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**Oracle's PeopleTools PeopleBook**

# PeopleBooks and the PeopleSoft Online Library

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# Contents

## Preface

<b>PeopleBooks and the PeopleSoft Online Library Preface .....</b>	<b>v</b>
Understanding PeopleBooks and the PeopleSoft Online Library .....	v
Submitting Comments and Suggestions .....	v

## Chapter 1

<b>Accessing PeopleBooks and the PeopleSoft Online Library .....</b>	<b>1</b>
Accessing Hosted PeopleBooks .....	1
Accessing Installable PeopleBooks .....	1
Accessing PeopleBooks in PDF Format .....	2
Accessing Documentation Updates and Additional Documentation .....	2

## Chapter 2

<b>Understanding PeopleBooks .....</b>	<b>3</b>
The PeopleBooks Structure .....	3
Typographical Conventions and Cues That Are Used in PeopleBooks .....	5
ISO Country and Currency Codes .....	6
Region and Industry Identifiers .....	6
Common PeopleBooks .....	7
Application Fundamentals PeopleBooks .....	7
Using PeopleSoft Applications PeopleBook .....	7
Common Elements Used in PeopleBooks .....	7

## Chapter 3

<b>Using PeopleBooks .....</b>	<b>9</b>
Navigating the PeopleBooks Interface .....	9
Understanding How to Access the PeopleBooks Interface .....	9
Showing and Hiding the Reference Pane .....	10
Navigating Between Books and Chapters .....	11
Navigating Within a Chapter .....	11

Using the Table of Contents .....	12
Using the Index .....	13
Searching the Hosted PeopleBooks Website .....	13
Performing a Simple Search .....	13
Performing an Advanced Search .....	14
Viewing Search Results .....	15
Searching an Installed PeopleBooks Website .....	16
Performing a Search .....	17
Viewing Search Results .....	18
Displaying and Printing Graphics in PeopleBooks .....	19

## Chapter 4

<b>Managing the Locally Installed PeopleSoft Online Library .....</b>	<b>21</b>
Understanding the PeopleSoft Online Library Website Folders .....	21
Global Folder Level .....	21
Language Folder Level .....	23
Documentation Type Folder Level .....	24
Book Folder Level .....	26
Managing the PeopleSoft Online Library .....	27
Installing New PeopleSoft Documentation .....	27
Managing Language Support .....	27
Managing Individual PeopleBooks and Integrated Documentation .....	29

## Appendix A

<b>Application Abbreviations .....</b>	<b>47</b>
HCM Abbreviations .....	47

<b>Index .....</b>	<b>59</b>
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# PeopleBooks and the PeopleSoft Online Library Preface

This preface provides an overview of PeopleBooks and the Oracle's PeopleSoft Online Library and discusses how to submit comments and suggestions.

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## Understanding PeopleBooks and the PeopleSoft Online Library

The PeopleSoft Online Library is a website that enables you to browse PeopleBooks. It also provides context- and language-sensitive online help for PeopleSoft application users. The library provides standard navigation and search capabilities, including an expandable table of contents, a keyword index, and full-text searching.

You access the PeopleSoft Online Library on the Oracle PeopleSoft Hosted PeopleBooks website, which enables you to access PeopleBooks and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate application maintenance documentation postings on My Oracle Support, because that documentation is now incorporated into the hosted PeopleBooks content. The Hosted PeopleBooks website is available in English only.

If your company has firewall restrictions that prevent you from using the Hosted PeopleBooks website, you can install the PeopleSoft Online Library locally. If you install the library locally, you can control which documents users can access and you can integrate customized documentation for your company into the library.

If you locally install the PeopleSoft Online Library, you can use any search engine for full-text searching. Your installation documentation includes instructions for how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.52 Installation for <your database platform>*, Appendix: Installing PeopleBooks or the documentation for your chosen search engine, if you decide not to use Secure Enterprise Search.

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## Submitting Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about PeopleBooks and other Oracle PeopleSoft reference and training materials. Please send your suggestions to [PSOFT-INFODEV\\_US@ORACLE.COM](mailto:PSOFT-INFODEV_US@ORACLE.COM). Include release numbers for the PeopleTools and applications that you are using.



## Chapter 1

# Accessing PeopleBooks and the PeopleSoft Online Library

This chapter discusses how to access:

- Hosted PeopleBooks.
- Installable PeopleBooks.
- PeopleBooks in PDF and mobile formats.
- Documentation updates and additional documentation.

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## Accessing Hosted PeopleBooks

You can access the Hosted PeopleBooks website from any location with an Internet connection.

See <http://www.oracle.com/pls/psft/homepage>.

The Hosted PeopleBooks website homepage contains a link to instructions for setting up context-sensitive help to point to Hosted PeopleBooks.

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## Accessing Installable PeopleBooks

At each release the installable PeopleSoft Online Library, including a complete line of PeopleBooks documentation, is made available with the release through the Oracle E-Delivery website. Translated PeopleBooks are offered for PeopleSoft Application PeopleBooks via Electronic Product Delivery (ePD) after GA.

If you cannot use the Hosted PeopleBooks website as your default PeopleSoft Online Library, you can set up the PeopleSoft Online Library on a server using the Online Document Library Site Installer. Your installation documentation includes an appendix with instructions for how to install PeopleBooks and the PeopleSoft Online Library for your business environment.

See *PeopleTools 8.52 Installation for <your database platform>*, Appendix: Installing PeopleBooks.

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## Accessing PeopleBooks in PDF Format

You can download PDF and Kindle-compatible mobile versions of PeopleSoft documentation from the Oracle Technology Network (OTN). These PDF and mobile files are available online for each major release shortly after GA.

See Oracle Technology Network, <http://www.oracle.com/technetwork/documentation/psftent-090284.html>.

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## Accessing Documentation Updates and Additional Documentation

The Hosted PeopleBooks website is updated on a regular schedule, ensuring that you have access to the most current documentation.

See <http://www.oracle.com/pls/psft/homepage>.

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:

- Release notes describe the new features and enhancements in the release.
- PeopleSoft Cumulative Feature Overview tools provide concise, 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 notes provide supplemental licensing information that is related to the use of PeopleTools technology and third-party products.
- Documentation homepages provide updated, release-specific information, with links to additional information that may be relevant.

In addition, the PeopleSoft Enterprise 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. By using the PeopleSoft Enterprise Information Solution data sheets, you can easily access information and links to PeopleBooks, documentation updates, instructor-led training, online classes, User Productivity Kits (UPKs), self-study CDs, certification programs, and other helpful information.

See <http://www.oracle.com/us/products/applications/054275.html>.



## Chapter 2

# Understanding PeopleBooks

This chapter discusses:

- The PeopleBooks structure.
- Typographical conventions and cues that are used in PeopleBooks.
- ISO country and currency codes.
- Region and industry identifiers.
- Common PeopleBooks.
- Common elements used in PeopleBooks.

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## The PeopleBooks Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use PeopleBooks more efficiently.

The PeopleBooks structure conveys conceptual material and a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

This table provides the order, types, and descriptions of prefaces, chapters, and appendixes in a PeopleBook:

<b><i>Content Type</i></b>	<b><i>Description</i></b>
Preface	<p>The preface explains:</p> <ul style="list-style-type: none"><li>• The structure of the PeopleBook you are reading.</li><li>• Common elements that are used in the PeopleBook, if applicable.</li><li>• Additional resources.</li></ul>

<b>Content Type</b>	<b>Description</b>
Getting Started With...	<p>(Optional) This chapter discusses product implementation guidelines. It explains:</p> <ul style="list-style-type: none"> <li>• The business processes that are documented within the book.</li> <li>• Integrations between the product being discussed and other products.</li> <li>• A high-level overview of how the documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.</li> </ul>
Setup and Implementation	<p>This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, these chapters explain how to set up functionality X, not necessarily how to use functionality X. The corresponding business process chapters explain how to use the functionality.</p> <p><b>Note.</b> A small amount of business process information might be included in a setup chapter if the amount of business process documentation is insufficient to require a separate section in the book.</p>
Business Process	<p>This can be one or more chapters in the application PeopleBooks. These chapters contain documentation that addresses specific business processes, with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, these chapters explain how the functionality works, not necessarily how to set up functionality X. The corresponding setup and implementation chapters explain how to set up the functionality.</p> <p><b>Note.</b> A small amount of setup and implementation information might be included in a business process chapter if the amount of setup and implementation documentation is insufficient to require a separate chapter in the book.</p>
Appendixes	<p>(Optional) One or more appendixes might be included in the book. Appendixes contain information that is supplemental to the primary documentation.</p>
Delivered Workflow Appendix	<p>(Optional) The delivered workflow appendix describes all of the workflows that are delivered with the application.</p> <p><b>Note.</b> Not all applications have delivered workflows.</p>

<b>Content Type</b>	<b>Description</b>
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports usually appears in the related business process chapters.

## Typographical Conventions and Cues That Are Used in PeopleBooks

This table describes the typographical conventions and cues that are used in PeopleBooks:

<b>Typographical Convention or Visual Cue</b>	<b>Description</b>
<b>Bold</b>	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  Italics also identify references to words or letters, as in the following example: Enter the letter <i>O</i> .
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.
Monospace font	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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.

<i>Typographical Convention or Visual Cue</i>	<i>Description</i>
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

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## ISO Country and Currency Codes

PeopleBooks 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 PeopleBooks. Reference to an ISO country code in your PeopleBook 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 your application PeopleBooks for more information.

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## Region and Industry Identifiers

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

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

### ***Region Identifiers***

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

### **Industry Identifiers**

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

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

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## **Common PeopleBooks**

Common PeopleBooks are books of the same name that are used in multiple applications or books of particular interest to all customers. This section discusses:

- Application fundamentals PeopleBooks
- Using PeopleSoft Applications PeopleBook

### **Application Fundamentals PeopleBooks**

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

For some applications additional, essential, information describing the setup and design of your system appears in a companion volume of documentation called the Application Fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

### **Using PeopleSoft Applications PeopleBook**

*PeopleTools 8.52: Using PeopleSoft Applications PeopleBook* 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 PeopleBook provide general information about using PeopleSoft applications.

### **Common Elements Used in PeopleBooks**

#### **As of Date**

The last date for which a report or process includes data.

<b>Business Unit</b>	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
<b>Description</b>	Enter up to 30 characters of text.
<b>Effective Date</b>	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
<b>Once, Always, and Don't Run</b>	<p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
<b>Process Monitor</b>	Click to access the Process List page, where you can view the status of submitted process requests.
<b>Report Manager</b>	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
<b>Request ID</b>	An ID that represents a set of selection criteria for a report or process.
<b>Run</b>	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
<b>SetID</b>	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
<b>Short Description</b>	Enter up to 15 characters of text.
<b>User ID</b>	An ID that represents the person who generates a transaction.

## Chapter 3

# Using PeopleBooks

This chapter discusses how to:

- Navigate the PeopleBooks interface.
- Search the Hosted PeopleBooks website.
- Search an installed PeopleBooks website.
- Display and print graphics in PeopleBooks.

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## Navigating the PeopleBooks Interface

This section provides an overview of how to access the PeopleBooks interface and discusses how to:

- Show and hide the reference pane.
- Navigate between books and chapters.
- Navigate within a chapter.
- Use the table of contents.
- Use the index.

## Understanding How to Access the PeopleBooks Interface

When you click a product line and release link on the Oracle PeopleSoft Enterprise Hosted PeopleBooks homepage, the PeopleBooks Library page appears.

The PeopleBooks are logically grouped by suite, product line, or functional area so that books are easier to find when accessing them online. Select a PeopleBook title on the homepage to display the PeopleBook interface, which includes the following panes:

- Document

The pane on the right side of the window displays the document HTML file, which corresponds to a chapter.

