

# PeopleSoft

## Using and Managing the PeopleSoft Online Help



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# 1

## Understanding the PeopleSoft Online Help

### 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:

- 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
<b><u>Key+Key</u></b>	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 <b><u>Alt+W</u></b> , hold down the <b><u>Alt</u></b> key while you press the <b><u>W</u></b> 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.

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)

### 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.

## Understanding PeopleSoft Online Help Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

Review [Navigating the PeopleSoft Online Help](#) for information about how the PeopleSoft Online Help is structured and how to navigate between pages.

In addition, the following recommendations improve the usability of specific features in the PeopleSoft Online Help when using assistive technology.

### Accessibility Features in PeopleSoft Applications

For information about using the accessibility features in PeopleSoft Applications, see *PeopleTools: Accessibility Guide*.

# 2

## Using the PeopleSoft Online Help

### Accessing the PeopleSoft Online Help and PeopleBooks

This section discusses how to access the various formats of the PeopleSoft Online Help and PeopleBooks.

#### Accessing the PeopleSoft Online Help (PeopleBooks)

You can access the hosted online help and downloadable PDFs on the [Oracle Help Center](#).

#### Accessing and Downloading Installable PeopleSoft Online Help

If you cannot use Oracle Help Center as your default PeopleSoft Online Help, you can install the PeopleSoft Online Help on a local web server. 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](#).

#### Accessing Documentation Updates and Additional Documentation

The PeopleSoft Online Help on the [Oracle Help Center](#) is updated on a regular schedule, ensuring that you have access to the most current documentation. You can also find updates and additional documentation for this release, as well as previous releases, on [My Oracle Support](#). Many additional types of documentation exist for your release, including:

- New feature overviews describe the new features and enhancements in the release.
- [PeopleSoft Cumulative Feature Overview](#) (CFO) tool provide concises, high-level summaries of the enhanced functionality between starting and target releases.
- Installation guides provide detailed, platform-specific installation instructions.
- Hardware and software guides describe the minimum hardware and additional component software requirements.
- Upgrade guides provide detailed instructions for customers who are upgrading, including locations for required additional patches prior to upgrading.
- Licensing information user manuals provide licensing information that is related to the use of PeopleSoft products and third-party products.
- Documentation homepages provide updated, release-specific information, with links to additional information that may be relevant.

In addition, the [PeopleSoft Information Portal](#) provides a single entry point to locate the documentation, training, and other useful information that you need to help with your implementation process and improve your daily experiences with PeopleSoft products. You can easily access information and links to the online help and PeopleBooks, documentation updates, videos and on-demand training, tutorials, instructor-led training, and other helpful information.

### Accessing Context-Sensitive Help

If your help administrator has enabled context-sensitive help, you can access the PeopleSoft Hosted Online Help by clicking a Help link on any page in a PeopleSoft application or by pressing F1 in Application Designer. The context-sensitive help takes you directly to the help for the page that you're viewing in the application. If multiple help pages are available, you should see a web page providing a list of help pages that you can access.

If context-sensitive help is not available to you, you can access embedded help at crucial spots within the applications. See *PeopleTools: Applications User's Guide* for more information about embedded help.

## Navigating the PeopleSoft Online Help

The PeopleSoft Online Help website provides several different types of pages and universal navigation features to help you quickly find the information you need.

### Note

The examples on this page may look slightly different on mobile devices.

### Finding Information in the Online Help

The online help provides multiple ways to find and navigate through information:

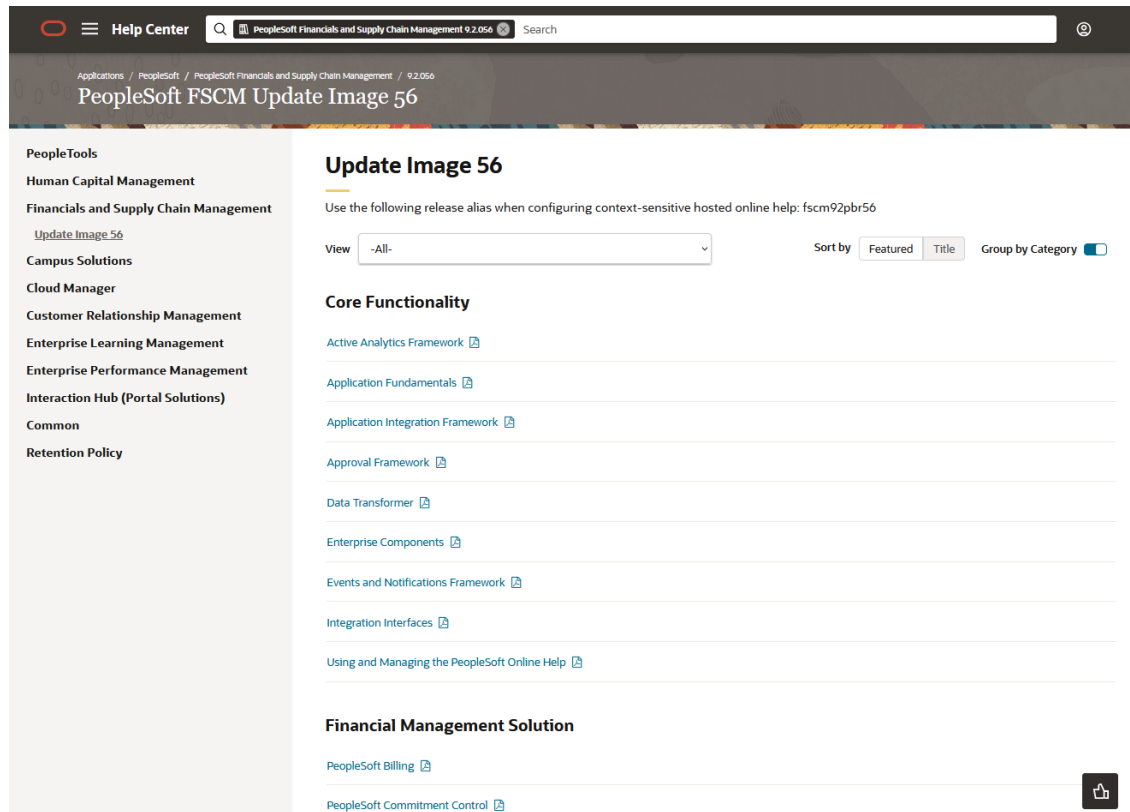
- Click the Help link on any PeopleSoft application page (Hosted Online Help only, if context-sensitive help is enabled).
- Click the book title on the release-specific interface page.  
See [Using the Release-Specific Interface Page](#)
- Select a topic from the table of contents in the left sidebar.  
See [Using the Contents Sidebars](#).
- Search for a term or phrase (Hosted Online Help only).  
See [Searching the Hosted Online Help](#).
- Click the Previous Page or Next Page button on any help page to page through related topics.

## Using the Release-Specific Interface Page

Use the release-specific interface page to access each book in this release.

A release-specific interface page on Oracle Help Center provides links to the HTML and PDF versions of each book included with a release or update image.

In this example, the release-specific interface page for PeopleSoft FSCM Update Image 56 is displayed.




Use the following controls on a release-specific interface page:

Field or Control	Description
<b>View</b>	Use the View selector to view all books or only the books in a specific category.
<b>Sort by</b>	Sort the categories (or books) by: <ul style="list-style-type: none"> <li>• <i>Featured</i> - The categories (or books) are displayed in the product groupings used in previous PeopleSoft online help libraries.</li> <li>• <i>Title</i> - The categories (or books) are displayed in alphabetical order.</li> </ul>
<b>Group by Category</b>	Select to toggle whether category titles are displayed.
<Book Title>	Select a book title to view the HTML pages for a book.

**Note**

If Group by Category is deselected, the sort is applied to the book titles.

Field or Control	Description
	Select to download the PDF version of a book.







## Using the Contents Sidebars

Use the contents sidebars to navigate in the current book or in the current topic if a On This Page sidebar is also available on the right.

