PeopleSoft Interaction Hub 9.1: Resource Finder

September 2014

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

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.

Note: Only the most current release of hosted documentation is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

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 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.

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.

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

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

Field and Control Definitions

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

Typographical Conventions

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

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.

Typographical Convention	*Description*
& (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)

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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.

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 acessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

About PeopleSoft Interaction Hub

This section discusses:

- PeopleSoft Portal Solutions product family.
- PeopleSoft Interaction Hub and PeopleTools.

PeopleSoft Portal Solutions Product Family

This section discusses the products that are part of the PeopleSoft Portal Solutions product family:

- PeopleSoft Interaction Hub.
- PeopleSoft Internal Controls Enforcer.

PeopleSoft Interaction Hub

Oracle's PeopleSoft Interaction Hub is a world-class portal solution with many robust content and collaborative features. The PeopleSoft Interaction Hub is ideal for customers wishing to deploy an unlimited number of communities across an enterprise that focusses on PeopleSoft application business processes.

PeopleSoft Interaction Hub 9.1 contains a rich set of Web 2.0 features. For instance, collaborative workspaces and related content services can be keyed to PeopleSoft application transactions providing contextually relevant collaboration.

Two key characteristics distinguish PeopleSoft Interaction Hub as a rich Web 2.0 platform:

- First, PeopleSoft Interaction Hub is a traditional portal framework that can be used for aggregating and managing content from multiple applications and sources. With unified navigation, it is now simple to configure PeopleSoft Interaction Hub to federate multiple PeopleSoft application systems.
- Second, its collaborative capabilities make PeopleSoft Interaction Hub a functional application that complements the features found in PeopleSoft applications.

PeopleSoft Internal Controls Enforcer

Oracle's PeopleSoft Internal Controls Enforcer is designed to automate and enforce internal controls required under Section 404 of the Sarbanes-Oxley Act. Using the product's monitoring and diagnostic capabilities, you can reduce the cost of complying with the new regulations and the risk of unforeseen changes in internal controls. PeopleSoft Internal Controls Enforcer will work in conjunction with other PeopleSoft corporate governance solutions to make the entire compliance process repeatable and auditable, allowing you to focus on running your business.

In addition, the product enables you to continuously track and monitor controls, and, optionally, certify their effectiveness at interim times throughout the year to support certifications that are required for Section 302 of Sarbanes-Oxley.

See the product documentation for Internal Controls Enforcer.

PeopleSoft Interaction Hub and PeopleTools Portal Technology

To understand the functionality of PeopleSoft Interaction Hub, Oracle recommends that you familiarize yourself with PeopleTools, focusing especially on the subject areas and sections that are devoted to portal functionality. Because PeopleSoft Interaction Hub builds upon the basic internet architecture that is delivered with PeopleTools, this information gives you an excellent foundation of knowledge upon which the PeopleSoft Interaction Hub suite of documentation builds.

PeopleTools portal technology is built on top of PeopleSoft Pure Internet Architecture and enables you to easily access and administer multiple content providers, including PeopleSoft databases such as Oracle's PeopleSoft HRMS or Oracle's PeopleSoft CRM, as well as non-PeopleSoft content. It enables you to combine content from these multiple sources and deliver the result to users in a unified, simple-to-use interface.

The main elements of the PeopleTools portal technology are a portal servlet and an application server. These two elements work together to provide common portal processing features such as page assembly, search, content management, navigation, and homepage personalization.

Product documentation for PeopleTools covers the PeopleSoft Pure Internet Architecture and PeopleTools portal technology in detail.

See *PeopleTools: Portal Technology*.

Related Documentation

This section discusses:

- PeopleSoft Interaction Hub documentation.
- PeopleTools documentation.

PeopleSoft Interaction Hub Documentation

PeopleSoft Interaction Hub documentation includes:

- *PeopleSoft Interaction Hub: Branding*

  This subject covers PeopleSoft Interaction Hub's branding feature, which is built on the PeopleTools branding framework. Branding enables you to create branding definitions and apply branding themes to portals, sites, and workspaces allowing you to create a differentiated appearance for specific user audiences.

- *PeopleSoft Interaction Hub: Collaborative Workspaces*

  This subject covers setup, administration, and use of collaborative workspaces, which are virtual team rooms that facilitate collaboration on a variety collaborative projects and processes.

- *PeopleSoft Interaction Hub: Content Management System*

  This subject describes the content management system, which includes features to help you manage, create, and organize content. The resulting content is ready and available for placement in various portal pagelets and news publications; reuse in workspaces, calendars, and other portal features; or available just for browsing.

- *PeopleSoft Interaction Hub: Portal and Site Administration*

  This subject covers tasks for administering portals and sites including product configuration, system-wide setup and administration, integration with third-party systems, and so on.

- *PeopleSoft Interaction Hub: Resource Finder*

  This subject describes how to setup and use Resource Finder, a highly flexible repository that describes any organizational resource, along with links that relate these resources to each other.

- *PeopleSoft Interaction Hub: Using Portal Features*

  This subject covers setup and usage of items such as blogs, calendars, discussion forums, feeds, tagging, searching, related content services, and other features of PeopleSoft Interaction Hub.

PeopleTools Documentation

PeopleSoft Online Help for PeopleTools contains the complete set of subject areas covering PeopleTools 8.53. In particular, several of these subjects are useful to the setup, administration, and use of PeopleSoft Interaction Hub including:

- *PeopleTools: Feed Publishing Framework*

  The PeopleTools Feed Publishing Framework supports the publication of PeopleSoft Interaction Hub data as feeds. In addition, the framework can be used to develop custom feed types.

- *PeopleTools: Integration Broker*

  PeopleSoft Integration Broker facilitates the exposure of PeopleSoft business logic as services and the consumption of external web services. Integration Broker also supports synchronous and asynchronous messaging between PeopleSoft applications and with third-party systems.

- *PeopleTools: Portal Technology*

  PeopleTools portal technology is the foundation of the PeopleSoft Interaction Hub product. This subject covers critical portal technologies such as portal implementation, PeopleSoft Pure Internet Architecture, Pagelet Wizard, the PeopleSoft Related Content Framework, and others.

- *PeopleTools: Security Administration*

  This subject covers important security-related topics including PeopleTools user profiles, roles, permission lists, single sign-on (SSO), and others.

- *PeopleTools: Applications User's Guide*

  This subject provides general information about PeopleSoft applications useful to all users of PeopleSoft systems. Topics include an introduction to the PeopleSoft Pure Internet Architecture, explanation of how to navigate through the system, how to perform searches, elements of application pages, and so on.

Note: These subjects and others in the PeopleSoft Online Help are referenced as needed.

PeopleSoft Portal Solutions Related Links

PeopleSoft Interaction Hub 9.1 Documentation Home Page [ID 887960.1]

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

Contact Us

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

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Chapter 1

PeopleSoft Interaction Hub Resource Finder Overview

Understanding PeopleSoft Interaction Hub Resource Finder

Note: PeopleSoft Interaction Hub will not enhance the Resource Finder feature in future releases. We recommend that you use the PeopleSoft Human Capital Management Company Directory for more robust functionality specific to Employee profile.

See the product documentation for *PeopleSoft HCM: Human Resources Administer Workforce*, “Setting Up the Org Chart Viewer”.

PeopleSoft Interaction Hub Resource Finder is a highly flexible repository that you can configure to receive data loads containing information about any organizational resource, along with links that relate these resources to each other. These resources are typically things like customers, suppliers, employees, departments, locations, companies, and business units, but can also be easily expanded to include things like products and projects, for example.

PeopleSoft Interaction Hub Resource Finder is inherently flexible, enabling you to configure and track any of these resources based on your own business requirements. PeopleSoft Interaction Hub Resource Finder is also designed to promote the discovery of interrelationships between your resources, based on your resource configurations.

You can locate these enterprise resources, or participants, in the repository using a variety of tools, including the Resource Finder simple search pagelet, which can be added to portal homepages; the Resource Finder - Advanced Search page, which offers search options that can be tailored to the specific resource the user is looking for; or by drilling down through the organizational chart and related links on resource profile pages. You can also relate resources to business processes directly by leveraging the Related Resources pagelet that works with the Context Manager. Resource Finder search functionality uses Verity for indexing and searching the resource metadata.

Resource Finder searches this metadata to return matching resource results, which you can use to access profile pages. Resource profiles are dynamically generated based on profile definition settings. You can use these resource profiles to view and access various details configured to appear for Resource Finder participant types.

Security options allow you granular control over the information about resources that different users can access, as well as who in your organization can manage resource information.

Navigating in PeopleSoft Interaction Hub Resource Finder

PeopleSoft Interaction Hub Resource Finder provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note: In addition to the PeopleSoft Interaction Hub Resource Finder custom navigation pages, PeopleSoft Interaction Hub Resource Finder provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

Pages Used to Navigate in PeopleSoft Interaction Hub Resource Finder

This table lists the custom navigation pages that are used to navigate in PeopleSoft Portal Resource Finder.

Core Objects

The Core Objects custom navigation pages are intended for the person in the organization who defines the core objects used by the Resource Finder repository.

Page Name	***Navigation***	***Usage***
Define Valid Value Group	Portal Administration, Resource Finder, Core Objects, Valid Value Groups, Define Valid Value Group	Define groups of valid values that can be associated with user-editable attribute types to constrain their values.
Define Valid Value Group - Delete Confirmation	Portal Administration, Resource Finder, Core Objects, Valid Value Groups, Define Valid Value Group Click the Delete this Valid Value Group button on the Define Valid Value Group page.	Confirm or cancel your selected deletion.
Define Attribute	Portal Administration, Resource Finder, Core Objects, Attributes, Define Attribute	Enter the data-driven definitions of the properties used to describe and relate participants. Define attributes to be assigned to participant types and display groups. Configure settings for attribute values, such as value types and requirements.
Define Attribute - Configure Attribute References	Portal Administration, Resource Finder, Core Objects, Attributes, Define Attribute On the Define Attribute page, select *Attribute Reference* from theValue Type drop-down list box, and then click theConfigure link.	Specify attribute references and edit controls for an attribute that derives its value by referencing one or more attributes.

Page Name	***Navigation***	***Usage***
Define Attribute - Configure User Edits	Portal Administration, Resource Finder, Core Objects, Attributes, Define Attribute On the Define Attribute page, select *Basic Data Attribute* from theValue Type drop-down list box, and then click theConfigure link.	Configure edit controls for an editable attribute that derives its value from a data source or user edit. If the attribute that you are defining is a straight data-derived attribute, setting the attribute type to Basic Data Attribute on the Define Attribute page is sufficient. Access the Define Attribute - Configure User Edits page only to allow a user to edit.
Define Attribute - Configure External Asset References	Portal Administration, Resource Finder, Core Objects, Attributes, Define Attribute On the Define Attribute page, select *External Asset Reference* from theValue Type drop-down list box, and then click theConfigure link.	Specify an external asset reference for an attribute type that derives its value by referencing an external asset. You must define external assets before configuring an external asset reference for an attribute type. See Configuring External Assets.
Define Attribute - Configure Participant References	Portal Administration, Resource Finder, Core Objects, Attributes, Define Attribute On the Define Attribute page, select *Participant Reference* from theValue Type drop-down list box, and then click theConfigure link.	Specify participant references for an attribute type that derives its value by referencing participant types.
Define Attribute - Delete Confirmation	Portal Administration, Resource Finder, Core Objects, Attributes, Define Attribute Click the Delete this Attribute ID button on the Define Attribute page.	Confirm or cancel your selected deletion.
Define External Asset Type	Portal Administration, Resource Finder, Core Objects, External Asset Types, Define External Asset Type	Assign attributes to external assets that determine the external asset details that appear on participant profiles. **Note:** You must already have defined these attributes on the Define Attribute page.

Page Name	***Navigation***	***Usage***
View Details - Attribute Details	Portal Administration, Resource Finder, Core Objects, External Asset Types, Define External Asset Type Click the View Details link on the Define External Asset Type page.	View attribute details to verify that you have selected the intended attribute.
Define External Asset Type - Delete Confirmation	Portal Administration, Resource Finder, Core Objects, External Asset Types, Define External Asset Type Click the Delete this External Asset Type ID button on the Define External Asset Type page.	Confirm or cancel your selected deletion.
Define Participant Type	Portal Administration, Resource Finder, Core Objects, Participant Types, Define Participant Type	Define the person or things that are relevant to the business in PeopleSoft Portal Resource Finder. Participant types can be employees, customers, organizations, organizational units, departments, divisions, and so on. Specify attributes that you want to be available for different types of participants.
View Details - Attribute Details	Portal Administration, Resource Finder, Core Objects, Participant Types, Define Participant Type Click the View Details link on the Define Participant Type page.	View attribute details to verify that you have selected the intended attribute.
Define Participant Types - Set Viewer Security	Portal Administration, Resource Finder, Core Objects, Participant Types, Define Participant Type Click the Set Viewer Security link on the Define Participant Type page.	Define row-level security by role or by user ID to limit viewer access to selected participant attributes on participant profiles for the selected participant type.
Define Participant Type - Delete Confirmation	Portal Administration, Resource Finder, Core Objects, Participant Types, Define Participant Type Click the Delete this Participant Type button on the Define Participant Type page.	Confirm or cancel your selected deletion.

Page Name	***Navigation***	***Usage***
Specify Add/Update Privileges	Portal Administration, Resource Finder, Core Objects, Participant Types, Define Participant Type Select the Specify Add/Update Privileges tab.	Specify roles and user IDs that have add and update access for the selected participant type. When users with the roles and user IDs that you specify access participant profiles for the selected participant type, they can add new attribute information or update existing attribute data for the participant.

Mappings

The Mappings custom navigation pages are intended for the person in the organization who sets up data maps between source systems and repository objects.

Page Name	***Navigation***	***Usage***
Define Data Sources - Specify Participant Types	Portal Administration, Resource Finder, Mappings, Data Sources, Define Data Sources	Specify the external data sources of import information for the Resource Finder repository, as well as the participant types for which they supply data. You identify these external data sources to ensure that only valid data sources are available for selection when a user maps Resource Finder data to external data source applications.
Define Data Sources - Specify Data Source Keys	Portal Administration, Resource Finder, Mappings, Data Sources, Define Data Sources Click the Specify Data Source Keys link on the Define Data Sources - Specify Participant Types page.	Define key fields that identify participant types in the selected data source. The values of these fields uniquely identify a participant associated with the selected participant type when these values are loaded from the specified data source. The Configure File Import Application Engine process (EPX_FILE_IMP) uses these key values to determine whether it is importing new participant data or updated data for an existing participant. Perform this setup for all data sources that supply data for the participant type.

Page Name	***Navigation***	***Usage***
Define Data Sources - Map Keys Between Data Sources	Portal Administration, Resource Finder, Mappings, Data Sources, Define Data Sources Click the Specify Data Source Keys link on the Define Data Sources - Specify Participant Types page, and then click theMap Keys Between Data Sources link.	Map the selected participant type key field to other key fields defined for other data sources that provide attribute data for the participant type. **Note:** Use this page if you have participant type data for the same participant being imported from different data sources and you need to ensure that the system doesn't create multiple sets of data solely based on the existence of multiple data sources.
Define Participant Map	Portal Administration, Resource Finder, Mappings, Participant Mappings, Define Participant Map	Specify the mappings between an external data source and Resource Finder repository participant type attributes.

Profile Management

The Profile Management custom navigation pages are intended for the person in the organization who defines and maintains repository profiles.

Page Name	***Navigation***	***Usage***
Define Display Group	Portal Administration, Resource Finder, Profile Management, Display Groups, Define Attribute Group	Logically group attribute IDs together. **Note:** You must already have defined relevant participant types on the Define Participant Type page.
Define Participant Profile	Portal Administration, Resource Finder, Profile Management, Participant Profiles, Define Participant Profile	Define participant profile and configuration settings that the system uses to build participant profiles dynamically.
View Details - Display Group	Portal Administration, Resource Finder, Profile Management, Participant Profiles, Define Participant Profile Click the View Details link on the Define Participant Profile page.	View display group details to verify that you have selected the intended display group.

Page Name	***Navigation***	***Usage***
Specify Profile Manager	Portal Administration, Resource Finder, Profile Management, Participant Profiles, Define Participant Profile Select the Specify Profile Manager tab.	Specify a profile manager for a participant profile. Profile managers are notified by email when their users modify user-editable profile attributes that require change notification. Profile managers can update user-editable information on profiles that are owned by their individual participants. An email notification of changes is sent to the email address that is defined for the profile manager on the Email Addresses page. See the product documentation for *PeopleTools: Security Administration* “Administering User Profiles,” Specifying User Profile Attributes.

Administration

The Administration custom navigation pages are intended for the person in the organization who manage Resource Finder administration and batch processes.

Page Name	***Navigation***	***Usage***
Define Advanced Search Option	Portal Administration, Research Finder, Administration, Search Options, Define Advanced Search Option	Specify attributes that you want to use as search parameters for the selected participant type on the Resource Finder - Advanced Search page.
View Details - Attribute Details	Portal Administration, Research Finder, Administration, Search Options, Define Advanced Search Option Click the View Details link on the Define Advanced Search Option page.	View attribute details. Information displayed on this page can help you verify that you have selected the intended attribute.
Select Search Parameter Attributes - Check Viewer Security	Portal Administration, Research Finder, Administration, Search Options, Define Advanced Search Option Click the Check Viewer Security link on the Define Advanced Search Option page.	To modify viewer access, access the Define Participant Types - Set Viewer Security page.

Page Name	***Navigation***	***Usage***
Specify Result Attributes	Portal Administration, Research Finder, Administration, Search Options, Define Advanced Search Option Select the Specify Result Attributes tab.	Specify attributes that you want to display as search results for the selected participant type on the Resource Finder - Advanced Search page.
View Details - Attribute Details	Portal Administration, Research Finder, Administration, Search Options, Define Advanced Search Option Select the Specify Result Attributes tab, and then click the View Details link.	View attribute details. Information displayed on this page can help you verify that you have selected the intended attribute.
Select Search Result Attributes - Check Viewer Security	Portal Administration, Research Finder, Administration, Search Options, Define Advanced Search Option Select the Specify Result Attributes tab, and then click the Check Viewer Security link.	Check viewer access for participant attribute search results on the Resource Finder - Advanced Search page.
Configure Organization Charting	Portal Administration, Resource Finder, Administration, Organization Charting, Configure Organization Charting	Activate organization charts for your Resource Finder implementation. Select the organization charting options that the Resource Finder will display on participant profile pages.
Build Search Indexes	Portal Administration, Search, Build Search Indexes Select the delivered *PAPP_RESOURCE_ FINDER* run control ID. See "Building Search Indexes" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).	Create the Resource Finder search collection.
Configure File Import	Portal Administration, Resource Finder, Batch Processing, Configure File Import, Configure File Import	Enter run control parameters and select XML-formatted files for inclusion in updates to the Resource Finder repository.
Load Participant User IDs	Portal Administration, Resource Finder, Batch Processing, Load Participant User Ids, Load Participant User IDs	Run a batch process to update Resource Finder participants with corresponding user IDs.

Page Name	***Navigation***	***Usage***
Participant Profile	Portal Administration, Resource Finder, Administration, Search Options, Resource Finder Advanced Search Click the Participant Profile link in the email that you received notifying you of changes to a participant profile.	View and edit information on your profile. View and modify information displayed on a profile for which you have been given Participant type manager Update/Add access. View the selected participant in an organization chart based on available participant reference attributes.
Personalize Resource Finder	Click the Customize icon on the Resource Finder pagelet.	Personalize your Resource Finder pagelet and Resource Finder - Advanced Search page to display a default participant type for your searches. Set your organization chart and image display options. You can specify different default participant types and display options for each home page tab on which the Resource Finder pagelet appears in your PeopleSoft Interaction Hub.
Resource Finder - Advanced Search	• Enter search criteria on the Resource Finder pagelet and click the Search button. • Click the Advanced Search link on the Resource Finder pagelet. • Click the Resource Finder link on the PeopleSoft Interaction Hub header.	View results for Resource Finder pagelet searches, perform detailed Resource Finder searches, and access relevant participant profiles.
Resource Finder - Search Tips	Click the Advanced Search link on the Resource Finder pagelet. Click the Search Tips link on the Resource Finder - Advanced Search page.	View an outline of search techniques you can use to expand and constrain searches.

Chapter 2

Setting Up Core Tables

Understanding Core Table Objects

Resource Finder core table objects work together to provide a configurable repository that can receive data loads containing information about any entity, along with links that relate these entities to each other. These entities, or participants, typically include customers, suppliers, employees, departments, locations, companies, and business units. Resource Finder enables you to find information about any of these resources by using a single search interface and to discover relationships between resources.

Note: Before you can configure and use PeopleSoft Resource Finder, you must select the Enable Resource Finder option on the Interaction Hub Installation Options page.

See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

You can configure Resource Finder so that you can grant access for specific users and roles to update attribute information for all participants of a particular type. You can also configure the system to enable end users to edit certain attributes on their own profiles.

Setting up these core table objects:

- Configures the kinds of data that are loaded into the Resource Finder repository.
- Configures how the pieces of data relate to each other.
- Configures the format of end-user search and profile pages.

Resource Finder core tables use these basic elements:

- Participant types

  Define the core entities of Resource Finder. Examples include employees, contractors, customer contacts, and supplier contacts. However, participants can also refer to entities that are not people, such as companies, customers, suppliers, departments, locations, business units, universities, and government agencies. Associate attributes with participants to uniquely identify participants in the repository.

- Valid value groups

  Provide users with consistent and valid selectable values for any editable attributes that you associate with them. A valid value group acts like a set of PeopleSoft application translate-table values for an associated editable attribute. Setting up valid value groups is optional.

- Attributes

  Provide users with information about the enterprise participants with which you associate them. Attributes are data-driven definitions of properties that describe participants. Examples include name, phone number, email address, physical address, location, role, and homepage URL.

Associating attributes with participants provides the information that Resource Finder needs to identify the participant resources within the user community and to relate participants to each other.

- External assets

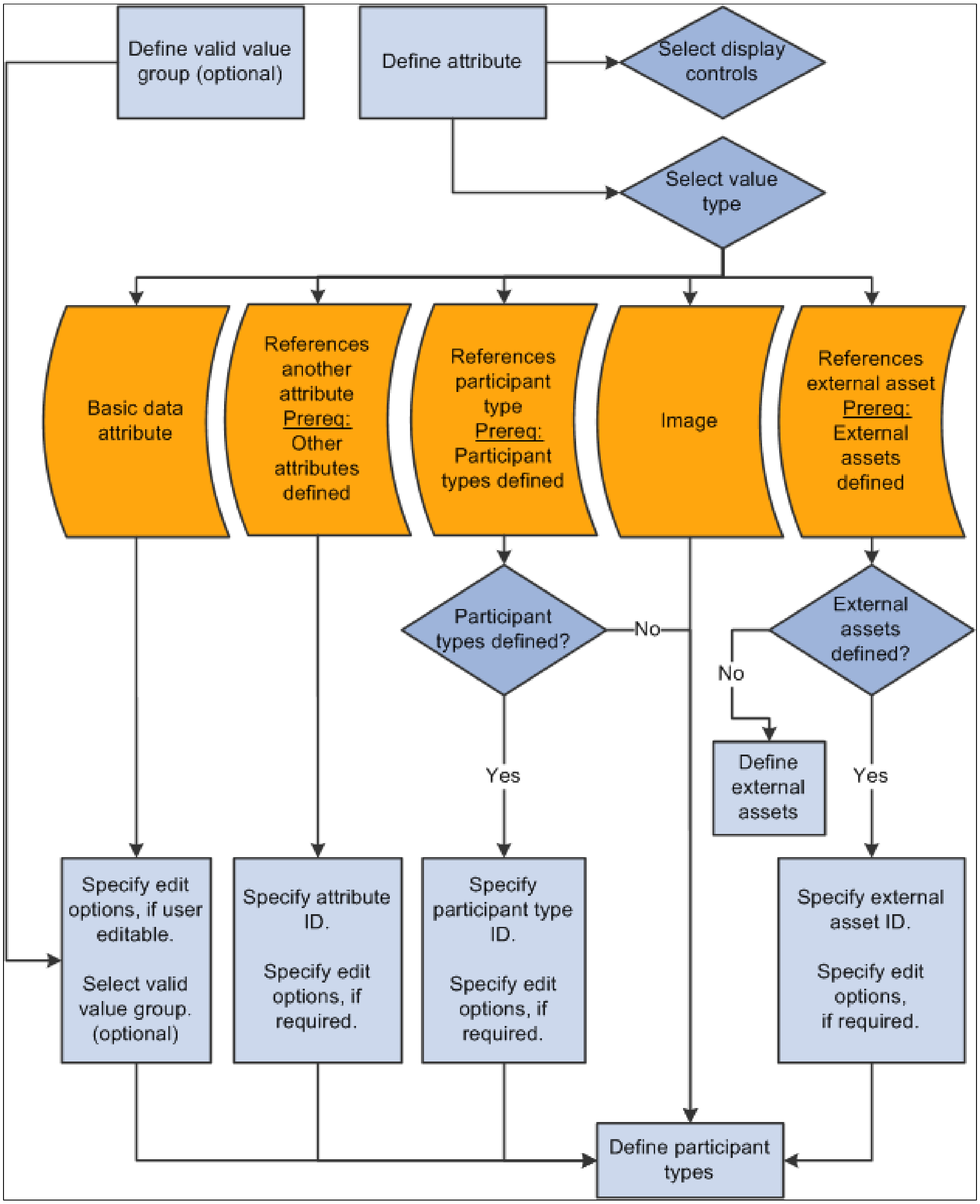
  External assets are lightweight references to objects that are outside the repository that you want to make available for association with participants. Example external assets include courses and publications from tributary systems. Resource Finder can make these associations between participants and external assets by using the external asset's metadata.

