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# PeopleTools 8.53: PeopleSoft Setup Manager

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February 2013

PeopleTools 8.53: PeopleSoft Setup Manager

CDSKU pt853pbr0

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# Contents

<b>Setup Manager Preface.....</b>	<b>v</b>
Understanding the PeopleSoft Online Help and PeopleBooks.....	v
PeopleSoft Hosted Documentation.....	v
Locally Installed Help.....	v
Downloadable PeopleBook PDF Files.....	v
Common Help Documentation.....	v
Typographical Conventions.....	vi
ISO Country and Currency Codes.....	vii
Region and Industry Identifiers.....	vii
Access to Oracle Support.....	viii
Documentation Accessibility.....	viii
Using and Managing the PeopleSoft Online Help.....	viii
PeopleTools Related Links.....	viii
Contact Us.....	ix
Follow Us.....	ix
<b>Chapter 1: Getting Started with Setup Manager.....</b>	<b>11</b>
Getting Started with Setup Manager.....	11
Setup Manager Overview.....	11
Basic Requirements for Implementers.....	12
Setup Manager Setup.....	12
<b>Chapter 2: Managing Implementation Projects.....</b>	<b>15</b>
Managing Implementation Projects.....	15
Understanding Implementation Projects.....	15
Common Elements Used to Implement Projects.....	16
Managing Implementation Projects.....	18
Implementing by Products.....	19
Selecting Products.....	19
Selecting Features.....	20
Viewing the Product Summary.....	21
Implementing by Business Processes.....	22
Selecting Business Processes.....	23
Selecting Business Process Features.....	24
Viewing the Business Process Summary.....	25
Saving Implementation Projects.....	26
Generating Setup Task Lists.....	26
Reviewing Setup Task Generation.....	26
<b>Chapter 3: Performing Setup Tasks.....</b>	<b>29</b>
Performing Setup Tasks.....	29
Understanding the Setup Task List.....	29
Common Elements Used to Setup Task List.....	29
Reviewing the Setup Tasks.....	30
Completing Tasks in Parallel.....	30
Tracking Setup Tasks.....	31
Viewing Setup Task Details.....	32
Viewing Associated Products.....	33
Generating Excel to CI Templates.....	34
Generating Data Mover Scripts.....	35

Testing the Implementation.....	36
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# Setup Manager Preface

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## Understanding the PeopleSoft Online Help and PeopleBooks

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

### PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website 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 documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

### Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

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

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

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**Note:** Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

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### Downloadable PeopleBook PDF Files

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

### Common Help Documentation

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

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. 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 help. They provide the starting points for fundamental implementation tasks.

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

## Typographical Conventions

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

<b><i>Typographical Convention</i></b>	<b><i>Description</i></b>
<b>Bold</b>	Highlights 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>	Highlights 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 highlight 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	Highlights a PeopleCode program or other code example.
. . . (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.

<b><i>Typographical Convention</i></b>	<b><i>Description</i></b>
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

## ISO Country and Currency Codes

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

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

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

## Region and Industry Identifiers

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

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

### Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

## Industry Identifiers

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

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

## Access to Oracle Support

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

## Documentation Accessibility

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

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## Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

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## PeopleTools Related Links

[Oracle's PeopleSoft PeopleTools 8.53 Documentation Home Page \[ID 1494462.1\]](#)

[PeopleSoft Information Portal on Oracle.com](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)



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## Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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# Getting Started with Setup Manager

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## Getting Started with Setup Manager

This topic discusses:

- Basic requirements for implementers
  - Setup Manager setup
- 

## Setup Manager Overview

Setup Manager is a tool that helps you implement PeopleSoft applications by using a project and predefined tasks to produce a setup task list that is specific to your implementation project.

The setup task list identifies the setup tasks required to support your specific implementation and presents those tasks in the sequence in which they must be completed. The list contains the related navigation path to the setup component and provides a direct link to that setup component. For each task, the system identifies a suggested load method and provides links to PeopleBook documentation so that you can view documentation for the associated setup component.

### Implementation Project Management

An implementation project is a list of the features that you have selected to implement. It is organized either by business process or by product suite and product. Setup Manager enables you to alternate between views to refine the effect of one selection method upon the other.

As you create your implementation projects, you see that the information presented on the pages is specific to your installed PeopleSoft products. When you select a particular product to implement, the list of features that appears is specific to that product. This helps guide you through the selection process and enables you to create an implementation project that is tailored to your licensed and installed PeopleSoft applications.

### Setup Task List Generation

The Setup Manager feature enables you to generate a step-by-step list of tasks that are necessary for you to successfully set up your PeopleSoft system. An Application Engine process produces a sequenced list of tasks that must be completed to support the features that you are implementing.

### Setup Tasks

After you've generated the list of setup tasks, you use the list to guide you through the implementation process. The setup list pages display an ordered list of tasks to be completed and links to associated PeopleBooks that contain setup information.

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## Basic Requirements for Implementers

PeopleSoft applications support a broad range of configurations that accommodate the way in which you do business. As with any implementation, you are asked to make business decisions during this process to ensure that the final configuration reflects your company's business needs.