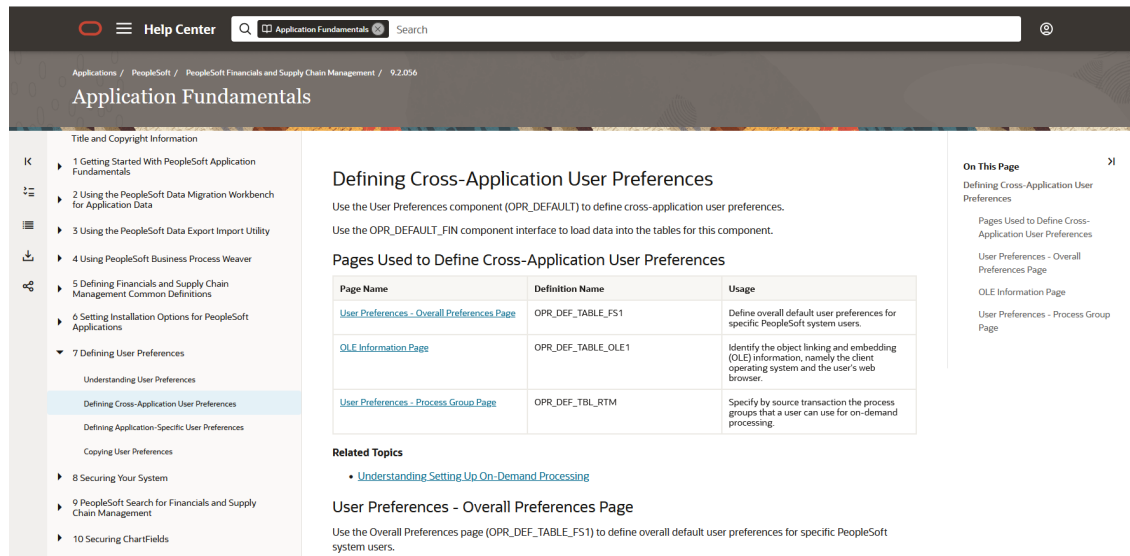
### Using the Left Sidebar

The sidebar on the left side of every help page provides a table of contents of the current book, along with other controls. The table of contents is an expandable and collapsible tree view with links to all help pages in the book. When you go to a new page in the help site, the left sidebar automatically selects and moves focus to the page that you're viewing. This helps you see where you're at in the book.

Use the following buttons in the right sidebar:

Field or Control	Description
	Select to hide or display the sidebar.
or	
	
	Select to toggle whether the table of contents is fully expanded, or collapsed to chapter titles only.
	Select to display the full table of contents in the topic pane.
	Select to download a PDF version of this book.
	Select to share a link to this page.



This example illustrates a typical online help page with the left sidebar expanded along with an On This Page sidebar on the right.



### Using the On This Page Sidebar

The On This Page sidebar is displayed for certain topics that include subtopics. Select any subtopic in the right sidebar to scroll to that topic on the page.

Use the following buttons in the right sidebar:

Field or Control	Description
	Select to hide or display the sidebar.
or	
	

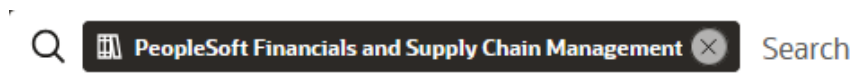
## Searching the Hosted Online Help

This section discusses how to search the PeopleSoft Online Help that is hosted on the Oracle Help Center.

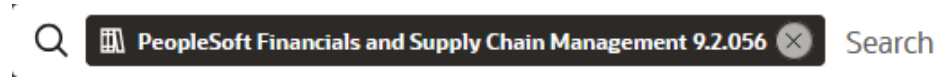
### Search Scope Chips

When you search the Hosted Online Help, Oracle Help Center displays a scope chip in the Search field indicating the context or scope of the search. For example:

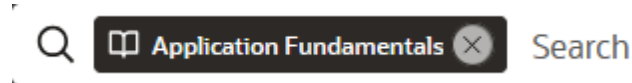
- Product-level scope searches all content published to Oracle Help Center for this product.



- Release-level scope searches only content that was published to Oracle Help Center for this specific release.



- Book-level scope searches only content that is part of this book.



## Performing a Simple Search

On any page, enter a word or phrase in the Search field, and click the Search button.

To search for a specific phrase, enter it in quotation marks.

### Note

The search results might include results from older PeopleSoft update images or PeopleTools patches, other PeopleSoft or Oracle products, My Oracle Support, and Oracle Learning Library. Check the title and date for each result to decide whether it's the right content.

## Expanding Search Results

If you don't find what you're looking for in the results from the simple search, click the **Find more in this content** button or the **Load More** button below the initial search results.

This example shows the top search results for searching for "page composer" in PeopleSoft Financials and Supply Chain Management 9.2.056.

