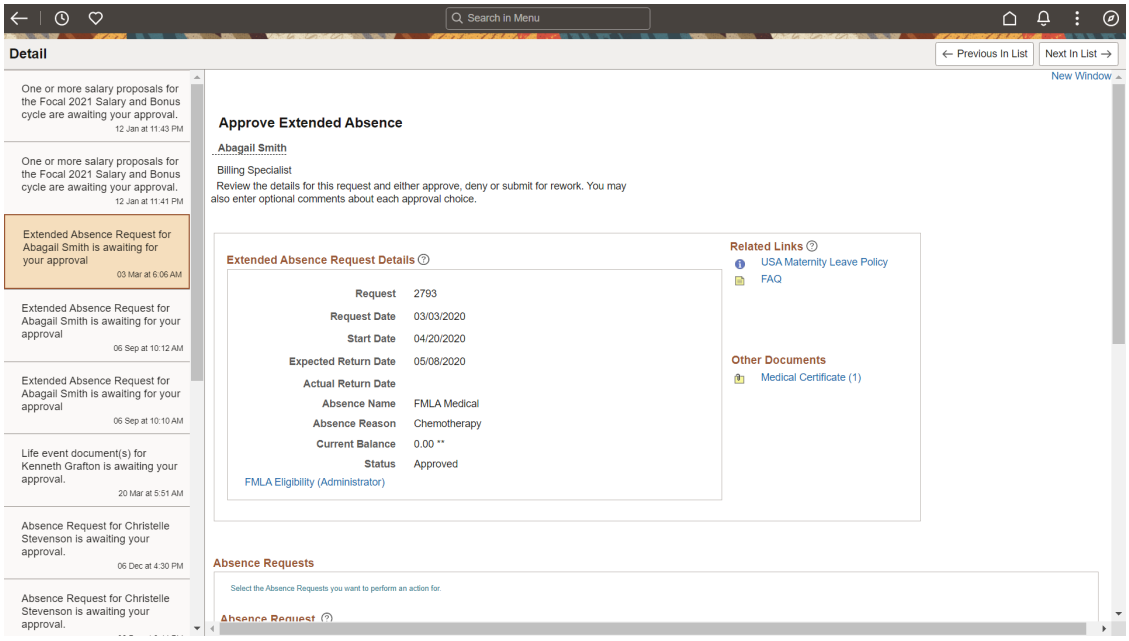

The action view uses the master/detail architecture to display a master list of your actionable items in the left panel while displaying the notification target content on the right. You can act directly on this target content—for example, to approve, deny, or take any other action appropriate to the transaction. To navigate in the action view, click a notification listed in the left panel to display it on the right. Alternatively, use the Previous in List and Next in List navigation buttons to navigate sequentially through your list of actionable items.

Because the action view is a master/detail component, some transactions are presented to you different from the preceding example:

- If the transaction cannot be displayed directly within the action view, then you will be presented with the following message:

  ```
  The notification source can't be directly displayed within this area.
  Click on the link below to navigate to target notification:
  Notification Target
  ```

  Click the **Notification Target** link to open the notification in a new browser window.
- If the transaction includes its own inner left panel, the list of notifications is initially collapsed so that the inner left panel of the target transaction is displayed. To redisplay your list of notifications, click the Notifications tab to slide out the outer left panel. See Working with the Slide-out Left Panel for more information.

Viewing All Notifications

Use the View All Notifications page to review all of your actions and alerts together.

Navigation:

From the Notifications panel, **Notifications Menu button**, and then **View All Notifications link**

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

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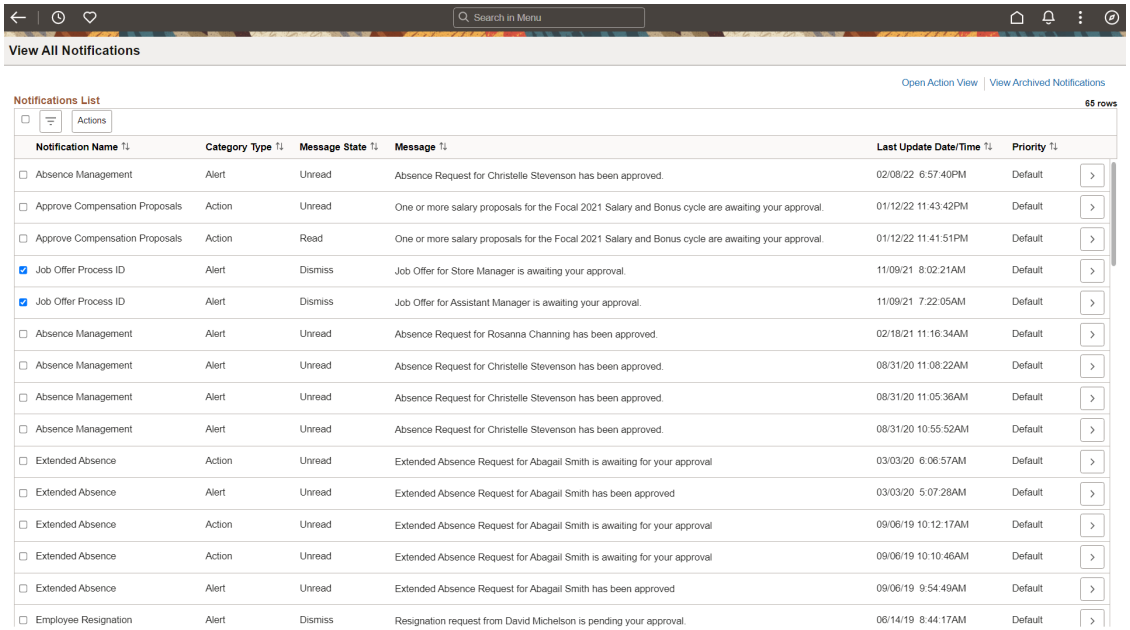

Notification Name	Category Type	Message State	Message	Last Update Date/Time	Priority
Absence Management	Alert	Unread	Absence Request for Christelle Stevenson has been approved.	02/08/22 6:57:40PM	Default
Approve Compensation Proposals	Action	Unread	One or more salary proposals for the Focal 2021 Salary and Bonus cycle are awaiting your approval.	01/12/22 11:43:42PM	Default
Approve Compensation Proposals	Action	Read	One or more salary proposals for the Focal 2021 Salary and Bonus cycle are awaiting your approval.	01/12/22 11:41:51PM	Default
Job Offer Process ID	Alert	Dismiss	Job Offer for Store Manager is awaiting your approval.	11/09/21 8:02:21AM	Default
Job Offer Process ID	Alert	Dismiss	Job Offer for Assistant Manager is awaiting your approval.	11/09/21 7:22:05AM	Default
Absence Management	Alert	Unread	Absence Request for Rosanna Channing has been approved.	02/18/21 11:16:34AM	Default
Absence Management	Alert	Unread	Absence Request for Christelle Stevenson has been approved.	08/31/20 11:08:22AM	Default
Absence Management	Alert	Unread	Absence Request for Christelle Stevenson has been approved.	08/31/20 11:05:36AM	Default
Absence Management	Alert	Unread	Absence Request for Christelle Stevenson has been approved.	08/31/20 10:55:52AM	Default
Extended Absence	Action	Unread	Extended Absence Request for Abagail Smith is awaiting for your approval	03/03/20 6:06:57AM	Default
Extended Absence	Alert	Unread	Extended Absence Request for Abagail Smith has been approved	03/03/20 5:07:28AM	Default
Extended Absence	Action	Unread	Extended Absence Request for Abagail Smith is awaiting for your approval	09/06/19 10:12:17AM	Default
Extended Absence	Action	Unread	Extended Absence Request for Abagail Smith is awaiting for your approval	09/06/19 10:10:46AM	Default
Extended Absence	Alert	Unread	Extended Absence Request for Abagail Smith has been approved	09/06/19 9:54:49AM	Default
Employee Resignation	Alert	Dismiss	Resignation request from David Michelson is pending your approval.	06/14/19 8:44:17AM	Default

In the left panel, you can filter the list of notifications by:

- Notification name
- Category type
- Message state
- Priority

Select one or more notifications, and then select an item from the Actions menu:

- Mark the notifications as read.
- Mark the notifications as unread.
- Mark the notifications as dismissed (available for alerts only).

Click the Open Action View link to open the two-panel action view. See Using the Two-Panel Action View for information. Click the View Archived Notifications link to view your archived notifications. See the following section.

Archived Notifications

Use the View Archived Notifications page to view notifications that have been archived by your system administrator.

Navigation:

On the View All Notifications page, click the View Archived Notifications link.

This example illustrates the fields and controls on the View Archived Notifications page.