The implementation team must consider whether your company will alter your existing business processes to fit within the PeopleSoft system's delivered functionality or whether you will modify the PeopleSoft system to match your existing business processes. These decisions require a thorough understanding of how your business operates, and should be based on a solid knowledge of PeopleSoft functionality.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, PeopleTools documentation, and the PeopleBooks that are specific to your applications.

The Setup Manager is designed to assist you with your implementation of recently purchased PeopleSoft products. Alternatively, you may use Setup Manager to implement new products that are now available to you because of a recent upgrade.

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## Setup Manager Setup

Several activities must be completed before you use the setup task list that will guide you through the implementation of your PeopleSoft applications.

- The implementation team must make business decisions regarding what functionality you need to configure within your PeopleSoft applications.
- You must install your PeopleSoft database and define security access.

The PTLT\_PROJECT\_MGR and PTLT\_IMPLEMENTER roles contain the permissions lists necessary to access the relevant Setup Manager pages contained within a PeopleSoft database. (PTLT\_IMPLEMENTER allows you only to view implementation project options).

- You must acquire a user profile that provides access to the setup components and processes that you use during the implementation.

Additionally, you must ensure that a Process Scheduler server is configured and running on the database that you are working on so that the Application Engine processes can be run.

You can use Setup Manager with the PeopleSoft products for which you are licensed (and which have been installed on the database). Setup Manager resides in one database and enables you to perform the implementation in only that database.

Setup Manager supports the implementation of one or more products within a single PeopleSoft database. If your implementation requires multiple PeopleSoft databases, you use one setup task list for each database.

## Enabling PeopleBooks Help

PeopleBooks are the documentation delivered with every PeopleSoft application. The Setup Manager provides a link to PeopleBooks for each setup task identified by Setup Manager in your setup task list. This link accesses the section in the applicable PeopleBook that explains the fields and pages of the setup components with which you are working.

To view the documentation from Setup Manager, you must install and configure PeopleBooks so that you can deploy the PeopleSoft documentation at your site. You can install PeopleBooks to a dedicated web server machine or to a separate web server machine. Regardless of where you install PeopleBooks, you must first install the web server software.



## Chapter 2

# Managing Implementation Projects

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## Managing Implementation Projects

This topic provides an overview of implementation projects, lists common elements, and discusses how to:

- Manage implementation projects
  - Implement by products
  - Implement by business processes
  - Save implementation projects
  - Generate setup task lists
- 

## Understanding Implementation Projects

Implementation projects comprise PeopleSoft product suites or business processes and their underlying products and features that you have chosen through the Manage Implementation Projects pages.

Regardless of whether you choose to make your implementation projects selections from a business process or a product perspective, Setup Manager displays the supporting data to the feature level. Only installed products and their related business processes are displayed on the page for selection.

You begin by selecting an implementation method—either by business process or by product—that influences how the underlying features are presented to you. The strategy of selecting an implementation method is determined by the way in which you've structured your implementation project team or your implementation project. For example, consider whether you are replacing or improving a specific business process such as Order to Cash, or planning to implement specific PeopleSoft modules. You and your implementation team need to assess your company's needs and choose the implementation method accordingly.

From the Product Summary page or the Business Process Summary page, you can see your feature selections displayed relative to the products or business processes that they support. For example, if you are implementing a group of PeopleSoft product suites or products, you can check the Business Process Summary page to see what business processes you are supporting based on your feature selections. At that point, you might determine that you have a business process partially implemented, which might influence whether you elect to implement the entire business process using Setup Manager.

After you select the products and business processes for the implementation projects, save it with a unique name.

## Multiple Projects

You might want to generate more than one implementation project to support various implementation scenarios. For example, to perform a phased implementation, you can create a implementation project for each implementation phase. Or, you might also want to create different implementation projects to investigate the effect of selecting a particular set of features. You can also create different implementation projects to support different teams working concurrently on different functional areas. For example, you might have a team working on modules such as General Ledger and Accounts Payable while another team works on Order Management and Billing.

In summary, you can create multiple implementation projects that reflect different implementation scenarios. For example, you can create implementation projects that are specific to different phases of an implementation, or you might want to examine the effect of implementing different combinations of products and business processes.

## Common Elements Used to Implement Projects

<b>Select All</b>	Click to select all check boxes in the grid.
<b>Clear All</b>	Click to clear all check boxes in the grid.
<b>Additional Configuration</b>	Displays activities that must be performed before or after a particular setup task.
<b>Business Process</b>	Displays one of the delivered business process models maintained by the PeopleSoft system.
<b>Implementation Options</b>	Displays the PeopleSoft application features that you have selected for implementation. The list of features is available to be edited or viewed by either product suite and product or by the associated business process.
<b>Detailed Business Process</b>	Identifies a second-level subsection of the delivered business process.
<b>Feature</b>	Identifies an aspect of PeopleSoft functionality that requires one or more setup elements to be defined before it can be used. For example, Journal Generation, Travel Authorizations, and Commitment Control are all delivered features that can be selected by the user to implement. Features can be associated with more than one product, and more than one feature can be associated with one product. Additionally, features can be associated with one or more business processes.
<b>Product</b>	Identifies a module of PeopleSoft software that is licensed to you. For example, PeopleSoft General Ledger, PeopleSoft Benefits Administration, and PeopleSoft Help Desk are all PeopleSoft products. Products can be associated with more than one product suite, and more than one product can be associated with one product suite.
<b>Product Suite</b>	Identifies a grouping of products that exist either within a product line or across product lines. For example, PeopleSoft



Customer Relationship Management and PeopleSoft Human Capital Management are both product suites.