- Navigation

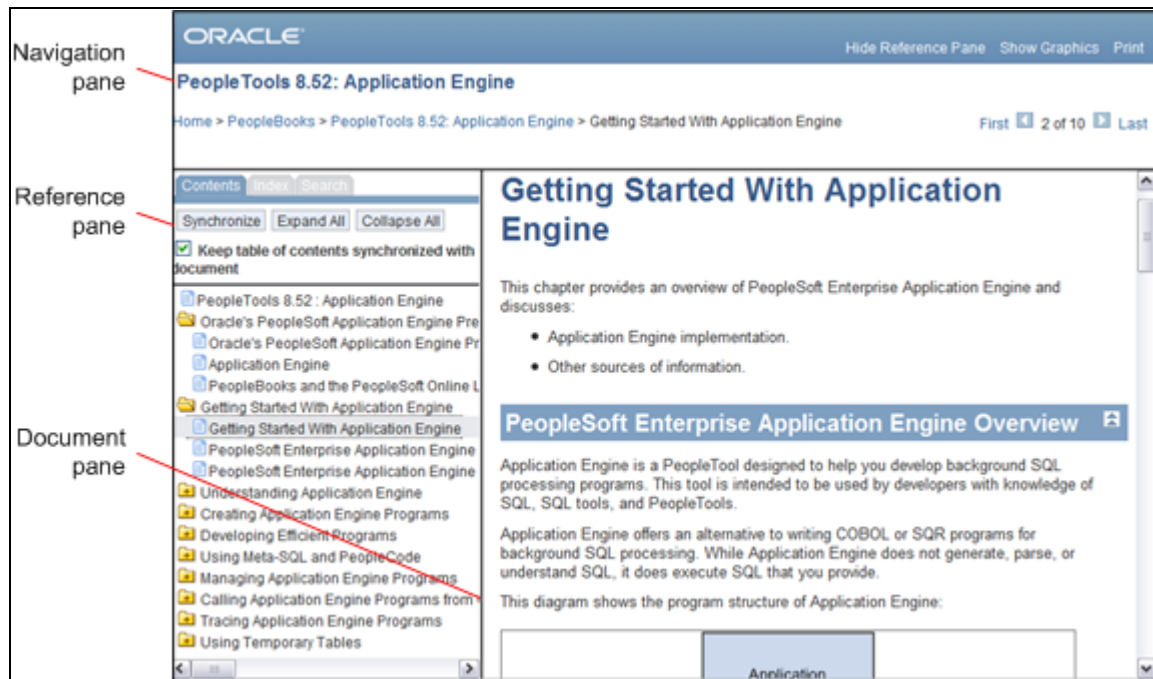
The pane above the document pane contains display options, navigation controls (breadcrumbs), and the current PeopleBook and chapter titles.

- Reference

The pane on the left side of the window contains two tabs: Contents and Index. (A search tab also appears when you use the Hosted PeopleBooks website.) Select these tabs to explore the PeopleBooks or to locate a specific topic. You can hide the reference pane to maximize the size of the document pane.

**Note.** When you access a topic through the Help link on an application page, through context-sensitive (F1) help, or when you access one PeopleBook from another, the reference pane is always hidden initially.

The following example illustrates the three panes in the browser:



PeopleBook page with panes identified

**Note.** The preceding example includes the Search tab in the Reference pane. This Search tab appears only when you use the Hosted PeopleBooks website.

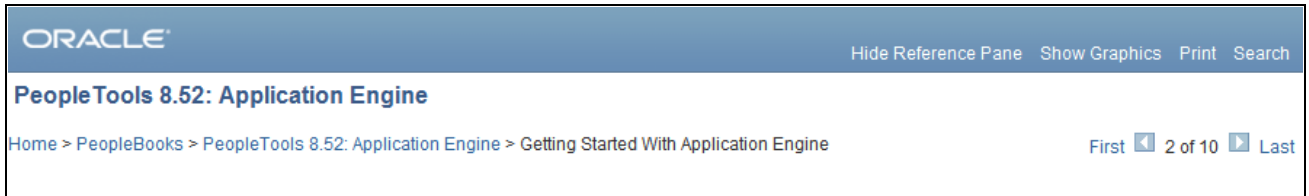
## Showing and Hiding the Reference Pane

If the reference pane (with the Contents and Index tabs) doesn't appear, click the Show Reference Pane link in the Navigation pane at the top of the browser. To hide the Reference pane, click the Hide Reference Pane link. If you have cookies enabled on your browser, your last Reference pane setting is remembered when you jump between books. Otherwise, jumping to a new book always hides the Reference pane (to speed page loading).



## Navigating Between Books and Chapters

Use the Navigation pane to view information about the current PeopleBook and to navigate between PeopleBooks or between chapters in the current PeopleBook. The following example illustrates the Navigation pane elements that are discussed in this section:



### Navigation pane

Use the following Navigation pane elements for navigating through PeopleBooks:

#### Breadcrumbs

Click the breadcrumb links at the bottom of the Navigation pane to access the following pages:

- **Home:** Takes you to the PeopleSoft Online Library homepage, where you can navigate to other documentation types, if your company has integrated or customized documentation.
- **PeopleBooks:** Takes you to the PeopleBooks homepage, where you can browse to select a PeopleBook title.
- **PeopleBook title:** Takes you to the preface of the PeopleBook that you are currently viewing.

The final, text-only breadcrumb is the title of the PeopleBook chapter that you are currently viewing.



Click the Previous or Next button to go to the previous or next chapter in the book.

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**Note.** These buttons move you to the previous or next chapter in the sequence in which the chapters are organized in the book, not (as with the browser's Forward and Back buttons) in the sequence in which you have opened the chapters.

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#### First and Last

Click these links to go to the first and last chapter in a book, respectively.

## Navigating Within a Chapter

Use the following navigation features in the Document pane to navigate within a chapter:



Click the Top button to go to the top of the current page, which is the beginning of the chapter.

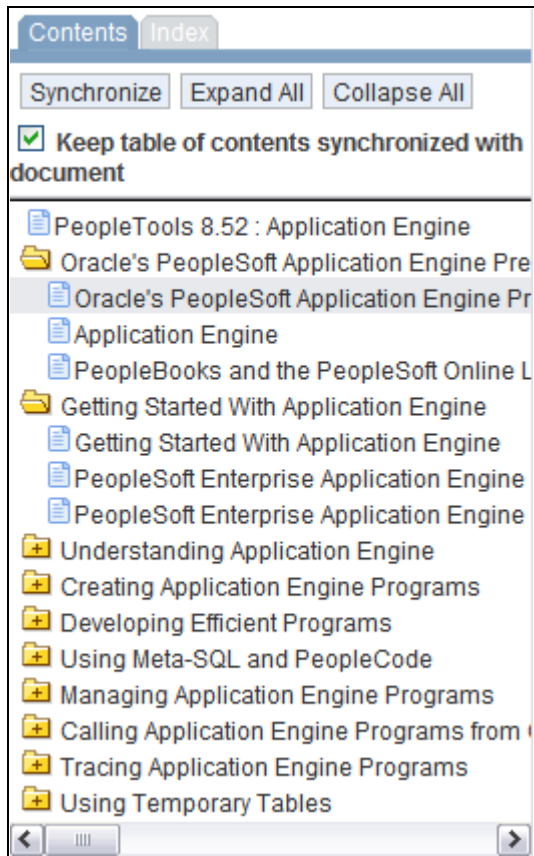


Click the Previous button to go to the beginning of the parent section within the page.

Click a cross-reference link to go to a related topic. These links typically appear in sentences that begin with the word *See* or under subtopic headings that contain the words *See Also*.

## Using the Table of Contents

Select the Contents tab in the Reference pane to drill down to topics in the current PeopleBook, as illustrated in the following example:



Reference pane displaying the Contents tab

Use the following elements to navigate within the Contents tab:



Click a closed folder icon to expand a chapter.



Click an open folder icon to collapse a chapter.



Click a section icon to open to the section.

### Synchronize

Click to open the Table of Contents to the topic that currently appears in the Document pane.

<b>Expand All</b>	Click to open all of the folders in the Table of Contents.
<b>Collapse All</b>	Click to close all of the folders in the Table of Contents.
<b>Keep table of contents synchronized with document</b>	Select this check box to automatically synchronize the Table of Contents with the page that appears in the Document page.

## Using the Index

Select the Index tab to browse or search the keyword index for the current PeopleBook.

To display an index topic, enter a keyword in the text box or scroll to the keyword and click it. The document appears at the associated topic, unless there are multiple topics. If multiple topics are related to the keyword, a pop-up menu appears. Click the link for the topic that you want to access.

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## Searching the Hosted PeopleBooks Website

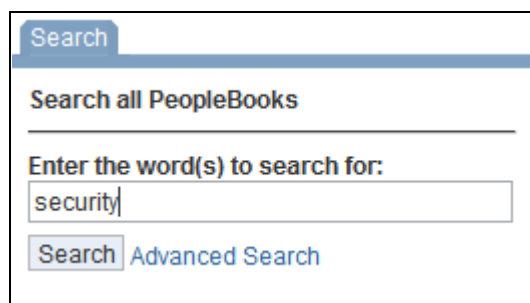
This section discusses how to:

- Perform a simple search
- Perform an advanced search
- View search results

### Performing a Simple Search

On the Search tab of the Reference pane, enter a word or phrase and click the Search button. This searches all PeopleBooks for the product line and release that you're viewing.

The following example illustrates the Search tab:



The screenshot shows a web interface for searching PeopleBooks. At the top is a tab labeled 'Search'. Below the tab is the text 'Search all PeopleBooks'. Underneath is a prompt 'Enter the word(s) to search for:' followed by a text input field containing the word 'security'. At the bottom of the form are two buttons: 'Search' and 'Advanced Search'.

Example of the Search tab

## Performing an Advanced Search

Use the advanced search if too few or too many results were obtained from the simple search. Enter a word or phrase in one of the first three search fields, select any of the additional optional fields, then click the Search button. The following example illustrates the search options that are discussed in this section:

The screenshot shows the 'Oracle PeopleSoft Enterprise Search Results' interface. It includes several search options:
 

- Search for all the words:** A text input field followed by a 'Search' button.
- Search for any of the words:** A text input field followed by a 'Search' button.
- Search for the exact phrase:** A text input field followed by a 'Search' button.
- Don't show results containing this word or phrase:** A text input field.
- Show this many results on each page:** A dropdown menu currently set to '10'.
- Show results where the words are:** A dropdown menu currently set to 'Anywhere in the topic'.
- Only show results from this book:** A dropdown menu currently set to 'All Books'.
- Only show results of this type:** A dropdown menu currently set to 'All Types'.

Example of the search on Hosted PeopleBooks

Use the following options on the Search page:

<b>Search for all the words and Search for any of the words</b>	By default, all search terms longer than 3 characters are surrounded by wildcards on both sides. For example, searching for <i>intermedia</i> also finds <i>intermediate</i> . Searching for <i>sql</i> or <i>aq</i> does not use wildcards, because those terms have 3 or fewer characters. If you include typical wildcard characters, such as %, _, *, and ?, in your search terms, they are interpreted as literal characters rather than wildcards.
<b>Search for the exact phrase</b>	Quotes are not required, and because all searches are not case sensitive, you do not need to enter a word in all capital letters.
<b>Don't show results containing this word or phrase</b>	(Optional) Enter words or phrases to be excluded from the search results (similar to the Boolean search NOT).
<b>Show this many results on each page</b>	(Optional) Expand the number of displayed search results by changing the selection from 10 (default), to 20, 50, or 100.
<b>Show results where the words are</b>	(Optional) Identify whether the search words can be anywhere in the topic or only in the topic title.