The screenshot shows the Oracle Help Center search results for the query "page composer". The search bar at the top contains the text "page composer". Below the search bar, there is a "Filter your results" section. The search results are organized into three main sections, each with a "Find more in this content" button:

- Enterprise Components** (February 17, 2026): This section includes links to "Using Page Composer" (describing how to use the Page Composer page EOPC\_MAIN\_FL to create page compositions), "Understanding Page Composer" (describing how to design Fluid Application Pages), "Registering Components in Page Composer" (describing how to use the Registration page for Page Composer), and "Configuring and Implementing the Comments and Attachments View Framework" (describing how to use the CAVF Configuration ID Page Composer Mapping Page).
- Home: PeopleSoft Financials and Supply Chain Management 9.2** (July 17, 2025): This section includes links to "Understanding Page Composer" (describing how to design Fluid Application Pages), "Using Page Composer" (describing how to use the Page Composer feature), "Registering Components in Page Composer" (describing how to use the Page Composer Administrator), and "Setting Up PeopleSoft Mobile Approvals for Treasury" (describing how to customize the page setup).
- PeopleSoft Cash Management 9.2.056** (February 23, 2026): This section includes links to "Setting Up PeopleSoft Mobile Approvals for Treasury" (describing how to customize the page setup) and "Understanding PeopleSoft Mobile Approvals for Treasury" (describing the minimum requirements for Fluid Application Pages).

The search results in this example include topics from these published items:

- *Enterprise Components* (February 17, 2026) - A book published to this release context.
- *Home: PeopleSoft Financials Supply Chain Management 9.2* (July 17, 2025) - A previous PeopleSoft FSCM library published to Oracle Help Center.
- *PeopleSoft Cash Management 9.2.056* (February 23, 2026) - Another book published to this release context.


## Refining Search Results

If you receive too many results from the simple search, expand the **Filter your results** section near the top of the page. You can filter by content type or date.

### **Note**

Select the **Documentation** filter to see only online help and exclude other content types, like My Oracle Support documents.

This example shows the filters on the search results page.

 **Filter your results** ▼

Content Types

Documentation  API Reference  FAQ  Solution Architecture  Support  Tutorial and Learning Path  Video

Release Notes

Date

Anytime (Default)  Past 7 days  Past 30 days  Past 6 months  Past year

# 3

## Managing Hosted Online Help

### Configuring Context-Sensitive Help Using the Hosted Online Help

You can configure the context-sensitive help for your PeopleSoft applications and Application Designer to use the PeopleSoft Online Help that is hosted on the [Oracle Help Center](#).

#### Prerequisites

- Ensure that you have an internet connection available to the server where PeopleTools is installed.
- Identify the library IDs you'll use to link to the online help.

You can link to multiple library IDs.

Library ID Type	When to Use	How to Find
Latest update image or patch	<p>Use when you always want your users to see help for the latest PeopleSoft update image or PeopleTools patch.</p> <p><b>Note:</b> You won't have to update the help URL when you take new update images or patches, unless you want to roll back to the help for an earlier image or patch.</p>	<p>Select from the following library IDs:</p> <ul style="list-style-type: none"> <li>– <i>cmlatest</i>: Cloud Manager</li> <li>– <i>crm92latest</i>: Customer Relationship Management</li> <li>– <i>cs92latest</i>: Campus Solutions</li> <li>– <i>elm92latest</i>: Enterprise Learning Management</li> <li>– <i>epm91latest</i>: Enterprise Performance Management</li> <li>– <i>fscm92latest</i>: Financials and Supply Chain Management</li> <li>– <i>hcm92latest</i>: Human Capital Management</li> <li>– <i>ih91latest</i>: Interaction Hub</li> <li>– <i>pt859latest</i>: PeopleTools 8.59</li> <li>– <i>pt860latest</i>: PeopleTools 8.60</li> <li>– <i>pt861latest</i>: PeopleTools 8.61</li> <li>– <i>pt862latest</i>: PeopleTools 8.62</li> <li>– <i>ptlatest</i>: All PeopleTools (latest patch of latest release)</li> </ul>
Specific update image or patch (for content published in or after March 2026)	<p>Use when you want your users to see help for a specific PeopleSoft update image or PeopleTools patch.</p> <p><b>Note:</b> To use the help for a new update image or patch, you'll have to update the help URL configuration manually.</p>	<ol style="list-style-type: none"> <li>1. Go to <a href="#">Oracle Help Center</a> to access all supported PeopleSoft Online Help sites.</li> <li>2. Navigate to the release-specific page for your product (for example, PeopleSoft Financials Supply Chain Management 9.2.056)</li> <li>3. Locate and copy the release alias listed at the top of the page.</li> </ol>