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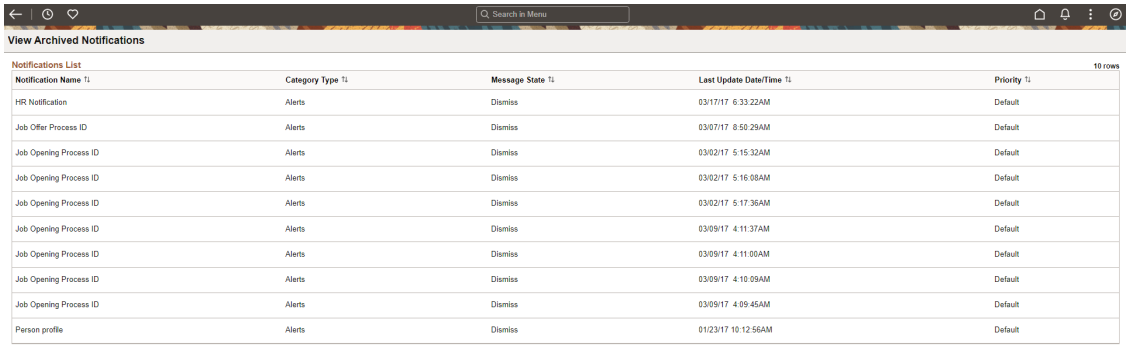


Notification Name	Category Type	Message State	Last Update Date/Time	Priority
HR Notification	Alerts	Dismiss	03/17/17 6:33:22AM	Default
Job Offer Process ID	Alerts	Dismiss	03/07/17 8:50:29AM	Default
Job Opening Process ID	Alerts	Dismiss	03/02/17 5:15:32AM	Default
Job Opening Process ID	Alerts	Dismiss	03/02/17 5:16:08AM	Default
Job Opening Process ID	Alerts	Dismiss	03/02/17 5:17:36AM	Default
Job Opening Process ID	Alerts	Dismiss	03/09/17 4:11:37AM	Default
Job Opening Process ID	Alerts	Dismiss	03/09/17 4:11:00AM	Default
Job Opening Process ID	Alerts	Dismiss	03/09/17 4:10:09AM	Default
Job Opening Process ID	Alerts	Dismiss	03/09/17 4:09:45AM	Default
Person profile	Alerts	Dismiss	01/23/17 10:12:56AM	Default

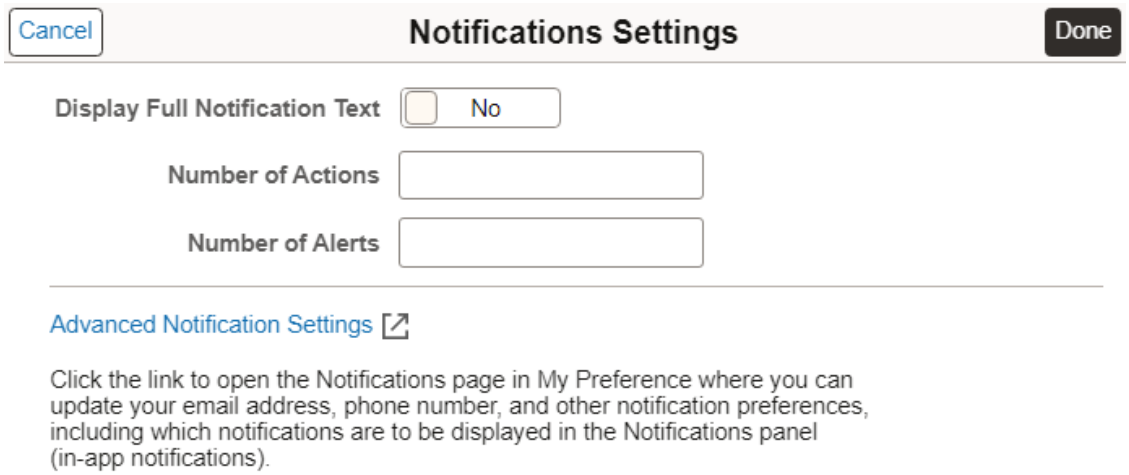
Personalizing the Notifications Panel and Your Notifications

Use the Notifications Settings page to personalize the Notifications panel.

Navigation:

In the Notifications panel, click the **Notifications Settings button**, and then **Settings.**

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



Field or Control	Description
Display Full Notification Text	Select this option if certain notifications are truncated when displayed in the Notifications panel.

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Field or Control	Description
Number of Actions	Enter the maximum number of actions to be displayed in the Notifications panel. **Note** If the number of actions exceeds this value, a View All link is displayed to allow you to view all of your actions in New, Unread, and Read state on the View All Notifications page. Actions in Dismissed state are not displayed.
Number of Alerts	Enter the maximum number of alerts to be displayed in the Notifications panel. **Note** If the number of alerts exceeds this value, a View All link is displayed to allow you to view all of your alerts in New, Unread, and Read state on the View All Notifications page.
Advanced Notification Settings	Click to open the Notifications page in My Preferences, where you can personalize how you wish to receive your notifications.

When you personalize your notifications, you can select among the notification options that have been configured for each notification type. When the options are available, you can select to receive notifications in the Notification panel (in-app), in email, or by text message. You can also personalize which pop-up notifications you wish to receive. The following table provides links to additional topics for personalizing the Notifications panel and your notifications.

Topic	See
Personalizing the Notifications panel.	See the preceding information in this topic for more information.
Personalizing whether the Notifications panel is displayed on your homepages by default.	Managing Fluid Homepages
• Providing consent to receive text messages. • Personalizing the notification options for each notification type.	Personalizing Notifications

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Topic	See
Specifying an email address for receiving notifications.	Setting Up Your System Profile **Note:** The location to define your email address can differ by PeopleSoft application pillar. See the documentation for your PeopleSoft application for more information.
Specifying a phone number for receiving text messages.	"Notifications" section in Specifying General Settings in My Preferences **Note:** The location to define your phone number can differ by PeopleSoft application pillar. See the documentation for your PeopleSoft application for more information.
Personalizing pop-up notifications.	"Pop-up Notification" section in Specifying General Settings in My Preferences

Sending Ad Hoc Notifications from Fluid Components

The system sends notifications automatically as part of standard workflow routings. You can also send notifications from fluid components by using the Notify link from the Actions menu of a fluid component.

The Notify feature is based on the notification configuration framework and supports three types of notifications:

- In-App (the Notifications panel)
- Email
- Text

You can use the Notify option to send notifications to other users.

To use the Notify feature, an administrator must enable the Notify check box on the Fluid tab (Component Properties dialog box in Application Designer) of the component from where you want to send the notification. See Fluid User Interface Developer's Guide: Administering Notifications and Fluid User Interface Developer's Guide: Setting Component Properties for Fluid Components.

> **Note**
>
> The Notify option is not available for Activity Guide because Activity Guide has its own mechanism to notify.

To access the Notify page, select the **Notify** link from the Actions menu of a fluid component.