  An external asset that is associated with a participant appears in summary form on the participant's profile along with a link to provide appropriate access to the asset that is stored in the tributary system. Tributary systems include document management applications, spreadsheets, and enterprise resource applications.

Image: Resource Finder core table object data flow

The following image is an example of Resource Finder core table object data flow.

This data flow illustrates how the core table elements work together to provide the foundation of the Resource Finder repository.



Configuring Valid Value Groups

This section discusses how to use the Valid Value Groups component (EPX_DOMAIN) to define valid value groups and confirm a deletion.

Pages Used to Configure Valid Value Groups

Page Name	***Definition Name***	***Usage***
Define Valid Value Group Page	EPX_DOMAIN	Define a group of valid values that can be associated with user-editable attribute types to constrain their values.
Define Valid Value Group - Delete Confirmation Page	EO_PE_DEL_CONFIRM	Confirm or cancel your selected deletion. This page also prompts you for confirmation when you delete an attribute on the Define Attribute page, an external asset on the Define External Asset Type page, or a participant type on the Define Participant Type page.

Define Valid Value Group Page

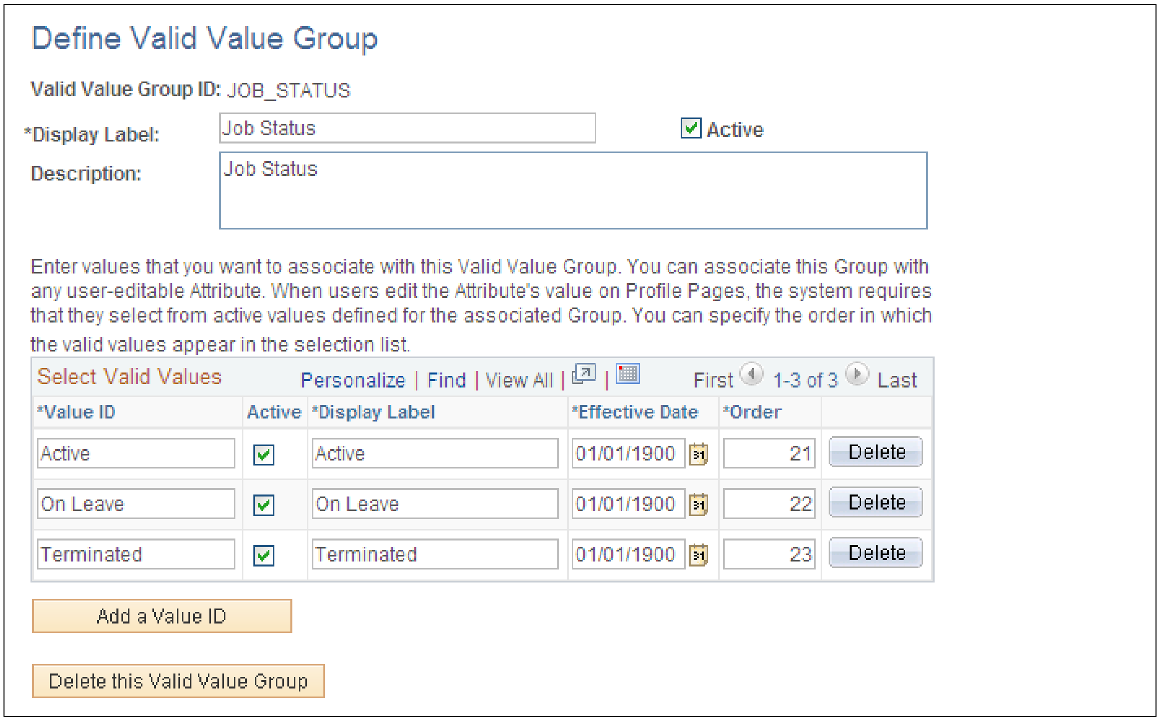
Use the Define Valid Value Group page (EPX_DOMAIN) to define a group of valid values that can be associated with user-editable attribute types to constrain their values.

Navigation

Portal Administration, Resource Finder, Core Objects, Valid Value Groups, Define Valid Value Group

Image: Define Valid Value Group page

The following screen shot defines Valid Value Group page. You can associate with a valid value group by entering valid values.



Display Label

Enter a label for the valid value group ID.

This label appears with the ID wherever it is referenced. This label may also appear in place of the valid value group ID when the ID is selected and displayed.

Active

Deselect to make the valid value group ID unavailable for selection for future associations.

Inactivating a group ID does not affect preexisting associations; however, we recommend that you not inactivate a widely used ID.

Description

Enter text for your information only. This description does not appear elsewhere in the system.

Select Valid Values

Value ID

Enter the values that users can select for the valid value group ID. The values that you enter constrain user entries, but they do not constrain values that are supplied by external data sources.

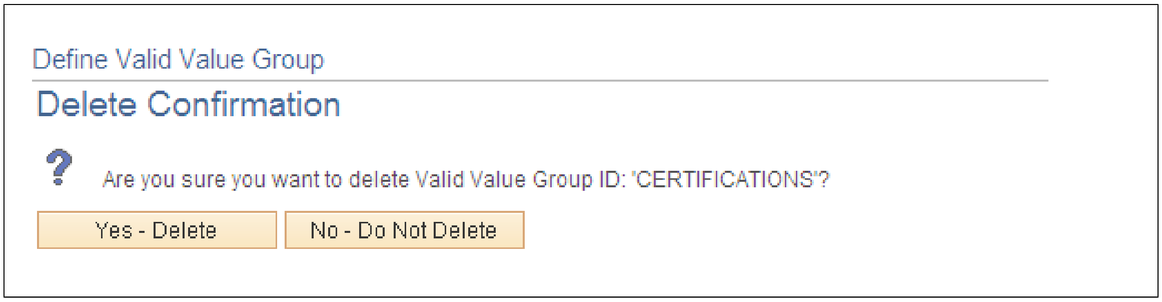
	For example, you can enter *Active, Leave of Absence,* and*Terminated* for the JOB_STATUS valid value group ID. You can then associate the JOB_STATUS valid value group ID with the JOB_STATUS attribute and associate the attribute with the EMPLOYEE participant type. When a user selects the job status for an employee on the employee's profile page, the three valid values in the group are available for selection. The value ID is stored as the attribute value in the repository. This value is searchable.
Active	Deselect to inactivate the value and remove it from all display contexts in which it is referenced.
Display Label	Enter a label that appears in place of the value ID when a user selects the value for an associated attribute. For example, if you enter *CA* for the value ID and enter*California* for the display label, the system stores*CA,* but it displays*California* on a relevant profile. The display value is not the stored value.
Order	Enter the order in which the valid values appear in the selection list for an attribute with which the valid values group ID is associated. If multiple values have the same order value, they are sorted alphabetically based on their display label text. You can use an ordering scheme that enables you to add values within the selection list without having to renumber all existing values.
Delete this Valid Value Group	You cannot delete a valid value group if it is being used or referenced elsewhere. This delete option is primarily for you to correct newly entered definitions and values. If Resource Finder detects that the object is available for deletion, it prompts you to confirm your deletion on the Define Valid Value Group - Delete Confirmation page. After you confirm the deletion, the object is deleted, along with any data that is associated with it. Resource Finder stops the deletion and prompts you with an error message if an attribute has already been associated with the valid value group, thus making the group unavailable for deletion.

Define Valid Value Group - Delete Confirmation Page

Access the Define Valid Value Group - Delete Confirmation page (select Portal Administration, Resource Finder, Core Objects, Valid Value Groups; and click theDelete This Valid Value Group button on the Define Valid Value Group page).

Image: Define Valid Value Group - Delete Confirmation page

The following screenshot is an example of define Valid Value Group - Delete Confirmation page.



Use this page to confirm or cancel your selected deletion.

Note: This page also prompts you for confirmation when you delete an attribute on the Define Attribute page, an external asset on the Define External Asset Type page, or a participant type on the Define Participant Type page.

Configuring Attributes

This section discusses how to use the Attributes component (EPX_ATTRIBUTE) to describe properties of attribute type and configure attribute references, external asset references and participant references.

Pages Used to Configure Attributes

Page Name	***Definition Name***	***Usage***
Define Attribute Page	EPX_ATTRIBUTE	Define attributes to be assigned to participant types and display groups. Configure settings for attribute values, such as value types and requirements.
Define Attribute - Configure Attribute References Page	EPX_ATTRREFTYP_SEC	Specify attribute references and edit controls for an attribute that derives its value by referencing one or more attributes.

Page Name	***Definition Name***	***Usage***
Define Attribute - Configure User Edits Page	EPX_ATTR_USRED_SEC	Configure edit controls for an editable attribute that derives its value from a data source or user edit. If the attribute that you are defining is a straight data-derived attribute, setting the attribute type to *Basic Data Attribute* on the Define Attribute page is sufficient. Access the Define Attribute - Configure User Edits page only to allow a user edit.
Define Attribute - Configure External Asset References Page	EPX_COMPREFTYP_SEC	Specify an external asset reference for an attribute type that derives its value by referencing an external asset. You must define external assets before configuring an external asset reference for an attribute type.
Define Attribute - Configure Participant References Page	EPX_PARTREFTYP_SEC	Specify participant references for an attribute type that derives its value by referencing participant types.
Define Attribute - Delete Confirmation Page	EO_PE_DEL_CONFIRM	Confirm or cancel your selected deletion. See Define Attribute Page to know more about Delete Confirmation page.

Define Attribute Page

Access the Define Attribute page (select Portal Administration, Resource Finder, Core Objects, Attributes, Attribute Type, Define Attribute).

Image: Define Attribute page

The following screenshot is an example of Define Attribute page. The settings control the attribute's display on participant profile pages and indicate how the attribute's value is obtained.

Attribute ID

Do not use these terms as attribute IDs:

- Title
- Author
- Keywords
- Snippet

- MIME-Type
- Charset
- To
- Date
- NewsGroups
- PageMap

These terms are field names that are reserved for use in Verity's proprietary search index format, which is used to build the Resource Finder search collection. The attribute IDs that you define here become fields in the search collection. Therefore, if you use any of the reserved text as attribute IDs, the Build Search Indexes Application Engine process (EO_PE_IBLDR) that builds the search collection using the preferred *PAPP_ RESOURCE_FINDER* run control ID fails.

As an alternative, you can qualify attribute names with context-specific modifiers. For example, use ARTICLE_TITLE, BOOK _AUTHOR, BIRTH_DATE, and so forth.

Display Label

Enter a label for the attribute that appears along with the attribute wherever it is referenced.

This label appears in place of the attribute ID when it is referenced on a participant profile.

Active

Deselect to inactivate the attribute and remove it from all display contexts in which it is referenced.

Description

Enter text for your information only.

This does not appear elsewhere in the system.

Value Control Settings

Attribute Type

Specify how the value of the attribute is determined by the repository by selecting the type of value that is allowable for the attribute. An attribute can have only one attribute type. The type influences the way that the system displays the value on profile pages and the controls that the system provides for setting the attribute value in update mode.

Attribute Reference: Select this option to indicate that allowable values are references to other attributes. To enable users to select from multiple values, select theUser Editable option and enter multiple attribute ID values. To provide a single default value, deselect theUser Editable option and enter a single attribute ID value.

See Define Attribute - Configure Attribute References Page.

Basic Data Attribute: Select this option to indicate that allowable values are supplied either by a data source or by online edits from a user.

See Define Attribute - Configure User Edits Page.

External Asset Reference: Select this option to indicate that allowable values are references to external assets that are supplied either by a data source or by online edits from a user.

See Define Attribute - Configure External Asset References Page.

Participant Reference: Select this option to indicate that allowable values are references to participants that are supplied either by a data source or by online edits from a user.

See Define Attribute - Configure Participant References Page.

Image: Select this option to indicate that allowable values are image uniform resource locators (URLs) that are supplied by a data source.

Configure

When the Attribute Type field is set to*Attribute Reference,* click to access the Define Attribute - Configure Attribute References page.

When the Attribute Type field is set to*Basic Data Attribute,* click to access the Define Attribute - Configure User Edits page. If the attribute that you are defining is a straight data-derived attribute, setting the attribute type to*Basic Data Attribute* on this page is sufficient. Access the Define Attribute - Configure User Edits page only to allow a user edit.

When the Attribute Type field is set to*External Asset Reference,* click to access the Define Attribute - Configure External Asset References page.

When the Attribute Type field is set to*Image,* this link is unavailable. Image URL values can be supplied only by data sources and cannot be edited online.

When the Attribute Type field is set to*Participant Reference,* click to access the Define Attribute - Configure Participant References page.

Value Required

Select to indicate that the attribute must have an associated value when it is referenced on a participant profile. The attribute value can originate from an end user or from an established data source.

This requirement is enforced only when the participant profile is accessed in update mode either by users with update privileges for relevant participant types or by the profile owner.

Display Control Settings

Data Type

Select the data type to indicate how to format attribute data for display on participant profiles. For example, the system left-justifies strings and Boolean expressions, right-justifies numbers, and uses masks to display dates and times according to global standards.

The data type setting is used for formatting purposes only. The system does not verify that the data that is entered for the attribute matches the data type setting. For example, the system does not verify that numeric data was entered for an attribute with a number data type setting.

Date: Select this option to provide date formatting. In update mode, this provides a date prompt.

Number: Select this option to provide left-justified formatting.

String: Select this option to provide a basic string edit box.

Control Type

Displays the method by which attribute data is presented on the participant profile. The system assigns the control type based on the settings in the attribute definition when you save the page. The system adjusts the control type if you make relevant modifications to the attribute definition.

Edit Box: Indicates an attribute that allows only one value, has a value type of*Basic Data Attribute,* and does not have an associated valid value group.

Long Edit: Indicates an attribute that allows only one value, has a value type of*Basic Data Attribute,* does not have an associated valid value group, and has a value that is longer than 254 characters. Because the value length is not determined by the attribute definition, the control type is resolved when the data value is rendered and displayed on a participant profile.

List Box: Indicates an attribute that allows only one value, has a value type of*Basic Data Attribute,* and has an associated valid value group containing between 6 and 50 values. This control type also indicates an attribute with a value type of*Attribute Reference,* in which case the drop-down list box is populated with the descriptive names of reference-able attributes.

Edit Box with Prompt: Indicates an attribute that allows only one value, has a value type of*Basic Data Attribute,* and has an associated valid value group containing more than 50 values.

Grid: Indicates an attribute that allows multiple values.

	P Link (participant link): Indicates an attribute that allows only one value and has a value type of*Participant Reference.* This control type appears on a participant profile as a link to another participant profile for a related manager, department, or other participant, for example. *Image:* Indicates an attribute that has a value type of*Image.* This control type appears on a participant profile as the associated image. *Static Text with Prompt:* Indicates an attribute that allows only one value and has a value type of*External Asset Reference.*
Render as Hyperlink	Select to display the attribute as a link on the participant profile. Use this option to link email addresses, URLs, and instant messaging IDs.
URL Template	If the Render as Hyperlink option is selected, enter an HTML string to help define the action of the linked attribute. The string should contain an asterisk where you want the value of the attribute to be appended to the URL template. For example, you can create an EMAIL_ADDRESS attribute and enter *mailto:** in this field to render the attribute value into amailto link that opens the default email system from the browser. You can also create a TICKER_SYMBOL attribute and have it render as a link that accesses relevant stock information. Enter the path to a stock website and insert an asterisk to indicate where the ticker symbol value should be placed in the URL string.
Delete this Attribute ID	You cannot delete an attribute if it is being used or referenced elsewhere. This delete option is primarily for you to correct newly entered definitions and values. If Resource Finder detects that the object is available for deletion, it prompts you to confirm your deletion on the Define Attribute - Delete Confirmation page. After you confirm the deletion, the object is deleted, along with any data that is associated with it. Resource Finder stops the deletion and prompts you with an error message if the attribute is unavailable for deletion because it is associated with: • Attribute references. • Display groups. • External asset constraints. • External asset attribute values.

- Data sources and related participant data mapping.
- Search result fields.
- Search parameter fields.
- Organization chart default attributes.
- Participant type or attribute associations and related viewer privileges.
- Participant attribute values.

Define Attribute - Configure Attribute References Page

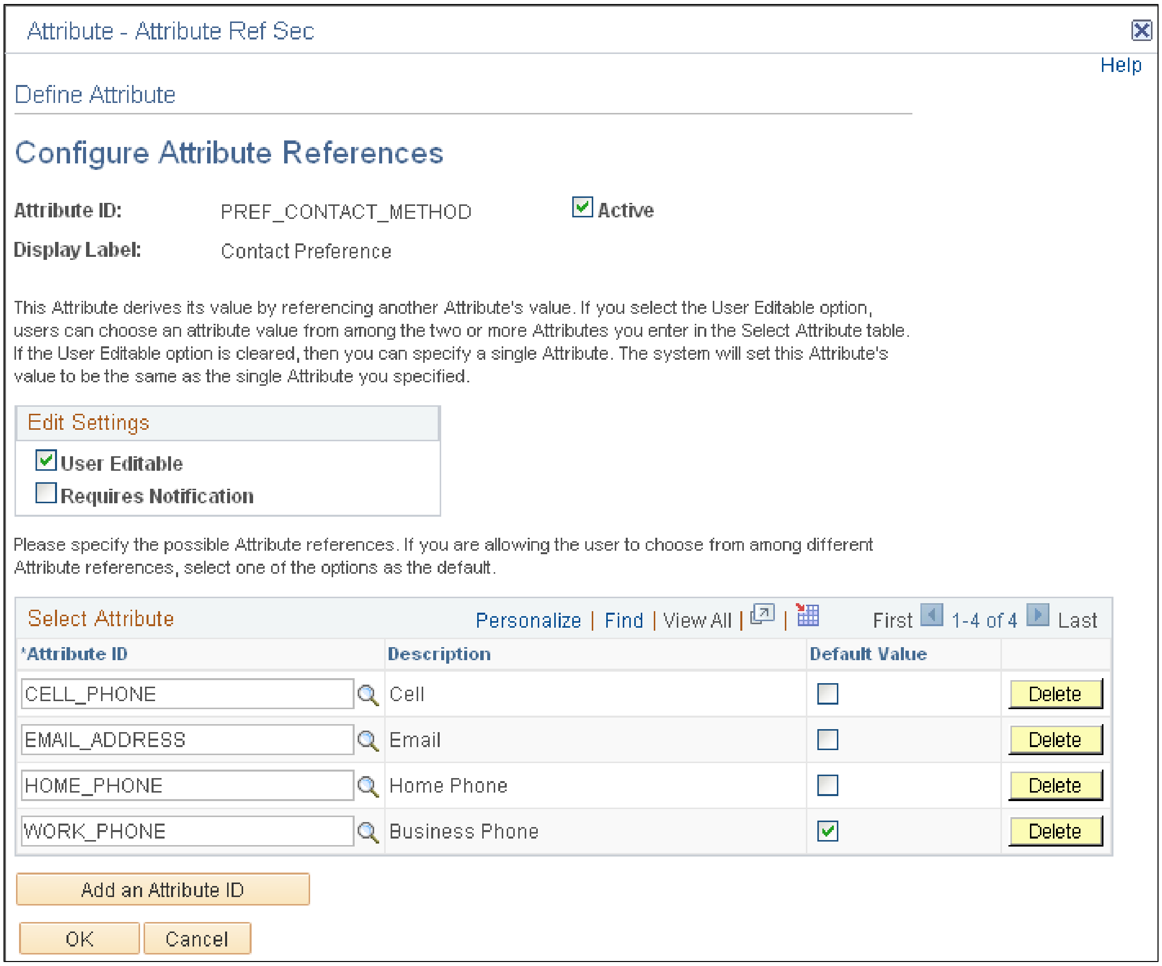
Access the Define Attribute - Configure Attribute References page (select Portal Administration, Resource Finder, Core Objects, Attributes, Attribute Type, Define Attribute; click theConfigure link on the Define Attribute page when theValue Type field is set to*Attribute Reference*).

When you select an attribute type of *Attribute Reference* on the Define Attribute page, you create an attribute that derives its value from another attribute. For example, you can create a PREF_CONTACT_METHOD attribute with the Attribute Reference attribute type.

When you configure the PREF_CONTACT_METHOD attribute on the Define Attribute - Configure Attribute References page, you can set up the attribute to enable end users to select from multiple values for the attribute when they access it on profile pages, as shown in this example:

Image: Define Attribute - Configure Attribute References page

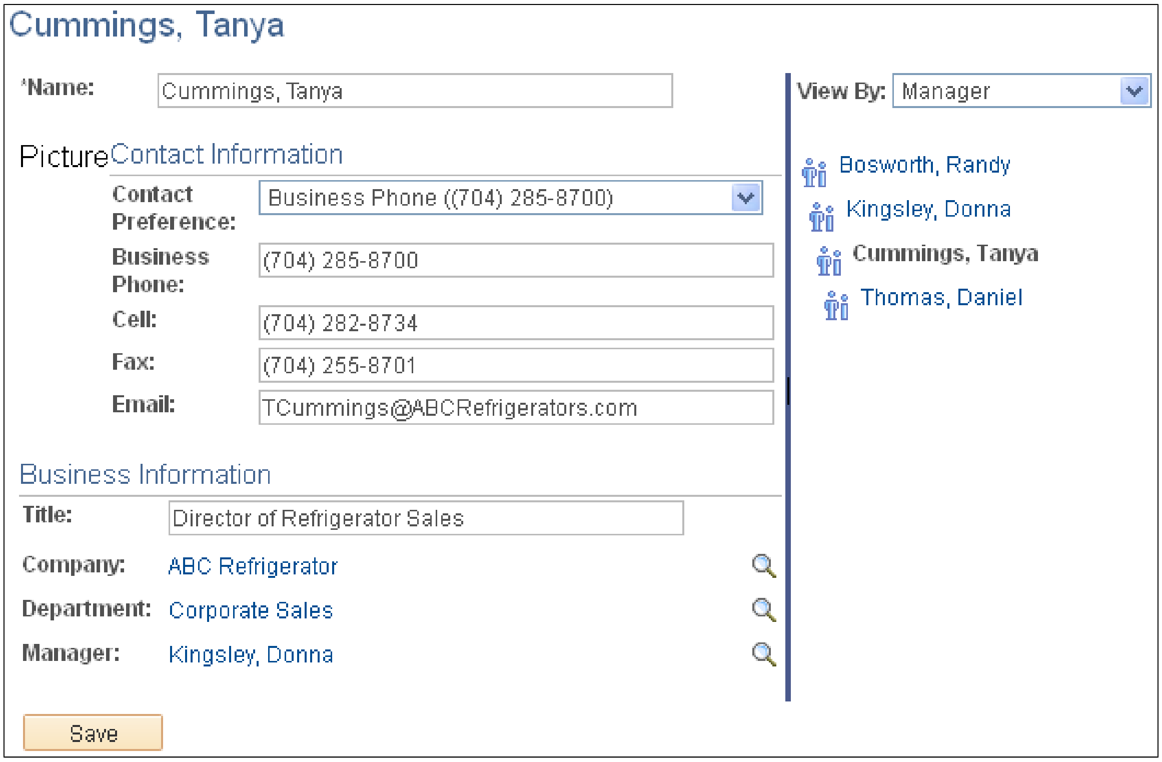
The following screenshot is an example of Define Attribute - Configure Attribute References page where in the attributes enable end users to select from multiple values when they access it on profile pages.



The PREF_CONTACT_METHOD attribute appears in the following way on relevant profiles:

Image: Resource Profile page, Tanya Cummings

The following screenshot is an example of Resource Profile page for Tanya Cummings.



You can also set up the attribute to display a single, noneditable default value for the attribute on relevant profiles by deselecting the User Editable option on the Define Attribute - Configure Attribute References page. This setup enables you to enter a single attribute ID value. For example, you can set all contact preferences of participants to*Email* and not allow any unauthorized users to change this information.

See Define Attribute - Configure Attribute References Page, Building Your Resource Finder Search Index.