**Setup Task**

Identifies a step or unit of work in the task list.

**Setup Task List**

Identifies the setup tasks that must be configured to support the defined implementation projects.

**Product Name**

Displays the product name as a link to the Product Features page, on which you can select underlying features for the product.

**Selected Features**

Displays the number of features that support the particular product and how many of those features have been selected for implementation.

**View Summary**

Click to display the summary page of features that you have selected to implement based on either product or business process. You must select at least one feature to be able to view the summary page.

**Expand All**

Maximizes the collapsible section of the page to show the underlying business process or product name, the associated features, and a description of each feature.

**Collapse All**

Minimizes the collapsible section of the page to hide the underlying business process or product name, the associated features, and a description of each feature.

**Continue**

Displays the next page in the process.

**Save**

Click to save the information on the page.

**Select All**

Marks all check boxes on the page as selected.

**Clear All**

Clears all selected check boxes on the page.



In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.



Click to return the expanded grid to its tabbed state.



Click to download the contents of a grid to a Microsoft Excel spreadsheet.

## Managing Implementation Projects

Access the Manage Implementation Projects page (PeopleTools, Setup Manager, Manage Implementation Projects).

### Image: Manage Implementation Projects page

This example illustrates the fields and controls on the Manage Implementation Projects page.

Manage Existing Project					
Find   View All   First 1-5 of 5 Last					
Project Name	Description	Task List	Updated on	Export	Delete
<a href="#">AM_AP_AR</a>	Asset Mgmt, Payables, Receivables	<a href="#">View</a>	09/21/04 4:28:00PM PDT		
<a href="#">ASSET_MGMNT</a>	All Asset Management Features	<a href="#">Failed</a>	09/21/04 4:46:51PM PDT		
<a href="#">BILLING</a>	All Billing Features	<a href="#">View</a>	09/17/04 3:23:43PM PDT		
<a href="#">DEPRECIATION</a>	Asset Management Depreciation	<a href="#">View</a>	09/17/04 3:07:08PM PDT		
<a href="#">PORTAL_PACKS</a>	ESA and FIN Portal Packs	<a href="#">View</a>	09/17/04 3:25:46PM PDT		

Create New Project By

[Products](#)
[Business Processes](#)
[Project Import](#)

You can create implementation projects based on products and features or based on business processes and features.

In the Create New Project By group box, click Products to select from a list of different products and related features for your implementation. Click Business Processes to select from a list of business processes and their associated underlying features.

After you have saved an implementation project, you can retrieve it by using the Manage Existing Projects grid on the page. If you select a saved implementation project, Setup Manager retrieves and displays a page showing the product summary and the business process summary for that project.



Click to export an implementation project, including its setup task list if it exists. The Export page appears and prompts you for a save location.



Click to delete the selected project, and if it exists, the project's setup task list.

### Project Import

Click to import a project. The system prompts you to enter the location of an implementation project XML file. You cannot import projects that already exist or that are from a different version of your installed product line. The system uses the filename of the XML file as your project name.

---

## Implementing by Products

This section discusses how to:

- Select products
- Select features
- View the product summary

### Selecting Products

If you implement your system based on products, select the products that your company wants to implement, or navigate to the underlying features and select them for implementation. Only those products licensed to you and marked as installed on the PS\_INSTALLATION table are available for you to select.

Access the Product List page.

The Product List page comprises several collapsible grids that are labeled with the names of the PeopleSoft product suites. The collapsible grid label also shows the number of products that have been selected for implementation out of the total number of products that you installed relative to that product suite. The default appearance of the Product List page is expanded to show all of the product suites. When expanded, each collapsible grid shows a list of products within the particular product suite. To collapse the product lists that you don't want to view, click the arrow that precedes the name of the PeopleSoft product suite.

To select all products associated with a particular product suite, select the check box to the left of the product suite name. As a default, no products are selected for implementation.

If a product belongs to more than one product suite and you select it for implementation, that product is automatically selected for all product suites in your system. For example, if you select Grants Management as a product suite, it includes the *Billing* product. Any other product suite that has Billing in it is also selected by the system.

## Selecting Features

Access the Product Features page by clicking the product name link.




### Image: Product Features page

This example illustrates the fields and controls on the Product Features page.

Product Features

Product Suite NameCustomer Fulfillment Management

Product NameReceivables

Feature List				Customize	Find	View All		First		1-10 of 36		Last
Select	Feature Name	Required	Description									
<input checked="" type="checkbox"/>	Banking General		Setup common elements for Banks.									
<input checked="" type="checkbox"/>	Customers and Contacts		Model your customer's structure and contact relationships.									
<input checked="" type="checkbox"/>	General Ledger General		Setup common elements for General Ledger including Business Units, users, security, ledgers, calendars, periods, etc.									
<input checked="" type="checkbox"/>	Receivables General		Setup common elements for Receivables including customers, Business Units, accounting rules, etc.									
<input checked="" type="checkbox"/>	Action Lists		Maintain action lists.									
<input checked="" type="checkbox"/>	Aging		Execute the batch Aging process.									
<input checked="" type="checkbox"/>	Automatic Maintenance		Execute the batch Automatic Maintenance process.									
<input checked="" type="checkbox"/>	ChartField Configuration		Configure ChartFields and define ChartField values, combinations, etc.									
<input checked="" type="checkbox"/>	Collections Management		Manage collection items.									
<input checked="" type="checkbox"/>	Commitment Control		Configure commitment control budget setup, security authorization, and budget closing rules.									