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

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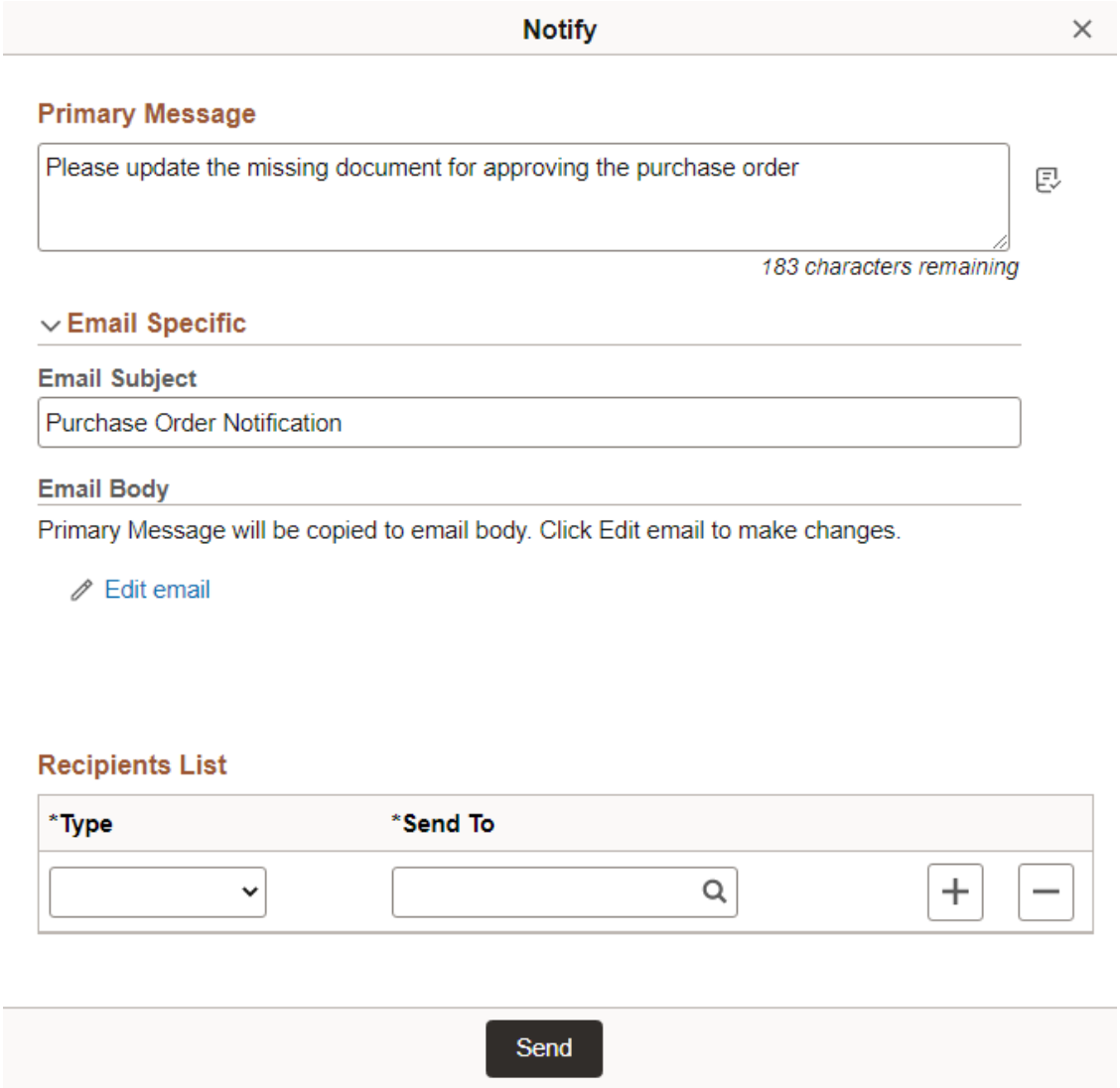

Field or Control	Description
Primary Message	Enter your own comments. The message text is sent in the language of the sender. The **Primary Message** will be displayed in the in-app notification in the Notifications panel and in the subject of the text notification.
Email Subject	Enter the topic or a brief description of the email. The default value is the description of the component from which the notification is invoked, but you can edit it.
Email Body	Includes the primary message to be delivered in the email. Displays the contents of the **Primary Message** field by default.
Edit Email	Select this link to edit the contents of the **Email Body**. When you select this link, the **Copy Primary Message** and **Available Binds** links are displayed.

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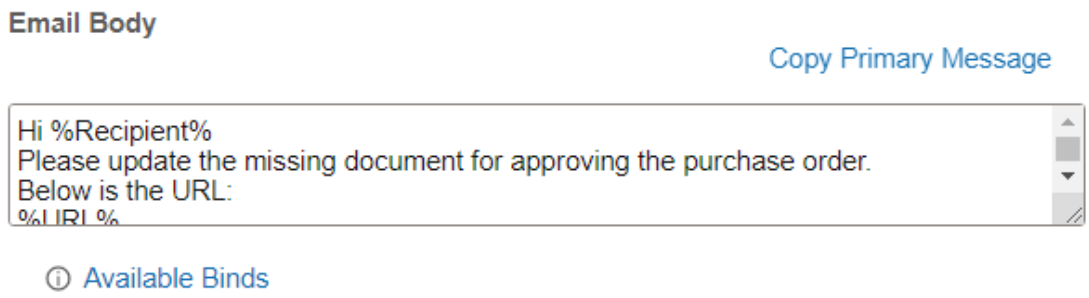
Field or Control	Description
Type	Select the type for the recipients list. • Email ID • Phone Number • Role Name • User ID
Send To	Select the sender ID of the recipient.

The following example illustrates the Notify page with the Edit Email option selected.



Field or Control	Description
Email Body	Includes the primary message to be delivered in the email. Displays the contents of the **Primary Message** field by default. You can edit the content and add bind variables to the **Email Body** to send a personalised email.
Copy Primary Message	This link is displayed when you select the **Edit Email** link. Select the **Copy Primary Message** link to copy the contents of the **Primary Message** to the **Email Body**.
Available Binds	This link is displayed when you select the **Edit Email** link. Select the **Available Binds** link to display a list of bind variables that you can use within your **Email Body** to send a personalised email. • %Recipient% - Describes the recipient user ID. • %Sender% - Describes the sender user ID. • %SenderEmail% - Describes Email ID of the sender. • %URL% - Describes the url of the underlying transaction page.

Related Topics

- Fluid User Interface Developer's Guide: Setting Properties on the Fluid Tab

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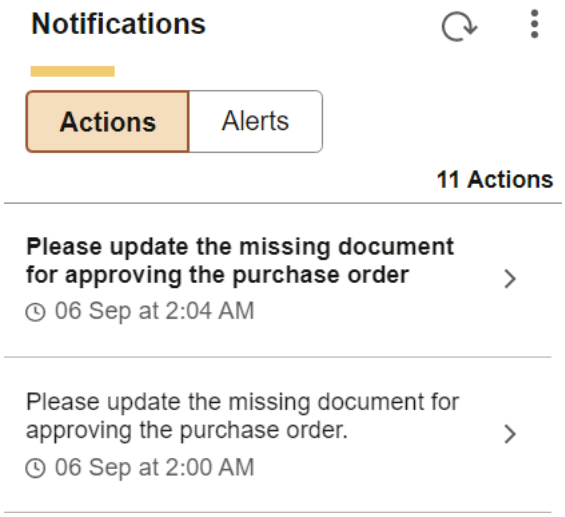
Receiving Ad Hoc Notifications from Fluid Components

You can configure your fluid notification settings to receive your notifications in-app, as an email, or as a text notification.

Receiving in-App Notifications

In-App notifications are actionable notifications that appear in the Notifications panel on the homepage. The notification text is the content defined in the **Primary Message** field on the Notify page. See Sending Ad Hoc Notifications from Fluid Components. The notification also contains a link to the underlying transaction page from where the notification is invoked. You can select this link to access the transaction page and take any required action.

The following image illustrates in-app notifications delivered in the Notifications panel on the homepage.



Receiving Email Notifications

When you receive an email notification, the notification typically includes a link to the PeopleSoft page where you will perform the necessary work. Depending on your business processes, you may need to notify a colleague or supervisor that you have completed the work.

The following example illustrates a notification received by email from a fluid component. In this example, bind variables %Recipient%, %URL%, and %Sender% were used to pick up the details of the recipient, the url of the transaction page, and the sender respectively.

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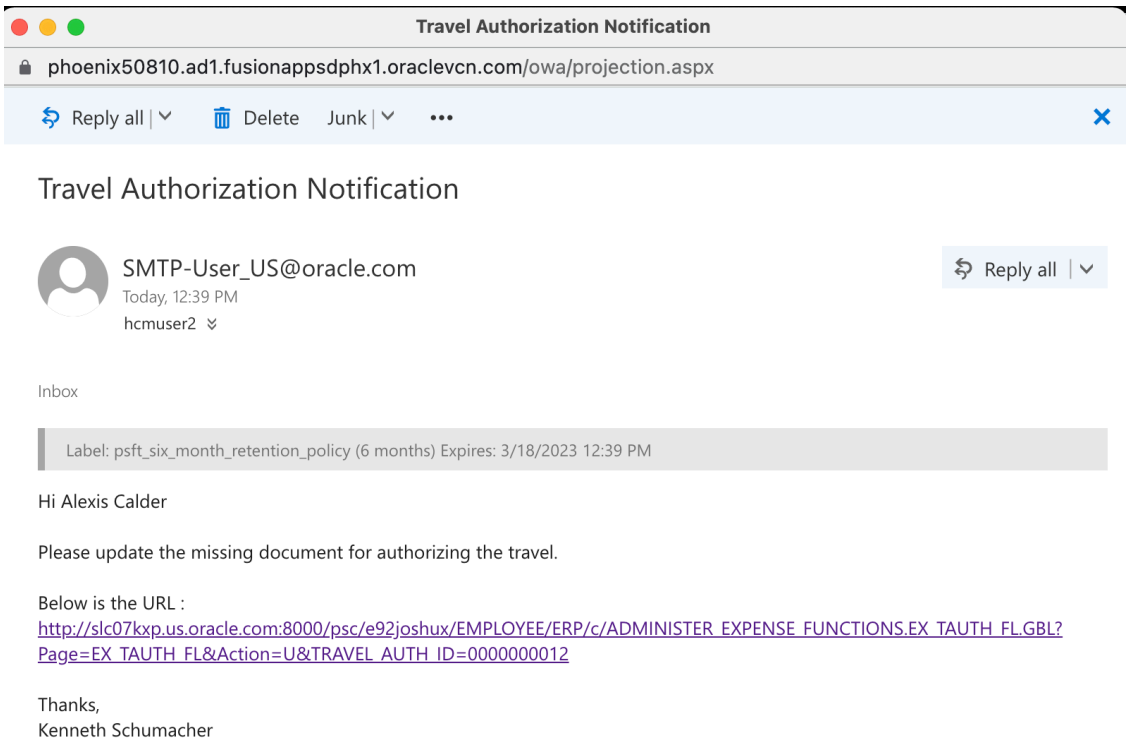

Receiving Text Notifications

A text notification contains the **Primary Message** defined in the Notify page as well as the link to the underlying transaction page from where the Notify option is invoked. See Sending Ad Hoc Notifications from Fluid Components. Select the link to access the transaction page and take any required action.