Define Attribute - Configure User Edits Page

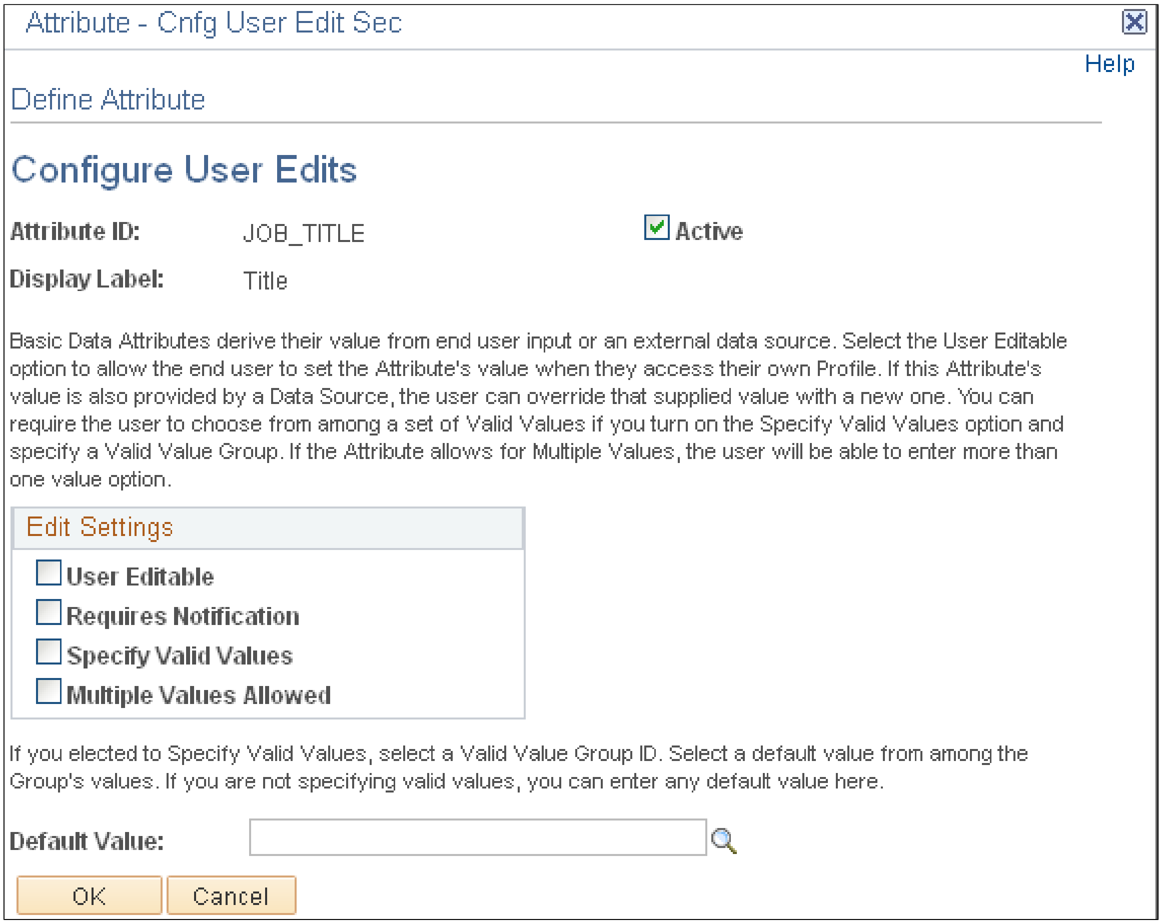
Access the Define Attribute - Configure User Edits page (select Portal Administration, Resource Finder, Core Objects, Attributes, Attribute Type, Define Attribute; click theConfigure link on the Define Attribute page when theValue Type field is set to*Basic Data Attribute*).

When you select an attribute type of *Basic Data Attribute* on the Define Attribute page, you create an attribute for which the allowable values are supplied either by a data source or by an online edit. For example, you can create a JOB_TITLE attribute with the Basic Data Attribute type. Because you do not need an online user edit, you do not need to set anything beyond the attribute type.

When you configure the JOB_TITLE attribute on the Define Attribute - Configure User Edits page, you may want to set it up as shown in this example:

Image: Define Attribute - Configure User Edits page

This example illustrates the fields and controls on the Define Attribute - Configure User Edits page.

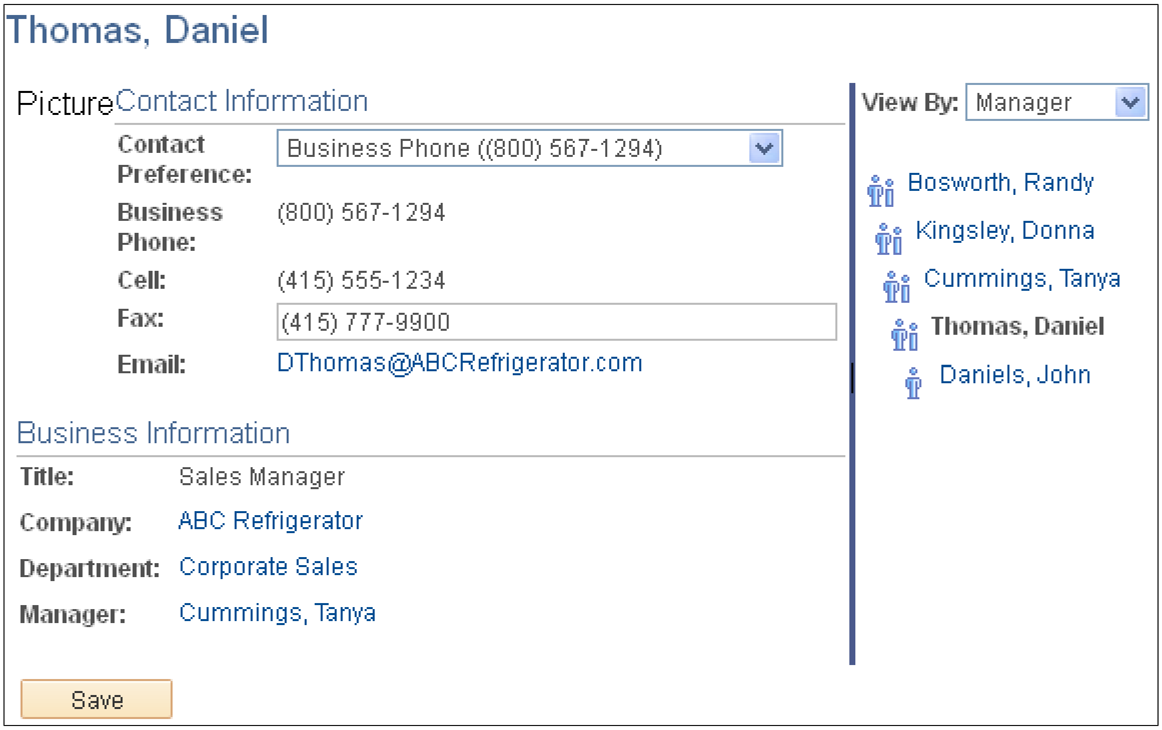


Because the data in the preceding example is most likely to be loaded into the system from a data source and not entered by end users, do not select the User Editable option.

The JOB_TITLE (Title) attribute appears in the following way on relevant profiles:

Image: Resource Profile page, Thomas Daniel

The following screenshot is an example of Resource Profile page for Thomas Daniel.



See Define Attribute - Configure User Edits Page.

Define Attribute - Configure External Asset References Page

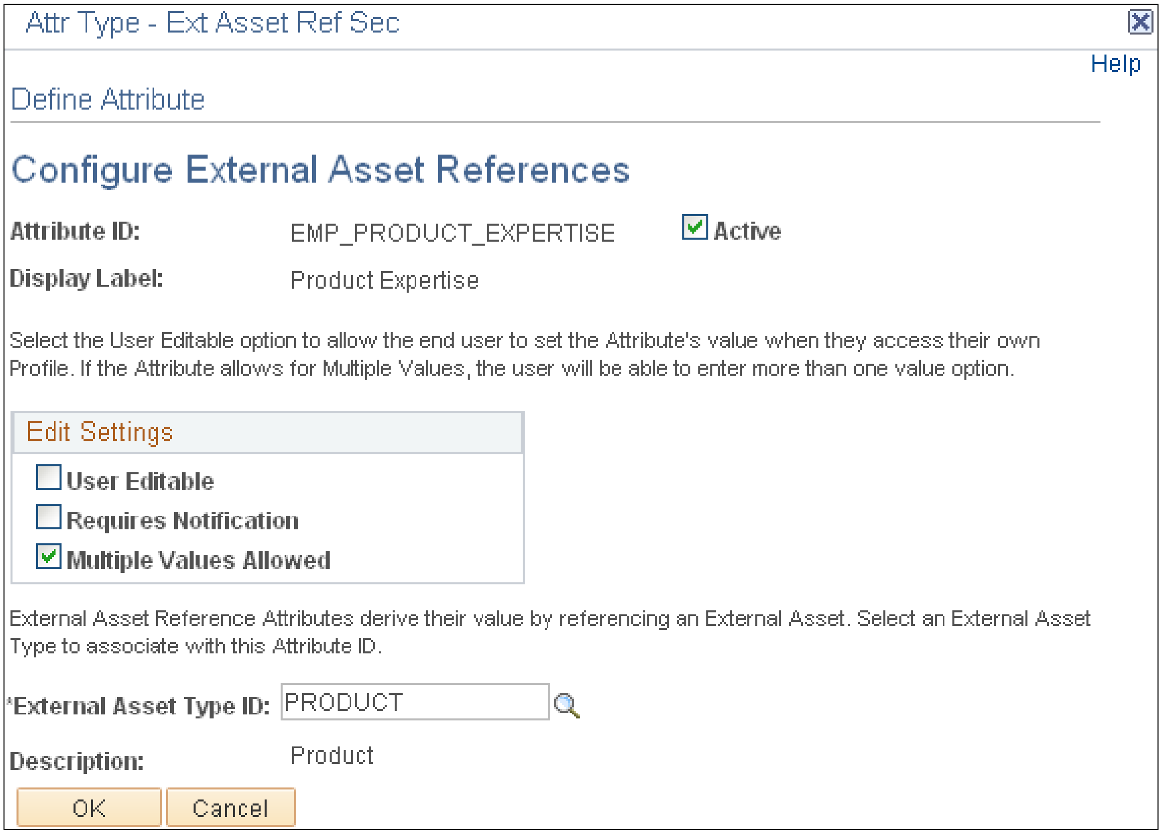
Access the Define Attribute - Configure External Asset References page (select Portal Administration, Resource Finder, Core Objects, Attributes, Attribute Type, Define Attribute; click theConfigure link on the Define Attribute page when theValue Type field is set to*External Asset Reference*).

When you select an attribute type of *External Asset Reference* on the Define Attribute page, you create an attribute for which the allowable value is a reference to an external asset. For example, you can create an EMP_PRODUCT_EXPERTISE attribute with an External Asset Reference type.

When you configure the EMP_PRODUCT_EXPERTISE attribute on the Define Attribute - Configure External Asset References page, you may want to set it up as shown in this example:

Image: Define Attribute - Configure External Asset References page

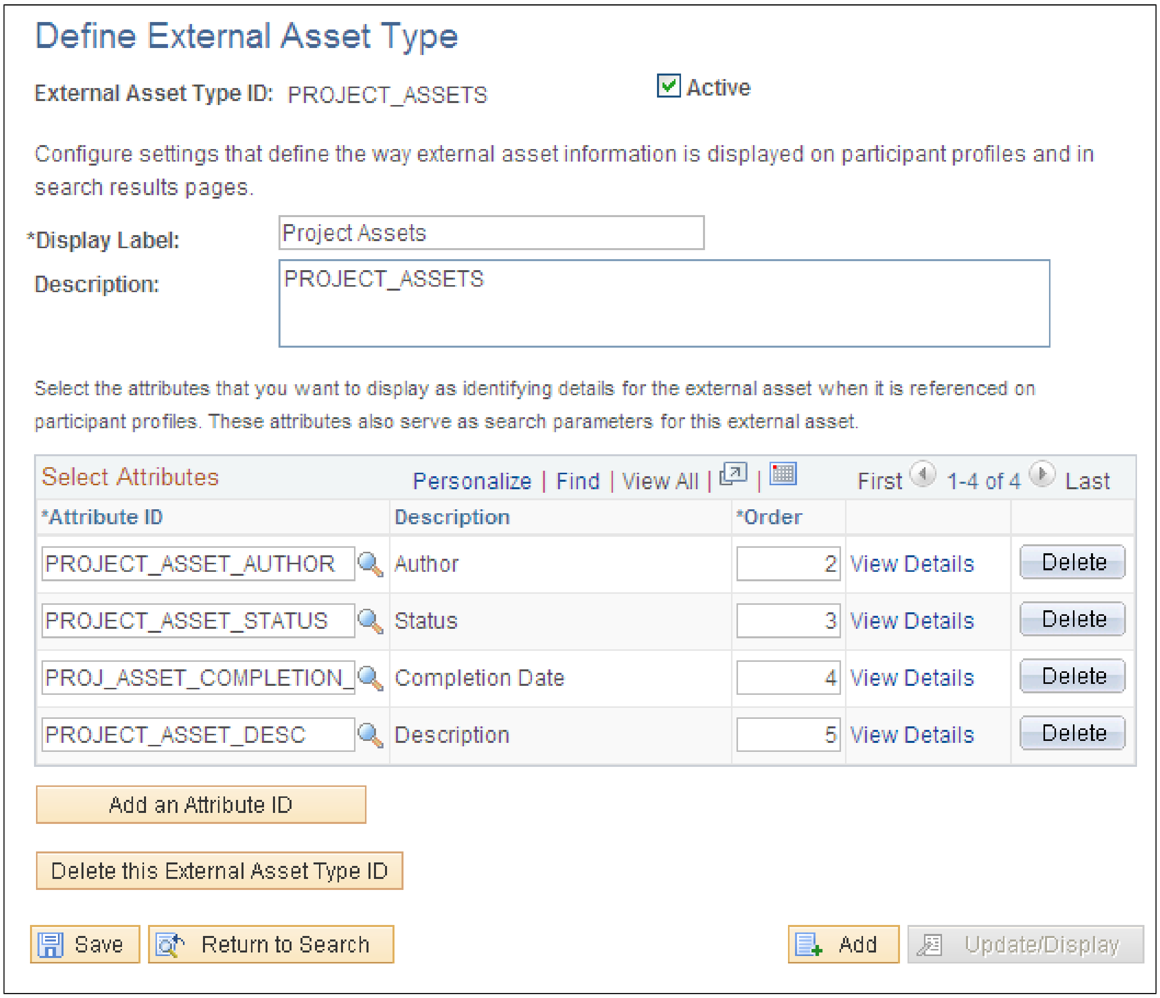
This example illustrates the fields and controls on the Define Attribute - Configure External Asset References page.



The EMP_PRODUCT_EXPERTISE external asset attribute derives its value by referencing the PRODUCT external asset type, which is defined on the Define External Asset Type page (Portal Administration, Resource Finder, Core Objects, External Asset Types) in the following way:

Image: Define External Asset Type page

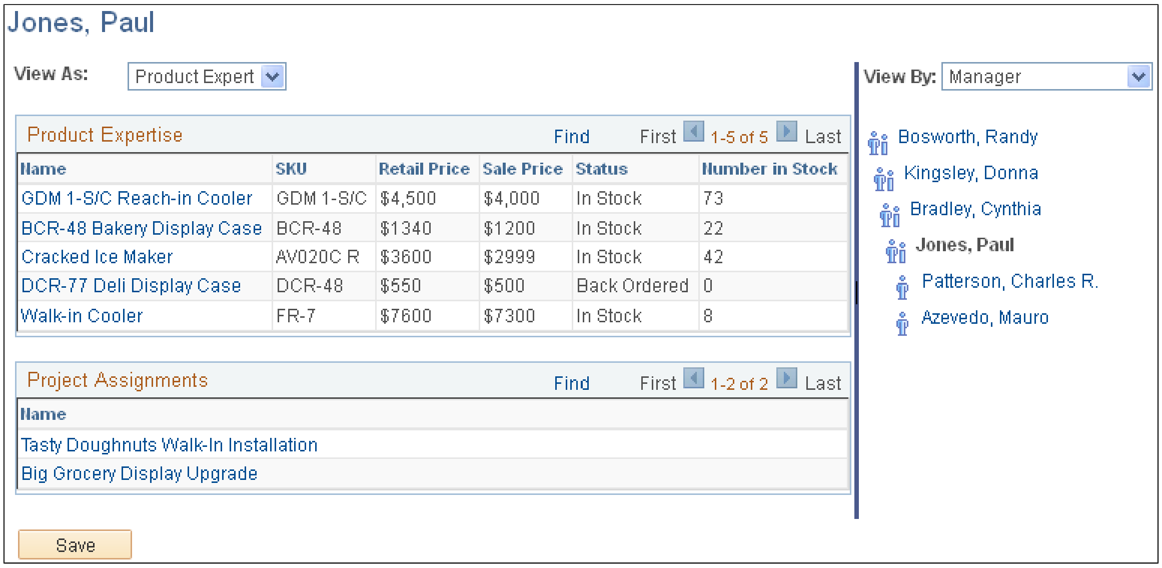
The following is an example of Define External Asset Type page where in you can configure settings that define the way external asset information is displayed on the participant profiles and in the search results page.



This setup, in turn, causes the EMP_PRODUCT_EXPERTISE attribute to appear on a profile in the following way:

Image: Resource Profile page, Paul Jones

The following screenshot is an example of Resource Profile page for Paul Jones.



In the preceding example, the attribute displays the external asset name and five columns based on the attributes that are associated with the asset.

The EMP_PRODUCT_EXPERTISE external asset reference attribute helps illustrate a participant's product expertise, while also providing links to an external system that stores product information, such as product prices, specifications, and inventory data.

See Define Attribute - Configure External Asset References Page.

Define Attribute - Configure Participant References Page

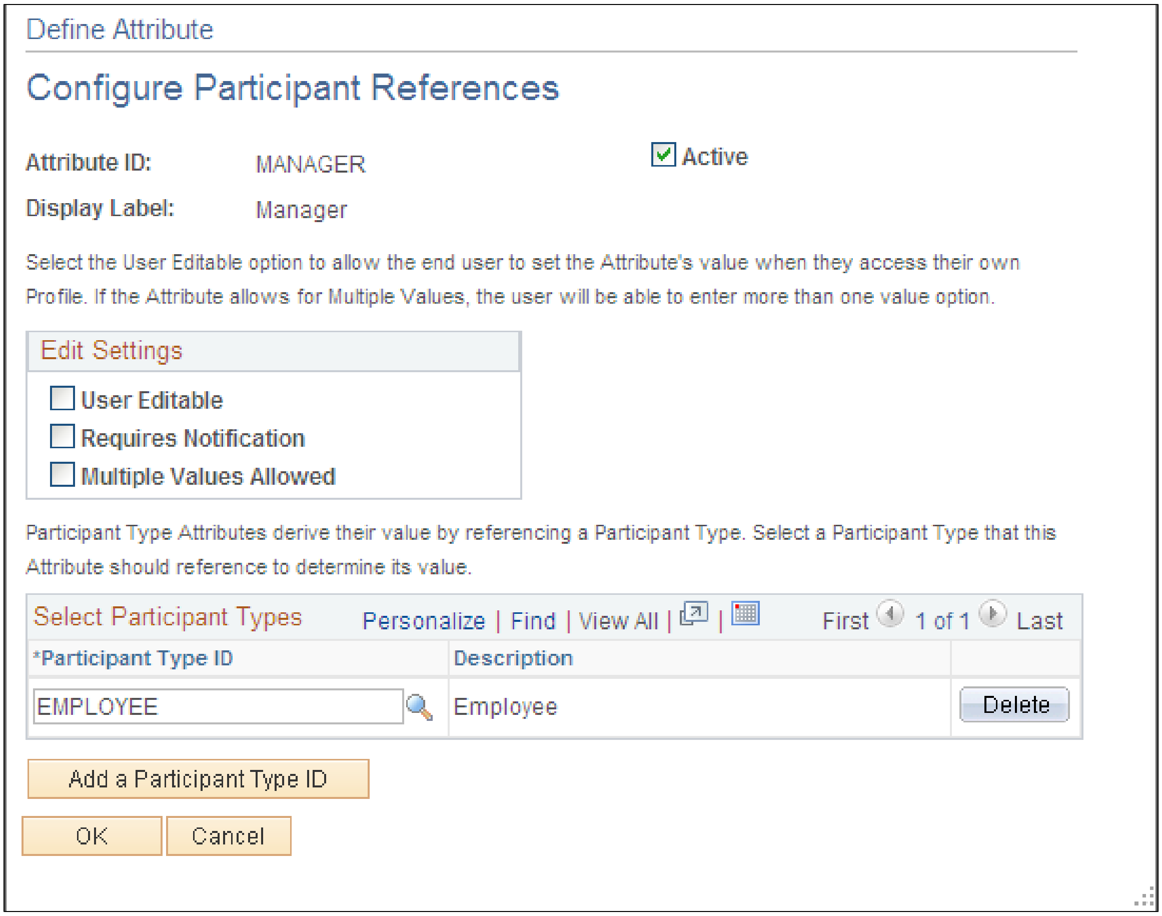
Access the Define Attribute - Configure Participant References page (select Portal Administration, Resource Finder, Core Objects, Attributes, Attribute Type, Define Attribute; click theConfigure link on the Define Attribute page when theValue Type field is set to*Participant Reference*).

When you select an attribute type of *Participant Reference* on the Define Attribute page, you create an attribute for which the allowable value is a reference to a Resource Finder participant. For example, you can create a MANAGER attribute as a Participant Reference attribute type.

When you configure the MANAGER attribute on the Define Attribute - Configure Participant References page, you may want to set it up as shown in this example:

Image: Define Attribute - Configure Participant References page

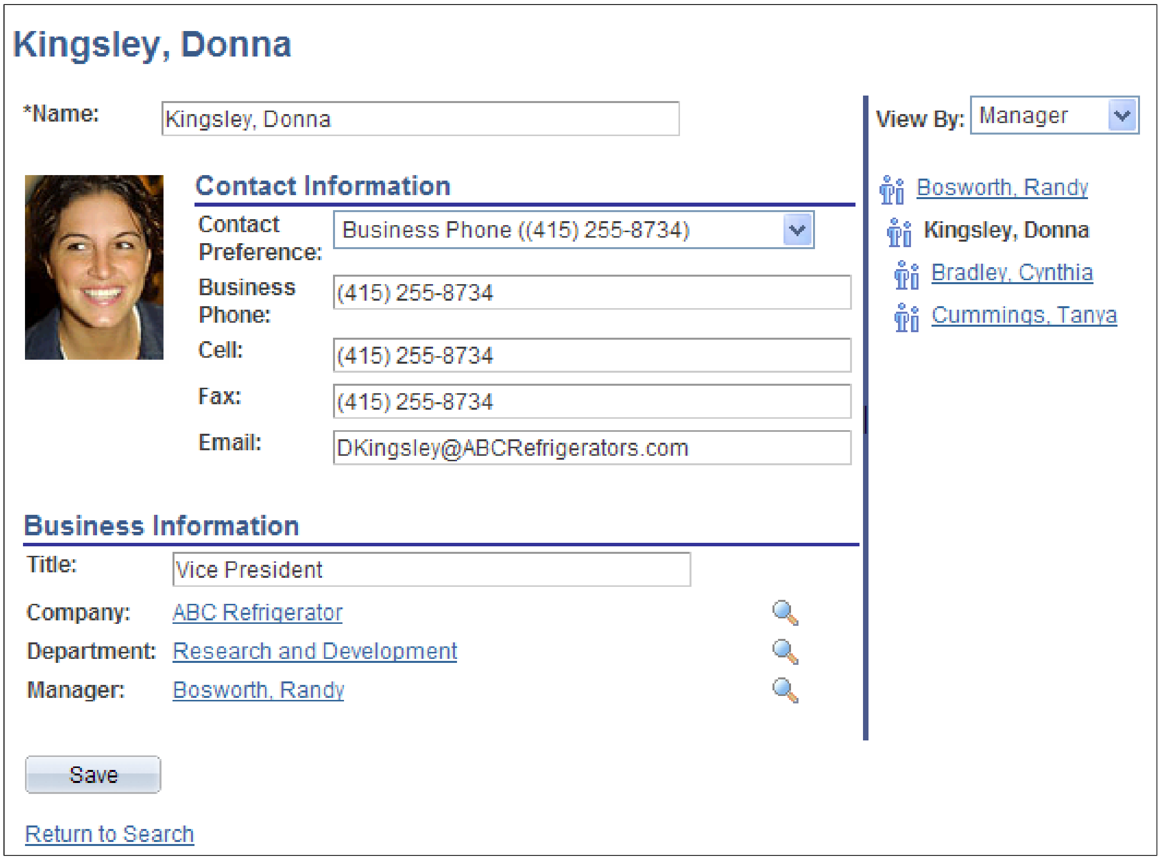
The following screenshot is an example of Define Attribute - Configure Participant References page where in the user editable edit setting allows the end user to set the attribute value when they access their own profile.