- Only show results from this book** (Optional) Select from a list of all books within the product line. For example, if you are searching within PeopleTools PeopleBooks, the list contains every PeopleTools PeopleBook title.
- Only show results of this type** (Optional) Filter the search results by type of content, such as tasks or concepts.

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**Note.** The task and concept types may limit your search more than you expect, since some topics are not labeled as either task or concept. The Examples, Error Messages, and Glossary Terms types do not apply to PeopleBooks and may return unexpected results.

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## Viewing Search Results

The Oracle PeopleSoft Enterprise Search Results page displays information about the current query, the total number of search results that were found, and the number of results on the current page, as illustrated in the following example:

The screenshot shows the Oracle PeopleSoft Enterprise Search Results page for the query 'sales'. The page title is 'Oracle PeopleSoft Enterprise Search Results: sales'. At the top, there is a search bar with 'sales' entered, a 'Search' button, and a link to 'Advanced Search'. Below the search bar, there is a 'Product Line' dropdown menu set to 'CRM 9.1'. The results section shows 'Results 1 to 10 of about 126 for sales.' and lists five search results, each with a 'TASK' label and a title. To the right of the results, there are two sidebars: 'Refine Results' with links for 'Related concepts (14)' and 'Related tasks (84)', and 'Top Matching Books' with a list of books and their counts.

**Oracle PeopleSoft Enterprise Search Results: sales**

sales  [Advanced Search](#)

Product Line: CRM 9.1

Results 1 to 10 of about 126 for sales.

**TASK** [Getting Started with PeopleSoft Enterprise Sales for Handhelds Application](#)  
 Sales for Handhelds Application  
[PeopleSoft Enterprise Sales for Handhelds 9.1 PeopleBook](#) • [Search this book](#) • [Hide this book](#) • [Contents](#) • [PDF](#)

**TASK** [Getting Started with PeopleSoft Enterprise Sales](#)  
 Sales  
[PeopleSoft Enterprise Sales 9.1 PeopleBook](#) • [Search this book](#) • [Hide this book](#) • [Contents](#) • [PDF](#)

**TASK** [Understanding Sales Leads and Opportunities](#)  
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**TASK** [Understanding Sales Forecasts](#)  
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**TASK** [Understanding PeopleSoft Enterprise Sales for Handhelds](#)  
 Understanding PeopleSoft Enterprise Sales for Handhelds  
[PeopleSoft Enterprise Sales for Handhelds 9.1 PeopleBook](#) • [Search this book](#) • [Hide this book](#) • [Contents](#) • [PDF](#)

**TASK** [Understanding Forecast Functionality in PeopleSoft Enterprise Sales](#)  
 Understanding Forecast Functionality in PeopleSoft Enterprise Sales

**Refine Results**  
[Related concepts \(14\)](#)  
[Related tasks \(84\)](#)

**Top Matching Books**  
[PeopleSoft Enterprise Sales 9.1 PeopleBook \(88\)](#)  
[PeopleSoft Enterprise Sales for Handhelds 9.1 PeopleBook \(10\)](#)  
[PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook \(6\)](#)  
[PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook \(4\)](#)  
[PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook \(3\)](#)  
[PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook \(3\)](#)  
[PeopleSoft Enterprise CRM 9.1 Partner Relationship Management PeopleBook \(2\)](#)  
[PeopleSoft Enterprise CRM Portal Pack 9.1 PeopleBook \(2\)](#)  
[PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook \(2\)](#)

Example of the simple search results page on Hosted PeopleBooks

If the results are not sufficient, you can select another product line from the Product Line drop-down list box and perform the search again. If the results contain information that's not relevant for you, you can filter the results by clicking a link in one of the boxes on the right side of the results page:

- Refine Results
- Filter by Job Role
- Top Matching Books

In addition, each topic in the results includes links to show only results from that book or to hide results from that book if the entire book is not relevant.

## Searching an Installed PeopleBooks Website

If you use Oracle Secure Enterprise Search as the search engine for your installed PeopleBooks website, your installation documentation discusses how to configure basic full-text search functionality. This section describes how to use that basic functionality. However, if your search administrator has customized the search functionality or installed a different search engine, consult the search engine documentation for details about how to perform searches.

This section discusses how to:

- Perform a search
- View search results

## Performing a Search

Enter a word or phrase in the search field, then click the Search button. The following example illustrates the search options that are discussed in this section:



Example of the standard search page from Oracle Secure Enterprise Search

If the search page contains links above the Search field, as in the preceding example, you can click a link to narrow your search to look within a particular search group. The search group names depend on how Secure Enterprise Search is configured. A typical setup might list links for each product line that you have installed.

Alternatively, you can select a search group by clicking the Browse link and selecting the search group in the pop-up window. To view all documents in a search group, click the View All link to the right of the search group in the pop-up window.

You can also narrow search results by clicking the Attribute Filters link and entering more specific attributes, such as title and last modified date. Depending on how Secure Enterprise Search is set up for your site, the attributes list may include some default attributes that do not apply to PeopleBooks, such as mimetype. When you filter on an attribute that does not apply to PeopleBooks, the filter is ignored. Your search administrator can customize the attribute mappings for each search source using the Secure Enterprise Search portal. See the Secure Enterprise Search documentation for more information about configuring and using these attributes.

---

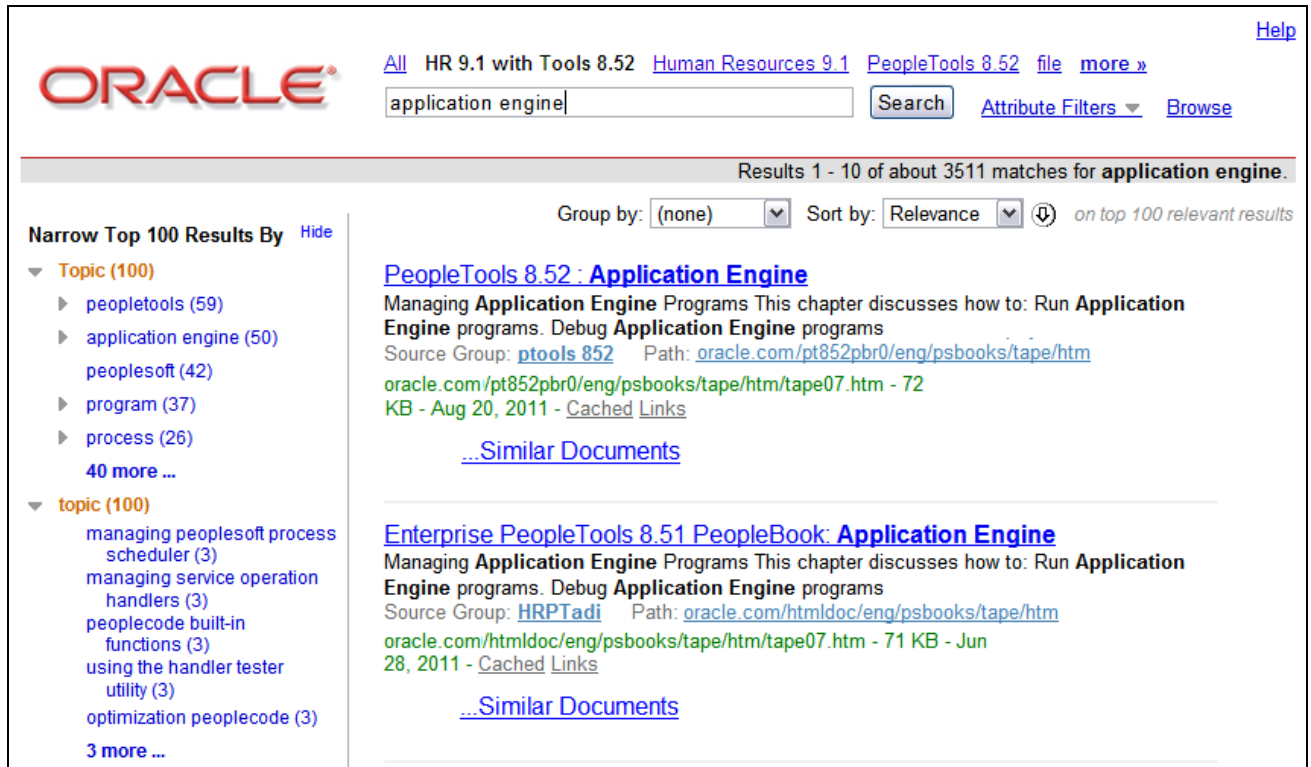
**Note.** If you set attribute filters, they may remain active on future searches during your browser session until you remove them. Therefore, filters that you set on one search may affect other unrelated searches. To remove a filter, click the Attribute Filters link, and click the Remove Filter icon to the right of the filter.

---

For details on performing wildcard, fuzzy, and other complex searches, click the Help link on the Search page.

## Viewing Search Results

The following screen shot illustrates the basic search results with Secure Enterprise Search:



Example of search results with Secure Enterprise Search

On the search results page, you can use the same filtering tools that you use on the search page, such as the Attribute Filters and Browse links. In addition, the basic search results page includes the following features:



Click the Show Results Clusters icon on the top, left side of the page to narrow the search results by various terms that appear in the results. For example, in the preceding screen shot, you can click the peopletools (59) link to narrow the results to show only topics that include the word *PeopleTools*.

### Group by and Sort by

Use these drop-down list boxes to reorganize search results on the page.

### Cached

Click this link to view a cached HTML version of the document with the search term highlighted throughout the document. The cached document may not be as up-to-date as the source document, but it may be retrieved more quickly.

### Links

Click this link to displays the Links page, which lists other documents that link to or are linked from the selected document.



For more details on using the search results, click the Help link on the search results page.

---

## Displaying and Printing Graphics in PeopleBooks

In the Document pane, you can display many of the graphics in Pop-up or Inline mode. The default Pop-up mode provides faster document loading and scrolling speeds because each graphic is represented by the following pop-up icon, which you click to display the full-sized graphic:



Pop-up icon

In Inline mode, graphics appear at full size in the Document pane. This mode is useful when viewing the PeopleBooks locally (when loading and scrolling speeds are not an issue) and with the browser window maximized.

To activate Pop-up mode, click the Hide Graphics link in the Navigation pane. This link then changes to Show Graphics, which you click to activate Inline mode.

To print the current file with graphics displayed inline in the text (instead of pop-up icons), click the Print link in the Navigation pane.

---

**Important!** If you use your browser's Print command, the graphics appear exactly as they appear on the screen: pop-up icons are not replaced with the actual graphics, and graphics are not scaled to fit on the printed page.

---



## Chapter 4

# Managing the Locally Installed PeopleSoft Online Library

This chapter provides an overview of the PeopleSoft Online Library website folders and discusses how to manage the PeopleSoft Online Library.