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7

Working With Processes and Reports

Understanding PeopleSoft Processes and Reports

Although much of your interaction with the PeopleSoft system involves working with the online pages of a PeopleSoft application, you also run offline or batch processes that run in the background while you continue to use the application or even after you have left the office.

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

You run batch processes in the PeopleSoft system using the PeopleSoft Process Scheduler, which enables your organization to define processes, submit requests for processes, and set up an agent to scan for and run submitted processes.

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

> **Note**
>
> The procedures described in these topics apply to most standard reports but not all of them. Some PeopleSoft applications include reports that you run from outside the system using PS/nVision or a third-party application. The documentation for your PeopleSoft application tells you which third-party application to use.

Requesting Reports in PeopleSoft Applications

This section discusses how to generate reports.

Selecting Reports

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

Run Controls

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

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

Run Control IDs

Each run control that you create receives a unique run control ID. These IDs are product-specific. Refer to your PeopleSoft product documentation for details about the run control IDs that you will be using. When you select a report to run, the system prompts you for a run control ID. If you are in Add mode, enter a new ID for the run control that you are about to define. If you are in Update/Display mode, enter an existing run control ID or click the **Search** button and select from the list of available run control IDs.

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

To select a report:

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

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

   - Add a new run control ID.
   - Select an existing run control ID.

Specifying Report Parameters

You can run offline processes from pages in your PeopleSoft application in a variety of ways. The way in which you use the processes depends on the application. Access the page from which you want to run your process. For many reports, you need to enter values for parameters that specify what data the report includes, such as from and to dates or business units. The parameters page appears after you enter the run control ID.

This example illustrates the fields and controls on the Ledger Activity Report page.

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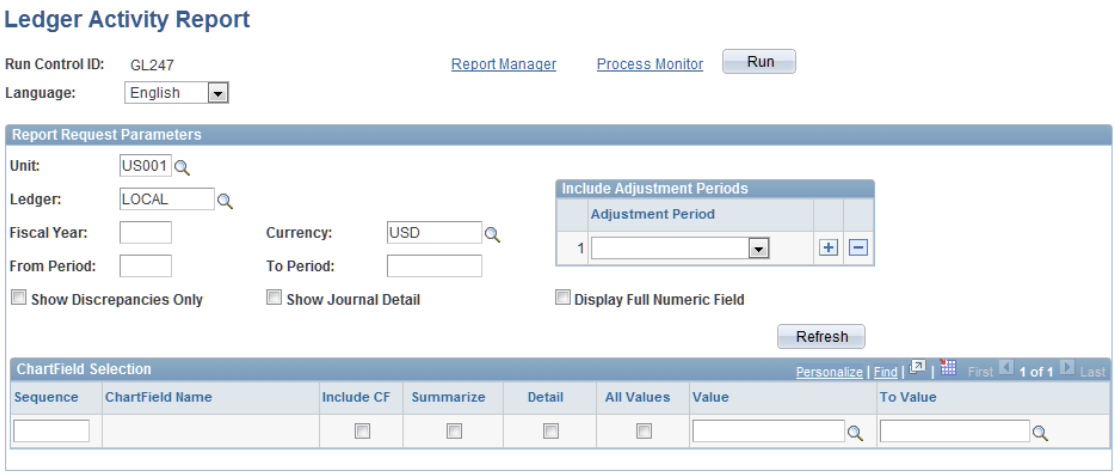

> **Note**
>
> The pages you use to submit report parameters in your applications may appear differently.

If you selected an existing run control ID, the values in this page reflect the settings from the selected run control; if you added a new value or if you are using a PeopleSoft Human Capital Management application, they are the default values.

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

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

Specifying Where and When to Run Reports

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

The options available to you on this page are determined by your security profile. For example, each end user has a user profile, which is linked to one or more roles. Roles define groups or types of end users, such as payroll clerks, sales staff, or managers. Each role has one or more permission lists that control what a user can access. You can run only those processes that are associated with your permission list. For example, if you are in the human resources department, you probably belong to a human resources role and, therefore, can run only human resources processes. The number of processes that appear in the list on the Process Scheduler Request page is directly associated with your security profile.

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

This example illustrates the fields and controls on the Process Scheduler Request page.

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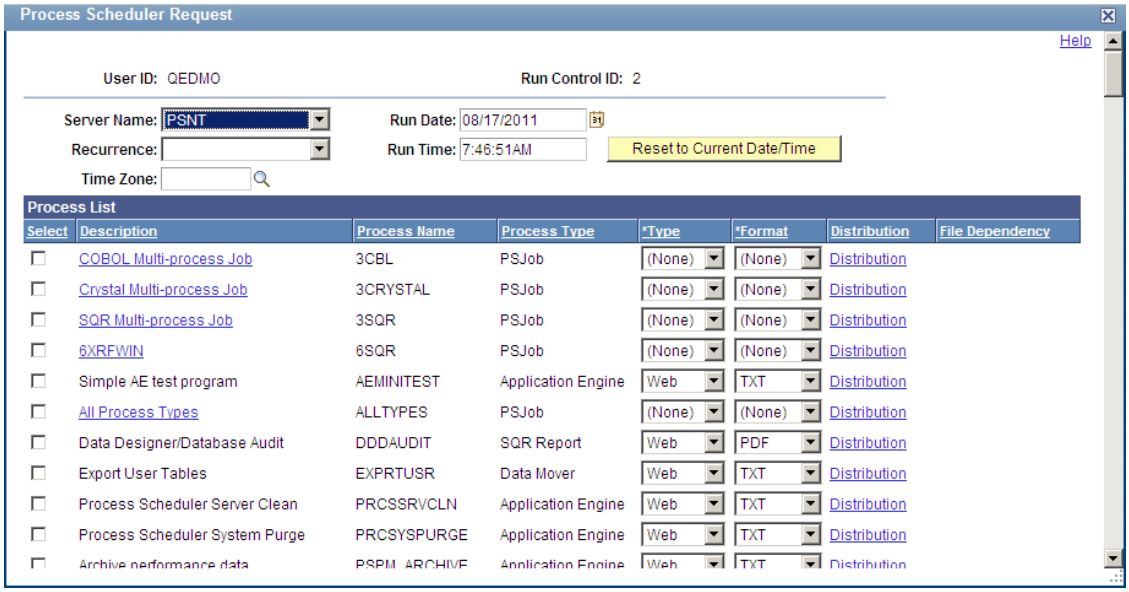

See Process Scheduler: Submitting Process Requests.

Selecting Output Formats and Setting Report Distribution

You can choose several kinds of output formats for your process. The following table lists output formats by process type and output type:

Process Type	Output Type	Output Format	Default
AppEngine	FILE	PDF, XLS, TXT, HTM	TXT
AppEngine	WEB	PDF, XLS, TXT, HTM	TXT
AppEngine	WINDOW	PDF, XLS, TXT, HTM	TXT
COBOL	NONE	NONE	NONE
COBOL	WEB	TXT	TXT
COBOL	WINDOW	TXT	TXT
Cube	NONE	NONE	NONE
nVision	EMAIL	HTM, XLS	XLS
nVision	FILE	HTM, XLS	XLS
nVision	PRINTER	HTM, XLS	XLS
nVision	WEB	HTM, XLS	XLS
nVision	WINDOW	HTM, XLS	XLS
nVision	DEFAULT	DEFAULT	DEFAULT
SQR	EMAIL	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER **Note:** CSV output is not supported on OS390/zOS platforms.	PDF

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Process Type	Output Type	Output Format	Default
SQR	FILE	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER **Note:** CSV output is not supported on OS390/zOS platforms.	PDF
SQR	PRINTER	HP, LP, PS, WP	PS
SQR	WEB	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER **Note:** CSV output is not supported on OS390/zOS platforms.	PDF
SQR	WINDOW	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER **Note:** CSV output is not supported on OS390/zOS platforms.	PDF
WinWord	WEB	DOC	DOC
WinWord	WINDOW	DOC	DOC
Data Mover	FILE	TXT	TXT
Data Mover	WEB	TXT	TXT
Data Mover	WINDOW	TXT	TXT
OTHER	NONE	NONE	NONE

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

See Process Scheduler: Selecting Output Types and Formats.