The MANAGER participant reference attribute configuration shown here is for EMPLOYEE values that will likely be loaded into Resource Finder from a data source. If so, the system determines the identity of the referenced participant based on key identifying information that you provide in the data source configuration. The MANAGER attribute appears in the following way on relevant profiles:

Image: Resource Profile page

The following screenshot is an example of Resource Profile page for Donna Kingsley.



You can click the name link for the manager to access the profile of that manager.

If you configure a Participant Reference attribute to be user-editable, users can select from a list of valid participants within the participant types that you have selected.

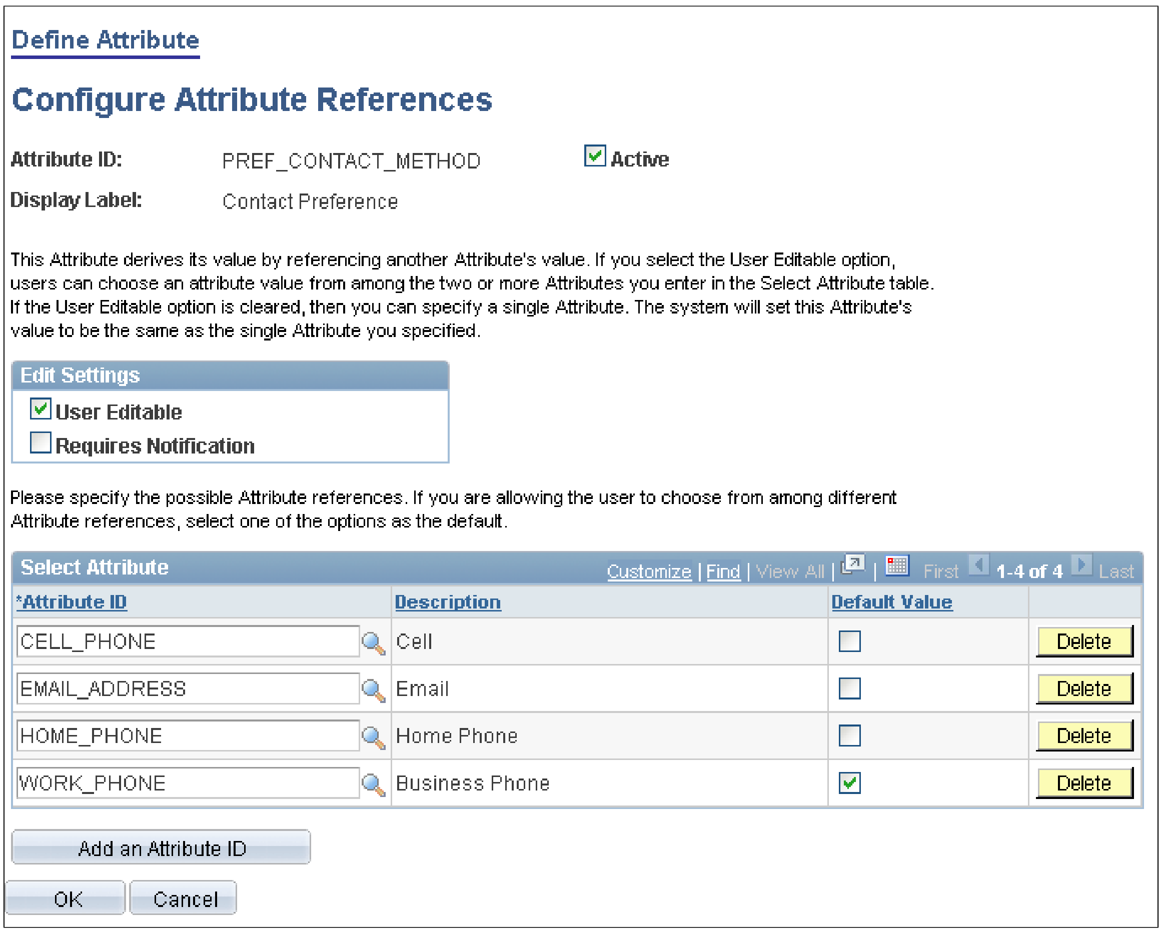
See Define Attribute - Configure Participant References Page.

Define Attribute - Configure Attribute References Page

Access the Define Attribute - Configure Attribute References page (select Portal Administration, Resource Finder, Core Objects, Attributes, Attribute Type, Define Attribute; click theConfigure link on the Define Attribute page when theValue Type field is set to*Attribute Reference*).

Image: Define Attribute - Configure Attribute References page

The following screenshot is an example of Define Attribute - Configure Attribute References page where in this attribute derives its value by referencing another attribute's value.



Attribute ID

Displays the attribute ID for which you are defining attribute references. This attribute derives its value by referencing one or more attributes.

For example, you can configure the PREFERRED_CONTACT _METHOD attribute to derive its value from contact methods. On the participant profile, end users can select from a list of associated contact methods, such as Email Address (JSmith@company.com), Home Phone (555–555–1212), and so forth.

Edit Settings

User Editable

Select to enable users to select a value from a set of attributes. If this option is selected, the user can choose from the attributes that you specify in the Select Attribute section. Selecting this option is appropriate only to specify more than one attribute as a referenced attribute.

Deselect this option to have the attribute reference a single attribute that you specify in the Select Attribute section. If you do this, the system does not allow you to enter more than one attribute ID.

Requires Notification

If the User Editable option is selected, select the Requires Notification option to indicate that the user's edit sends a notification to a manager of the affected participant profile. If this option is selected, user selections for the attribute require notification regardless of the participant profile with which it is associated.

You designate the notification party when you create the participant profile, enabling you to set a logical party based on the participant type, rather than on the attribute. For example, the notified party for employees can be set to their managers, for customers it can be set to their account managers or customer contacts, and so forth.

Select Attribute

Attribute ID

Enter the attribute to be referenced by the attribute that you are configuring. This ID creates a dynamic reference from the configured attribute to this attribute. For example, you can configure the PREFERRED_CONTACT_METHOD attribute to reference the value of other contact method attributes, such as EMAIL ADDRESS, WORK_PHONE, and WORK_CELL_PHONE.

If the User Editable option is selected, enter two or more attributes. If theUser Editable option is deselected, enter a single attribute.

Default Value

Select this option for the single attribute that you want to use as the default referenced attribute.

Users with editing rights on the participant profile can override this value.

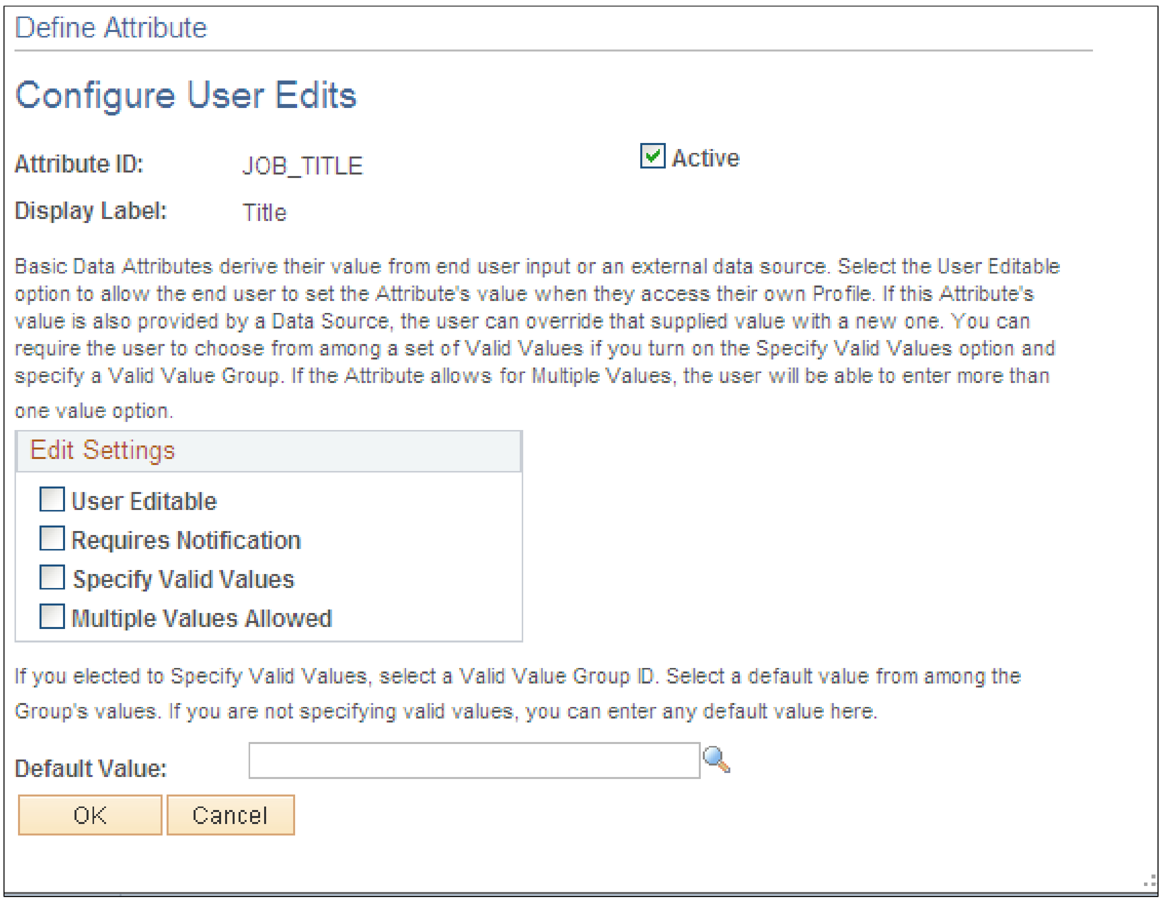
See Define Attribute - Configure Attribute References Page.

Define Attribute - Configure User Edits Page

Access the Define Attribute - Configure User Edits page (select Portal Administration, Resource Finder, Core Objects, Attributes, Attribute Type, Define Attribute; click theConfigure link on the Define Attribute page when theValue Type field is set to*Basic Data Attribute).*

Image: Define Attribute - Configure User Edits page

The following screenshot is an example of Define Attribute - Configure User Edits page that helps configure user input for basic data attributes.



Attribute ID

Displays the attribute ID for which you are defining user edit controls. This attribute derives its value from online edits on participant profiles or from external data sources.

If the attribute value is provided by an external data source, users can override that supplied value with their own value. A data source can also override a user edit when data is refreshed. Be sure to consider potential data clashes, unless you have specified that the user's edits are to be preserved when you define how the value of the attribute is supplied by data sources when you define a participant data source map.

Users can override a value that is supplied by an external data source only if the User Editable option is selected. Use the Define Participant Map page to assign external data sources permission to supply a value.

See Configuring Participant Data Maps.

Edit Settings

User Editable

Select to indicate that users can enter free-form values for the attribute.

Requires Notification

Select to indicate that input for the attribute requires notification to a manager of the affected participant profiles. If this option is selected, input for the attribute requires notification regardless of the participant profile with which it is associated.

You designate the profile manager when you create the participant profile, enabling you to set a logical manager based on the participant, rather than on the attribute. For example, the profile manager for employees can be set to their managers, for customers it can be set to their account managers or customer contacts, and so forth.

See Specifying Profile Managers.

Specify Valid Values

Select to limit input to a set of valid values for the attribute.

If this option is selected, the Valid Value Group ID field appears.

Valid Value Group ID

This field appears if the Specify Valid Values field is selected.

You must enter a valid values group ID and specify a default valid value.

Multiple Values Allowed

Select to indicate that multiple values can be entered. If this option is deselected, only a single value can be entered by either a user edit or by a data source load.

Default Value

If the Specify Valid Values option is selected and you have specified a valid values group ID, you must select a default value for the attribute on the participant profile.

If you specify a default value, the value automatically appears for the attribute on the participant profile, unless the value was overridden by a user or external data source edit.

If the Specify Valid Values option is deselected, you can enter any default value. However, specifying a default value is not required, even if the attribute value is required on the participant profile.

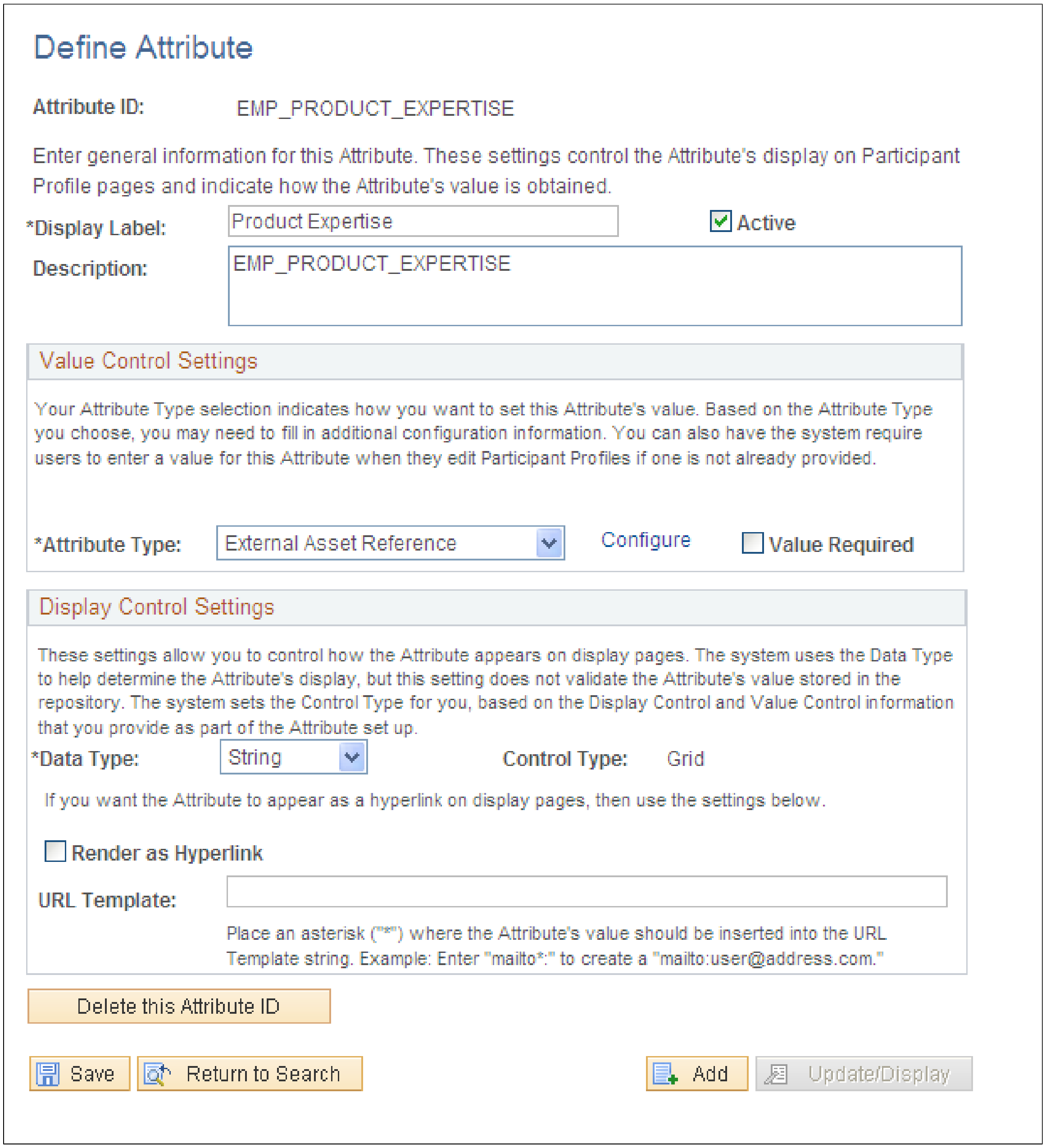
See Define Attribute - Configure User Edits Page.

Define Attribute - Configure External Asset References Page

Access the Define Attribute - Configure External Asset References page (select Portal Administration, Resource Finder, Core Objects, Attributes, Attribute Type, Define Attribute; click theConfigure link on the Define Attribute page when theValue Type field is set to*External Asset Reference)*.

Image: Define Attribute - Configure External Asset References page

The following screenshot is an example of Define Attribute - Configure External Asset References page that helps configure external asset references.



Attribute ID

Displays the attribute ID for which you are defining an external asset attribute reference.

This attribute derives its value by referencing an external asset.

Edit Settings

User Editable	Select to enable users to choose from a set of external assets when selecting a value for this attribute on their own profiles. For example, when users enhance their product knowledge, you allow them to add new products, which you have defined as external assets, to their product knowledge attributes. If this option is selected, users can choose from the external assets within the external asset type that you specify in the External Asset Type ID field. Deselect this option to load the external asset references from data sources.
Requires Notification	Select to indicate that input for the attribute requires notification to a manager of the affected participant profiles. If this option is selected, input for the attribute requires notification regardless of the participant profile with which it is associated. You designate the approver when you create the participant profile, enabling you to set a logical approver based on the participant, rather than on the attribute. For example, the notified party for employees can be set to their managers, for customers it can be set to their account managers or customer contacts, and so forth.
Multiple Values Allowed	Select to indicate that multiple values can be entered. If this option is deselected, only a single value can be entered either by a user edit or by a data source load.
External Asset Type ID	External assets can be loaded into Resource Finder by way of custom integrations only. That is, no standard data import mechanism is available for external assets. External assets are classified into types, similar to the way in which participants are classified into types. For example, if documents are loaded as external assets from a content management system, they might be classified as external assets of the DOCUMENT type. If training courses are imported from an education database, they might be classified as external assets of the TRAINING_COURSE type. Attributes that are external asset references can be constrained by identifying an external asset type to which the associated values of the attribute must belong. For example, an attribute called DOCUMENTS_PUBLISHED might be constrained with the DOCUMENT external asset type, meaning that any values that are associated with the attribute must be external assets of the DOCUMENT type. See Configuring External Assets.

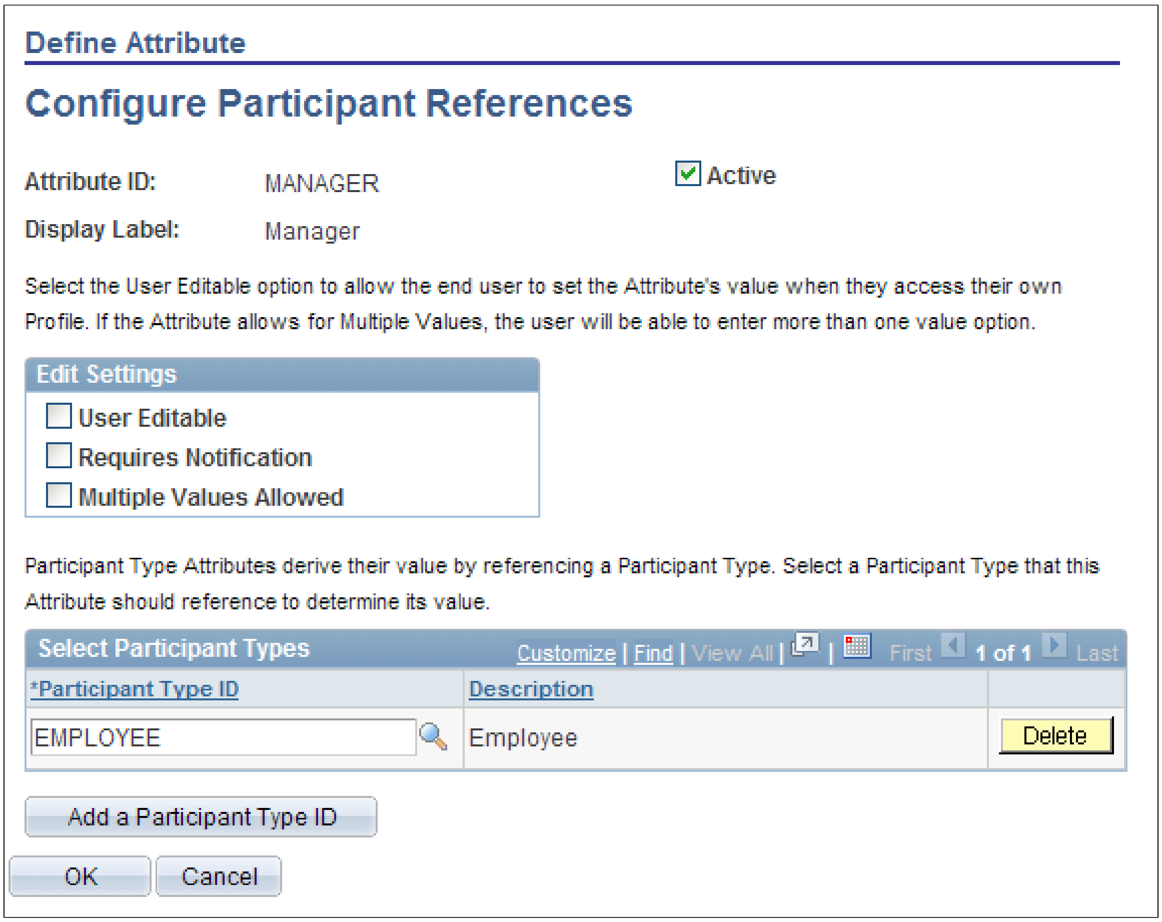
See Define Attribute - Configure External Asset References Page.

Define Attribute - Configure Participant References Page

Access the Define Attribute - Configure Participant References page (select Portal Administration, Resource Finder, Core Objects, Attributes, Attribute Type, Define Attribute; click theConfigure link on the Define Attribute page when theValue Type field is set to*Participant Reference)*.

Image: Define Attribute - Configure Participant References page

The following screenshot is an example of Define Attribute - Configure Participant References page that helps configure participant references.



Attribute ID

Displays the attribute ID for which you are defining participant type references.

This attribute derives its value by referencing one or more participant types.

For example, the participant reference in the preceding page enables Resource Finder to resolve the following situation:

A data load from human resources tells Resource Finder that employee ID 0123 has a manager with an employee ID of 01795. One of the factors that enables the resolution of participant references is the definition of keys that uniquely identify participant types. In this example, suppose that the key is the EMPLID value. Resource Finder uses this key to crossreference the participant and the participant reference to make a match.

Resource Finder can resolve this participant reference because the configuration tells the system that employee participant managers are other employee participants and because the data source has provided the key EMPLID field values that can be used to derive the employee participant who is the employee's manager.

If Resource Finder contains data for employee ID 01795, it can create the necessary participant reference. If Resource Finder does not contain data for employee ID 01795, it creates a new participant reference for the manager, and then it waits for the remaining identifying information to be loaded.

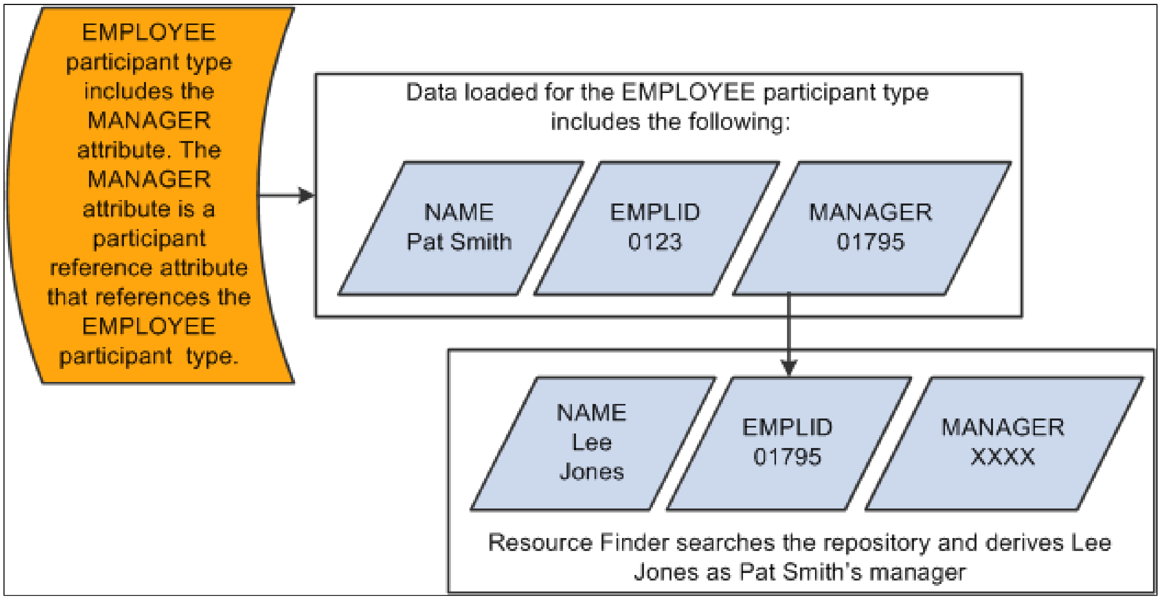
This participant referencing functions in the same way to derive account managers for accounts, members of a department, and so forth.