Library ID Type	When to Use	How to Find
Specific update image or patch (for content published prior to March 2026)	Use when you want your users to see help for a specific PeopleSoft update image or PeopleTools patch. <b>Note:</b> To use the help for a new update image or patch, you'll have to update the help URL configuration manually.	<ol style="list-style-type: none"> <li>Go to <a href="#">Oracle Help Center</a> to access all supported PeopleSoft Online Help sites.</li> <li>Click the <b>View HTML</b> link for the library that you want to use.</li> <li>Copy the portion of the URL that's just before the "/eng/." This is the library ID. For example, for the following URL, "hcm92pbr32" is the library ID.   <pre>https:// docs.oracle.com/cd/ F23178_01/ <b>hcm92pbr32</b>/eng/hcm/ index.html</pre> </li> </ol>

## Enabling PeopleSoft Application Help Links Using the Hosted Online Help

To enable Help links:

1. Sign in to your PeopleSoft application.
2. Select **PeopleTools**, and then **Web Profile**, and then **Web Profile Configuration**.
3. Click **Search** and select the profile name that you specified during your PeopleSoft installation.
4. On the General page, enter the help URL in the following format:

```
https://docs.oracle.com/pls/topic/lookup?
id=%CONTEXT_ID%&ctx=library_ID1&ctx =library_ID2&ctx=library_ID3
```

Replace the values of *library\_ID1*, *library\_ID2*, and so on, with the library IDs that you identified during the [Prerequisites](#). To search across multiple help libraries, add as many instances of *&ctx=library\_ID* as you need. If you include both PeopleTools and applications, list the PeopleTools library ID first.

Examples:

- Latest Human Capital Management:

```
https://docs.oracle.com/pls/topic/lookup?id=%CONTEXT_ID%&ctx=hcm92latest
```

- Latest PeopleTools 8.62 and latest Human Capital Management:

```
https://docs.oracle.com/pls/topic/lookup?
id=%CONTEXT_ID%&ctx=pt862latest&ctx=hcm92latest
```

This example illustrates the General page with the help URL for the latest PeopleTools 8.62 and latest Human Capital Management help:

**Web Profile Configuration**

**General**   Security   Virtual Addressing   Cookie Rules   Authorized Site   >

---

Profile Name: TEST      [View History](#)

Description:

Authentication Domain:  ?

Help URL:  ?

Compress Responses ?

Compress Response References ?

Compress Mime Types:  ?

Compress Query ?

Save Confirmation Display Time:  Milliseconds ?

5. Save your changes.
6. Restart your web server.
7. Test the links by clicking the Help link on at least one page in each of the PeopleSoft applications that you defined in the help URL.

#### Note

If you reach the Oracle Help Center but receive a “page not found” error (404), this could mean that the library ID is incorrect or that no help is available for the page that you’re testing. If the library ID is correct, try testing some other pages.

## Enabling Application Designer F1 Help Using the Hosted Online Help

To enable the F1 help:

1. Sign in to your PeopleSoft applications.
2. Select **PeopleTools**, and then **Utilities**, and then **Administration**, and then **PeopleTools Options**.
3. In the **Help Options** section, enter the F1 URL in the following format:

```
https://docs.oracle.com/pls/topic/lookup?id=%CONTEXT_ID%&ctx=library_ID
```

Replace the value of *library\_ID* with the library ID that you identified during the [Prerequisites](#).

Example for the latest PeopleTools 8.57:

```
https://docs.oracle.com/pls/topic/lookup?id=%CONTEXT_ID%&ctx=pt882latest
```

This example illustrates the PeopleTools Options page with the F1 help URL for the latest PeopleTools 8.62 help:

**Help Options**

F1 Help URL:

Ctrl-F1 Help URL:

4. Save your changes.
5. Open Application Designer.

**Note**

If Application Designer is already running, quit and restart it.

6. Test the help by opening a definition, such as a page or dialog box, and pressing F1.

**Note**

If you reach the Oracle Help Center but receive a “page not found” error (404), this could mean that the library ID is incorrect or that no help is available for the page that you’re testing. If the library ID is correct, try testing some other pages.