Report Distribution

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

If your process allows output that can be emailed, you can enter an email subject and message and send the output to a group of email addresses.

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

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

See Process Scheduler: Setting Report Distribution.

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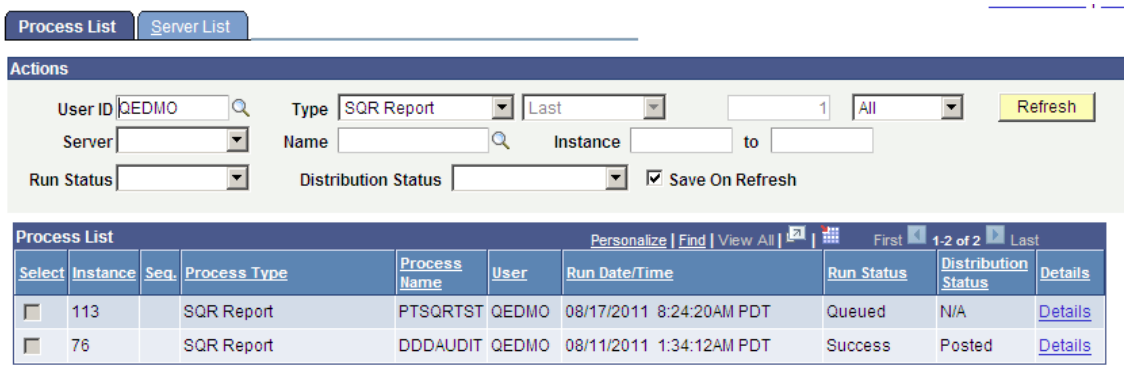
Checking the Status of Reports

When you click **OK** on the Process Scheduler Request page, the system returns you to your application page. Use the Process Monitor to view the status of your submitted processes. Process Monitor is a tool designed to track the status of all running, pending, and completed Process Scheduler requests.

> **Note**
>
> The time it takes for a process request to complete varies. The complexity of the process and the current load on the system are examples of the factors that can lengthen the duration of a process request. For example, a large, complicated report extracting large volumes of data will take longer to run than a simpler report. Keep this in mind when monitoring the status of your process requests.

Access Process Monitor (click the **Process Monitor** link or select **PeopleTools**, and then **Process Scheduler**, and then **Process Monitor.**

This example illustrates the fields and controls on the Process Monitor component.



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

1. Use the **Server, Type**, **Run Status**, **Last**, and **Instance** list boxes to limit the processes that Process Monitor displays.
2. Click **Refresh** to update this page with the latest system activity.

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

Depending on the status of your report, you can cancel it or put it on hold. If the **Run Status** of a report is *Completed*, you can delete information about the report from Process Monitor. Click **Details** to display the options for canceling or holding a request.

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Related Topics

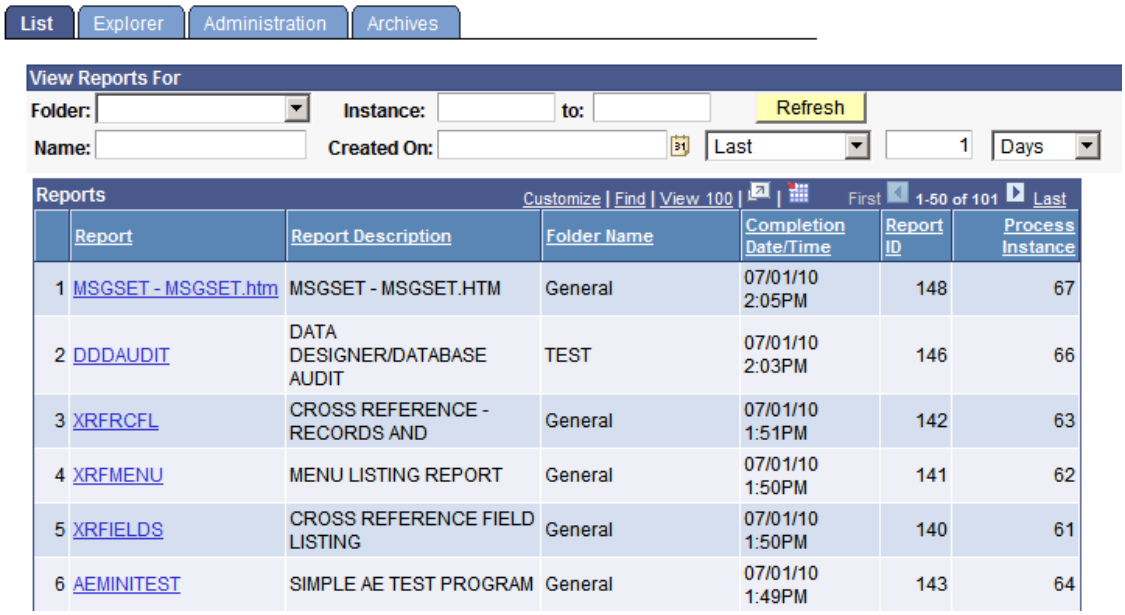
- Process Scheduler: Understanding Process Monitor

Viewing Reports in Report Manager

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

Access Report Manager (**Main Menu**, and then **Reporting Tools**, and then **Report Manager**.)

This example illustrates the fields and controls on the Report Manager - List page.



	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	MSGSET - MSGSET.htm	MSGSET - MSGSET.HTM	General	07/01/10 2:05PM	148	67
2	DDDAUDIT	DATA DESIGNER/DATABASE AUDIT	TEST	07/01/10 2:03PM	146	66
3	XRFRCFL	CROSS REFERENCE - RECORDS AND	General	07/01/10 1:51PM	142	63
4	XRFMENU	MENU LISTING REPORT	General	07/01/10 1:50PM	141	62
5	XRFIELDS	CROSS REFERENCE FIELD LISTING	General	07/01/10 1:50PM	140	61
6	AEMINITEST	SIMPLE AE TEST PROGRAM	General	07/01/10 1:49PM	143	64

1. Click the report name link to view your report output.

   The Report/Log Viewer page appears in another browser window.

2. Click the link to the report or any associated files that you want to view.

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

Related Topics

- Process Scheduler: Understanding Report Manager

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8

Using Workflow

Understanding Workflow

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

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

Related Topics

- Workflow Technology

Sending and Receiving Ad Hoc Notifications

The system sends notifications automatically as part of standard workflow routings. The behavior of **Notify** in classic pages is based on how the system administrator sets the web profile.

If the web profile is set to launch the fluid notify behavior, the **Notify** button will open a fluid Notify page. See Sending Ad Hoc Notifications Using Notification Configuration and Receiving Ad Hoc Notifications Using Notification Configuration. On classic pages, the default is to use the fluid notify feature

If the web profile is set to launch the classic workflow notify behavior, **Notify** will open a classic Notify page which is worklist-based notify. See Sending Ad Hoc Notifications and Using Worklists to Receive Ad Hoc Notifications

Sending Ad Hoc Notifications Using Notification Configuration

You can also send notifications from many classic components by using the **Notify** toolbar button. The classic Notify option opens a fluid **Notify** page by default. The Notify feature is based on the notification configuration framework and supports three types of notifications:

- In-App (the Notifications panel)
- Email
- Text

You can use the Notify option to send notifications to other users.