On the participant profile, this reference is used to display the name of the employee's manager, which is linked to the manager's participant profile.

If the data message from human resources contained both the manager ID and the manager's name, you would still want to configure the MANAGER attribute to reference the EMPLOYEE participant type. This reference enables Resource Finder to point to the correct employee participant who is the manager and to provide the link to the manager's profile as an employee participant.

Image: Resource Finder uses the EMPLID key value to derive Lee Jones as Pat Smith's manager

The following image is an example of Resource Finder uses the EMPLID key value to derive Lee Jones as Pat Smith's manager.



Edit Settings

User Editable

Select to enable users to select a value from a set of participants. If this option is selected, the user can choose from the individual members of the participant types that you specify in the Select Participant Types section.

Deselect this option to indicate that you want the participant references for the attribute to be loaded from data sources only.

Requires Notification

Select to indicate that input for the attribute requires notification to a manager of the affected participant profiles. If this option is selected, input for the attribute requires notification regardless of the participant profile with which it is associated.

You designate the profile manager when you create the participant profile, enabling you to set a logical manager based on the participant, rather than on the attribute. For example, the profile manager for employees can be set to their managers, for customers it can be set to their account managers or customer contacts, and so forth.

See Specifying Profile Managers.

Multiple Values Allowed

Select to indicate that multiple participants can be referenced by the attribute. For example, a customer could have multiple account representatives or customer contacts, which are participants. An account representative could manage multiple customers, which are also participants.

Select Participant Types

Participant Type ID

Select a participant type to be referenced by the attribute that you are configuring. This selection creates a dynamic reference from the configured attribute to the selected participant type.

See Define Attribute - Configure Participant References Page.

Configuring External Assets

This section provides an overview of external assets and discusses how to use the External Asset Types component (EPX_COMP_TYPE) to define external asset types and view attribute details.

Pages Used to Configure External Assets

Page Name	***Definition Name***	***Usage***
Define External Asset Type Page	EPX_COMP_TYPE	Define external assets. Assign attributes to external assets that determine the external asset details that appear on participant profiles. You must already have defined these attributes on the Define Attribute page. See Define External Asset Type Page for more information.
Define External Asset Type - Delete Confirmation Page	EO_PE_DEL_CONFIRM	Confirm or cancel your selected deletion. See Define External Asset Type Page for more information.
Attribute View Details Page	EPX_ATT_VW_DETAIL2	View attribute details to verify that you have selected the intended attribute.

Understanding External Assets

External assets are abstract, lightweight references to business entities within integrating applications, such as publications and training courses.

When you assign attributes such as DOCUMENT_TITLE and DOCUMENT_OWNER to a CM_DOC external asset type on the Define External Asset Type page, you set up Resource Finder to expect this metadata to be loaded for the external asset by way of the PeopleSoft Integration Broker transformation.

External assets can have two types of attributes: descriptive and associative. Use descriptive attributes to identify the external asset in search results or participant profiles, for example. Use associative attributes to derive associations between the external assets and participants by comparing the external asset attributes with participant attributes, for example.

The attributes that are associated with external assets serve several purposes. They provide search parameters and search result attributes when authorized users use search prompt pages to select additional external assets to reference profiles. This search option is available only to users with authority to modify participant profiles by making a specific association between the authorized user and an external asset.

Resource Finder relates external assets to participants by matching external asset attribute metadata to a participant's name. These relationships may result in a collection of external asset documents that are authored by a participant, as well as a set of documents of which the participant is the subject.

The external asset that is used as an example at the beginning of the section appears in the following way on a participant profile:

Title	***Author***	***Publish Date***
This is the document name that is provided by the source system. This title may be linked to a URL for the asset when it is stored in the source system.	This is the author's name that is provided by the source system. This could be a participant reference attribute, which would function as if it were assigned to an employee participant, for example.	This is the publication date that is supplied in the metadata that is provided by the source system.

External asset data that is supplied in the PeopleSoft Integration Broker transformation may include a URL for the asset in the source system, along with attribute data meeting requirements that you have defined for the external asset type. External asset data loads are handled entirely by the PeopleSoft Integration Broker transformation process.

The external asset source system is responsible for providing the URL that is necessary to locate and open the document. You can configure Resource Finder to provide user ID and password information for users accessing data in the source system. This transaction honors any security that Resource Finder can detect in the source system.

The URLs that point to source systems are formatted by source-specific integration codes. Authenticated Resource Finder users have authentication tokens (PSTOKEN) buffered in in-memory cookies in their current HTTP sessions that can be used to authenticate them on source systems.

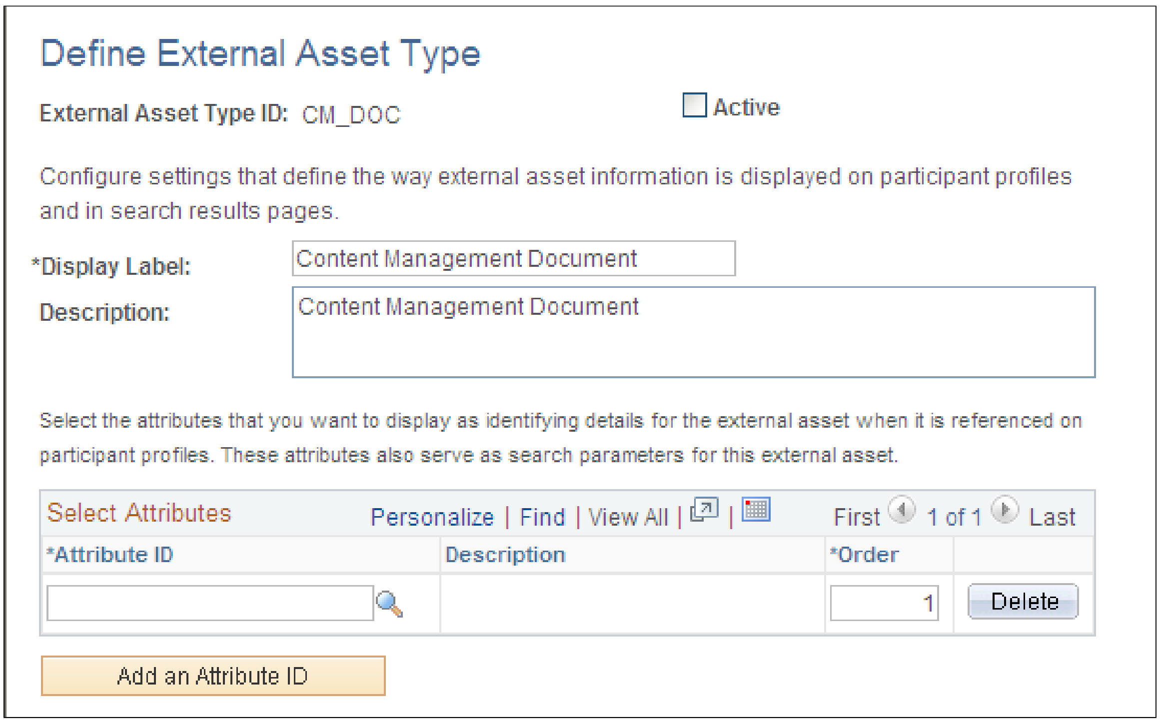
See Describing Message Transformations.

Define External Asset Type Page

Access the Define External Asset Type page (select Portal Administration, Resource Finder, Core Objects, External Asset Types, Define External Asset Type).

Image: Define External Asset Type page

The following screenshot is an example of Define External Asset Type page. This example explains about configure settings that define the way external asset information is displayed on participant profiles and in search results pages.



Active

If you deselect this option for an external asset that is referenced by an active attribute, a warning message informs you that you are affecting the attribute. The external asset attribute still appears on profiles, and selecting it still accesses the external asset, if it has an associated URL. However, you cannot change the value of the attribute by using the profile interface because the external asset lookup page filters on the associated external asset type, which must be active.

Display Label

Enter a label for the external asset, such as *Content Management Document* or*Training Course.*

The label appears in place of the ID wherever it is referenced.

Select Attributes

Attribute ID

Enter attribute IDs to provide details about external assets that are referenced on participant profiles.

	These attributes also act as search parameters when you look up external assets while you are entering profile pages.
Order	Enter the order in which you want the external asset attributes to appear on participant profiles.
View Details	Click to access the Attribute View Details page.

Note: When you are configuring external asset attributes, the system does not enforce any viewer security.

Delete this External Asset Type ID

You cannot delete an external asset type if it is being used or referenced elsewhere. This delete option is primarily intended for you to correct newly entered definitions and values.

If Resource Finder detects that the object is available for deletion, it prompts you to confirm your deletion on the Define External Asset Type - Delete Confirmation page. After you confirm the deletion, the object is deleted, along with any data that is associated with it.

Resource Finder stops the deletion and prompts you with an error message if the external asset is unavailable for deletion because:

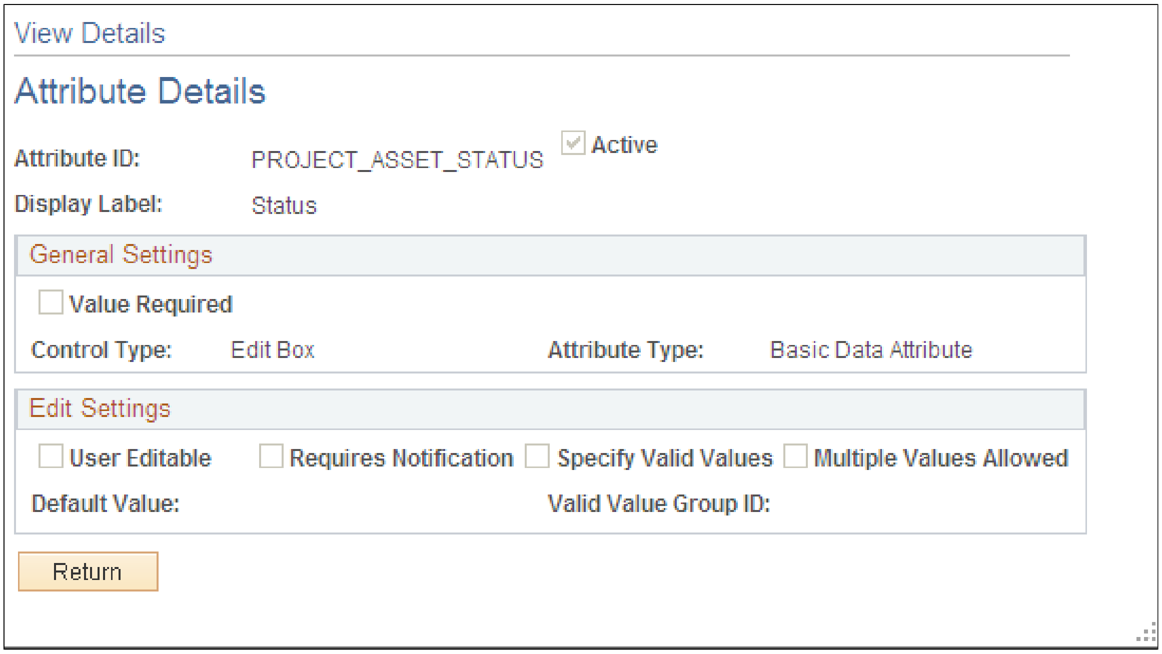
- An external asset reference attribute has been associated with the external asset type as a constraint.
- External assets are associated with the external asset type.

Attribute View Details Page

Access the Attribute View Details page (select Portal Administration, Resource Finder, Core Objects, External Asset Types, Define External Asset Type; click theView Details link on the Define External Asset Type page).

Image: Attribute View Details page

The following screenshot is an example of Viewing Attribute Details page.



Note: Access the Define Attribute Type component to modify attribute information.

See Configuring Attributes.

Configuring Participant Types

This section provides an overview of participant types and discusses how to use the Participant Types component (EPX_PART_TYPE) to define participant types and set viewer security for participant attributes.

Pages Used to Configure Participant Types

Page Name	***Definition Name***	***Usage***
Define Participant Type Page	EPX_PART_TYPE	Define participant types that are available in Resource Finder. Specify attributes that you want to be available for different types of participants.

Page Name	***Definition Name***	***Usage***
Define Participant Type - Delete Confirmation Page	EO_PE_DEL_CONFIRM	Confirm or cancel your selected deletion. See Define Participant Type Page for more information on Delete Confirmation page.
Define Participant Types - Set Viewer Security Page	EPX_PART_TYPE_SEC	Define row-level security by role or by user ID to limit viewer access to selected participant attributes on participant profiles for the selected participant type.
Define Participant Types - Specify Add/ Update Privileges Page	EPX_PART_TYPE_PRIV	Specify roles and user IDs that have add and update access for the selected participant type. When users with the roles and user IDs that you specify access participant profiles for the selected participant type, they can add new attribute information or update existing attribute data for the participant.
Attribute View Details Page	EPX_ATT_VW_DETAIL2	View attribute details to verify that you have selected the intended attribute. Access the Define Attribute Type component to modify attribute information.

Understanding Participant Types

Individual participants in Resource Finder are categorized by participant type. Participant types can represent a person's role, such as employee, manager, or customer. It can also represent a business entity in your enterprise, such as a department, location, company, or work group. The participant type designation enables Resource Finder to regroup participants depending on their characteristics, relative to the user searching for participants. For example, a participant who appears as a customer in one user's search can also appear as a supplier in another user's search.

This list provides suggested attributes that you can associate with participant types:

- Status

  This attribute enables users to limit their participant searches to active enterprise participants. For example, you can use the attribute to filter inactive employees out of searches for active employees. This attribute removes participants from your searches, while enabling you to maintain a record of them in Resource Finder. In certain contexts, you may want to preserve data that is associated with an inactive participant. For example, the author of a document may no longer be an employee; however, the author's identity and the document remain useful in Resource Finder.

- Contact methods

  This attribute can include physical addresses and locations, phone numbers, and email addresses for person and nonperson participant types.

- Organizational information

This attribute can include the department, business unit, and company, or the participant manager or department manager of a participant.

- Account owner

  This attribute can be the name of the person who manages the account for a customer participant type.

- Customer contact

  This attribute can be the name of the person who acts as your contact for a customer participant type.

- Project owner

  This attribute can be the name of the person who owns a project participant type.

- Project employees

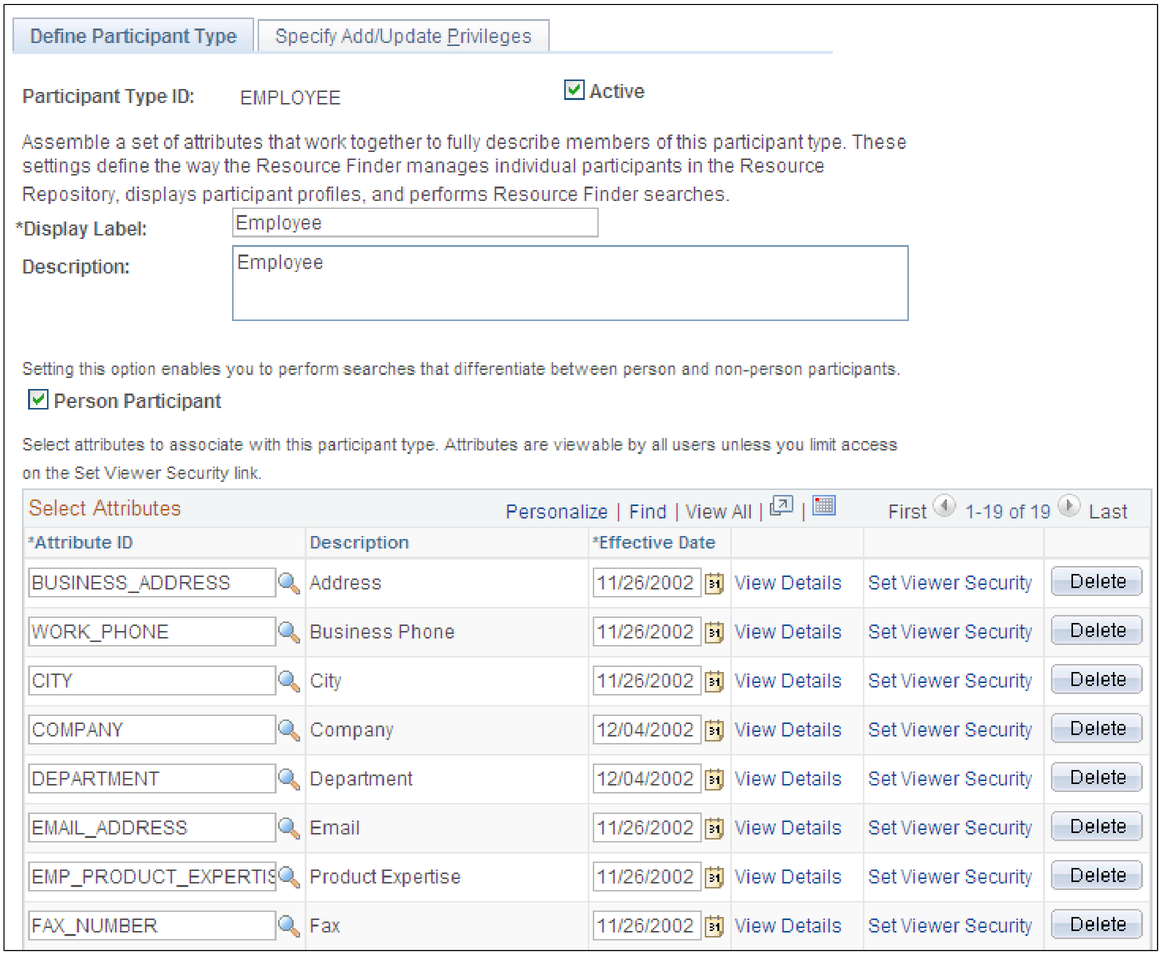
  This attribute can define the team of employees who are assigned to a project participant type.

Define Participant Type Page

Access the Define Participant Type page (select Portal Administration, Resource Finder, Core Objects, Participant Types, Define Participant Type).

Image: Define Participant Type page

The following screenshot is an example of Defining Participant Types page which fully describes members of this participant type which uses a set of attributes that work together.



Use the Define Participant Type page to define participant types that are available in Resource Finder and specify attributes that you want to be available for different types of participants. You must have defined these attributes already on the Define Attribute page. To associate external assets with this participant type, you must have defined relevant external assets already on the Define External Asset Type page.

The selections that you make on this page affect the way participant profiles appear and determine the attributes that are available for selection as participant search parameters. You determine which of these selectable attributes are actually available for use as search parameters by using the Define Advanced Search Option component.

Active	Deselect this option to inactivate the participant type and remove it from all display contexts in which it is referenced.
Display Label	Enter a label for the participant type that appears along with the participant type wherever it is referenced.

Description

Enter text for your information only.

This does not appear elsewhere in the system.

Person Participant

Select to indicate that the participant type represents a person. This selection enables you to perform person and nonperson participant searches and to limit choices for Related Resource contacts to people, as opposed to nonperson participants.

This option also controls how the system displays person-specific and nonperson-specific icons in organization charts.

See "Working With the Related Resources Pagelet" (PeopleSoft Interaction Hub 9.1: Using Portal Features), Configuring Organization Charts.

Select Attributes

Attribute ID

Select attributes to describe the participant type.

These attributes can be used as search parameters and displayed as search results for the participant type.

Delete this Participant Type

You cannot delete a participant type if it is being used or referenced elsewhere. This delete option is primarily for you to correct newly entered definitions and values.

If Resource Finder detects that the object is available for deletion, it prompts you to confirm your deletion on the Define Participant Type - Delete Confirmation page. After you confirm the deletion, the object is deleted, along with any data that is associated with it.

Resource Finder stops the deletion and prompts you with an error message if the participant attribute is unavailable for deletion because it is associated with:

- Participant reference attribute definition constraints.

  For example, it is a participant type to which a participant reference can point.

- Row-level editing privileges.

  For example, the participant type is associated with a profile manager definition.

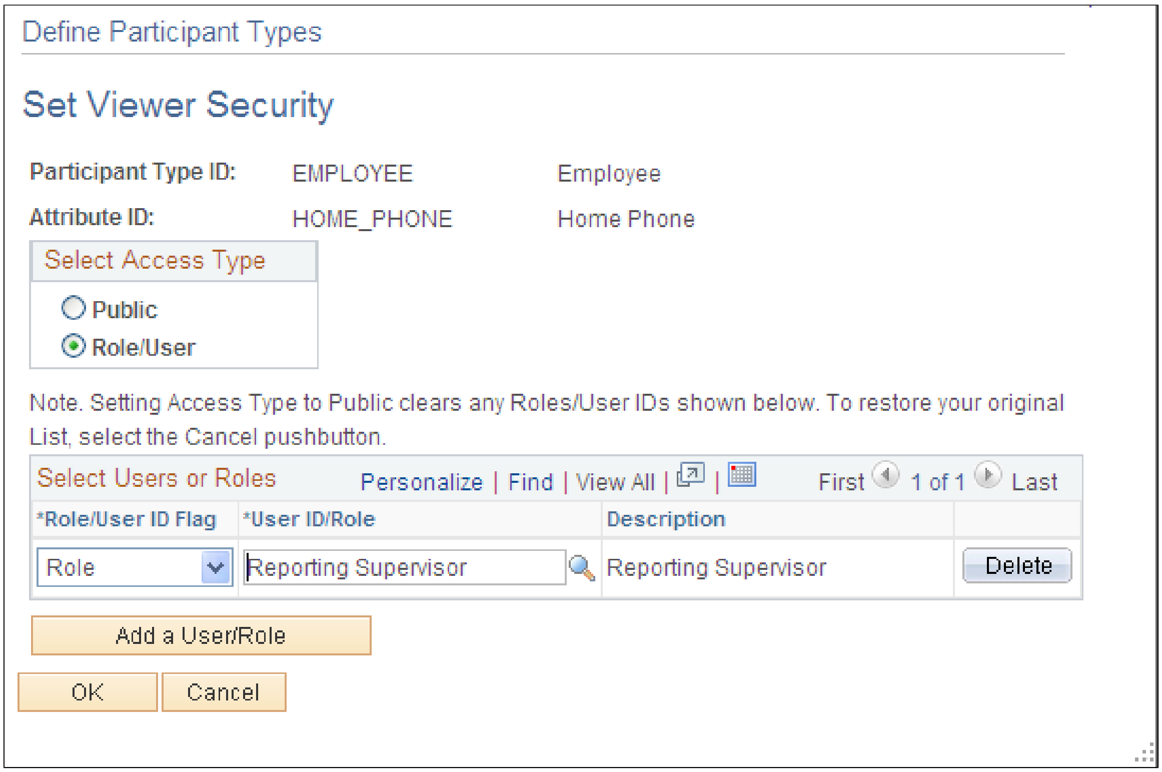
- Data sources and related participant mapping.
- Participants.

Define Participant Types - Set Viewer Security Page

Access the Define Participant Types - Set Viewer Security page (select Portal Administration, Resource Finder, Core Objects, Participant Types, Define Participant Type; click theSet Viewer Security link on the Define Participant Type page).

Image: Define Participant Types - Set Viewer Security page

The following screenshot is an example of Define Participant Types - Set Viewer Security page which indicates how to set viewer security for participant attributes.



Public Select to indicate that the attribute is viewable by all users on user profiles for the selected participant type.

Rolename Select to indicate that the attribute is viewable on user profiles for the selected participant type only by roles and user IDs that are specified in the Select Users or Roles section.

Select Users or Roles

Role/User ID Flag If the Rolename option is selected, select the*Role* or*User ID* option to indicate the type of value to enter in theUser ID/Role field.

User ID/Role If you selected the *Role* option in theRole/User ID Flag field, enter the role that should be able to view the attribute as a search parameter for the participant type.

See*PeopleTools: Security Administration* "Setting Up Roles."

If you selected the *User ID* option in theRole/User ID Flag field, enter the user ID that should be able to view the attribute as a search parameter for the participant type.

See *PeopleTools: Security Administration* "Administering User Profiles."

Chapter 3

Setting Up Data Sources

Understanding Data Sources

The majority of data in Resource Finder is loaded from external data sources, such as your human resources, customer relationship management, and document management systems. After participants and their attribute data are loaded into the repository, authorized users can use Resource Finder tools to manipulate and update the data.

These external data sources need to be defined in Resource Finder so that they can communicate with the application by providing data feeds using incremental batch and real-time updates. All Resource Finder participant and attribute values have associated data sources indicating the source from which they originated. When data is manually created or changed in Resource Finder, its data source is set to *Local.* PeopleSoft Portal Resource Finder delivers*Local* as a predefined data source. Oracle recommends that you not alter this*Local* data source, which is programmatically referenced by its associated constant, EPX_BASE::Constants.LOCAL_CONST. This*Local* data source enables you to establish conflict rankings for manual changes as opposed to changes originating from external data sources.