Products comprise *features* that support individual products. This page displays the list of features that support the product that you've selected and enables you to select one or more of those features to include in the implementation. Select the check box for the features that you want to implement. The system automatically selects all required features for that product after at least one feature is selected.

The Select All and Deselect All links enable you to edit the list more efficiently.

### Required Features

Some of the features listed on pages are identified as required features. A required feature contains the basic components without which a particular product could not be implemented; therefore required feature must be set up for the product to function correctly. All required features appear at the top of the feature list by default. The system automatically selects all required features when you select any of the features for the product. If you clear one of the required features, Setup Manager clears all other features for that product.

If a required feature belongs to more than one product or product suite and you select it for implementation, that feature is automatically selected for all products or product suites in your system. In addition, Setup Manager selects any additional required features that support the other products and product suites.

## Viewing the Product Summary

Access the Product Summary page.

### Image: Product Summary page

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

Product Summary

Business Process Summary

Customize

Find

View All

First

1-10 of 34

Last

Product Suite Name	Product Name	Selected Features	Feature Name	Delete
<a href="#">Financial Management</a>	<a href="#">Asset Management</a>	17 of 17	Asset Management General	
			General Ledger General	
			Asset Capital Planning	
			Asset Classification	
			Asset Depreciation Allocation	
			Asset Disposal Worksheet	
			Asset Maintenance	
			Asset Taxation	
			Billing General	
			ChartField Configuration	

Implementation Project

ASSET\_MGMNT

All Asset Management Features

Add/Remove Features

[By Product](#)
[By Business Process](#)

	Setup Task List	Last Update Date/Time	Last Generated Date/Time	Delete
	<a href="#">View Setup Task List</a>	09/17/04 3:24:20PM	09/17/04 3:20:46PM	

The names of the product suites and products on this page are links to the Product List page and the Product Features page, on which you can view and edit the list of features that you want to implement.

**Product Suite Name** Click the name of the product suite to view the Product List page.

**Product Name** Click the name of the product to view the Product Features page.

**Selected Features** Displays the number of features selected for implementation out of the total possible features for that product.

<b>Feature Name</b>	Displays the name of the feature as defined by PeopleSoft development.
<b>Required</b>	A red star appears in this column if the feature is required for this product.
<b>Delete</b>	Click to delete this feature from the implementation project. This action is enabled only for nonrequired features. Any feature that you delete from the Product Summary page is also deleted from the Business Process Summary page.
<b>Implementation Project</b>	Displays the name of the implementation project. This field is not populated until you save the implementation project.
<b>Add/Remove Features</b>	Click the By Productlink to display the Product List page, on which you can add and remove features.  Click the By Business Processlink to display the Business Process List page, on which you can add and remove features.
<b>Save and Regenerate</b>	Click to start the process that creates the setup task list. This button is not available for selection until the implementation projects has been saved.

---

**Note:** If you remove a feature from this page, the system also removes the feature from the Business Process page.

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## Implementing by Business Processes

This section discusses how to:

- Select business processes
- Select business process features.
- View the business process summary.

If you implement your system based on business processes, you select the delivered business process that your company wants to implement, navigate to the underlying features, and select them for implementation. The PeopleSoft system delivers a list of business processes that are specific to your installed products. Only those business processes related to at least one installed product in the particular PeopleSoft database are available for you to select, and only those features associated with those products can be selected.

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**Note:** Setup Manager focuses on key business processes based on installed products that PeopleSoft delivers to customers. These business processes are stored as system metadata and are delivered with Setup Manager in the same way that the product and product suite information are delivered.

---

## Selecting Business Processes

Access the Business Process List page.

### Image: Business Process List

This example illustrates the fields and controls on the Business Process List.

### Business Process List

Select Business Processes to implement or drill down to edit Features.

[View Summary](#)

**Select** [Expand All](#) [Collapse All](#)

<input type="checkbox"/>	▼ Cash Management ( 0 of 4 )			
Select	Detailed Business Process	Selected Features	Description	
<input type="checkbox"/>	<a href="#">Analyze Risk</a>	0 of 2	Analyze cash flow and determine exposure to risk; perform valuation and analysis of portfolio; assess risk profile and determine hedging strategies	
<input type="checkbox"/>	<a href="#">Determine Cash Position</a>	0 of 12	Load and reconcile bank statements; forecast cash position; compare actual cash position to forecast; adjust forecast if necessary or determine action to be taken	

Business processes comprise two categories: high-level business processes and detailed business processes. High-level business processes comprise several detailed business processes. Detailed business processes comprise groups of features that support the detailed business process and, in turn, roll up into the high-level business process.