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

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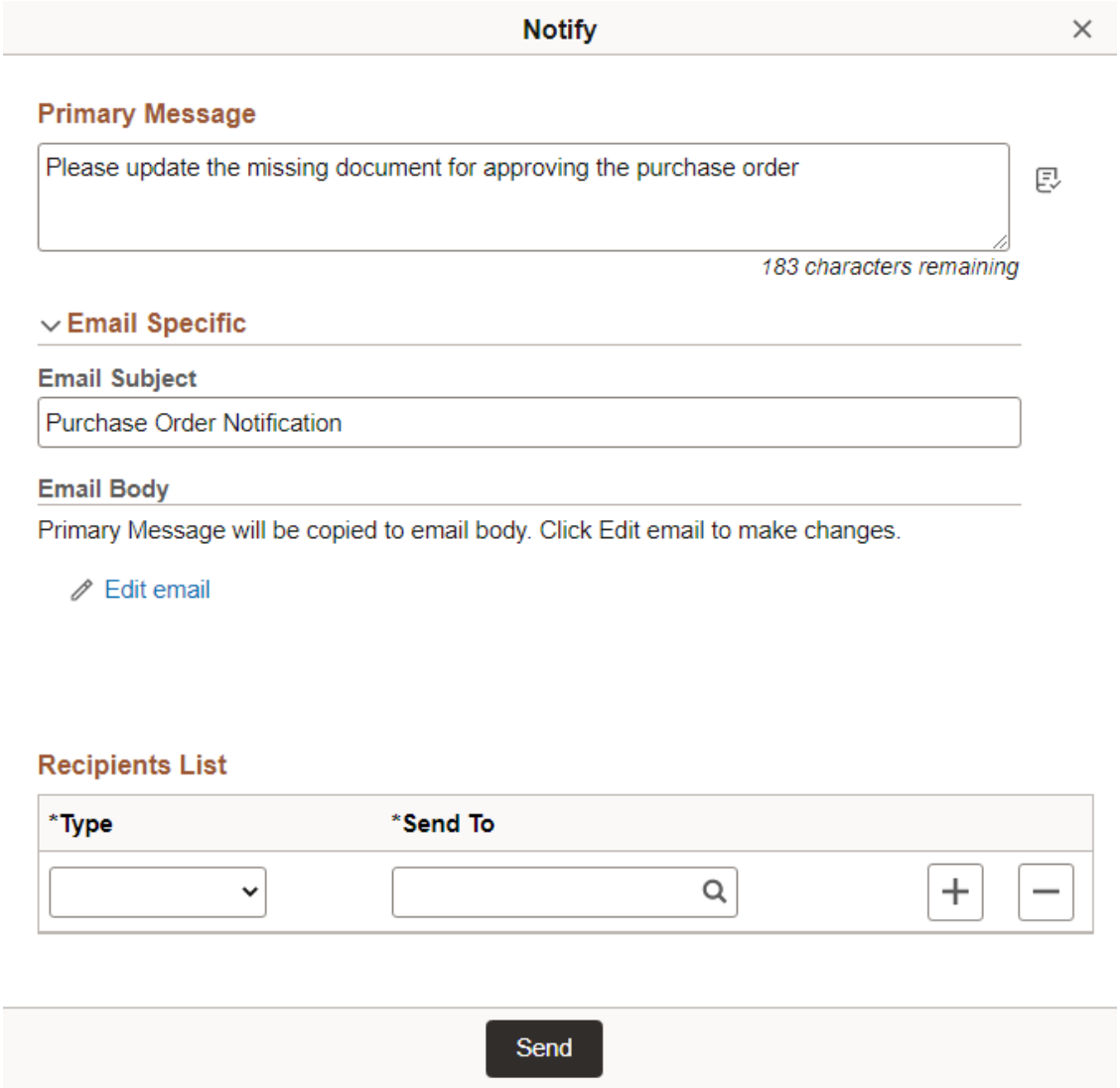

Field or Control	Description
Primary Message	Enter your own comments. The message text is sent in the language of the sender. The **Primary Message** will be displayed in the in-app notification in the Notifications panel and in the subject of the text notification.
Email Subject	Enter the topic or a brief description of the email. The default value is the description of the component from which the notification is invoked, but you can edit it.
Email Body	Includes the primary message to be delivered in the email. Displays the contents of the **Primary Message** field by default.
Edit Email	Select this link to edit the contents of the **Email Body**. When you select this link, the **Copy Primary Message** and **Available Binds** links are displayed.

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Field or Control	Description
Type	Select the type for the recipients list. • Email ID • Phone Number • Role Name • User ID
Send To	Select the sender ID of the recipient.

Related Topics

- Working with Push Notifications
  The Push Notification Framework helps in disseminating and consolidating notifications from events in the PeopleSoft system in real time. When you login to the PeopleSoft system, you can see your notifications in the Notifications panel. On desktop browsers and device widths greater than 1280 pixels, the Notifications panel is open by default on your fluid homepages. On device widths of 1280 pixels or less, such as on a smartphone, and on all transaction pages, the Notifications panel is available by clicking the Notifications button in the header. The system continues to update notifications as they occur in real time while you are working on your tasks and even as you're working on notifications themselves.

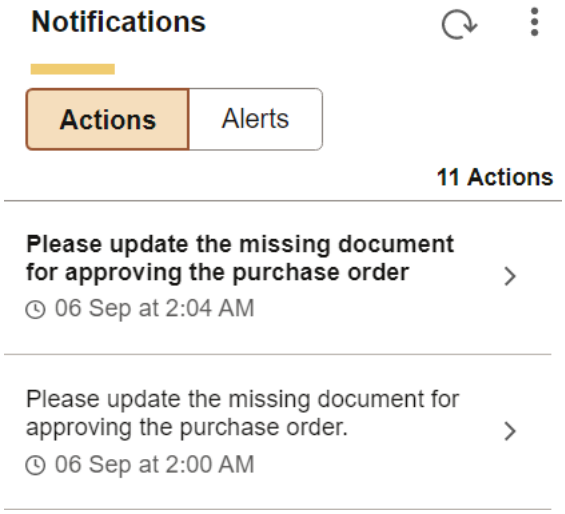
Receiving Ad Hoc Notifications Using Notification Configuration

You can configure your notification settings to receive your notifications as an in-app, email, or text notification.

Receiving in-App Notifications

In-App notifications are actionable notifications that appear in the Notifications panel on the homepage. The notification text is the content defined in the **Primary Message** field on the Notify page. See Sending Ad Hoc Notifications Using Notification Configuration. The notification also contains a link to the underlying transaction page from where the notification is invoked. You can select this link to access the transaction page and take any required action.

The following image illustrates in-app notifications delivered in the Notifications panel on the homepage.



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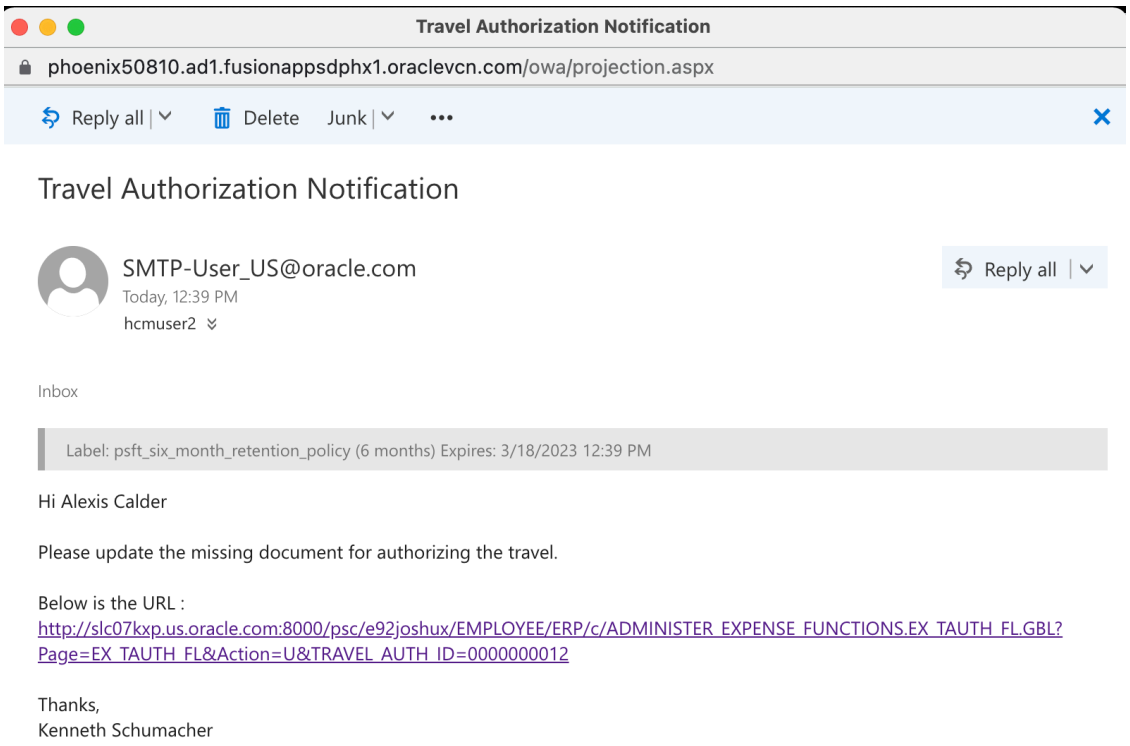
Receiving Email Notifications

When you receive an email notification, the notification typically includes a link to the PeopleSoft page where you will perform the necessary work. Depending on your business processes, you may need to notify a colleague or supervisor that you have completed the work.

The following example illustrates a notification received by email from a component. In this example, bind variables %Recipient%, %URL%, and %Sender% were used to pick up the details of the recipient, the url of the transaction page, and the sender respectively.