See Define Data Sources - Specify Participant Types Page.

Resource Finder includes administrative pages that you use to uniquely identify participants in each external data source. Using these pages, you create an external representation of a participant that can be accurately mapped to the Resource Finder representation of that same participant.

Unless the field names of an external data source are the same as the corresponding attribute names in Resource Finder, you must also use the administrative pages to map the external field names to Resource Finder attribute names.

See Configuring Participant Data Maps.

If you know that data for an individual participant can be provided by multiple external data sources, you can use mapping definitions to create associations between identifying key field values in one data source to identifying key field values in another. For example, this mapping can associate EMPL_ID 12345 from data source X to CUST_ID 12345 in data source Y. The identifying key field value must be the same in all external data sources.

The mapping of key fields between data sources serves two purposes:

- Synchronizing similar data elements originating from two different data sources (same participant, same attributes).
- Synchronizing related data elements originating from two different data sources (same participant, different attributes).

If you have more than one data source providing the same participant attribute data, you can rank the data sources, providing Resource Finder with a hierarchy it can use to determine which source it should use to derive the value.

These external data source feeds interact with Resource Finder using the messaging Application Programming Interface (API). You must write logic to transform the native message format of the external data source to the native message format of Resource Finder.

See Understanding Importing Participant Data

Configuring Data Sources

This topic discusses how to use the Data Sources component (EPX_DEF_DATASRC) to define data sources and the participant types for which they supply data. It also specifies data source keys.

Pages Used to Configure Data Sources

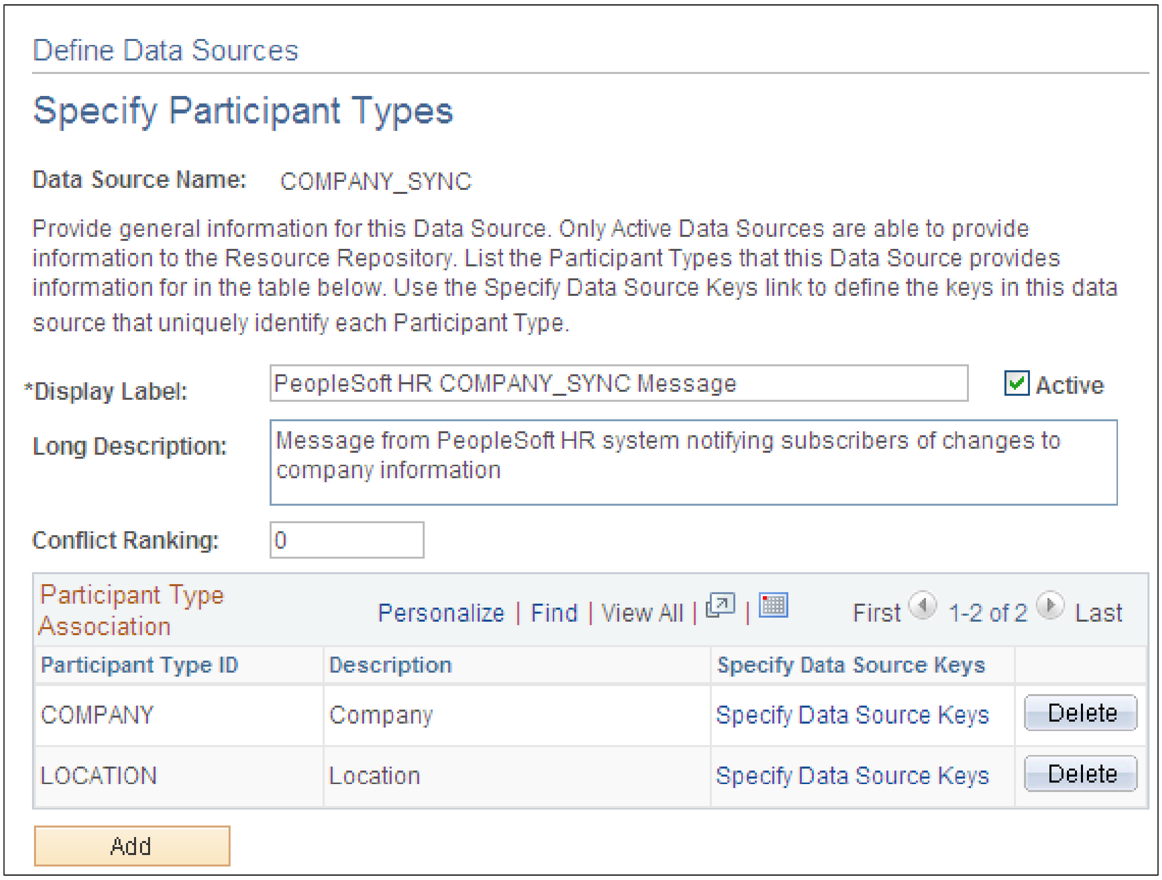
Page Name	***Definition Name***	***Usage***
Define Data Sources - Specify Participant Types Page	EPX_DDS_PTYPES	Define external data sources for Resource Finder, as well as the participant types for which they supply data. You identify these external data sources to ensure that only valid data sources are available for selection when mapping Resource Finder data to external data source applications.
Define Data Sources - Specify Data Source Keys Page	EPX_DDS_KEYS	Define key fields that identify participant types in the selected data source. The values of these fields uniquely identify a participant associated with the selected participant type when loaded from the specified data source. The Configure File Import Application Engine process (EPX _FILE_IMP) uses these key values to determine whether it is importing new participant data or updated data for an existing participant. Perform this setup for all data sources that supply data for the participant type.
Define Data Sources - Map Keys Between Data Sources Page	EPX_DDS_KEY_MAPS	Map the selected participant type key field to other key fields defined for other data sources that provide attribute data for the participant type. Use this page if you have participant type data for the same participant being imported from different data sources and you need to ensure that the system does not create multiple sets of data based solely on the existence of multiple data sources.

Define Data Sources - Specify Participant Types Page

Access the Define Data Sources - Specify Participant Types page (select Portal Administration, Resource Finder, Mappings, Data Sources, Define Data Sources).

Image: Define Data Sources - Specify Participant Types page

The following screenshot is an example of Define Data Sources - Specify Participant Types page.



Data Source Name

Enter a data source name.

Available values include valid data sources defined in the PeopleSoft Integration Broker.

Note: You must configure the data source in the PeopleSoft Integration Broker before you enter the data source on this page.

See Understanding Importing Participant Data

You cannot delete a data source after it has been defined in Resource Finder tables. Doing so may result in data inconsistencies.

After you have defined and approved your data sources, they can be associated with participants and their attributes using the mapping interface pages.

Display Label

Enter a label for the data source that appears along with the data source wherever it is referenced.

Active

Select to indicate that the data source is active. Only active data sources are used to populate Resource Finder when you run the File Import process.

Deselect this option to inactivate the data source and remove it from all display contexts in which it is referenced.

Long Description

Enter a description of the data source.

This text is informational only and does not appear elsewhere in the system.

Conflict Ranking

Enter a default conflict ranking for all attributes associated with the data source.

This default conflict ranking can be overridden for attributes at the participant data mapping level.

See Configuring Participant Data Maps.

This value also serves as the conflict ranking for non-attribute participant data. For example, this value serves as the conflict ranking for the participant name, which is not an attribute, but rather a fixed property of all participants. You can use this conflict ranking to determine that the participant name loaded from your Customer Relationship Management system outweighs the participant name loaded from your PeopleSoft Human Capital Management system.

The LOCAL data source defined in system data gets its conflict ranking value here. If you don't want changes that are made manually using the Resource Finder interface to be overwritten by data imports, set the conflict ranking for the LOCAL data source higher than other data sources.

Participant Type Association

Participant Type ID

Select the participant types for which the data source provides information.

Specify Data Source Keys

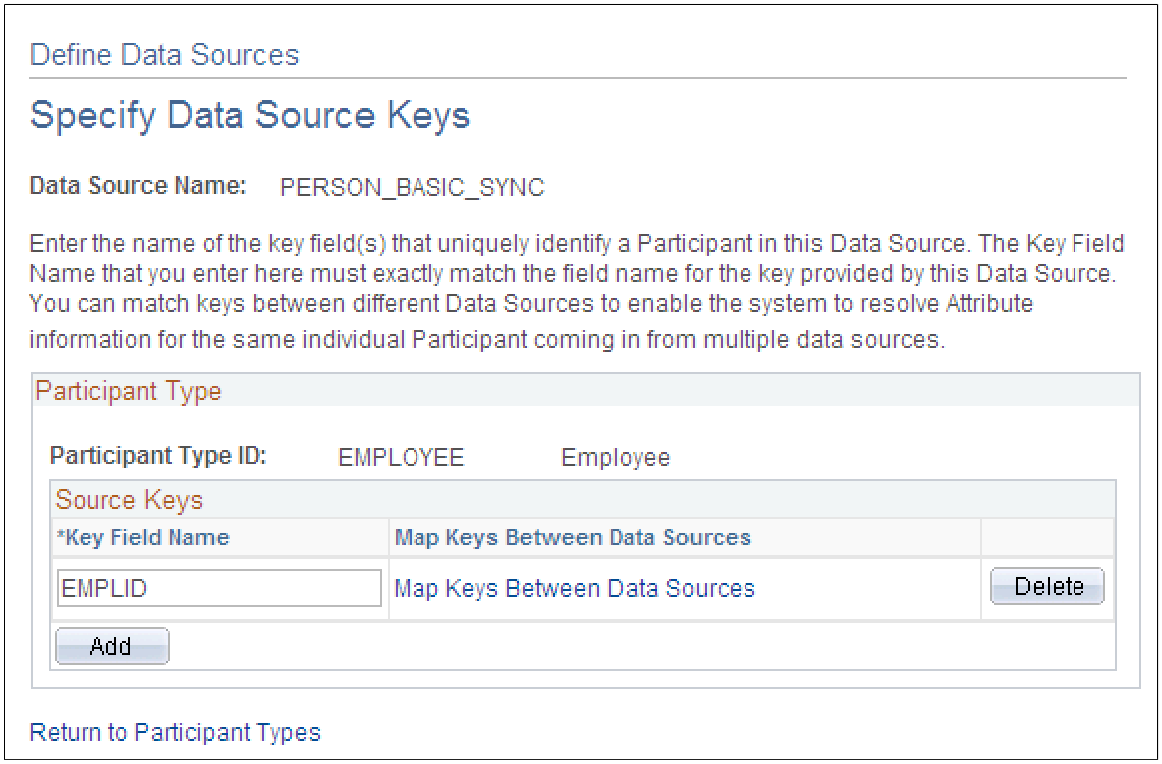
Click to access the Define Data Sources - Specify Data Source Keys page.

Define Data Sources - Specify Data Source Keys Page

Access the Define Data Sources - Specify Data Source Keys page (select Portal Administration, Resource Finder, Mappings, Data Sources; click theSpecify Data Source Keys link on the Define Data Sources - Specify Participant Types page).

Image: Define Data Sources - Specify Data Source Keys page

The following screenshot is an example of Define Data Sources - Specify Data Source Keys page.



Data Source Name

Displays the data source for which you are defining key fields for the indicated participant type.

Participant Type

Participant Type ID

Displays the participant type for which you are defining key fields for the indicated data source.

Source Keys

Key Field Name

Enter the key field name that uniquely identifies a participant in the selected data source.

This value must match the value of the field-name attribute of the external-field-mapping element. The File Import process uses the values of these keys to determine whether it is receiving new participant data or updated data for an existing participant.

For example, if you have specified a key field name of *EMPLID* for the employee participant type from the WORKFORCE_

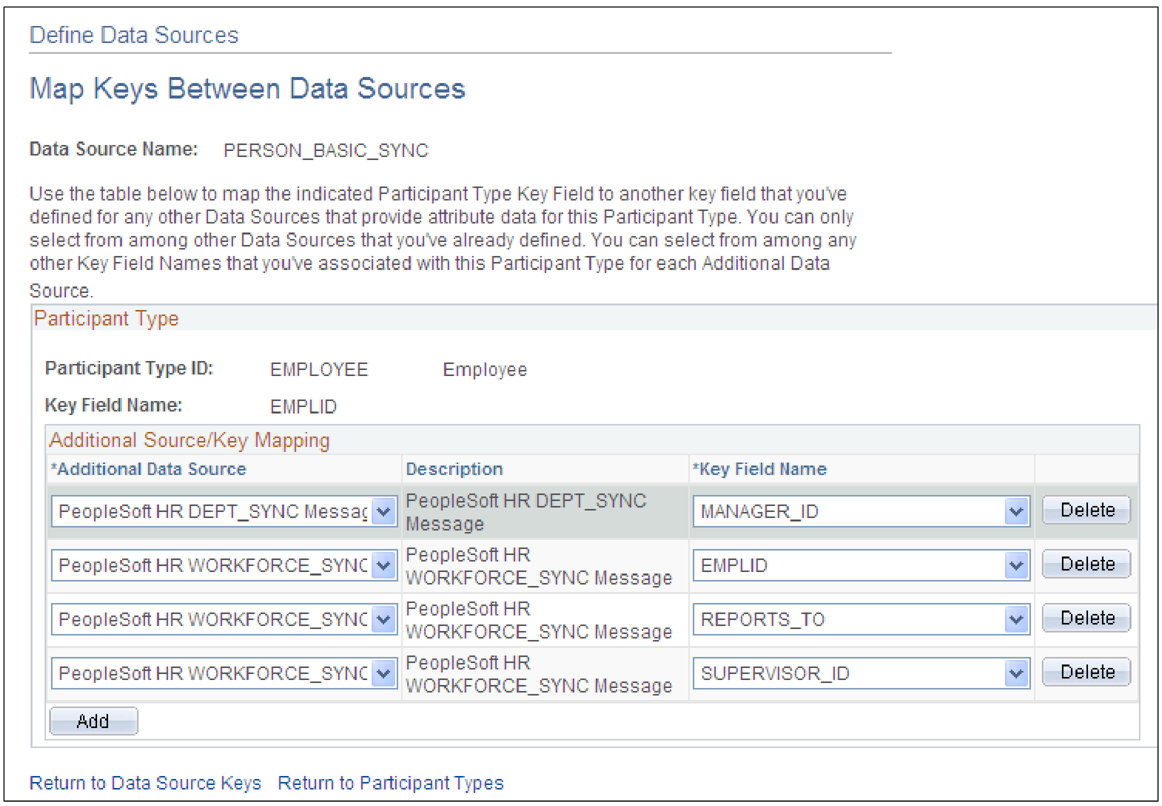
	SYNC data source, an incoming data source message contains an EMPLID of*11128* and an EMPLID*11128* exists in Resource Finder, the load process identifies the participant data as an update to an existing participant. If the EMPLID*11128* does not exist, the load process identifies the data as a new participant.
Map Keys Between Data Sources	Click to access the Define Data Sources - Map Keys Between Data Sources page.

Define Data Sources - Map Keys Between Data Sources Page

Access the Define Data Sources - Map Keys Between Data Sources page (select Portal Administration, Resource Finder, Mappings, Data Sources; click theSpecify Data Source Keys link; and click theMap Keys Between Data Sources link on the Define Data Sources - Specify Data Source Keys page).

Image: Define Data Sources - Map Keys Between Data Sources page

The following screenshot is an example of Define Data Sources - Map Keys Between Data Sources page



Use this page if you have participant type data for the same participant being imported from different data sources and you need to ensure that the system does not create multiple sets of data solely based on the existence of multiple data sources.

For example, if the key field name MANAGER_ID has a value of *11128* from DEPT_SYNC and the key field name SUPERVISOR_ID has a value of*11128* from WORKFORCE_SYNC, use this page to create this mapping so that the system knows both instances of*11128* are the same participant, even if the key field names and data sources are different. The mapping tells the system that MANAGER_ID from DEPT_SYNC = SUPERVISOR_ID from WORKFORCE_SYNC.

Even if you have the same key field names being loaded by different sources, you must use this page to draw the connection between them. When you enter the keys for one relationship, the system builds out reciprocal information. For example, creating a DEPT_SYNC.MANAGER_ID = WORKFORCE_SYNC.SUPERVISOR_ID relationship creates the WORKFORCE_SYNC.SUPERVISOR_ID = DEPT_SYNC.MANAGER_ID relationship.

You can select only defined data sources and participant key field names that have been associated with the participant type on the Define Participant Type page.

Data Source Name

Displays the data source for which you are defining additional key fields and data sources for the indicated participant type.

Participant Type

Participant Type ID

Displays the participant type for which you are defining key fields from additional data sources.

Key Field Name

Displays the participant type key field for the indicated data source that you are mapping to a key field in an additional data source.

Additional Source/Key Mapping

Additional Data Source

Select an additional data source for the indicated participant type and associated key field.

You can select only data sources that have been associated with the selected participant type on the Define Data Sources - Specify Participant Types page.

Key Field Name

Select a key field from the additional data source that you want to map to the indicated key field, participant type, and data source combination.

The key field names for the additional data source and participant type must have already been defined as key field names and data sources for the participant type on the Define Data Sources - Specify Data Source Keys page.

Configuring Participant Data Maps

This section discusses how to configure participant data maps using the Participant Mappings component (EPX_DEF_PARTMAP).

Define Participant Map Page

Access the Define Participant Map page (EPX_DPM_MAIN) (select Portal Administration, Resource Finder, Mappings, Participant Mappings).

Image: Define Participant Map page

The following screenshot is an example of Defining Participant Data Maps page.

Define Participant Map

Participant Type ID: COMPANY Company

These options allow you to map Data Source Field Names to this Participant Type's Attributes. To begin the mapping, choose any Data Source associated with this Participant Type. Enter the Source Field Name exactly as it appears in the Data Source. You can map multiple Data Source Fields to a single Attribute by providing a Rank number for each Data Source/Source Field combination (0=Lowest). The system accepts the highest ranked data source field that can provide a value to obtain the Attribute's repository value.

Source to EPR Mapping Personalize | Find | View All | First 1-25 of 46 Last

*Data Source Name	Description	*Ranking	*Source Field	*Attribute ID	
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	ADDRESS	ADDRESS	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	ALTERNATE_AI	ALTERNATE_ADDI	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	BUSINESS_DE	BUSINESS_DESCI	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	BUSINESS_PH	BUSINESS_PHON	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	CELL_PHONE	CELL_PHONE	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	CITY	CITY	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	CITY_OTHER	CITY_OTHER	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	COUNTRY	COUNTRY	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	COUNTRY_OTH	COUNTRY_OTHER	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	COUNTY	COUNTY	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	COUNTY_OTHE	COUNTY_OTHER	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	DESCR_AC	DESCR_AC	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	FEDERAL_EIN	FEDERAL_EIN	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	HOUSE_ADDRI	HOUSE_ADDRESS	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	HOUSE_TYPE	HOUSE_TYPE	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	HOUSE_TYPE_	HOUSE_TYPE_OT	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	INDUSTRY	INDUSTRY	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	INDUSTRY_SE	INDUSTRY_SECT	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	SETID_LOCATI	LOCATION	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	MAIN_PHONE	MAIN_PHONE	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	NUM1	NUM1	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	NUM1_OTHER	NUM1_OTHER	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	NUM2	NUM2	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	NUM2_OTHER	NUM2_OTHER	Delete
COMPANY_SYNC	PeopleSoft HR COMPANY_SYNC Message	3	OFFICIAL_LAN	OFFICIAL_LANG	Delete

Add

Use the Define Participant Map page to specify the mappings between an external data source and Resource Finder repository participant type attributes, and map data sources and source field names to participant attributes in Resource Finder.

Participant Type ID	Enter a participant type for which you want to map associated attributes to data sources and source field names. A participant type can have only one participant map definition.

Source to EPR Mapping

Data Source Name	Select a data source. You can select only data sources that have been associated with the selected participant type on the Define Data Sources - Specify Participant Types page.
Ranking	If you want to map multiple data source fields to a single participant attribute, you must enter rankings for the data source fields. Use natural numeric progression to designate rank—the higher number is the higher-ranked item. For example, enter a value of *1* to designate the lowest-ranked data source field. The system uses the highest-ranked value present as the value for the participant attribute. For example, you can configure the participant data map to look at multiple data sources to provide the participant's email address. If the email address is present in the source field designated for the highest-ranked data source, the system uses it. If the email address is not present, the system looks to the next highest-ranked data source in the hierarchy to derive the value, and so forth, until it finds a value.
Source Field	Enter the XML tag for the source field published by the data source that corresponds to the attribute you are mapping.
Attribute ID	Select the attribute that you want to map to the source field. You can select any active attribute for the participant type you are mapping. To add or remove attributes for this participant type, access the Define Participant Type page. See Configuring Participant Types.

Using Ranking to Resolve Data Conflicts

You can use the Ranking field on the Define Participant Map page to establish an order of precedence that can help resolve potential data conflicts involving data loaded from multiple data sources. Defining rankings can also help Resource Finder handle situations in which information can be stored in several data sources, but it is not clear which source will always provide the information.

Consider the following example in which you have three systems that serve as data sources for Tobias's name attribute. Having three data sources for the name attribute helps increase the chances that a name value for Tobias will be loaded into Resource Finder. However, notice that all three data sources store Tobias's name in a slightly different way.

Data Source	***Key Identifier***	***Name***
HR	EMPLID 2001	Tobias Larrson
eLearning	STUDENT ID 201	Toby Larrson
Lotus Notes	TLARRSON@PeopleSoft.com	T Larrson

In this case, you can use the Ranking field to create a precedence—or order—in which data from the three data sources is used by Resource Finder. If you define rankings as shown in the following table, you are stipulating that if HR can provide the Name value, Resource Finder uses that value before accepting the name value from eLearning and Lotus Notes, even if these systems can provide the data. However, if HR does not provide the value for this name entity, then eLearning or Lotus Notes could supply it.

Resource Finder Attribute ID	***Data Source***	***Data Source Field***	***Ranking***
DESCRIPTION	HR	NAME	1
	eLearning	NAME	2
	Lotus Notes	NAME	3

Chapter 4

Setting Up Participant Profiles

Understanding Participant Profiles

This section discusses:

- Participant profiles.
- Participant profile rendering logic.
- Profile layout considerations.

Participant Profiles

After you define participant types in the PeopleSoft Portal Resource Finder repository, you can use the profile definition pages to determine how Resource Finder displays information about your organization's participant resources for end users. You use display groups to organize attribute information about participants into logical groupings that emphasize important information to your end users.

Participant profile definitions provide a way to publish participant information in your organization. You can add or remove attribute information from profiles by modifying the profile definitions. Participant profiles are assigned by participant type and, therefore, affect how profiles appear for all individual participants within the participant type.

Participant profiles are based on dynamic data elements that cannot be bound to graphical user interface (GUI) controls on a page until they are rendered for display or editing. When a participant profile is requested for display or edit, GUI-related logic based on layout metadata that you have defined for the display group is applied to application data to create an object representation of a custom HTML page.

Participant profile definitions are also the basis for the detailed information for individual participants that is provided in the search results for end users who perform advanced searches in Resource Finder. In addition, when you use the Related Resources pagelet in the PeopleSoft Interaction Hub Context Manager, the details for the resources that are associated with your business processes in the portal are derived from the profile definition.

Participant Profile Rendering Logic

Participant profiles are generated from one or more display groups. Display groups contain specific attributes that you have defined for participants and external assets. They provide logical groupings of attributes for display on participant profiles. You associate display groups with participant types to determine the attributes that appear on the participant profile. The characteristics of each attribute determine how the attribute should appear on the participant profile.

Display groups, like attributes, are reusable elements. You can define a display group, such as CONTACT_INFO, and include all relevant attributes within the group. You can then associate this display group with multiple participant type profile definitions. Upon rendering the participant profile, Resource Finder displays only those attributes within the display group that you associate with the current participant type on the Define Participant Type page. The display of attributes on the participant profile also depends on viewer security that you define for the participant type attribute on the Define Participant Types - Set Viewer Security page.