The Business Process List page comprises several collapsible grids that are labeled with the names of a high-level business process. The grid label also shows the number of detailed business processes that have been selected for implementation out of the total number of detailed business processes supported by one or more of your installed products. The default appearance of the Business Process List page shows all business processes expanded, where each collapsible grid is a list of detailed business processes within the high-level business process. To collapse the high-level business process lists that you don't want to view, click the arrow that precedes the name of the PeopleSoft high-level business process.

If you choose to implement your system based on business processes, select the detailed business process that your company wants to implement, navigate to the underlying features, and select them for implementation. Only those business processes licensed to you and supported by products marked as installed on the PS\_INSTALLATION table are available for you to select.

To select all detailed business processes associated with a high-level business process, select the check box to the left of the high-level business process name. As a default, no business processes are selected

for implementation. You can select a subset of the features that support an individual detailed business process by clicking the detailed business process name link.

If a selected feature also supports other detailed business processes, the feature is automatically selected for the other detailed business processes where it is referenced. Additionally, the features that you selected on the business process side are also marked as selected for that product when viewing it from within a product suite.

## Selecting Business Process Features

Access the Business Process Features page.

### Image: Business Process Features page

This example illustrates the fields and controls on the Business Process Features page.

### Business Process Features

**Business Process** Cash Management

**Detailed Business Process** Analyze Risk

**Description** Analyze cash flow and determine exposure to risk; perform valuation and analysis of portfolio; assess risk profile and determine hedging strategies

Feature List				
Select	Product Name	Feature Name	Required	Description
<input type="checkbox"/>	Risk Management	Risk Management General		General Requirements for Installing Risk Management.
<input type="checkbox"/>	Risk Management	Hedging		Hedge creation and processing.

This page displays the list of product and feature pairs that support the detailed business process that you've selected and enables you to select one or more of those features to include in the implementation. Select the check box for each feature that you want to implement. The system automatically selects all required features for the same product after at least one feature for the product is selected.

### Required Features

A required feature must be set up for the product that supports the business process to function correctly. All required features appear at the top of the feature list by default. The system automatically selects all required features relative to a particular product when you select any of the features associated with that same product within the business process.

If you clear one of the required features, Setup Manager clears all other features associated with the same product that the required feature was associated with for that business process.

If a required feature belongs to more than one detailed business process and you select it for implementation, that feature is automatically selected for all detailed business processes in your system where it was assigned. In addition, Setup Manager selects any additional required features that support the same product that the originally selected required feature was associated with; Setup Manager does this for any detailed business processes where these features are assigned.



## Viewing the Business Process Summary

Access the Business Process Summary page.

### Image: Business Process Summary page

This example illustrates the fields and controls on the Business Process Summary page. You can find definitions for the fields and controls later on this page.

Product Summary

Business Process Summary

Customize | Find | View All |

First 1-10 of 17 Last

Business Process	Detailed Business Process	Selected Features	Feature Name	Product Name	Delete
<a href="#">Financial Control and Reporting</a>	<a href="#">Capture Transactions</a>	16 of 16	Asset Management General	Asset Management	
			General Ledger General	Asset Management	
			Asset Capital Planning	Asset Management	
			Asset Classification	Asset Management	
			Asset Depreciation Allocation	Asset Management	
			Asset Disposal Worksheet	Asset Management	
			Asset Maintenance	Asset Management	
			Asset Taxation	Asset Management	
			ChartField Configuration	Asset Management	
			Inter/Intra Unit	Asset Management	

Implementation Project

ASSET\_MGMNT

All Asset Management Features

Add/Remove Features

[By Product](#)
[By Business Process](#)

The names of the high-level business processes and detailed business processes on this page are links to the Business Process List page and the Business Process Features page, on which you can view and edit the list of features that you want to implement.

Additionally, features are listed on this page that don't directly support a business process, but that are required to support the business process. These features are identified as *Business Process Independent*.

#### Delete

Click the icon in this column to delete this feature from the implementation project. This action is enabled only for nonrequired features. Any feature that you delete from the Business Process Summary page is also deleted from the Product Summary page.

#### Add/Remove Features

Click the [By Product](#) link to display the Product List page, on which you can add and remove features.

Click the link [By Business Process](#) to display the Business Process List page, on which you can add and remove features.

#### Generate Setup Tasks

Click this button to start the process that creates the setup task list. This button is not available for selection until you save the implementation projects.

---

**Note:** If you delete a business process from this page, the system also deletes the related features from the Product Summary page.

---

---

## Saving Implementation Projects

To save the implementation projects, enter a unique name and a description for the implementation project that you've created. This name is used to retrieve an implementation project in the future and appears on the setup task list after it has been generated. Each time that you change an implementation project and save it, it is saved with the existing implementation project name.

---

## Generating Setup Task Lists

This section discusses how to generate setup task lists and review setup task generation.

When you click Generate Setup Tasks on the Product Summary or Business Process Summary pages, the system starts the process that creates a list of setup tasks. The list is based upon the selections that you have made.

Click Generate Setup Tasks on the Product Summary or Business Process Summary page.