---

## Understanding the PeopleSoft Online Library Website Folders

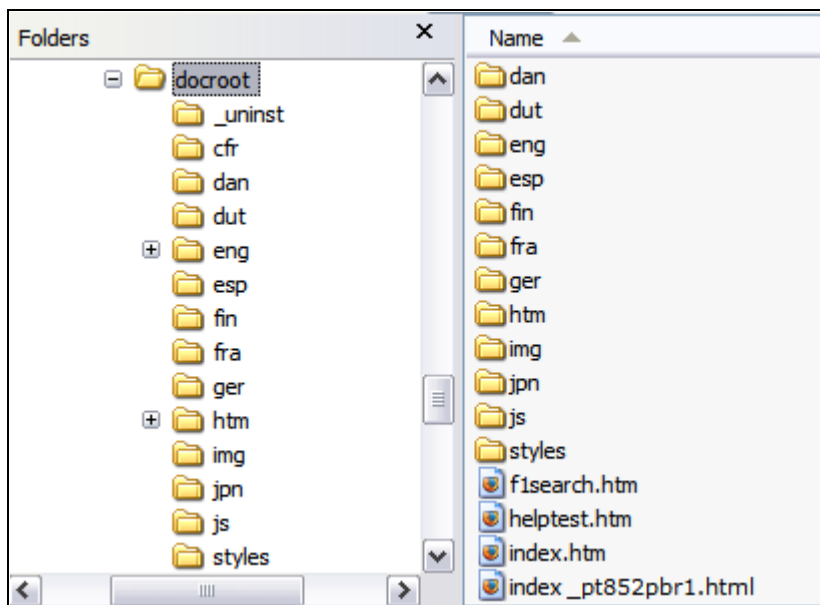
Before installing new PeopleSoft documentation over an existing website or changing how users access individual documentation types and books, you should understand the hierarchical folder structure of the website and how it corresponds to the organizational levels of the documentation on the site. This section discusses the:

- Global folder level.
- Language folder level.
- Documentation type folder level.
- Book folder level.

### Global Folder Level

The top folder of the website (<docroot>) is the *global* level of the library.

The following example illustrates the global files and subfolders that are discussed in this section:



Global level of the PeopleSoft Online Library

The global level contains three HTML files:

- index.htm

This is the homepage for the PeopleSoft Online Library. When a user opens this file in a browser, JavaScript logic for this page determines the browser's language setting and redirects the user to a PeopleSoft Online Library homepage in that language, if it exists. If no language match is found, English is used as the default language.

- f1search.htm

This file processes online help requests from the PeopleSoft applications. When a user requests help from an application page, a URL to `<docroot>/f1search.htm` is passed to the browser. The URL contains arguments that specify the help context ID and the user's preferred language. If that language exists on the PeopleSoft Online Library website, the documentation in that language is searched for a relevant help topic, and if one is found, the corresponding page is opened. If no language match is found, English is used as the default language.

- helptest.htm

This file is used for testing and troubleshooting online help functionality.

- index\_xxx.html

This file provides a list of HTML and PDF files for the product line. Secure Enterprise Search uses this file to build a full-text index. The `xxx` represents the product line and version number. For example, the delivered file for PeopleTools 8.52 is named `index_pt852pbr0.html`.

### Utility Folders

The global level also includes the following utility folders that contain files that are used at the global level or shared by subsequent levels of the PeopleSoft Online Library:

- htm

This folder contains common HTML files that are used in the PeopleSoft Online Library interface.

- img

This folder contains graphic files.

- styles

This folder contains cascading style sheet (CSS) files.

- js

This folder contains JavaScript files.

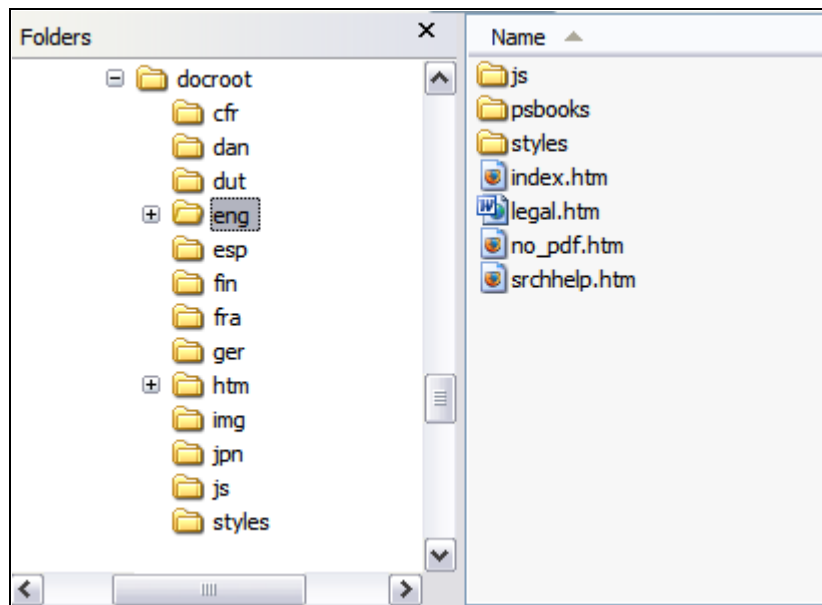
These utility folders also appear at lower levels in the library folder hierarchy. While it's not important to list or describe most of the files in these folders, one thing is important to understand: Each level of the library has at least one JavaScript file that stores information about the structure of the level below it. At the global level, the key JavaScript file is `<docroot>/js/langs.js`, which stores information about the languages that have been installed in the PeopleSoft Online Library.

See [Chapter 4, "Managing the Locally Installed PeopleSoft Online Library," Managing Language Support, page 27.](#)

## Language Folder Level

Below `<docroot>` are folders representing each installed documentation language: eng (English), fra (French), por (Portuguese), and so on. These folders represent the *language* level of the website.

The following example illustrates the language files and subfolders that are discussed in this section:



Language levels of the PeopleSoft Online Library

The language level is essentially the top of the PeopleSoft Online Library site as far as users are concerned. When a user navigates to <docroot>/index.htm, that user is redirected to the appropriate language folder, based on his or her browser language. The files at and below the language level (PeopleBooks and other document types, website display labels, CSS files, accented character conversion routines, and so on) are all language specific.

### Utility Folders

The language level includes the following utility folders that store files that are used at the language level or shared by subsequent levels of the PeopleSoft Online Library:

- styles

This folder contains CSS files.

- js

This folder contains JavaScript files. Information about the documentation type level of the website (which is the next level below the language level) is stored in the following JavaScript files:

- <docroot>/eng/js/doctypes.js

This file specifies which documentation types appear on the PeopleSoft Online Library homepage.

- <docroot>/eng/js/helptypes.js

This file specifies which documentation types support online help.

The js folder at the language level also includes several \*labels.js files that contain translatable text variables that are used throughout the PeopleSoft Online Library.

## Documentation Type Folder Level

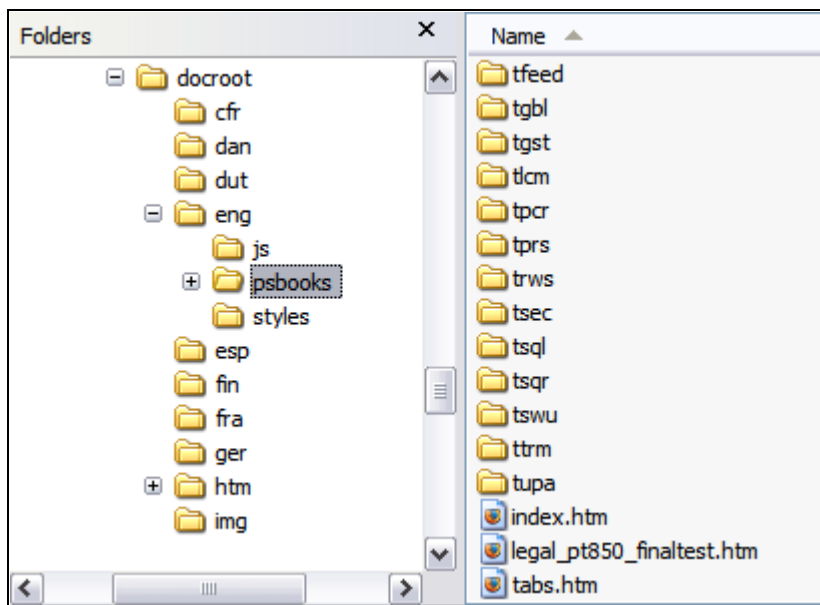
Each language folder includes the <docroot>/eng/psbooks folder, which contains PeopleBooks. This is the *documentation type* level of the website, and PeopleBooks is the only documentation type that is currently available.

---

**Note.** In the remainder of this document, the example file paths use eng (English) as the language folder.

---

The following example illustrates the documentation type files and subfolders that are discussed in this section:



Documentation type level of the PeopleSoft Online Library

The files that are stored at the PeopleBooks documentation type level are used for the PeopleBooks homepage and copyright information and to provide backwards compatibility with previous versions of PeopleBooks.

### **Utility Folders**

The PeopleBooks documentation type level includes the following utility folders that store files that are used at this level or shared by subsequent levels of the PeopleSoft Online Library:

- **img**

This folder contains graphics files.

- **styles**

This folder contains CSS files and information about how PeopleBooks appear on the homepage. The homepage displays PeopleBook titles in a hierarchical list based on book suites or categories. This hierarchy is controlled by two files:

- **TopTOCStyle.xml**

This file specifies the hierarchy and categories in which PeopleBook titles appear on the PeopleBooks homepage.

- **content.css**

This file contains the related stylesheet information.

- js

This folder contains JavaScript files. Information about the book level of the PeopleSoft Online Library (which is the next level below the documentation type level) is stored in the following JavaScript files:

- <docroot>/eng/psbooks/js/booklist.js

This file specifies which books within a documentation type appear on the documentation type homepage.

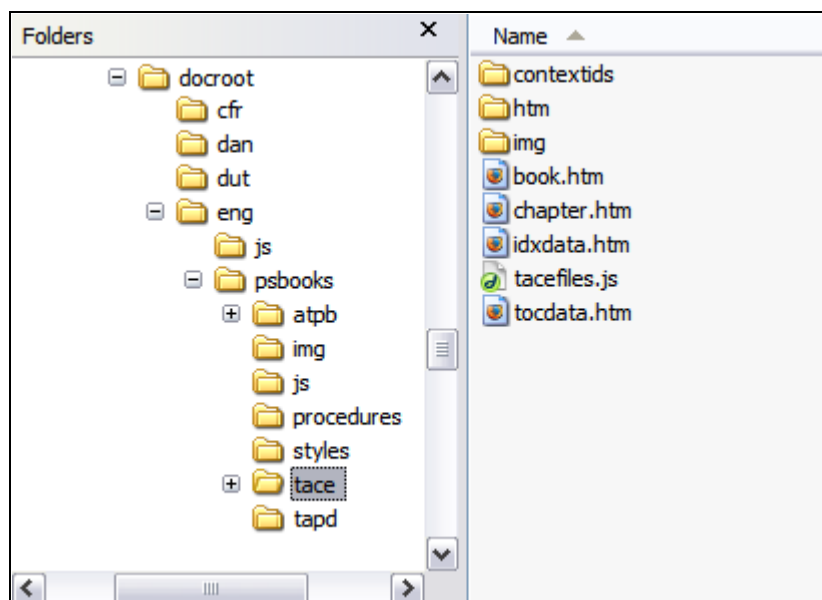
- <docroot>/eng/psbooks/js/helplist.js

This file specifies which books within a documentation type are to be used for context-sensitive help.

## Book Folder Level

Below the PeopleBooks documentation type level are folders for the individual books. For example, the <docroot>/eng/psbooks/fapy folder contains the *PeopleSoft Payables PeopleBook*. Because PeopleBooks are the only delivered documentation type, the information in this section applies to PeopleBooks and the psbooks folder.

The following example illustrates the book files and subfolders that are discussed in this section:



Book level of the PeopleSoft Online Library

The files at the book level in the PeopleBooks documentation type comprise both the content and the online interface of an individual PeopleBook. Book.htm and chapter.htm are framesets that display the content of the book, which appear in the Document pane of the PeopleSoft Online Library. Idxdata.htm and tocdata.htm contain the index and table of contents of the book, which appear in the Reference pane of the PeopleSoft Online Library. The JavaScript file (xxxxfiles.js) contains an array that lists the order of the individual HTML files that make up the content of the book. This array is used by the navigation features of the PeopleBook Library interface.