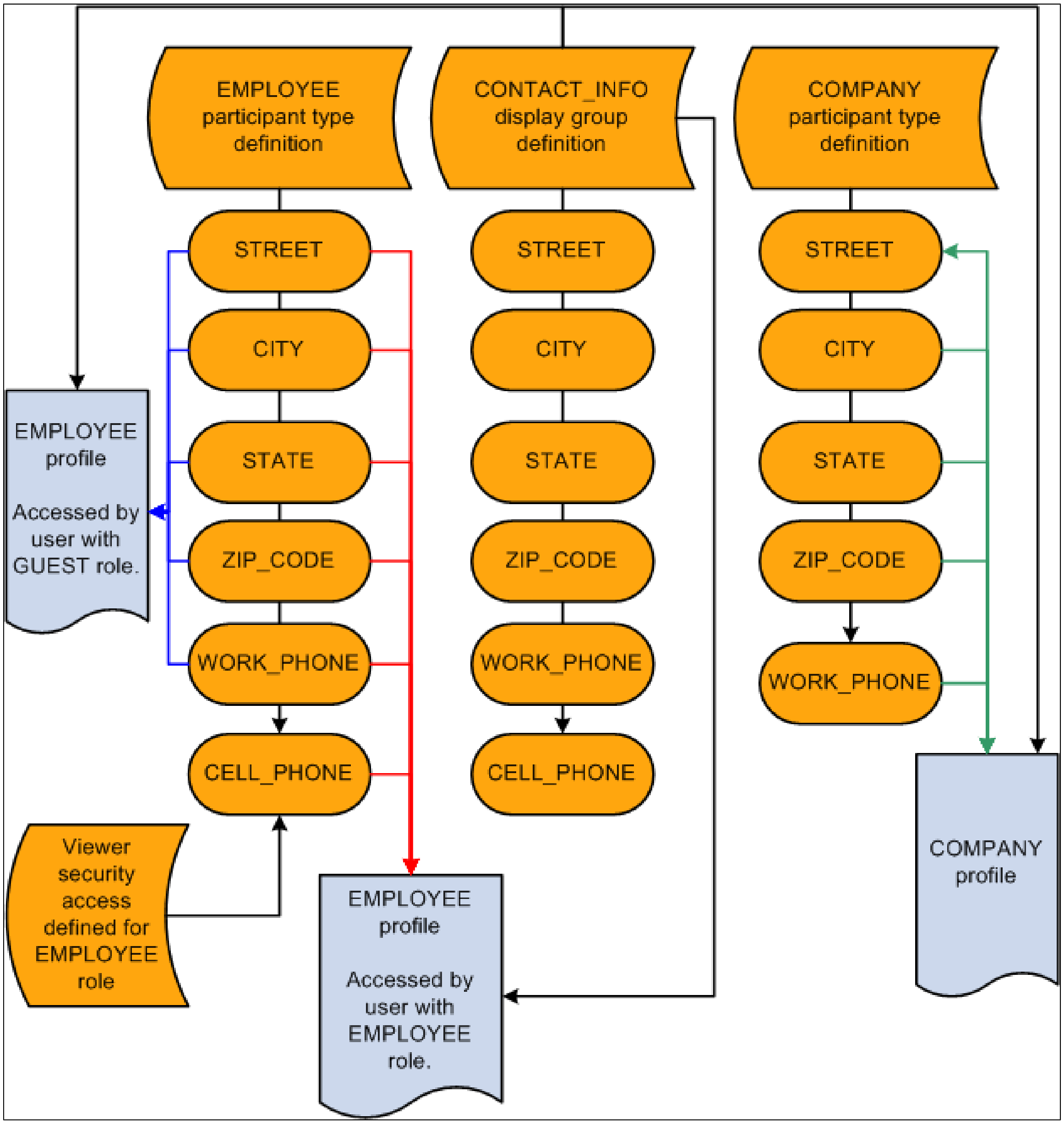
See Configuring Participant Types.

For example, the CONTACT_INFO display group may contain the following attributes: STREET, CITY, STATE, ZIP_CODE, WORK_PHONE, and CELL_PHONE. The display group is associated with both EMPLOYEE and COMPANY participant type profile definitions. EMPLOYEE participant type definitions reference all of the attributes in the display group, while COMPANY participant type definitions reference all of the attributes except CELL_PHONE. Upon rendering the participant profile, although both participant types reference the same display group, Resource Finder displays all of the attributes in the display group on the EMPLOYEE participant profile, while it displays all of the attributes except CELL_PHONE on the COMPANY profile.

This diagram illustrates the participant profile rendering logic:

Image: Profile rendering logic based on participant type, viewer security, display group, and profile definitions

This diagram illustrates the participant profile rendering logic based on participant type, viewer security, display group, and profile definitions.



Another piece of rendering logic for profiles is viewer security that is defined at the participant type level. Suppose that the CELL_PHONE attribute that is associated with the EMPLOYEE participant type has viewer security that enables only users with the EMPLOYEE role to view the attribute on the EMPLOYEE profile. If a user with the EMPLOYEE role accesses an EMPLOYEE profile, the CELL_PHONE attribute appears. However, if a user with a GUEST role accesses an EMPLOYEE profile, the CELL_PHONE attribute does not appear.

See Understanding Using Participant Profiles.

Profile Layout Considerations

When defining the content and layout of a profile page, Oracle recommends that you consider the usability and visual impact of the profile. In particular, consider the following points:

- While the administration pages allow you to place as many display groups on a page as you want, too much information can weigh down the page and prevent your user accessing the profile from getting to the information they want.
- The focus of the profile page, which is the material that appears at the top of the profile, should be the key information that you are trying to convey, with less critical, ancillary information coming afterwards.
- Too many tables (grids) on a single profile page can present the user with too much complex information.

  Consider spreading this information out amongst multiple participant type views of a single participant resource. See the example in the following bullet point. Remember that you can view the display information for any attribute that you add to a display group when you are defining the group.
- Remember that information about a single resource can be spread across multiple participant types.

  You can use this feature to focus on different types of information about any single participant resource. For example, an employee can be defined as both an Employee participant and a Project Member participant.

  This feature enables you to focus information about the employee's project experience and skills with his Project Member view, and his key contact and organizational information with his Employee view. When users access the employee's profile, they see the option to switch views of the employee to focus on either his Project Member or his Employee information.

  See Describing the Resource Finder XML Schema Definition.

Configuring Participant Profiles

This section discusses how to use the Display Groups component (EPX_ATTGROUP) and Participant Profiles component (EPX_PTYPE_ATTGR) to define display groups and participant profiles.

Pages Used to Configure Participant Profiles

Page Name	***Definition Name***	***Usage***
Define Display Group Page	EPX_ATTGROUP	Define display groups. You must have already defined relevant participant types on the Define Participant Type page.
Define Participant Profile Page	EPX_PTYPE_ATTGR	Define participant profile and configuration settings that the system uses to build participant profiles dynamically.

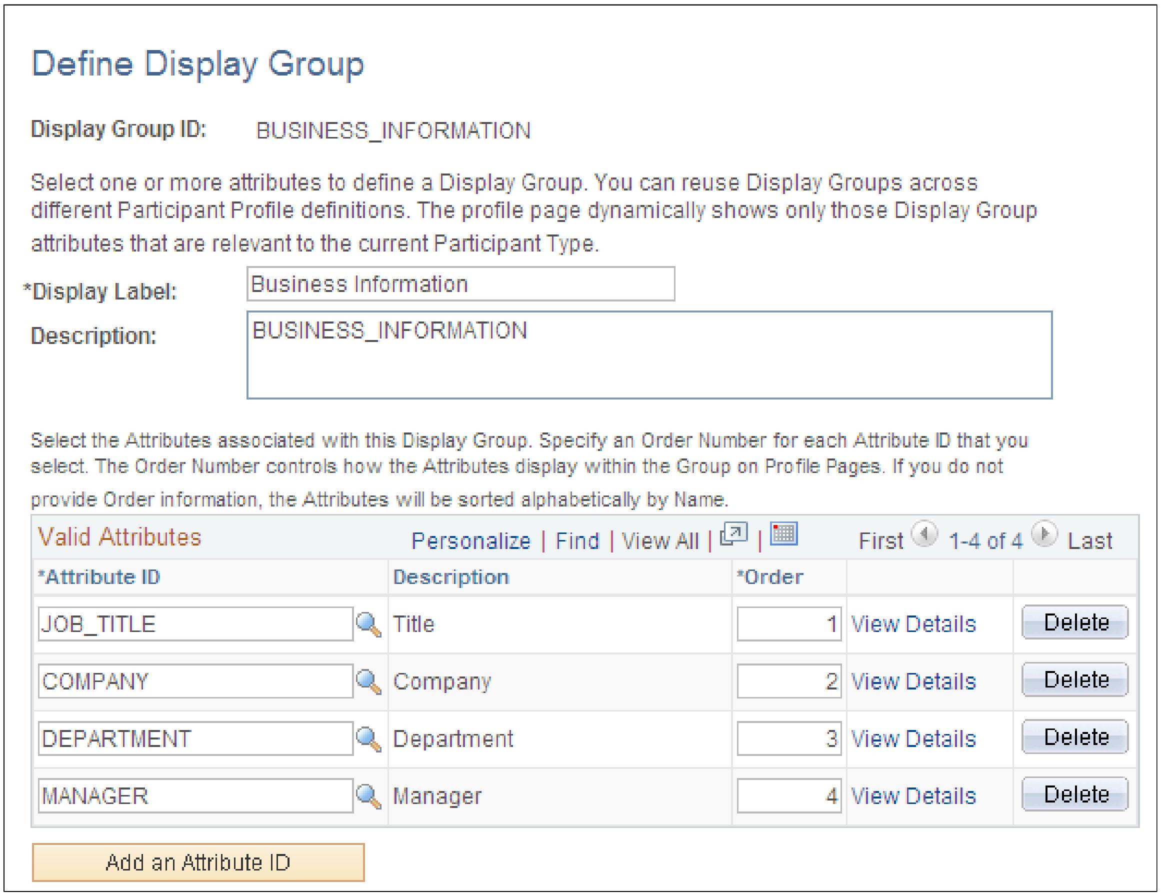
Page Name	***Definition Name***	***Usage***
View Details - Attribute Details Page	EPX_ATT_VW_DETAIL2	View attribute details to verify that you have selected the intended attribute. Click the View Details link on the Define Display Group page. See Define Display Group Page
View Details - Display Group Page	EPX_ATTGPVW_DTLSEC	View display group details to verify that you have selected the intended display group. Select Portal Administration, Resource Finder, Profile Management, Participant Profiles, Define Participant Profile Click the View Details link on the Define Participant Profile page. See Define Participant Profile Page.

Define Display Group Page

Access the Define Display Group page (select Portal Administration, Resource Finder, Profile Management, Display Groups, Attribute Group, Define Display Group).

Image: Define Display Group page

The following screenshot is an example of Defining Display Group page.



Display Label	Enter a label for the display group ID that appears along with the ID wherever it is referenced. You can configure participant profiles to use this label as the group box title for associated attributes.
Description	Enter a description for your information only. This does not appear elsewhere in the system.

Valid Attributes

Attribute ID	Select an active attribute to include in the display group. A single attribute can be associated with multiple display groups.

Order

Enter the order in which you want the attributes to appear within the display group on participant profiles.

View Details

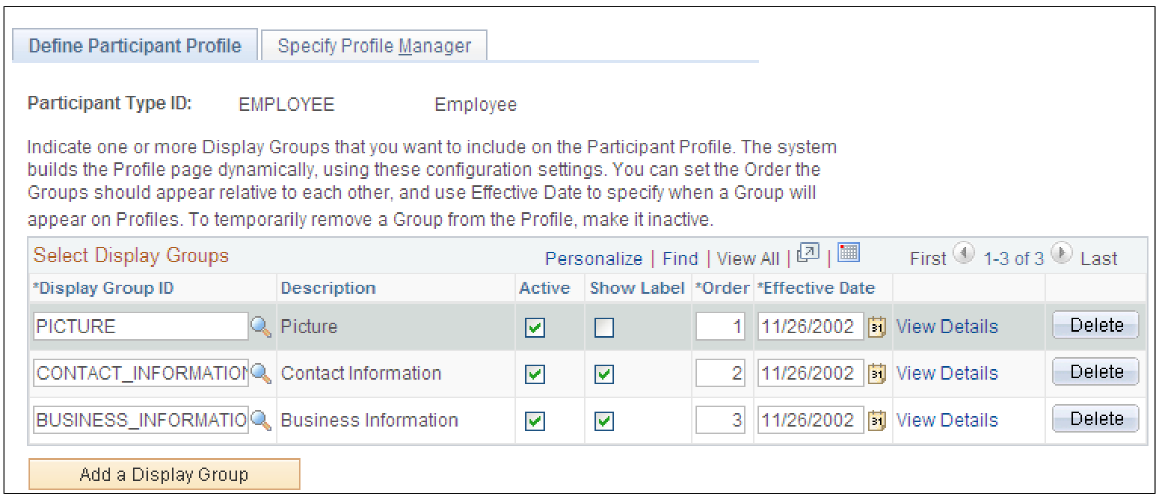
Click to access the Attribute View Details page.

Define Participant Profile Page

Access the Define Participant Profile page (select Portal Administration, Resource Finder, Profile Management, Participant Profiles, Define Participant Profile).

Image: Define Participant Profile page

The following screenshot is an example of Defining Participant Profile page.



Participant Type ID

Displays the participant type ID for which you want to define a participant profile.

A participant type can have only one participant profile definition.

Select Display Groups

Display Group ID

Select a display group ID to display on the participant profile.

The attributes that are associated with the display group appear on the participant profile according to the order that you set for the group on the Define Display Group page. You can reuse a single display group on multiple participant profile definitions.

Active

Select to indicate that the display group's association with the participant profile is active.

Deselect this option to inactivate the display group's association with the participant profile and remove it from the participant profile display.

This setting affects the active status of the display group only for the current participant profile definition. You can set the

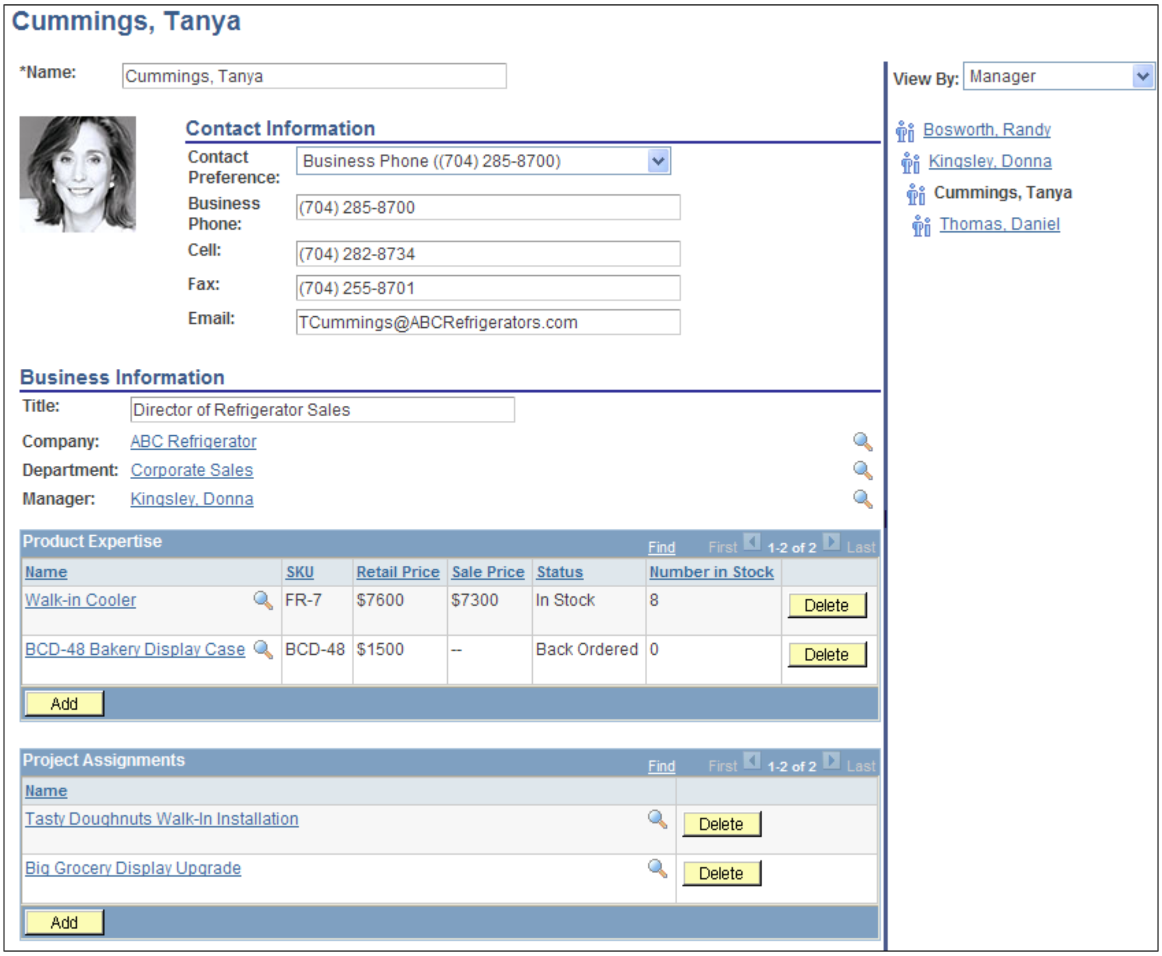
	display group to active for one display group and participant profile definition combination and to inactive for another.
Show Label	Select to have the display label that is defined for the display group on the Define Display Group page appear as the group box title for the display group on the participant profile. This setting affects the display of the label only for the current participant profile definition. You can set the display group label to appear for one display group and participant profile definition combination and to not appear for another.
Order	Enter the order in which you want the display groups to appear on the participant profile.
View Details	View display group details to verify that you have selected the intended display group.

Rendered Profile Example

This example illustrates how the profile definition on the previous page is rendered to create a profile page:

Image: Rendered profile page

The following screenshot is an example of Rendered profile page for Tanya Cummings.



Notice that the Picture, Contact Information, Business Information, Product Expertise, and Project Assignments display groups that are selected in the profile definition appear on the profile. They appear in the order and with the labeling that is specified in the profile definition.

Specifying Profile Managers

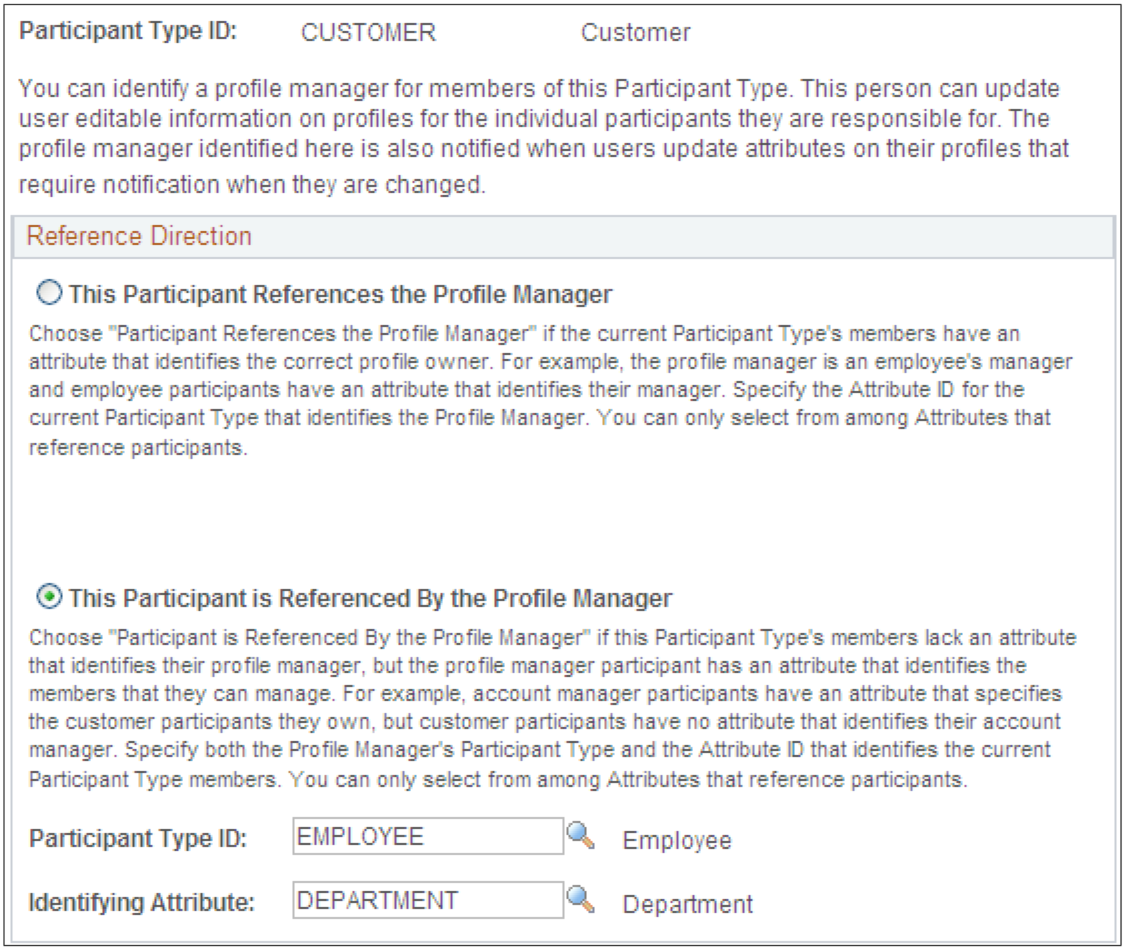
This section discusses how to specify a profile manager.

Define Participant Profiles - Specify Profile Manager Page

Access the Define Participant Profiles - Specify Profile Manager page (EPX_PTYPE_PERM) (select Portal Administration, Resource Finder, Profile Management, Participant Profiles, Specify Profile Manager).

Image: Define Participant Profiles - Specify Profile Manager page

The following screenshot is an example of Define Participant Profiles - Specify Profile Manager page.



Use the Define Participant Profiles - Specify Profile Manager page to specify a profile manager for a participant profile. Profile managers are notified by email when their users modify user-editable profile attributes that require change notification. Profile managers can update user-editable information on profiles that are owned by their individual participants.

An email notification of changes is sent to the email address that is defined for the profile manager on the Email Addresses page.

See *PeopleTools 8.52: Security Administration PeopleBook,* "Administering User Profiles," Specifying User Profile Attributes.

Reference Direction

This Participant References the Profile Manager	Select this option if the participant type definition contains an attribute that references, or identifies, the profile manager that you want to specify.

For example, to specify the profile manager for an EMPLOYEE profile when the EMPLOYEE participant type definition contains an attribute that identifies the employee's manager, select this option and enter the identifying attribute in the Identifying Attribute field.

You can select only from attributes with a value type that is set to *Participant Reference* on the Define Attribute page.

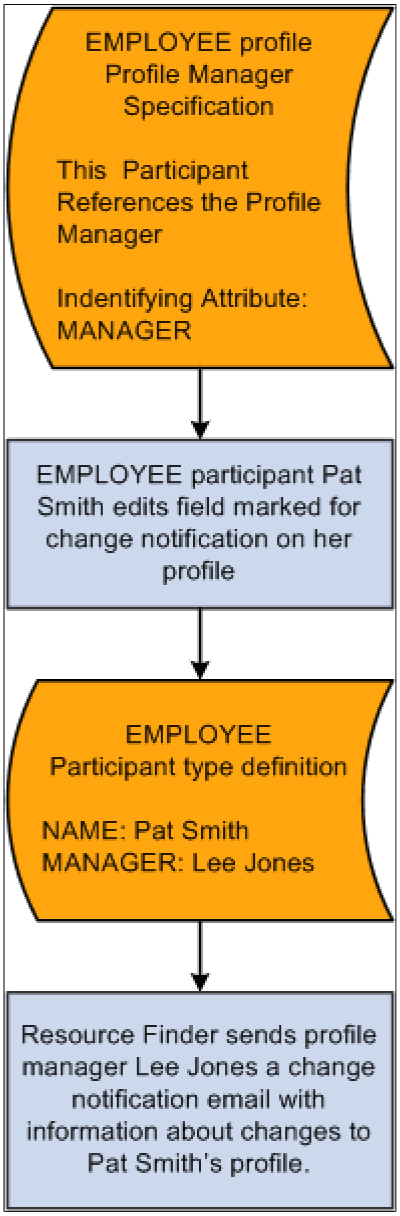
Identifying Attribute

Enter the attribute that references, or identifies, the profile manager in the selected participant type definition.

This field appears when you select the This Participant References the Profile Manager option.

Image: Example of profile manager processing flow using the This Participant References the Profile Manager option

The following image is an example of profile manager processing flow using the This Participant References the Profile Manager option.



This Participant is Referenced By the Profile Manager

Select this option if the participant type lacks an attribute that identifies its profile manager, but the profile manager participant type has an attribute that identifies the members whose profiles you want the profile manager to manage.