# 4

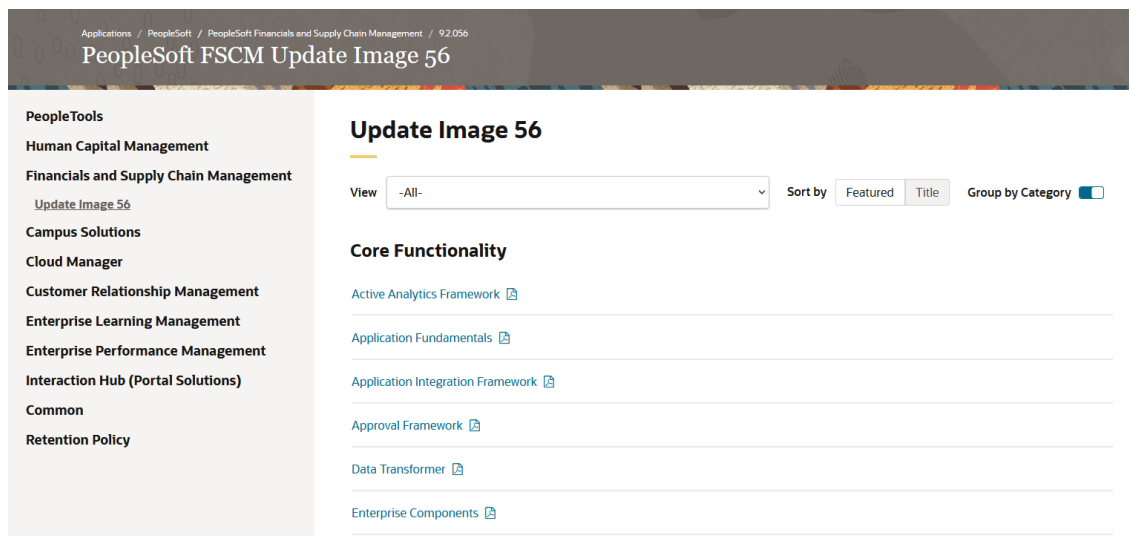
## Managing Locally Installed PeopleSoft Online Help

### Understanding Locally Installed PeopleSoft Online Help

When you install the PeopleSoft Online Help locally, you can begin using it as soon as it is installed.

The release-specific interface page for your locally installed PeopleSoft Online Help resembles the same page available online in the Oracle Help Center. You have access to both HTML and PDF versions of each book.

This example illustrates the HTML and PDF links for books on the release-specific interface page for PeopleSoft FSCM Update Image 56.



However, the breadcrumb links at the top of the page and the PeopleSoft product links in the left panel may not be operable inside your firewall because they point to URLs on oracle.com.

### Understanding the PeopleSoft Online Help Website Folders

The PeopleSoft Online Help site contains the following folder hierarchy:

- content
  - *peoplesoft-application* - The content for your PeopleSoft application or PeopleTools
    - \* *release* - The specific release
      - \* *book\_one*

- \* *book\_two*
- \* *book\_three*
- \* ...
- peoplesoft-common - (Optional) Enterprise Components content for your PeopleSoft application, Not delivered with PeopleTools or Cloud Manager.
  - \* *book\_one*
  - \* *book\_two*
  - \* *book\_three*
  - \* ...
- sp\_common - Auxiliary files for rendering your content

This example illustrates the hierarchy of the content folder that contains financials-supply-chain management, peoplesoft-common, and sp\_common.

Name	Date modified	Type
application-fundamentals	3/10/2026 2:59 PM	File folder
asset-lifecycle-management-fundam...	3/10/2026 2:59 PM	File folder
peoplesoft-asset-management	3/10/2026 2:59 PM	File folder
peoplesoft-banks-setup-and-processi...	3/10/2026 2:59 PM	File folder
peoplesoft-billing	3/10/2026 2:59 PM	File folder
peoplesoft-cash-management	3/10/2026 2:59 PM	File folder
peoplesoft-catalog-management	3/10/2026 2:59 PM	File folder
peoplesoft-commitment-control	3/10/2026 2:59 PM	File folder
peoplesoft-contracts	3/10/2026 2:59 PM	File folder
peoplesoft-contracts-for-government...	3/10/2026 2:59 PM	File folder
peoplesoft-cost-management	3/10/2026 2:59 PM	File folder