### **Content Folders**

Three of the subdirectories below the book level store content-related files:

- htm

This folder contains the individual HTML files that make up the content of the book.

- img

This folder contains graphics that are referenced by the HTML files.

- (optional) pdf

This folder contains Adobe Acrobat files containing other book content, such as report sample files.

### **Utility Folders**

The book level contains only one utility folder: contextids. This folder contains JavaScript files for online help support.

---

## **Managing the PeopleSoft Online Library**

This section discusses how to:

- Install new PeopleSoft documentation.
- Manage language support.
- Manage individual PeopleBooks and integrated documentation.

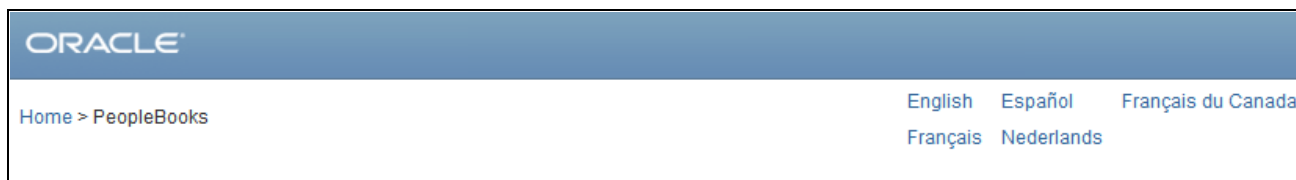
### **Installing New PeopleSoft Documentation**

Before installing new or additional PeopleSoft documentation, decide if you want to combine your existing documentation with the new documentation. If so, your installation guide contains instructions for merging existing documentation with new documentation. You may also need to reconfigure Secure Enterprise Search to perform full-text searching on the new documentation.

See *PeopleTools 8.52 Installation for <your database platform>*, Appendix: Installing PeopleBooks.

### **Managing Language Support**

You control PeopleSoft Online Library language support by editing the <docroot>/js/langs.js file, which defines an array of language codes and their corresponding language names. This array is used by the PeopleSoft Online Library homepage (<docroot>/eng/index.htm) and the PeopleBooks Library homepage (<docroot>/eng/psbooks/index.htm) to display a table of alternate language links that you click to open the corresponding homepage in a new language. The following example shows the location of the alternate language links on the right side of the Navigation pane:



### Alternate language links

The languages array is also used during a PeopleSoft application help request to match the help documentation language to the preferred language of the user.

To disable a language in the PeopleSoft Online Library:

1. Open `<docroot>\js\langs.js` for editing.

The file text looks something like this:

```
languages = new Array(
  "cfr|fc|Fran&ccedil;ais&nbsp;du&nbsp;Canada",
  "eng|en|English",
  "esp|es|Espa&ntilde;ol",
  "fra|fr|Fran&ccedil;ais",
  "dut|nd|Nederlands",
);
```

Each of the array elements contains three values, separated by double pipes ("|"):

- The language code (also the language folder name).
  - The browser language code.
  - The language name as it should appear in the PeopleSoft Online Library.
2. To disable support for an installed language on your site, precede the appropriate line with a double slash (//) to comment it out.

Here's an example, with the new double slash in bold:

```
languages = new Array(
  "cfr|fc|Fran&ccedil;ais&nbsp;du&nbsp;Canada",
  "eng|en|English",
  "esp|es|Espa&ntilde;ol",
  "fra|fr|Fran&ccedil;ais",
  //"dut|nd|Nederlands",
);
```

3. Remove the trailing comma from the last uncommented line in the array definition.

Here's an example, with the deleted comma crossed out:

```
languages = new Array(
  "cfr|fc|Fran&ccedil;ais&nbsp;du&nbsp;Canada",
  "eng|en|English",
  "esp|es|Espa&ntilde;ol",
  "fra|fr|Fran&ccedil;ais",
  //"dut|nd|Nederlands",
);
```

#### 4. Save the file.

---

**Note.** The order of the array elements determines the order of the language links on the homepages, with the exception of *Francais du Canada*. For formatting purposes, this link always appears either in the third table column or last in the list.

---

## Managing Individual PeopleBooks and Integrated Documentation

This section provides overviews of documentation management and context-sensitive online help and discusses how to:

- Manage browsing.
- Manage context-sensitive online help.
- Manage full-text searching.

### ***Understanding Documentation Management***

For each PeopleBook within a particular language directory in the PeopleSoft Online Library, you can disable browsing and context-sensitive online help and full-text searching. You can also enable these features for customized documentation that you integrate into the library. The customized documentation may be preexisting internal documentation or new content that you've written to supplement PeopleBooks.

To integrate documentation into the library, you add books to the PeopleBooks folder structure. Avoid modifying existing PeopleBooks files or using a copy of an existing PeopleBook to make your changes. Although tempting at first, this approach can lead to substantial overhead for you, because every change you make to the delivered content may render the table of contents or keyword index obsolete. Updating a PeopleBook table of contents and keyword index is a time-consuming, manual task. Also, consider that:

- PeopleSoft documentation that is delivered with a service pack overwrites the existing documentation.

---

**Note.** If you add customized books to the existing PeopleBooks folder structure, they will not be overwritten with updated documentation as long as their book-level folder names are different from the delivered book-level folders.

---

- To keep pace with new browsers and web servers, Oracle might need to modify JavaScript code and content files to accommodate different document object models.

One situation where it might make sense to modify the delivered PeopleBooks files is if you make minor application modifications. In this case, instead of fully integrating your documentation into the PeopleSoft Online Library, you can update the appropriate PeopleBooks help topic to insert a link that jumps to your customized documentation. You can include the documentation within the PeopleSoft Online Library and only enable it for browsing (but not context-sensitive online help) or you can store the documentation in another location.

If your application modifications are major and the PeopleBooks documentation for an application page is now largely obsolete, you may want to disable the PeopleBook file as well as enabling your own.

---

**Important!** If you decide to disable a book, you should disable all features for that book (browsing, context-sensitive online help, and full-text searching) and delete or move the folder that contains the book files to ensure that people cannot accidentally access the files.

---

## Understanding Context-Sensitive Online Help

This section discusses how the context-sensitive online help works, to aid you in troubleshooting if your context sensitivity doesn't work as expected.

When you request help from an application, the software generates a URL and passes it to your default web browser. This URL is generated by resolving two variables into a string value that is stored in the system. Here is an example of the syntax of the string, with variables wrapped in percent signs (%):

```
http://docroot/flsearch.htm?ContextID=%CONTEXT_ID%&LangCD=%LANG_CD%
```

Your installation documentation contains instructions for setting the value of the system help string.

You can see that the string is a URL pointing to the flsearch.htm page, which is in the <docroot> level of the library site. During the help call, the variables are resolved as follows:

- %CONTEXT\_ID% is replaced with the name of the page from which help is called.
- %LANG\_CD% is replaced with the user's preferred language code, for example ENG (English) or FRA (French).

Using the preceding syntax example, if a German user calls help from the PeopleSoft Enterprise Components Options page, the resulting URL looks like this, with the resolved values (PSOPTIONS and GER) in bold:

```
http://docroot/flsearch.htm?ContextID=PSOPTIONS&LangCD=GER
```

When the help URL is passed to a browser, the flsearch.htm page opens, and the JavaScript logic inside uses the two passed arguments (Context ID and LangCD) to load the appropriate context ID lookup files. These files map valid application context IDs to locations in the documentation. The lookup file contents are searched and, when a match is found for the ContextID value, flsearch.htm redirects the browser to the related location. If multiple matches are found, a pop-up window displays a list of help topic links from which the user can choose.

Because of the depth of the PeopleSoft Online Library folder structure, the process of loading the lookup files is complex. The following JavaScript sequence of events occurs when flsearch.htm is opened:

1. Validate the LangCD value that is passed to flsearch.htm against <docroot>/js/langs.js to see if the preferred language exists in the library.  
If not, substitute ENG (English).
2. Once the language (<langdir>) is determined, load <langdir>/js/helptypes.js to see which documentation types are enabled as context-sensitive help.
3. For each path (<typepath>) in helptypes.js, load <langdir>/<typepath>/js/helplist.js to determine which books within this documentation type are enabled for context sensitivity.
4. For each book (<bookpath>) in helplist.js, load <langdir>/<typepath>/<bookpath>/contextids/x.js, where *x* is the first character of the ContextID value that is passed.

The following example assumes that you have PeopleTools PeopleBooks installed and that your internal documentation is integrated as a separate documentation type:

1. A user with the language preference set to English clicks help on the USER\_PREF page.

- The following URL is passed to f1search.htm:

```
http://docroot/f1search.htm?ContextID=USER_PREF&LangCD=ENG
```

- The language code of the user's preferred language is validated against <docroot>/js/langs.js to see if that language exists in the library.

```
<docroot>/js/langs.js:
```

```
languages = new Array(
  "cfr||fc||Fran&ccedil;ais&nbsp;du&nbsp;Canada",
  "eng||en||English"
);
```

See and [Chapter 4, "Managing the Locally Installed PeopleSoft Online Library," Managing Language Support, page 27.](#)

- Once the language (<langdir>) is determined, <langdir>/js/helptypes.js is loaded.

```
eng/js/helptypes.js:
```

```
helptypes = new Array(
  "psbooks||PeopleBooks",
);
```

- For each path (<typepath>) in helptypes.js, <langdir>/<typepath>/js/helplist.js is loaded.

```
eng/psbooks/js/helplist.js:
```

```
helppnames[helppnames.length]="psbooks/pt||PeopleTools 8.52:=>
Security Administration";
```

- For each book (<bookpath>) in helplist.js, <langdir>/<typepath>/<bookpath>/contextids/x.js is loaded, where *x* is the first character of the ContextID value passed to f1search.htm.

```
eng/psbooks/pt/contextids/j.js:
```

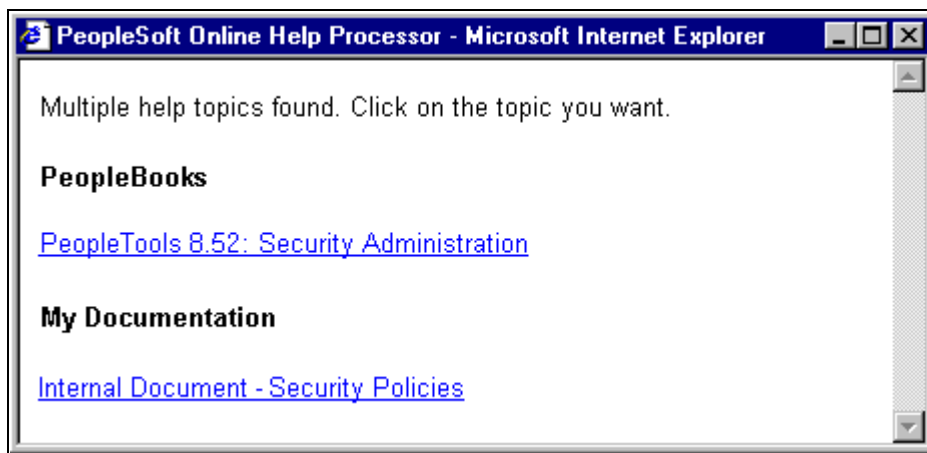
```
bookmarks[bookmarks.length] = "USER_PREF||psbooks/pt/htm/ptcom001.htm#F1ID_Job=>
Data1";
bookmarks[bookmarks.length] = "USER_PREF||psbooks/pt/htm/ptcom001.htm#F1ID_Job=>
Data2";
...
```

```
eng/my_documentation_type/my_pt_book/contextids/j.js:
```

```
bookmarks[bookmarks.length] = "USER_PREF||my_documentation_type/my_pt_book/htm=>
/xxxxxx.htm#MYF1ID_USER_PREF";
```

- Once all lookup files are searched and a match is found for the context ID, the browser is redirected to the location that is specified in the lookup file.