Receiving Text Notifications

A text notification contains the **Primary Message** defined in the Notify page as well as the link to the underlying transaction page from where the Notify option is invoked. See Sending Ad Hoc Notifications Using Notification Configuration. Select the link to access the transaction page and take any required action.

Sending Ad Hoc Notifications

The system sends notifications automatically as part of standard workflow routings. You can also send notifications from many classic components by using the **Notify** toolbar button. This button picks up any available notification templates for that component.

In both cases, you can send notifications by way of worklist or by email.

Access the Send Notification page (click the **Notify** button at the bottom of any page).

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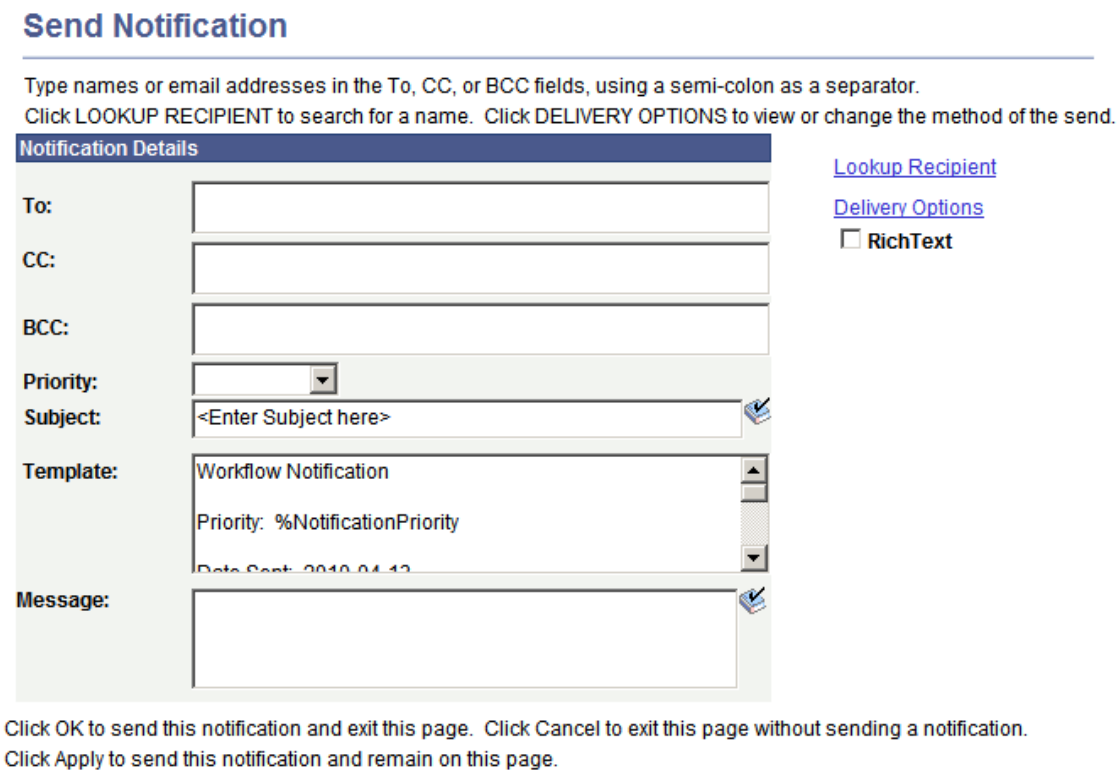
This example illustrates the fields and controls on the Send Notification page.



Field or Control	Description
To	Enter the user names or email addresses of those who need to take action. This field can contain one or more email addresses or user names separated by a semicolon.
CC (carbon copy)	Enter the names or email addresses of CC recipients, who are made aware of this notification publicly.
BCC (blind carbon copy)	Enter the names or email addresses of BCC recipients, who are made aware of this notification privately.
Priority	Select a priority level for the notification: low, medium, or high. This priority is reflected in the notification only if the *%NotificationPriority* variable is in the template text.
Subject	Enter the topic or a brief description of the notification. The subject value may appear by default from a template, but you can edit it.
Template Text	Displays the template text, which is based on a predefined notification template. The text in this field is sent in the language of the recipient. However, the notification template has to be defined with template text for each language.
Message	Enter your own comments. The message text is sent in the language of the sender.
Rich Text	Select this check box to enable rich text.

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Field or Control	Description
Lookup Recipient	Click to access the Lookup Address page. Enter the first characters of a recipient's name and click **Search** to see a list of people who match your search. To use someone as a recipient, select the check box for the type of recipient (**To, cc, bcc**) and click **Add to Recipient List.**
Delivery Options	The system populates the check boxes based on the delivery options that are defined in the recipient's user profile. The **Worklist** check box is unavailable for external email addresses.

Related Topics

- Workflow Technology: Setting Notification Options

Using Worklists to Receive Ad Hoc Notifications

PeopleSoft offers two types of workflow notifications:

- Email
- Worklists

Working with Email Notifications

While many workflow-enabled applications use worklists to assign work, you may receive workflow notifications through email. When you receive an email notification, the notification typically includes a link to the PeopleSoft page where you will perform the necessary work. Depending on your business processes, you may need to notify a colleague or supervisor that you have completed the work.

See Sending and Receiving Ad Hoc Notifications.

Viewing a Worklist

When you use workflow-enabled applications, changes in your day-to-day tasks are reflected in a worklist. A worklist is an organized list of the work items awaiting your attention. Selecting items to work on from a worklist automatically returns the pages that you need, which enables you to bypass any other navigational structure and work directly from the worklist.

The Worklist page provides summary information about all items in your personal worklist. This page also provides links that enable you to:

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

Access the Worklist page (Select **Worklist**, and then **Worklist**).

As with other grids, you can personalize the sorting and columns within the **Worklist** grid.

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

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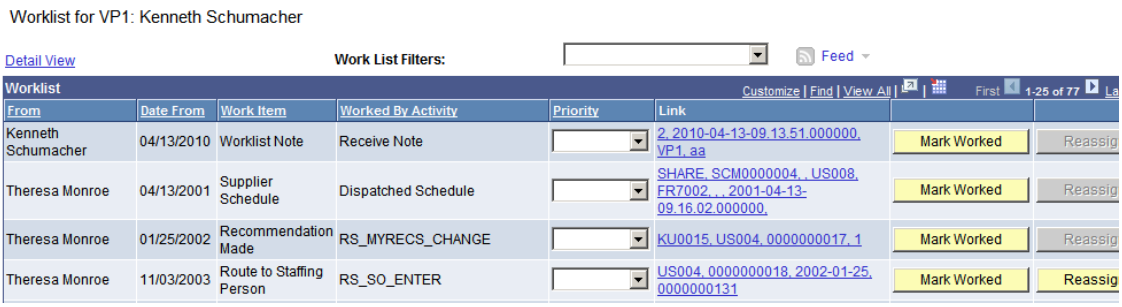

Field or Control	Description
Work List Filters	Select a worklist to view. You can only view worklists to which you are assigned. The system maintains the filter you have selected until you sign out of the PeopleSoft system. **Note:** If you complete all of your work items in a worklist and mark them as worked during your current PeopleSoft session, the system displays Invalid Value because the worklist is empty; it contains no more work items.
From	Displays who triggered the work item.
Date From	Displays when the work item was triggered.
Work Item	Displays the work items, which are the types of activities that you need to carry out. You can have multiple entries all with the same work item. For example, if you approve expense reports, you may have several entries with *Expense Approval* in the **Work Item** column. Each of these entries represents a different expense report that requires your attention.
Worked By Activity	Displays the activity that needs to be worked by the worklist item.
Priority	Ranks the worklist entry by importance. Priority values include: *1* for high, *2* for medium, and *3* for low.
Link	Click a link to access the target page—the page where you work the item. The target page is specific to the type of work that you are doing. For example, the link for an expense approval item accesses the page where you can review and approve expense reports. **Note:** You cannot sort on this column. In addition, you cannot use the Find function for this column and you cannot use the Download to Excel function to download the information in this column.
Mark Worked	Click to remove an item from your worklist without actually accessing the target page. You should not use this option unless the item is a simple notification and no additional work is required.
Reassign	Click to forward the item to another user and remove it from your list.

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

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

Performing Work

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

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

Reassigning a Worklist

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

Access the Worklist. (Click Worklist in the universal navigation header.)

1. Click the **Reassign** button.

   The Reassign page appears.
2. Enter the user ID of the person to whom you are reassigning the item.

   Click the **Search** button if you need help finding the appropriate user ID.
3. (Optional) Enter a comment.

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

Viewing Worklist Details

Access the Worklist Details page (click the **Detail View** link from the Worklist page).