## Reviewing Setup Task Generation

The Review Setup Task Generation page displays the status of the process that generates a list of step-by-step setup tasks for the implementation project that you specify. Each time that you run this process for a specific implementation project, it overwrites the existing setup task list for that specific implementation project. Additionally, if you select an implementation project that is currently undergoing processing, the system displays a message informing you that the implementation project is unavailable until the process has completed.

To view any processes that are currently running, select Review Setup Task Generation from the Portal navigation, and select the implementation project name. After the processes are complete, the Setup Task

Generation Status page indicates that the process is complete, and you can then view the View Setup Tasks button to see the setup task list.

**Image: Setup Task Generation Status page**

This example illustrates the fields and controls on the Setup Task Generation Status page. You can find definitions for the fields and controls later on this page.

**Setup Task Generation Status**

Process Details	
<b>Run Status</b>	Queued <span>Refresh</span>
<b>Project Name</b>	ASSET_MGMNT
<b>Run Control ID</b>	ASSET_MGMNT
<b>Process Instance</b>	4033

☒ **Refresh status every 15 seconds**  
☐ **Launch Setup Tasks when completed**

[Process Monitor](#)

View Setup Tasks

Return to Search

**Refresh status every 15 seconds**

Select to have the system automatically refresh the page every 15 seconds. If you do not select this check box, click the Refresh button on the page to manually refresh the page and determine the status of the process.

**Launch Setup Tasks when completed**

Select to have the system automatically display the Setup Task List page when the process has finished. This check box is not available until you have selected the check box to refresh the status of the page automatically.

**View Setup Tasks**

Click this button to display the Manage Setup Tasks page. This button is available after the process has run successfully.



# Performing Setup Tasks

---

## Performing Setup Tasks

This topic provides an overview of the setup task list and discusses how to:

- Review the setup tasks.
  - Complete tasks in parallel.
  - Track setup tasks.
  - View setup task details.
  - Generate Excel to CI (Component interface) templates.
  - Generate Data Mover scripts.
  - Test the implementation.
- 

## Understanding the Setup Task List

The Setup Tasks List identifies the setup tasks that are required to complete your implementation based on the feature selections that you made in your implementation projects. Setup tasks appear in sequence in which they must be completed. The system indicates how each setup task relates to a specific PeopleSoft setup component.

## Common Elements Used to Setup Task List

### Seq (sequence)

Displays the sequence number in which the setup tasks must be completed. Tasks that have the same sequence number can be performed in parallel.



Click to access the PeopleBook help for the identified task. This icon appears only for component-based setup tasks.

### Setup Task

Displays the name of the task that must be completed. This name is also a link to the first page of the component if the task is a component-based task.

## Reviewing the Setup Tasks

Access the Manage Setup Tasks page.

### Image: Manage Setup Tasks page, Summary tab

This example illustrates the fields and controls on the Manage Setup Tasks page, Summary tab. You can find definitions for the fields and controls later on this page.

Manage Setup Tasks

ProjectAM\_AP\_ARAsset Mgmt, Payables, Receivables

View By ProductAMAsset Management

Setup Tasks

Customize | Find | View 100 | First 1-20 of 173 Last

SummaryTrackingTask Details

Seq	Status		Setup Task	Description	Navigation	Products Affected	Features Affected
1.001			<a href="#">Installation Options</a>	Specify installed PeopleSoft products and other installation options.	Set Up Financials/Supply Chain > Install > Installation Options	<a href="#">AM, AP, AR, AUC, BI, EG, EPO, EX, ...More</a>	<a href="#">Payables General, Strategic Sourcing General, Billing General, ...More</a>
2.001			<a href="#">Country</a>		Set Up Financials/Supply Chain > Common Definitions > Location > Country	<a href="#">AM, AUC, CM, EPO, EX, IN, OM, PC, ...More</a>	<a href="#">Asset Management General, Strategic Sourcing General, Cash Management General, ...More</a>
3.001			<a href="#">State</a>	Add or review a state or province code.	Set Up Financials/Supply Chain > Common Definitions > Location > State	<a href="#">AM, AUC, EPO, EX, IN, MG, OM, PO, ...More</a>	<a href="#">Asset Management General, Strategic Sourcing General, Expenses General, ...More</a>

The summary shows the step-by-step sequenced list of setup tasks and reflects the order in which the setup components must be configured.

#### Status

Displays the status of the task. Move the cursor over the icon. Values are *Not Started*, *In Progress*, and *Complete*.

#### Setup Task and Description

Displays the task, in bold, that must be completed. The content of this field also contains the portal hover text, defined for the component associated with this setup task. This text provides you with information about the purpose of the task.

#### Navigation

Displays the portal navigation for the setup component-based tasks and navigation path to non-component-based setup tasks.

#### Features Affected

Displays the features that are associated with the task.

#### Products Affected

Displays the products that are associated with the task.

## Completing Tasks in Parallel

The setup tasks are ordered and displayed in the sequence that they need to be performed. The setup tasks that share the same main sequence number can be performed in parallel. For example, setup tasks 1.001, 1.002, and 1.005 could be performed in parallel; however, they must all be performed before any setup

tasks at level 2. Tasks that share the same main sequence number still appear in the order that they should be performed if they are not done in parallel.

## Tracking Setup Tasks

Access the Manage Setup Tasks page; select Tracking tab.