If multiple matches result, as in this example, a pop-up window displays the choices and the user can decide which help topic to select. The following example shows how the pop-up window appears for the preceding code example:



Pop-up window displaying the available delivered and custom help topics

### ***Managing Browsing***

You control the ability to browse through a list of available PeopleBooks by editing the `<docroot>/eng/psbooks/js/booklist.js` file. This file specifies which PeopleBook titles appear on the PeopleBooks homepage. You can integrate customized books so that they appear on the PeopleBooks homepage, or you can disable books so that they no longer appear. .

The syntax of the `booklist.js` doesn't contain an explicit array declaration, only array element assignments. Here is some sample JavaScript code from `booklist.js`:

```
booknames[booknames.length]="psbooks/tpsqli|PeopleTools 8.52:⇒
  PeopleSoft Query";
booknames[booknames.length]="psbooks/tsum|PeopleTools 8.52:⇒
  PeopleSoft Setup Manager";

function getTitle(strProdCode, strDocType) {
  strProdCode = strProdCode.toLowerCase(); ...
```

The lines preceding the `getTitle` declaration are the array assignment lines that define the PeopleBook titles that users can browse in the library.

To integrate customized documents into the PeopleBooks folder structure and enable them for browsing:

1. Create a new book folder below the `psbooks` folder in the library site.

For example: `<docroot>/eng/psbooks/procedures`

2. Add the folder name and display name of the new book to the <docroot>/eng/psbooks/js/booklist.js file.

Here's an example, with the new Internal Procedures book in bold:

```
booknames[booknames.length]="psbooks/tpsqli|PeopleTools 8.52:=>
  PeopleSoft Query";
booknames[booknames.length]="psbooks/tsum|PeopleTools 8.52:=>
  PeopleSoft Setup Manager";

booknames[booknames.length]="psbooks/procedures|Internal Procedures";

function getTitle(strProdCode, strDocType) {
  strProdCode = strProdCode.toLowerCase(); ...
```

Include the new book before the function getTitle declaration in the file. Be sure to add a semicolon at the end of the line with the new book.

3. Copy the book files into the new folder.

---

**Important!** If you want the files in the new folder to be available for context-sensitive online help the content files must reside exactly one folder level below each book folder that is defined in booklist.js. Using the preceding code example, the content files would have to reside in psbooks/procedures/htm.

---

4. Create a homepage called index.htm at the top folder level of the new book.

This step ensures that the automated link to your documentation from the PeopleBooks homepage works. If you already have a homepage that you don't want to rename, you can insert JavaScript into index.htm to automatically redirect users to your homepage.

5. Add the book, and a category, if necessary, to the `<docroot>/eng/psbooks/styles/TopTOCStyle.xml` file.

This file specifies the hierarchy and categories in which book titles appear on the PeopleBooks homepage. If you only add a book title to the `booklist.js` file, it will appear at the bottom of the book hierarchy on the homepage, below all of the other books.

The `TopTOCStyle.xml` file specifies the order and hierarchy of books, as well as the CSS classes or styles that provide the formatting for the books. The CSS classes are defined in the `<docroot>/eng/psbooks/styles/content.css` file.

This table describes the elements and attributes that you use within the `TopTOCStyle.xml` file:

<i>Element Type</i>	<i>Attributes</i>
Heading	<p>Contains the category title and nested book elements, as well as other nested heading elements, to create a hierarchy of categories. The following attributes are available:</p> <ul style="list-style-type: none"> <li>class: Specify the CSS class that is defined in <code>content.css</code>.</li> <li>style: You can specify the CSS styles here instead of using a class from <code>content.css</code>.</li> </ul>
Book	<p>The following attributes are allowed:</p> <ul style="list-style-type: none"> <li>bookcode (required): Specify the folder name of the new book.</li> <li>prefix: Enter characters to add in front of the book title (for example, to add bullets or other symbols).</li> <li>class: Specify the CSS class that is defined in <code>content.css</code>.</li> <li>style: You can specify the CSS styles here instead of using a class from <code>content.css</code>.</li> <li>sortas: Use this value to change the sort order of book titles. For example, to force a book to the top of the sort order, set the <code>sortas</code> attribute to <i>0</i> for that book and set it to <i>1</i> for all other books. This value is also used in Japanese translations of PeopleBooks to specify the sort order of book titles.</li> </ul>

Here's an example, with the new Internal Documents category and procedures book in bold:



```

<top_toc>
  <heading expandable="no" class="SUBTOPIC">
    <book bookcode="atpb"/>
    <book bookcode="tupa"/>
  </heading>
  <heading class="TOPICHEADING1">
    PeopleTools PeopleBooks
  <book bookcode="tgst"/>
  <heading class="TOPICHEADING2">
    Development Tools
    <book bookcode="tfeed"/>
    <book bookcode="tgbl"/>
    <book bookcode="tapd"/>
    <book bookcode="tpcr"/>
  </heading>
  <heading class="TOPICHEADING2">
    Reporting and Analytic Tools
    <book bookcode="tprs"/>
    <book bookcode="ttrm"/>
    <book bookcode="tace"/>
    <book bookcode="tsqr"/>
    <book bookcode="tsql"/>
    <book bookcode="trws"/>
  </heading>
  <heading class="TOPICHEADING1">
    Internal Documents
    <book bookcode="procedures"/>
  </heading>
</top_toc>

```

In the preceding example, the new Internal Documents title will appear as an expandable section at the bottom of the list of PeopleBooks, and the Internal Procedures book will appear below the Internal Documents title. The following example illustrates how this appears in the browser:



Example of new category and book added to the PeopleBooks homepage

To remove a title from the PeopleBooks homepage, comment it out of the `<docroot>/eng/psbooks/js/booklist.js` file by preceding that line with a double slash (`//`). Make sure that the remaining lines all end with a semicolon.

Here's an example, with the double slash in bold:

```
booknames[booknames.length]="psbooks/tpsquery|PeopleTools 8.52:=
  PeopleSoft Query";
booknames[booknames.length]="psbooks/tsum|PeopleTools 8.52:=
  PeopleSoft Setup Manager";

//booknames[booknames.length]="psbooks/procedures|Internal Procedures";

function getTitle(strProdCode, strDocType) {
  strProdCode = strProdCode.toLowerCase(); ...
```

---

**Note.** You do not need to remove the book from the TopTOCStyle.xml file. That file only specifies the hierarchy. It does not affect which books actually appear on the homepage.

---



---

**Note.** If you disable browsing for a book, you should also disable context-sensitive online help and full-text searching and delete or move the folder that contains the book files to ensure that people cannot accidentally access the files.

---

### ***Managing Context-Sensitive Online Help***

Documentation that you add to the PeopleSoft Online Library can be used as context-sensitive help for PeopleSoft applications. If you have documented the features and uses of an application that you have modified or built, you can ensure that your users see that documentation when they call help from the application. You can also disable context sensitivity for individual PeopleBooks if you are replacing the help with customized documentation that you are integrating into the library.

Preparing and enabling your documentation for context sensitivity requires more steps than adding a link to your documentation on the PeopleSoft Online Library homepage. You must adhere to certain folder structures and file naming conventions. You might also need to add anchors to your documentation.

You control which books are available as context-sensitive online help by editing the <docroot>eng/psbooks/js/helplist.js file. The syntax of helplist.js is similar to that of booklist.js, which controls browsing. The books that are listed in helplist.js are searched for a matching help topic during an online help request. Here is some sample JavaScript code from helplist.js:

```
helphnames[helphnames.length]="psbooks/famp|PeopleSoft Enterprise Asset Management=
  9.1 PeopleBook";
helphnames[helphnames.length]="psbooks/fsbk|PeopleSoft Enterprise Banks Setup and=
  Processing 9.1 PeopleBook";
helphnames[helphnames.length]="psbooks/sbil|PeopleSoft Enterprise Billing 9.1=
  PeopleBook";
```

To enable context sensitivity for an integrated book:

1. Make sure that your content files reside exactly one folder level below each book folder (for example, psbooks/procedures/htm).
2. (Optional) Add anchors to the content files.

In a help lookup file, you can map a context ID (application page or panel name) to a particular location in your documentation. That location can be a file name or a combination of a file name and anchor name. Whether you want to specify an anchor name depends on the length of your documentation files. If you document only one application page per HTML file, anchors are probably not necessary. If you document many application pages in an HTML file (as in PeopleBooks), however, you definitely need anchors. Anchors place users as close to their requested information as possible when they call help.

3. Add a new line with the folder name and display name of the new book to the `<docroot>/eng/psbooks/js/helplist.js` file.

Here's an example, with the new Internal Procedures book in bold:

```
helppnames[helppnames.length]="psbooks/famp||PeopleSoft Enterprise Asset Management=>
  9.1 PeopleBook";
helppnames[helppnames.length]="psbooks/fsbk||PeopleSoft Enterprise Banks Setup and=>
  Processing 9.1 PeopleBook";
helppnames[helppnames.length]="psbooks/sbil||PeopleSoft Enterprise Billing 9.1=>
  PeopleBook";
helppnames[helppnames.length]="psbooks/procedures||Internal Procedures";
```

4. Below every book folder that you specify in `helplist.js`, create a `contextids` subfolder (for example, `psbooks/procedures/contextids`).
5. Within each `contextids` folder, add 37 files: `a.js`, `b.js`, `c.js`, and so on up to `z.js`, `pce.js` (used for PeopleCode) and `0.js`, `1.js`, `2.js`, and so on up to `9.js`.

These are the context ID lookup files. The best way to create these folders and files is to copy them from a PeopleBooks folder, then edit the files so that they contain only this line:

```
arraycount[arraycount.length] = bookmarks.length - 1;
```

6. Populate the lookup files.

A help lookup file contains lines of JavaScript code that assign strings to an array. Each string contains the context ID for a help topic and the relative path to the help topic, separated by two pipes ("||"). The name of the lookup file reflects the first character of all of the context IDs that are stored inside. Here is an example of the syntax of these files:

```
bookmarks[bookmarks.length] = "<contextID1>||<path_to_file>#<anchor_name1>";
bookmarks[bookmarks.length] = "<contextID2>||<path_to_file>#<anchor_name2>";
...
bookmarks[bookmarks.length] = "<contextIDN>||<path_to_file>#<anchor_nameN>";

arraycount[arraycount.length] = bookmarks.length - 1;
```

A context ID corresponds to the name of the application page at which the user clicks help. This context ID is used by `flsearch.htm` to redirect the user to the correct help topic. Therefore, to create a context-sensitive link for a new application page called `MY_APPS`, you would insert this line into an `m.js` file:

```
bookmarks[bookmarks.length] = "MY_APPS||psbooks/procedures/htm/intro_to_
hr.htm#my_anchor";
```

Adhere to these conventions when populating lookup files:

- The first letter of the context ID in the string must correspond to the name of the lookup file.  
For example, `MY_APPS` would reside in `m.js`; `JOB_DATA1` would reside in `j.js`.
- All files must end with the `arraycount` line (shown in bold in the example at the beginning of this section), even if they contain no context ID strings.
- The context ID lines in the lookup file must be sorted alphabetically.
- All lookup files for a specific book must reside in the corresponding `contextids` subfolder for that book.

## 7. Populate the chapter list file.

Each PeopleBook folder contains an xxxxfiles.js file, which contains JavaScript array member assignments. Each line corresponds to a chapter file that makes up the PeopleBook. Each line also contains the title of that chapter. This file is used internally for the PeopleBook navigation controls.