The Worklist Details page provides additional information about items in your worklist; it includes all of the information from the Worklist page along with the additional information described here.

Field or Control	Description
Timed Out Dttm (timed out date and time)	Displays the date and time when the item will time out if it is not already worked.
Previous User	Displays the user whose action triggered this item.
Selected Dttm (selected date and time)	Displays the date and time when you first selected this item (to work the item).
Comment	Displays the comment (if any) entered by the user if the item was forwarded from another user.
Timed Out	Indicates whether the item has timed out.

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Field or Control	Description
Instance	Displays a unique identifier for each item of the same type.
Transaction	Displays a unique identifier for each item in the worklist.

Working Items

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

Although you cannot differentiate between the different types of worklist items just by looking at them, understanding these different types will clarify why different items respond to different actions:

Worklist Type	Description
User Specified	A work item is not marked as worked until you click **Mark Worked.** You typically use this option when you may need to return to the same work item several times or wait for supporting information.
Saved	A work item is marked as worked when you save your work on the page assigned to the worklist. You typically use this option when you can complete the item in one visit to the target page.
Selected	A work item is marked as worked as soon as you select it from a worklist. You typically use this option when the work items serve primarily as a notification.
Programmatic	A work item is marked as worked by behind-the-scenes processing attached to the page. You typically use this option when the data on the page must be evaluated to determine whether the item can be considered worked.

Using Timeout Worklists

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

When you open a timeout notification in your worklist, you are transferred to the Worklist Timeout Data page. You can also open this page by selecting **PeopleTools**, and then **Workflow**, and then **Monitor Worklists**, and then **Review Timed Out Work Items.**

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

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9

Using PeopleSoft Navigator

Understanding PeopleSoft Navigator

PeopleSoft offers multiple navigation methods for accessing application pages. PeopleSoft Navigator is an alternative navigational structure that uses a process-oriented organization to show you how individual steps fit together into a single activity or process.

Advantages of PeopleSoft Navigator

PeopleSoft Navigator maps are organized by procedure. For example, the delivered navigation hierarchy for PeopleSoft Enterprise Human Resources Management is organized functionally: payroll-related pages appear under a different hierarchy than benefits-related pages. Using the PeopleSoft Navigator process-oriented organization, however, you might have a hiring activity that includes both payroll-related and benefits-related steps.

The PeopleSoft Navigator process orientation also provides a high-level view of the process, which helps you understand the overall flow of work in your organization. Unlike text and menu-based navigations, PeopleSoft Navigator displays graphical maps. These maps clarify relationships among the steps in a process and ease your navigation through sequential tasks.

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

Related Topics

- Workflow Technology
- Workflow Technology: Understanding Workflow Maps

PeopleSoft Navigator Hierarchy

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

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

This example illustrates the PeopleSoft Navigator hierarchy.

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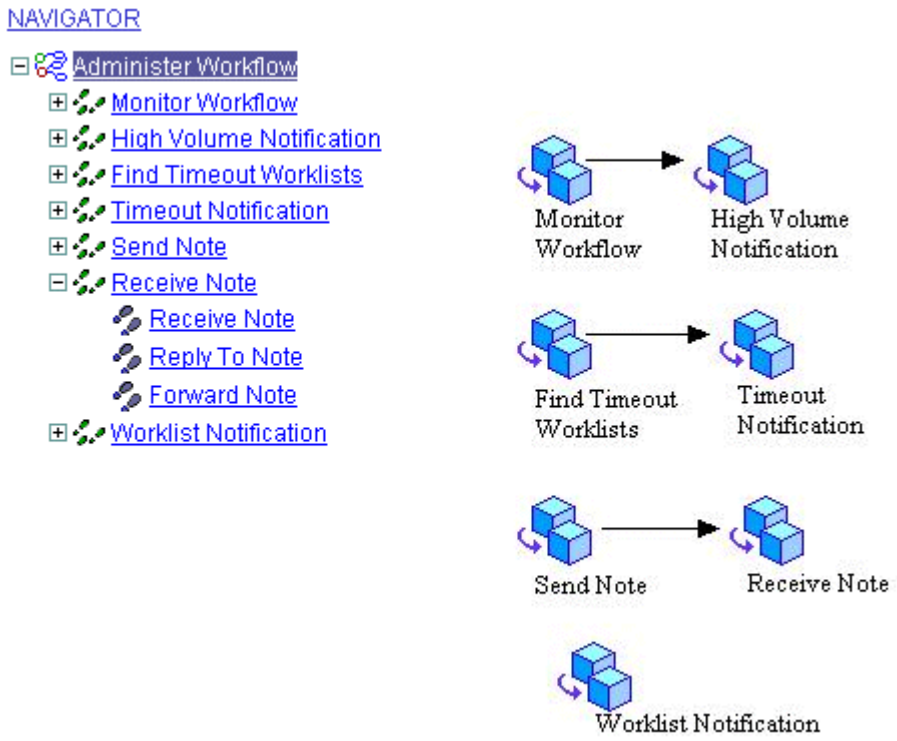

Related Topics

- Workflow Technology: Understanding Map Hierarchies

Workflow Processing

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

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

This example illustrates a PeopleSoft Navigator map with workflow icons.

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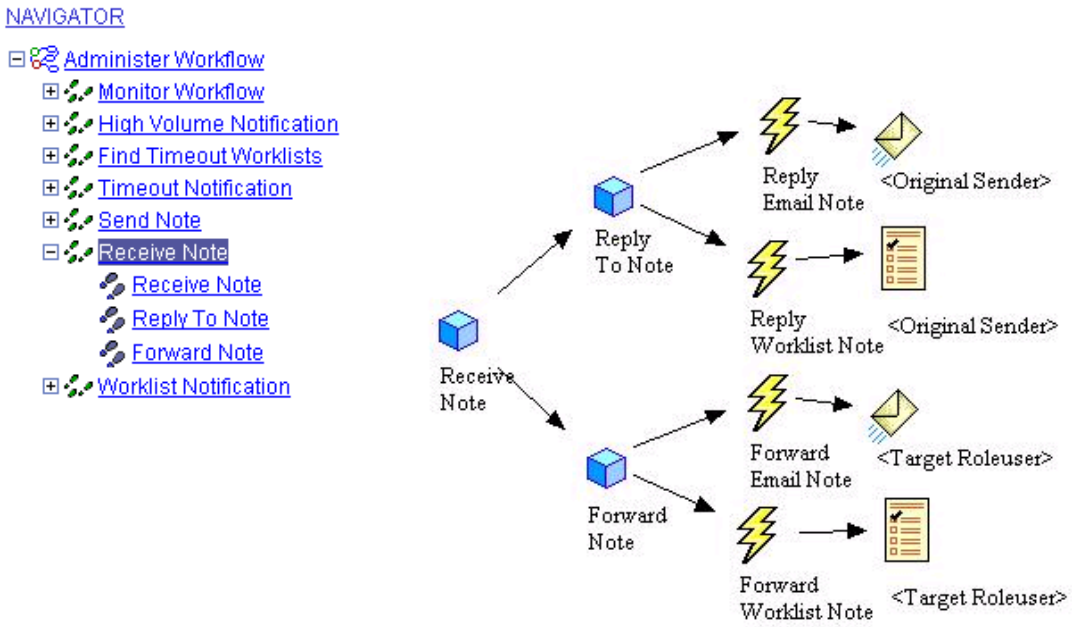

Some of the icons that you are likely to see include:

Term	Definition
	Event: A condition that triggers a workflow notification.
	Email Routing: A workflow notification that is delivered to users by email.
	Worklist Routing: A workflow notification that is delivered to users through their worklist.

Related Topics

- Workflow Technology: Understanding Workflow Maps

Working With PeopleSoft Navigator

This section discusses how to use PeopleSoft Navigator.

Navigating the Map Hierarchy

You can navigate through the PeopleSoft Navigator hierarchy by opening nodes in the tree or by clicking icons in the map. Either way, both the tree and the map always show the currently selected item. Navigate the map hierarchy by using the following actions:

- To select a tree node and simultaneously expand it, click either the node or the plus sign that appears next to the node.
- To collapse a tree node, click the minus sign that appears to the left of the node.

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- To return to a higher-level map, click the appropriate tree node; you cannot use the map to move to a higher level.

Navigating to Pages

When you click a step (the map element corresponding to a single page), the corresponding page appears on the right side of the screen where the map otherwise appears. A page that you access through PeopleSoft Navigator has the same access requirements as a page that you access through the standard application navigation. Therefore, you may need to go through a search page before accessing a transaction.

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

Navigating to the Next Page in an Activity

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

- Continue using the tree by clicking the next step in the activity.
- Click the navigation links that appear in the upper-right corner of any page that appears in PeopleSoft Navigator.

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

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