### Image: Manage Setup Tasks page, Tracking tab

This example illustrates the fields and controls on the Manage Setup Tasks page, Tracking tab. You can find definitions for the fields and controls later on this page.

**Manage Setup Tasks**

Project: AM\_AP\_AR Asset Mgmt, Payables, Receivables

View By Feature [dropdown] [search icon]

Setup Tasks Customize | Find | View 100 | First 1-20 of 373 Last

Summary Tracking Task Details [icon]

Seq	Status	Setup Task	Assigned To	Start Date	End Date	Discussion	Percent Complete
1.001	[icon]	[?] <a href="#">Installation Options</a>	[input]	[input] [calendar icon]	[input] [calendar icon]	[icon]	[input]
2.001	[icon]	[?] <a href="#">Country</a>	[input]	[input] [calendar icon]	[input] [calendar icon]	[icon]	[input]
3.001	[icon]	[?] <a href="#">State</a>	[input]	[input] [calendar icon]	[input] [calendar icon]	[icon]	50
4.001	[icon]		[input]	[input] [calendar icon]	[input] [calendar icon]	[icon]	[input]
5.001	[icon]	[?] <a href="#">Market Rate Index</a>	Impl1	09/21/2004 [calendar icon]	09/22/2004 [calendar icon]	[icon]	100

Use the Tracking tab to manage the process and personnel associated with completing the setup tasks. The fields on this page are only informational and can be used by the project team and project manager to track the progress of the setup tasks.

#### Assigned To

Enter an owner for this setup task. This is a free-form edit box, so you can enter multiple names or the role of the individual who owns this task.

#### Start Date

Enter the start date for this setup task.

#### End Date

Enter an end date for this setup task.

#### Percent Complete

Enter the percentage of the task that has been completed. When you enter 100 percent, the Status field indicates Complete.

## Viewing Setup Task Details

Access the Manage Setup Tasks page; select the Task Details tab.

### Image: Manage Setup Tasks page, Task Details tab

This example illustrates the fields and controls on the Manage Setup Tasks page, Task Details tab. You can find definitions for the fields and controls later on this page.

Manage Setup Tasks

Project

AM\_AP\_AR

Asset Mgmt, Payables, Receivables

View By Feature

Setup Tasks

Customize | Find | View 100 | First 1-20 of 373 Last

Summary

Tracking

Task Details

Seq	Status		Setup Task	Task Code	Cross Database	Load Method	Method Name
1.001		?	<a href="#">Installation Options</a>	INSTALLATION.GBL	No	Online	
2.001		?	<a href="#">Country</a>	COUNTRY_TABLE.GBL	No	Online	
3.001		?	<a href="#">State</a>	STATE_DEFN.GBL	No	Online	
4.001				CURRENCY_CD_TABLE.GBL	No	Component Interface	<a href="#">CURRENCY</a>
5.001		?	<a href="#">Market Rate Index</a>	MARKET_RATE_INDEX.GBL	No	Online	<a href="#">Link</a>
6.001		?	<a href="#">Market Rate Type</a>	RT_TYPE_TBL.GBL	No	Online	
7.001		?	<a href="#">Market Rate Definition</a>	MARKET_RATE_DEF.GBL	No	Online	

The Task Details page displays the setup task, task code, whether a cross-database impact exists, and the load method that you can use to load the data for the component during the implementation.

**Task Code** Displays the system-assigned code that identifies this task.

**Cross Database** Identifies whether the setup task has a cross-database impact.

**Load Method** Displays details about the load methods available for a given task. Values are: *Component Interface*, *ETL*, *Other*, and *Online*.

**Method Name** Depending on the type of load method, displays the name of the component interface, ELT, or other load program.

### Load Methods

For any component task, multiple methods exist by which to load the component with application data. Methods available for a given task display in the Load Method column. Examples of the methods are:

- Online pages might be used to enter application data manually.



- A component interface could be invoked using the Excel to Component Interface utility to load the component.
- A custom load program could be used to load application data.

## Viewing Associated Products

Access the Manage Setup Tasks page, and select the Summary tab.

Select a product code or Associated Products in the Products Affected column to view associated products.

### Image: Setup Task Products page

This example illustrates the fields and controls on the Setup Task Products page.

## Setup Task's Products

Project Name

AM\_AP\_AR

Asset Mgmt, Payables, Receivables

Seq

1.001

Task

Installation Options

Setup Task Specific Products

[Customize](#) | [Find](#) | [View All](#) |

First 1-10 of 19 Last

Product Code	Product Name
AM	Asset Management
AP	Payables
AR	Receivables
AUC	Strategic Sourcing
BI	Billing
EG	Engineering
EPO	eProcurement
EX	Expenses
GL	General Ledger
IN	Inventory

Return

## Generating Excel to CI Templates

Access the Generate Excel to CI Templates page.

### Image: Generate Excel to CI Templates page

This example illustrates the fields and controls on the Generate Excel to CI Templates page. You can find definitions for the fields and controls later on this page.