See [Chapter 4, "Managing the Locally Installed PeopleSoft Online Library," Book Folder Level, page 26.](#)

The chapter list file is also used during the online help call if a context ID is found in more than one lookup file. In this case, the titles of the destination files are pulled from their corresponding chapter list files; they appear in the online help pop-up window as links.

If any possibility exists that the context IDs in your custom documentation will also be found in PeopleBooks, or found in multiple locations in your own documentation, then you must create chapter list files for your documentation. Certain browsers will generate an error if a chapter list file cannot be found for any of the books found to contain a matching help topic.

You can copy an xxxxfiles.js file from any PeopleBook folder and modify it to match your files and file titles.

To exclude a book from being searched during online help requests, comment it out by preceding that line with a double slash (//). Make sure that the remaining lines all end with a semicolon.

Here's an example, with the double slash in bold:

```
helppnames[helppnames.length]="psbooks/famp||PeopleSoft Enterprise Asset Management⇒
  9.1 PeopleBook";
helppnames[helppnames.length]="psbooks/fsbk||PeopleSoft Enterprise Banks Setup and⇒
  Processing 9.1 PeopleBook";
helppnames[helppnames.length]="psbooks/sbil||PeopleSoft Enterprise Billing 9.1⇒
  PeopleBook";
//helppnames[helppnames.length]="psbooks/procedures||Internal Procedures";
```

---

**Note.** If you disable context-sensitive help for a book, you should also disable browsing and full-text searching and delete or move the folder that contains the book files to ensure that people cannot accidentally access the files.

---

## **Managing Full-Text Searching**

If you are using Secure Enterprise Search for full-text searching, you can disable search for a PeopleBook. You can also set up Secure Enterprise Search to crawl custom documentation that you integrate into the library. You control which files are included in full-text searching by editing the <docroot>/index\_xxx.html file (for example, index\_pt852pbr0.html), which tells Secure Enterprise Search which files to crawl. This file is delivered with your PeopleBooks, but you can also generate a new version of the file using an automated tool during the installation process, so it may have a different file name than the one that is delivered. The file lists links to each chapter-level HTML file that should be crawled, as illustrated in the following example:

```
<html>
  <head>
    <meta http-equiv="Content-Type" content="text/html; charset=UTF-8">
    <title>PeopleBooks</title>
  </head>
  <body>
    <a href="eng/psbooks/tpcr/htm/tpcr24.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr11.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr13.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr28.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr05.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr16.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr29.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr42.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr37.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr44.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr25.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr23.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr31.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr14.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr01.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr15.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr46.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr08.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr36.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr48.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr49.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr43.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr02.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr04.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr47.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr26.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr20.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr40.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr35.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr17.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr19.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr12.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr10.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr30.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr09.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr33.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr06.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr38.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr45.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr21.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr18.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr41.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr03.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr34.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr39.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr27.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr22.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr07.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr50.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr32.htm"/><br/>
    <a href="eng/psbooks/tapd/htm/tapd25.htm"/><br/>
    <a href="eng/psbooks/tapd/htm/tapd29.htm"/><br/>
    <a href="eng/psbooks/tapd/htm/tapd18.htm"/><br/>
    <a href="eng/psbooks/tapd/htm/tapd09.htm"/><br/>
    <a href="eng/psbooks/tapd/htm/tapd11.htm"/><br/>
    <a href="eng/psbooks/tapd/htm/tapd15.htm"/><br/>
    <a href="eng/psbooks/tapd/htm/tapd24.htm"/><br/>
    <a href="eng/psbooks/tapd/htm/tapd30.htm"/><br/>
```

```

<a href="eng/psbooks/tapd/htm/tapd32.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd14.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd23.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd31.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd33.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd20.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd21.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd19.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd02.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd06.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd26.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd22.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd16.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd01.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd10.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd35.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd12.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd17.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd03.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd28.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd05.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd13.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd07.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd08.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd04.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd34.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd27.htm"/><br/>
. . .
</body>
</html>

```

---

**Note.** The links may not be listed alphabetically.

---

To change which documents are included in full-text searching:

1. Remove or add documentation to the library folder structure, as needed.

To disable a PeopleBook, move or delete the folder that contains the book files. To add your own custom documentation, set up a new book folder to hold your files.

See [Chapter 4, "Managing the Locally Installed PeopleSoft Online Library," Book Folder Level, page 26.](#)

---

**Note.** If you move or delete a book folder, you also need to disable browsing and context-sensitive help for the book to avoid broken links to the removed files.

---

2. Edit the index\_xxx.html file using a text editor such as Notepad.

---

**Important!** Make a copy of the index\_xxx.html file before editing it so you can restore the original file, if needed.

---

To disable a PeopleBook, remove all links that point to chapters in the book folder that you removed. For example, to remove the book that is stored in the tapd book folder, remove the books that are crossed out in the following example:

```
<html>
  <head>
    <meta http-equiv="Content-Type" content="text/html; charset=UTF-8">
    <title>PeopleBooks</title>
  </head>
  <body>
    <a href="eng/psbooks/tpcr/htm/tpcr24.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr11.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr13.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr28.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr05.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr16.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr29.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr42.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr37.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr44.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr25.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr23.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr31.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr14.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr01.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr15.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr46.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr08.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr36.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr48.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr49.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr43.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr02.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr04.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr47.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr26.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr20.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr40.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr35.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr17.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr19.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr12.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr10.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr30.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr09.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr33.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr06.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr38.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr45.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr21.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr18.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr41.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr03.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr34.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr39.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr27.htm" /><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr22.htm" /><br/>
```



```

<a href="eng/psbooks/tpcr/htm/tpcr07.htm" /><br/>
<a href="eng/psbooks/tpcr/htm/tpcr50.htm" /><br/>
<a href="eng/psbooks/tpcr/htm/tpcr32.htm" /><br/>
<a href="eng/psbooks/tapd/htm/tapd25.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd29.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd18.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd09.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd11.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd15.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd24.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd30.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd32.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd14.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd23.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd31.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd33.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd20.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd21.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd19.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd02.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd06.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd26.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd22.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd16.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd01.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd10.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd35.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd12.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd17.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd03.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd28.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd05.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd13.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd07.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd08.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd04.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd34.htm"/><br/>
<a href="eng/psbooks/tapd/htm/tapd27.htm"/><br/>
. . .
</body>
</html>

```

To add custom documentation, add new links for each HTML file that you want to include for full-text searching. For example, if you added HTML files to a <docroot>/eng/psbooks/procedures folder, you might add the links that appear in bold in the following example:

```

<html>
  <head>
    <meta http-equiv="Content-Type" content="text/html; charset=UTF-8">
    <title>PeopleBooks</title>
  </head>
  <body>
    <a href="eng/psbooks/tpcr/htm/tpcr24.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr11.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr13.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr28.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr05.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr16.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr29.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr42.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr37.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr44.htm"/><br/>
    <a href="eng/psbooks/tpcr/htm/tpcr25.htm"/><br/>
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    <a href="eng/psbooks/procedures/htm/proc03.htm"/><br/>
    .
    .
    .
  </body>
</html>

```

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**Note.** If you are making a lot of changes, or if you are adding custom documents that are not in HTML format (such as PDF), you should regenerate the index\_XXX.html file automatically using the HTMListGenerator.jar tool, which is described in your installation documentation.

---

See *PeopleTools 8.52 Installation for <your database platform>*, Appendix: Installing PeopleBooks, Crawling a Source to Generate Full-Text Search.

3. Regenerate the full-text search index in Secure Enterprise Search:

- a. Log into the Secure Enterprise Search portal.
- b. Click the Schedules link at the top of the page.
- c. Scroll down to the source in which you are removing or adding documentation.

You set up the source name when you configured Secure Enterprise Search to work with PeopleBooks.

- d. Click the Edit icon to the right of the source name.
- e. Under Update Crawler Recrawl Policy, select the Process All Documents option.
- f. Click Update Recrawl Policy.
- g. Click Finish.
- h. Click the Select option to the left of the source that you are updating and click Start.
- i. (Optional) Click the link in the Schedule column for the selected source to monitor the progress.



## Appendix A

# Application Abbreviations

Some application fields within PeopleSoft may be labeled with an abbreviation rather than with the full spelling of the field name.

---

## HCM Abbreviations

Throughout PeopleSoft Human Capital Management (HCM) applications fields may be labeled with an abbreviation rather than with the full spelling of the field name. The following table lists those abbreviations that are used in HCM applications, along with the corresponding full name:

<b>Abbr</b>	Abbreviation
<b>Acad</b>	Academic
<b>Accomps</b>	Accomplishments
<b>Accr</b>	Accrual
<b>Acctng</b>	Accounting
<b>Accum</b>	Accumulator
<b>Actn</b>	Action
<b>Aaddl</b>	Additional
<b>Addr</b>	Address
<b>Adj</b>	Adjust or adjustment
<b>Adm</b>	Administration or administer
<b>Alloc</b>	Allocation
<b>Allow</b>	Allowance
<b>ANF</b>	Family allowances
<b>Anniv</b>	Anniversary

<b>Annl</b>	Annual
<b>Appl</b>	Applicant
<b>Appr</b>	Approver, approve, or approved
<b>Asc</b>	Ascending
<b>Asgnmt</b>	Assignment
<b>Assmptn</b>	Assumption
<b>Avg</b>	Average
<b>Ben</b>	Beneficiary
<b>BenAdmin</b>	Benefits administration
<b>Benef</b>	Beneficiary
<b>Benefit</b>	Benefit
<b>Btn</b>	Button
<b>CAF</b>	Tax Assistance Center
<b>Calc</b>	Calculation
<b>Calc'd</b>	Calculated
<b>Calcs</b>	Calculations
<b>Catgy</b>	Category
<b>Cd</b>	Code
<b>Cdn</b>	Canadian
<b>Certif</b>	Certification
<b>Chartfield</b>	Chart Field
<b>Chk</b>	Check
<b>Civ</b>	Civil
<b>Classif</b>	Classification
<b>Cnt</b>	Count

<b>Cntb</b>	Contribution
<b>Cntbs</b>	Contributions
<b>Cntry</b>	Country
<b>Coll</b>	Collaborative or collective
<b>Compa</b>	Comparative
<b>Comp</b>	Compensations
<b>Comprate</b>	Compensation rate
<b>Comps</b>	Competencies
<b>Cond</b>	Condition
<b>Cont</b>	Contract
<b>Contrib</b>	Contribution
<b>Conv</b>	Conversion
<b>Covg</b>	Coverage
<b>CPDF</b>	Central personnel data file
<b>CPF</b>	Central Provident Fund
<b>Cred</b>	Credit
<b>Curr</b>	Current
<b>Cust</b>	Customer
<b>DDP</b>	Direct deposit
<b>D.D.</b>	Direct deposit
<b>Decl</b>	Declaration
<b>Decr</b>	Decrease
<b>Dedn</b>	Deduction
<b>Dedns</b>	Deductions
<b>Defn</b>	Definitions

<b>Dep</b>	Dependent
<b>Dep/Ben</b>	Dependent/beneficiary
<b>Dept</b>	Department
<b>Dept ID</b>	Department ID
<b>Depts</b>	Departments
<b>Desc</b>	Descending
<b>Descr</b>	Description
<b>Disab</b>	Disability
<b>Dt</b>	Date
<b>Dtl</b>	Detail
<b>Dups</b>	Duplicates
<b>Dyn</b>	Dynamic
<b>Educ</b>	Education
<b>EE</b>	Employee
<b>Eff</b>	Effective
<b>Effdt</b>	Effective date
<b>Effseq</b>	Effective sequence
<b>EI</b>	Employment insurance
<b>Elig</b>	Eligible
<b>Empl</b>	Employee
<b>Empl ID</b>	Employee ID
<b>Empl ID's</b>	Employee IDs
<b>Emplr</b>	Employer
<b>Empls</b>	Employees
<b>Encum</b>	Encumbrance



<b>Enrl</b>	Enroll
<b>Entl</b>	Entitlement
<b>EPF</b>	Employee Provident Fund
<b>Erncd</b>	Earn code
<b>Est</b>	Estimated
<b>Estab</b>	Establishment
<b>Eval</b>	Evaluation
<b>Expr</b>	Expression
<b>Ext</b>	External
<b>Ext'n</b>	Extension
<b>FEGLI</b>	Federal Employee Group Life Insurance
<b>Fict</b>	Fictitious
<b>Fld</b>	Field
<b>Flds</b>	Fields
<b>Flg</b>	Flag
<b>Fnds</b>	Funds
<b>Func</b>	Function
<b>Genl</b>	General
<b>GL</b>	General ledger
<b>Govt</b>	Government
<b>Gratif</b>	Gratification
<b>Grd</b>	Grade
<b>Grp</b>	Group
<b>Grs</b>	Gross
<b>GST</b>	Goods and service tax

<b>H&amp;S</b>	Health and safety
<b>HCE</b>	Highly compensated employee
<b>HIPAA</b>	Health Insurance Portability and Accountability Act
<b>Hlth</b>	Health
<b>Hol</b>	Holiday
<b>Hrly</b>	Hourly
<b>ID</b>	Identification
<b>Ident</b>	Identification
<b>ID's</b>	Identifications
<b>IMSS</b>	<i>Instituto Mexicano del Seguro Social</i> —Social Security Institute (Mexico)
<b>INAIL</b>	National Injury Agency (Italy)
<b>Incl</b>	Include
<b>Incr</b>	Increase
<b>Ind</b>	Indicator
<b>Indep</b>	Independent
<b>Indiv</b>	Individual
<b>Inf</b>	Information
<b>INPDAI</b>	Social Security Agency for executives (Italy)
<b>INPS</b>	Social Security Agency (Italy)
<b>Insur</b>	Insurance
<b>Int</b>	Internal
<b>Integ</b>	Integration
<b>Investig</b>	Investigation
<b>IR</b>	Inland Revenue (has been renamed to HMRC)
<b>IRB</b>	Inland Revenue Board

<b>IRD</b>	Inland Revenue Department
<b>IRPEF</b>	Personal taxes (Italy)
<b>ISR</b>	<i>Impuesto sobre la Renta</i> —Income Tax (Mexico)
<b>JCR</b>	Job change request
<b>JobCd</b>	Job code
<b>Jrnl</b>	Journal
<b>Lgth</b>	Length
<b>Lmt</b>	Limit
<b>Locn</b>	Location
<b>Lve</b>	Leave
<b>Lvl</b>	Level
<b>LWF</b>	Labour Welfare Fund
<b>LWOP</b>	Leave without pay
<b>Mag</b>	Magnetic
<b>Matern</b>	Maternity
<b>Max</b>	Maximum
<b>Mbrs</b>	Members
<b>Meas</b>	Measure
<b>Metropol</b>	Metropolitan
<b>Min</b>	Minimum
<b>Mins</b>	Minutes
<b>MPF</b>	Mandatory Provident Fund
<b>MPP</b>	Maternity pay period
<b>Msg</b>	Message
<b>MTD</b>	Month to date

<b>Mthd</b>	Method
<b>Mthly</b>	Monthly
<b>Mths</b>	Months
<b>Mult</b>	Multiple or multiplication
<b>Natl</b>	National
<b>Nbr</b>	Number
<b>Neg</b>	Negative
<b>NID</b>	National identification
<b>NOA</b>	Nature of action
<b>Notif</b>	Notification
<b>Occ</b>	Occupational
<b>Ofc</b>	Office or official
<b>Oper</b>	Operating
<b>Opr ID</b>	Operator ID
<b>Optn</b>	Option
<b>Ord</b>	Ordinary
<b>Ovrd</b>	Override
<b>Parm</b>	Parameter
<b>Parms</b>	Parameters
<b>PAYE</b>	Pay as you earn
<b>PB</b>	Push button
<b>Pct</b>	Percent
<b>Perf</b>	Performance
<b>Pers</b>	Personal
<b>Pgm</b>	Program

<b>PI</b>	Positive input
<b>PIN_NUM</b>	Personal identification number
<b>Posn</b>	Position
<b>Prc</b>	Process
<b>Prcs</b>	Processes
<b>Prd</b>	Period
<b>Prds</b>	Periods
<b>Pref</b>	Preferred
<b>Prev</b>	Previous
<b>Probtn</b>	Probation
<b>Prog</b>	Program
<b>Pygrp</b>	Paygroup
<b>QIT</b>	Quebec Income Tax
<b>QPIP</b>	Quebec Parental Insurance Plan
<b>QPP</b>	Quebec Pension Plan
<b>Qstn</b>	Question
<b>QTD</b>	Quarter to date
<b>Rcd</b>	Record
<b>Reev</b>	Reevaluation
<b>Reg</b>	Regional, registry, or regular
<b>Remun</b>	Remuneration
<b>Reproc</b>	Preprocess
<b>Req</b>	Requisition
<b>Reqd</b>	Required
<b>Reqt</b>	Requirement

<b>RFC</b>	<i>Registro Federal de Contribuyente</i> —Federal Registry for the Payee (Mexico)
<b>Rfnd</b>	Refund
<b>RITS</b>	Reserve Bank Information and Transfer System
<b>RL</b>	<i>Relevé</i>
<b>RMG</b>	Average Daily Rate (Italy)
<b>ROE</b>	Record of Employment
<b>ROST</b>	Register of separations and transfers
<b>Rptg</b>	Reporting
<b>Rqmts</b>	Requirements
<b>Rqst</b>	Request
<b>Rslt</b>	Result
<b>Rt</b>	Rate
<b>Run Ctrl</b>	Run control
<b>Sal</b>	Salary
<b>Sched</b>	Schedule or scheduled
<b>SCON</b>	Scheme contracted out numbers
<b>Sen</b>	Seniority
<b>Seq</b>	Sequence
<b>SeqNum</b>	Sequence number
<b>Serv</b>	Service
<b>Set ID</b>	Set ID
<b>Set IDs</b>	Set IDs
<b>Sev</b>	Severance
<b>SINQ</b>	Suspense Inquiry and Correction System
<b>SJT</b>	Security Join table

<b>SocSec</b>	Social Security
<b>Spcl</b>	Special
<b>SSP</b>	Statutory sick pay
<b>Stnd</b>	Standard
<b>Stnd Hrs</b>	Standard hours
<b>Stds</b>	Standards
<b>Str</b>	String
<b>Summ</b>	Summary
<b>Suppl</b>	Supplementary
<b>Supv</b>	Supervisor
<b>SWT</b>	State withholding tax
<b>T&amp;L</b>	Time and labor
<b>TL</b>	Time and labor
<b>Tbl</b>	Table
<b>TCD</b>	Time collection device
<b>TFR</b>	Termination Payments (Italy)
<b>Tgt</b>	Target
<b>Tmp</b>	Temporary
<b>Tmplt</b>	Template
<b>TRC</b>	Time reporting code
<b>TRCs</b>	Time reporting codes
<b>Trmntn</b>	Termination
<b>Txbl</b>	Taxable
<b>Upd</b>	Update
<b>Vacn</b>	Vacation

<b>Var</b>	Variable
<b>Ver</b>	Version
<b>Vol</b>	Volume
<b>WAO</b>	<i>Wet op de arbeidsongeschiktheidsverzekering</i> Disability Insurance Act (The Netherlands)
<b>WCB</b>	Workers' Compensation Board
<b>WIGI</b>	Within grade increases
<b>wrk</b>	Worker
<b>XFER</b>	Transfer
<b>XLAT</b>	Translate
<b>XSLT</b>	XSL (Extensible Stylesheet Language) transformations
<b>YTD</b>	Year to date
<b>ZVW</b>	<i>Zorgverzekeringswet</i> —Health Care Insurance Act (The Netherlands)



# Index

## A

- abbreviations, application 47
- additional documentation, accessing 2
- advanced search, Hosted PeopleBooks 14
- appendixes, PeopleBooks 3
- application fundamentals 7
- applications, using 7

## B

- book folder level, PeopleSoft Online Library 26
- browsing, enabling for PeopleBooks and integrated documentation 32
- business process chapters, PeopleBooks 3

## C

- chapters, PeopleBooks 3
- comments, submitting v
- common elements 7
- common PeopleBooks 7
- content folders, PeopleSoft Online Library 27
- Contents tab, PeopleBooks interface 12
- context-sensitive online help
  - enabling for PeopleBooks and integrated documentation 37
  - overview 30
- country codes, ISO 6
- cross-references 12
- currency codes, ISO 6
- customized documentation
  - See* integrated documentation

## D

- documentation type folder level, PeopleSoft Online Library 24
- documentation updates, accessing 2
- Document pane 9, 11

## F

- fields, common *See* common elements
- folders, PeopleSoft Online Library 21

## G

- getting started chapters, PeopleBooks 3
- global folder level, PeopleSoft Online Library 21
- graphics, displaying and printing 19

## H

- Hosted PeopleBooks
  - accessing 1
  - searching 13
- HTMListGenerator.jar 39
- Human Capital Management (HCM)
  - abbreviations 47

## I

- implementation chapters, PeopleBooks 3
- Index tab, PeopleBooks interface 13
- industry identifiers, in PeopleBooks 6
- installable PeopleBooks
  - accessing 1
  - searching 16
- installation, PeopleSoft Online Library 27
- integrated documentation
  - browsing, enabling 32
  - context-sensitive online help, enabling 37
  - managing 29
- ISO codes 6

## K

- Kindle-compatible PeopleBooks, accessing 2

## L

- language folder level, PeopleSoft Online Library 23
- language support, PeopleSoft Online Library 27

## M

- mobile PeopleBooks, accessing 2

## N

- navigation, PeopleBooks interface 11
- Navigation pane 9, 11

## O

- online help *See* context-sensitive online help

## P

- PDF PeopleBooks, accessing 2
- PeopleBooks
  - application fundamentals 7
  - availability, managing 29
  - browsing, enabling 32
  - chapters 3
  - common 7
  - context-sensitive online help, enabling 37
  - folders 24, 26
  - hosted, accessing 1
  - installable, accessing 1
  - overview v
  - PDF and Kindle-compatible mobile files,
    - accessing 2
  - searching 13, 16
  - structure 3
  - translations, accessing 1
  - using 9
- PeopleBooks interface
  - accessing 9
  - Contents tab 12
  - graphics and screen shots, displaying and
    - printing 19
  - Index tab 13
  - navigating 11
- PeopleCode, typographical conventions 5
- PeopleSoft Online Library v
  - folders 21
  - installing 27
  - language support 23, 27
- prefaces, PeopleBooks 3

## R

- Reference pane 9, 10
- region identifiers, in PeopleBooks 6

## S

- screen shots, displaying and printing 19
- search
  - Hosted PeopleBooks 13
  - installable PeopleBooks 16
  - managing 39
- Search page
  - Hosted PeopleBooks 14
  - installable PeopleBooks 17
- Secure Enterprise Search 16, 39
- setup chapters, PeopleBooks 3
- structure, PeopleBooks 3
- suggestions, submitting v

## T

- typographical conventions 5

## U

- updates, documentation, accessing 2
- utility folders, PeopleSoft Online Library
  - 22, 24, 25, 27