### Generate Excel to CI Templates

**Project Name** AM\_AP\_AR      Asset Mgmt, Payables, Receivables

Tasks with Component Interfaces				
Seq	Task Name	Task Code	CI Name	Select
4.001		CURRENCY_CD_TABLE.GBL	CURRENCY	<input checked="" type="checkbox"/>
54.001	Location	LOCATION_TBL.GBL	LOCATION_TBL_CI	<input type="checkbox"/>
57.001		DEPARTMENT.GBL	DEPT_CF	<input type="checkbox"/>
59.001		ALTACCT.GBL	ALTACCT_CF	<input type="checkbox"/>
60.001		BD_SCENARIO.GBL	BUDGET_SCENARIO	<input type="checkbox"/>

[Generate Excel to CI Templates](#)
[Select All](#)
[Clear All](#)

**Template Generation Properties**

**\*Web Server Machine** 
**\*Port** 
**\*User ID**

**Site Name** 
**\*Protocol** 
**\*Password**

**Language** 
**\*Node Name**

**\*Portal Name** 
**File Directory**

The fields on this page are part of the component interface connection parameters. However, note the following two fields:

#### Language

Identifies the language used by the component interface (and thus from the database) and determines which Excel to CI base template is used. For example, if you select French from the dropdown list, the system uses the FRA subdirectory for the Excel to CI template.

#### File Directory

Identifies the location to which the template is generated. The system administrator should provide a path local to the Process Scheduler to which the user can map a drive.

## Generating Data Mover Scripts

Access the Generate Data Mover Scripts page.

### Image: Generate Data Mover Script page (1 of 2)

This example illustrates the fields and controls on the Generate Data Mover Script page (1 of 2).

### Generate Data Mover Scripts

**Project Name** AM\_AP\_AR Asset Mgmt, Payables, Receivables

Some Tasks cannot be selected because by design, their underlying records do not allow the use of Data Mover. These Tasks will appear in the grid below with the "Select" box disabled. Please refer to PeopleBooks for the proper method of exporting and importing the records behind these Tasks.

Seq	Task Name	Task Code	Select
1.001	Installation Options	INSTALLATION.GBL	<input checked="" type="checkbox"/>
2.001	Country	COUNTRY_TABLE.GBL	<input type="checkbox"/>
3.001	State	STATE_DEFN.GBL	<input type="checkbox"/>
4.001		CURRENCY_CD_TABLE.GBL	<input type="checkbox"/>
5.001	Market Rate Index	MARKET_RATE_INDEX.GBL	<input type="checkbox"/>

[Generate Data Mover Script](#)
[Select All](#)
[Clear All](#)

### Image: Generate Data Mover Script page (2 of 2)

This example illustrates the fields and controls on the Generate Data Mover Script page (2 of 2). You can find definitions for the fields and controls later on this page.

### Data Mover Script

View ☒ Export ☐ Import

--NOTE: If a setup table is identified within the script more than once, the subsequent duplicate records will appear commented out.

```

SET NO TRACE;
SET LOG EXPORT_AM_AP_AR.log;
SET OUTPUT AM_AP_AR.dat;
/

```

**File Name** EXPORT\_AM\_AP\_AR.dms

[Save Export File](#)

[Save](#)
[Return to Search](#)

This page enables you to select the components for a specific task and generate Data Mover scripts that export and import your setup data to another database. This assists with the migration of application setup data from one environment to another. You can use the Data Mover scripts to populate other databases with setup data that you've entered in another environment.

---

**Note:** Some component-based tasks cannot be exported or imported by using Data Mover; these do not appear as selections.

---

After you select the component-based tasks and click the Generate Data Move Scripts button, an additional section of the page appears, showing the text of the Data Mover script and fields to enter a name for the scripts. The script includes a sequenced list of the tables that support the selected tasks. Where a table is identified within the script more than once, the duplicate references are commented out.

---

**Note:** Setup Manager identifies the primary tables that support the setup components that you select to migrate. Other tables, such as prompt edit tables that are defined on the component, are not identified by Setup Manager but might be necessary for the component to function in the new environment. You should identify these tables ahead of time when planning your implementation.

---

### **Generate Data Mover Script**

Click to display an additional area of the page that displays the text of the Data Mover script as well as the directory where the script will be saved and filename of the script.

---

**Note:** This button is not available for selection until you have selected the check box for at least one setup task.

---

### **Export**

Select to view the Data Mover export script.

### **Import**

Select to view the Data Mover import script.

### **File Name**

Enter the file name for the Data Mover script. No directory separators are allowed in the filename edit.

### **Save Export File**

Click to save the file to the default output directory.

The PeopleSoft default directory is PS\_CFG\_HOME\appserv\files.

Your system administrator might have specified other locations for the output directory including:

- The directory for the environment variable \$PS\_FILEDIR that is defined during installation of the application server.
- The directory for the environment variable \$PS\_SERVDIR that is defined during installation of the application server.

---

## **Testing the Implementation**

When the tasks in the Setup Task List have been completed, the implementation team should verify that the application functions as designed and supports the business scenarios that the implementation was based on. The approach to verifying that the setup is complete is based on the team's implementation methodology.

After you have finished testing the implementation and are using the software in a live environment, you can use Setup Manager when you implement new releases, products, features, or business processes.

Tasks associated with testing the implementation might include:

- Testing individual online transactions and batch processes.
- Verifying whether you can access any existing data and enter new data successfully.
- Performing the steps of business processes end-to-end.