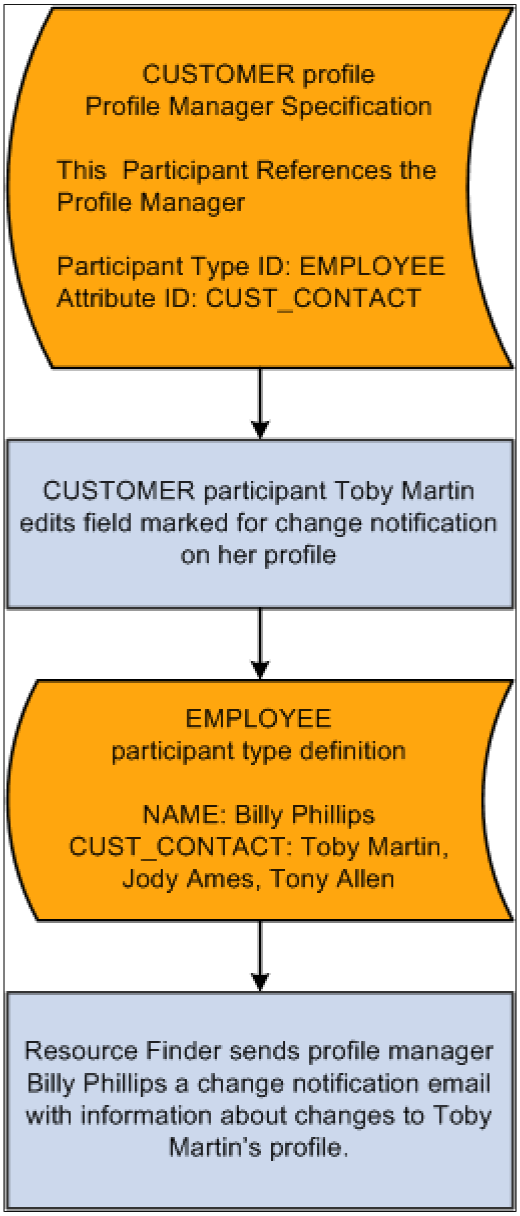
For example, EMPLOYEE participants, who are account managers, have an attribute that specifies their customer contacts (CUST_CONTACT), but CUSTOMER participant

	types do not contain an attribute that identifies their account managers. To specify the employee account manager as the customer profile manager, select this option, enter *EMPLOYEE* in theParticipant Type ID field, and enter*CUST_CONTACT* in theIdentifying Attribute field.
Participant Type ID	Select the profile manager's participant type. This field appears when you select the This Participant is Referenced By the Profile Manager option.
Identifying Attribute	Select the attribute ID that identifies the members of the current participant type in the definition of the Participant Type ID value. This field appears when you select the This Participant is Referenced By the Profile Manager option.

You can select only from attributes with a value type that is set to *Participant Reference* on the Define Attribute page.

Image: Example of profile manager processing flow using the This Participant is Referenced By the Profile Manager option

The following image is an example of profile manager processing flow using the This Participant is Referenced By the Profile Manager option.



See Define Attribute - Configure Participant References Page.

Chapter 5

Setting Up Resource Finder Searches

Understanding Resource Finder Search Functions

The Resource Finder repository is composed of information about participants in the enterprise provided either by data load or by online edits made directly to the repository. PeopleSoft Portal Resource Finder brings diverse information about enterprise resources together into a single repository and backs it with a single Oracle Enterprise Secure Search (SES) search engine. This combination enables you to look up any relevant resource in the enterprise using a single search engine and interface. Resource Finder allows for direct lookups of participants only. External assets—such as publications, products, or any other lightweight references—are available only by way of their connections to individual participants.

The PeopleSoft Interaction Hub system delivers two search definitions and corresponding categories that expose all of the resources in your enterprise.The search definitions and categories have the same name. The search definitions and categories are PAPP_RESOURCE_FINDER_PARTICIPANT and PAPP_RESOURCE_FINDER_EXT_COMPONENT. You must deploy both these search categories and build indexes for both, though only the PAPP_RESOURCE_FINDER_PARTICIPANT (Participants) search category is available as a search group in Global Search. The search index draws connections between entities by looking across individual participants and participant types and searching for similar attributes.

See "Understanding Search Definitions and Categories " (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

The Resource Finder end-user search experience provides the following search options:

- Free-form text search.

  This is the functionality behind the Contains words search field on the Resource Finder - Advanced Search page and the Contains field on the Resource Finder pagelet.

  This is an open-ended search in which a list of keywords is applied against all searchable fields in the search category. When search results are ranked, matches against principal participants weigh more than matches against participant references. For example, if you query against the EMPLOYEE participant type, any EMPLOYEE participant is a match, along with any participant that has an attribute that references other EMPLOYEE participants. However, the former search result always ranks higher than the latter.

- Parameterized search.

  This is the functionality behind the search parameters you define for rendering on the Resource Finder - Advanced Search page. Definition of these search parameters is covered in the topic: Understanding Resource Finder Search Functions.

  This search provides a more complex system of search criteria involving specific searchable attribute names and values. A parametric search includes an attribute name and value pair, such as CITY = Pleasanton, where CITY is an attribute name and Pleasanton is an attribute value. Rather than involving just a list of keywords, a parametric search involves an array of name and value pairs. The attribute name is the field name as it resides in the search category.

- Hybrid search.

  This search functionality leverages both the free-form text and parametric searches. An array of name and value pairs partially constrains the result set based on specific fields. Then an array of keywords filters the remaining result set based on all searchable fields.

Searches can be further configured to return only participants of a particular participant type. Only active, current-dated attributes are included in the search index. Search results are displayed for users in sets of 5.

Viewer security is enforced in Resource Finder searches. Viewer privileges set for participant type attributes on the Define Participant Types - Set Viewer Security page are used to determine which attributes and attribute values should appear in Resource Finder search parameters and results.

The participant description, or Name, is always a given search parameter and search result column.

Attribute reference, external asset reference, and participant reference attribute value types are stored in a format consistent with the way in which normal attribute values are stored during search category creation. This involves storing any supporting data, such as participant type and description for participant references, and component type and description for external asset references.

See Configuring Attributes.

Configuring Advanced Search Parameters

This section provides an overview of advanced search parameters and discusses how to use the Search Options component (EPX_PTYPE_SATT) to define participant search parameter options.

Pages Used to Configure Advanced Search Parameters

Page Name	***Definition Name***	***Usage***
Define Advanced Search Option Page	EPX_PTYPE_SATT	Specify attributes that you want to use as search parameters for the selected participant type on the Resource Finder - Advanced Search page.
Select Search Parameter Attributes - Check Viewer Security Page	EPX_PTYPE_SATT_SEC	Check viewer access for participant attribute search parameters on the Resource Finder - Advanced Search page. To modify viewer access, access the Define Participant Types - Set Viewer Security page. See Define Participant Types - Set Viewer Security Page

Page Name	***Definition Name***	***Usage***
Attribute View Details Page	EPX_ATT_VW_DETAIL2	View attribute details. Information displayed on this page can help you verify that you have selected the intended attribute. Access the Define Attribute Type component to modify attribute information. Select Portal Administration, Resource Finder, Administration, Search Options, Set Up Search Options Click the View Details link on the Define Advanced Search Option page.

Understanding Advanced Search Parameters

Resource Finder search parameters are configured by participant type. The search parameters and options you define using the pages discussed in this section are dynamically rendered onto the Resource Finder - Advanced Search page based on the participant type for which you are searching. These pages enable you to define highly configurable sets of search parameters for different participant types.

For example, you can configure a set of search parameters tailored specifically toward employee participant type searches. You can also configure different sets of search parameters appropriate for customer, department, and company searches. Resource Finder enables you to configure search parameters that meet your business requirements and that work most naturally for your users.

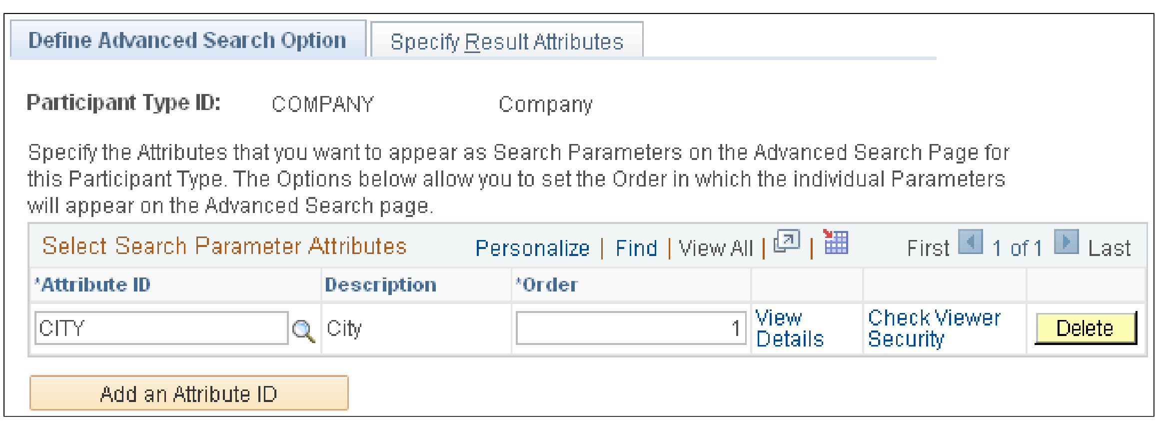
This configuration does not impact the Resource Finder pagelet.

Define Advanced Search Option Page

Access the Define Advanced Search Option page (select Portal Administration, Resource Finder, Administration, Search Options, Set Up Search Options).

Image: Define Advanced Search Option page

The following screenshot is an example of Defining Advanced Search Options page.



Participant Type ID

Enter a participant type for which you want to define attributes available as search parameters on the Resource Finder - Advanced Search page.

Each participant type in your repository can have only one set of search parameter attributes.

Select Search Parameter Attributes

Attribute ID

Select an attribute that you want to appear on the Resource Finder - Advanced Search page as a search parameter for the selected participant type.

You can select only from attributes associated with the current participant type on the Define Participant Type page.

See Configuring Participant Types.

These search parameter attributes do not necessarily have to be attributes that you have configured to appear on profiles for the participant type; however, you may choose to limit the parameters to these displayed profile attributes. You also can use a combination of displayed and nondisplayed profile attributes if doing so helps provide faster identification of the participant.

Order

Enter the order in which you want the attributes that you designate as search parameters to appear on the Resource Finder - Advanced Search page.

View Details

Click to access the Attribute View Details page.

Check Viewer Security

Click to access the Select Search Parameter Attributes - Check Viewer Security page, which displays viewer security information for the selected participant type attribute.

Viewer security for participant type attributes is strictly enforced on the Resource Finder - Advanced Search page. If users are restricted from viewing the attribute on a profile, they are restricted from viewing and using it as a search parameter, as well as from seeing it in search results.

To edit viewer security for a participant type attribute, access the Define Participant Types - Set Viewer Security page.

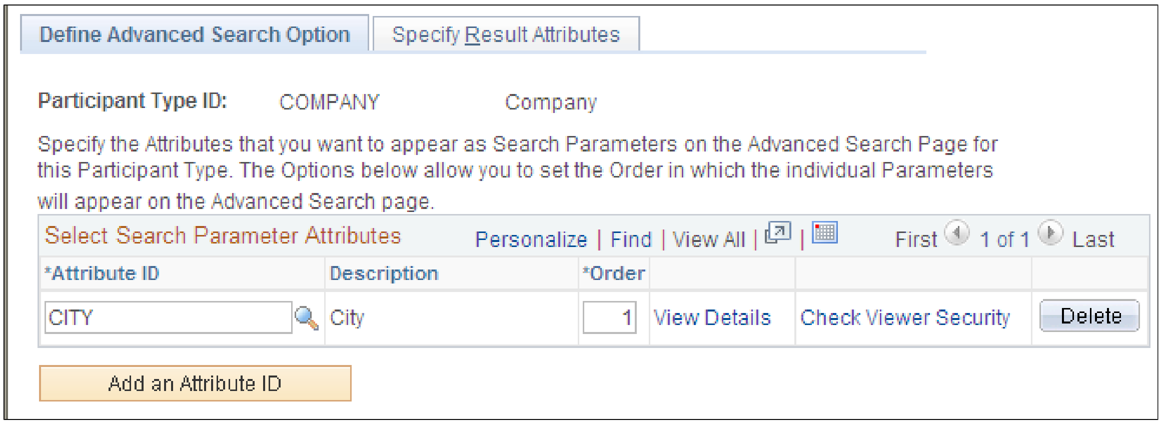
See Define Participant Types - Set Viewer Security Page.

Rendering Advanced Search Parameters on the Resource Finder - Advanced Search Page

The following examples show how the advanced search parameters that you define on the Define Advanced Search Option page are rendered for display on the Resource Finder - Advanced Search page:

Image: Define Advanced Search Option page

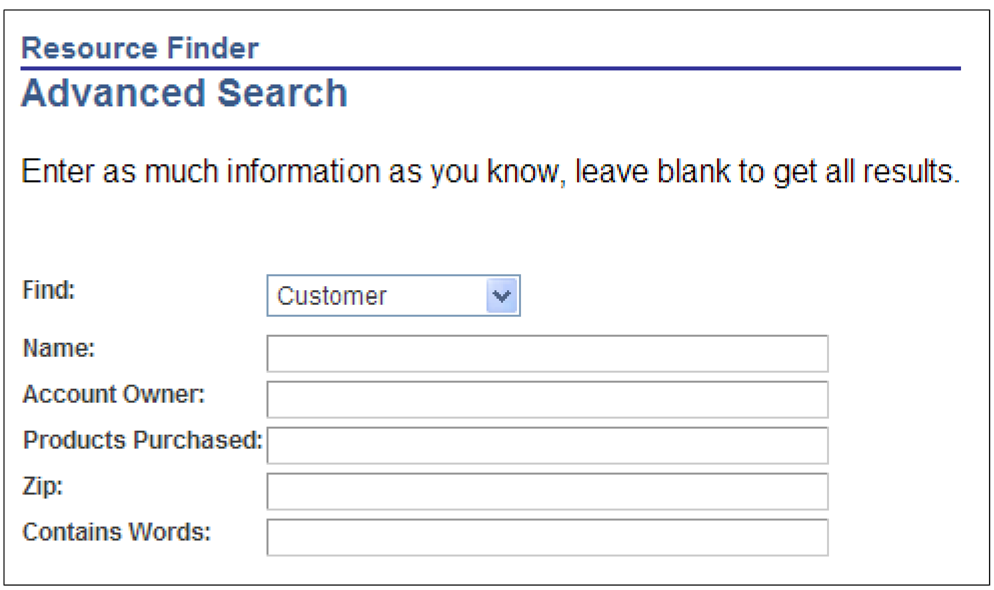
The following screenshot is an example of rendering Advanced Search Parameters on the Resource Finder - Advanced Search Page.



The search parameter attributes defined in the preceding example of the Define Advanced Search Option page appear in the following way on the Resource Finder - Advanced Search page:

Image: Resource Finder - Advanced Search page

The following screenshot is an example of building a Resource finder - Advanced Search page.



The Find, Name, andContains words fields appear for all advanced searches.

Configuring Advanced Search Result Attributes

This section provides an overview of advanced search result attributes and discusses how to define participant search result attributes.

Pages Used to Configure Advanced Search Result Attributes

Page Name	***Definition Name***	***Usage***
Specify Result Attributes Page	EPX_PTYPE_SRSLT	Specify attributes that you want to appear as search results for the selected participant type on the Resource Finder - Advanced Search page.
Attribute View Details Page	EPX_ATT_VW_DETAIL2	View attribute details. Information displayed on this page can help you verify that you have selected the intended attribute. Access the Define Attribute Type component to modify attribute information. Select Portal Administration, Resource Finder, Administration, Search Options, Set Up Search Options Select the Specify Result Attributes tab from the Define Advanced Search Option page. Click the View Details link on the Specify Result Attributes page.
Select Search Result Attributes - Check Viewer Security Page	EPX_PTYPE_SRST_SEC	Check viewer access for participant attribute search results on the Resource Finder - Advanced Search page. To modify viewer access, access the Define Participant Types - Set Viewer Security page. See Define Participant Types - Set Viewer Security Page

Understanding Advanced Search Result Attributes

Resource Finder search result attributes are configured by participant type. The search result attributes and options that you define using the pages discussed in this section are dynamically rendered onto the Resource Finder - Advanced Search page based on the participant type for which you are searching. These pages enable you to define highly configurable sets of search result attributes for different participant types.

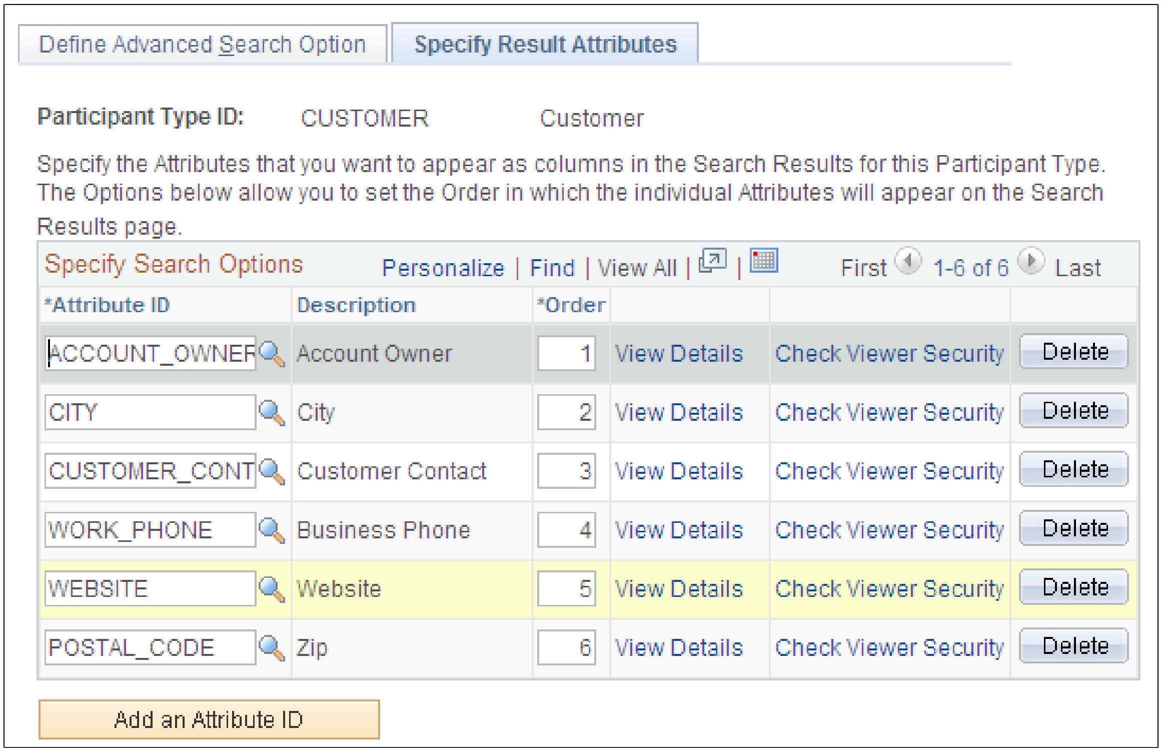
For example, you can configure a set of search result attributes tailored specifically for employee participant type searches. You can also configure different sets of search results attributes appropriate for customer, department, and company searches. Resource Finder enables you to configure sets of search result attributes that meet your business requirements and that work most naturally for your users.

Specify Result Attributes Page

Access the Specify Result Attributes page (select Portal Administration, Resource Finder, Administration, Search Options, Set Up Search Options; select the Specify Result Attributes tab from the Define Advanced Search Option page).

Image: Specify Result Attributes page

The following screenshot is an example of Defining Advanced Search Result Attributes page.



Participant Type ID

Enter a participant type for which you want to define attributes available as search results on the Resource Finder - Advanced Search page.

Each participant type in your repository can have only one set of search result attributes.

Specify Search Options

Attribute ID

Select an attribute that you want to appear as a search result column for the selected participant type on the Resource Finder - Advanced Search page.

You can select only from attributes associated with the current participant type on the Define Participant Type page.

See Configuring Participant Types.

Order

Enter the order in which you want the search result columns to appear on the Resource Finder - Advanced Search page.

View Details	Click to access the Attribute View Details page.
Check Viewer Security	Click to access the Select Search Result Attributes - Check Viewer Security page, which displays viewer security information for the selected participant type attribute. Viewer security for participant type attributes is strictly enforced on the Resource Finder - Advanced Search page. If users are restricted from viewing the attribute on a profile, they are restricted from viewing it in search results, as well as from viewing and using it as a search parameter. To edit viewer security for a participant type attribute, access the Define Participant Types - Set Viewer Security page. See Define Participant Types - Set Viewer Security Page.

Configuring Organization Charts

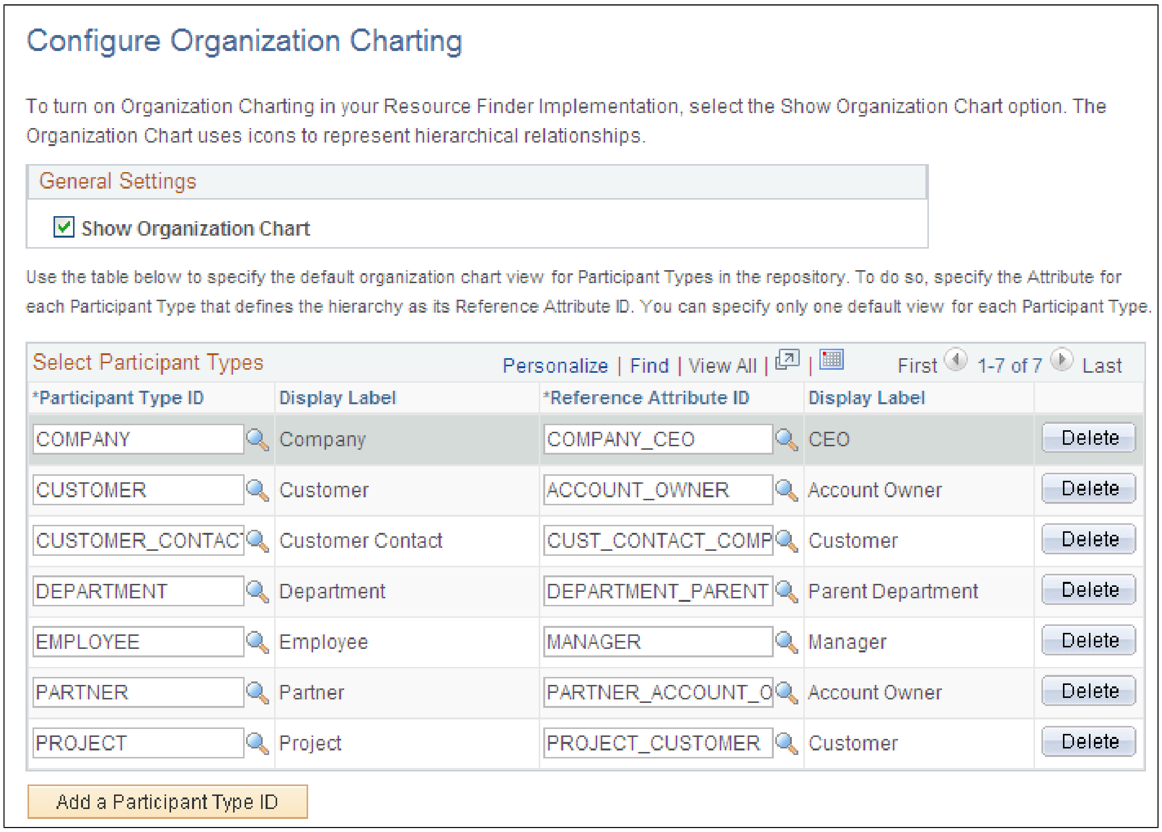
This section discusses how to use the Organization Charting component (EPX_ORGCHARTATT) to configure your organization charts.

Configure Organization Charting Page

Access the Configure Organization Charting page (EPX_ORGCHARTATT) (select Portal Administration, Resource Finder, Administration, Organization Charting).

Image: Configure Organization Charting page

The following screenshot is an example of Configuring and Defining Organization Charting page.



Use the Configure Organization Charting page to activate organization charts for your Resource Finder implementation. Define default organization chart settings. Your configured organization charts appear on applicable participant profiles.

General Settings

Show Organization Chart	Select to activate organization charts for your Resource Finder implementation. Organization charts appear as a part of applicable participant profiles. See Navigating Organization Charts.

Select Participant Types

Participant Type ID	Select a participant type for which to define a default organization chart view.

Reference Attribute ID

Select the attribute for any available participant type that you want to use to create a default organization chart view for the participant type ID.

You can select from participant reference attributes that have been associated with the participant type. Note that this setting does not limit the list of available organization chart view options that Resource Finder generates for participants. Rather, the full list of the View By options in the organization chart is determined by all the participant references specified in the Participant Type definition set up by the Resource Finder administrator.

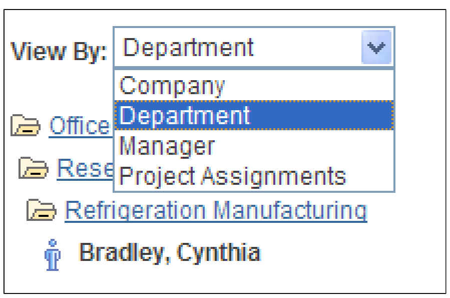
Note: If you suppress a participant reference attribute in a display group for a participant profile, it is not removed as a View By option for organization charts for the participant type.

See Define Attribute - Configure Participant References Page.

For example, the administrator defines the Employee participant type to include participant reference attributes for Manager, Company, Department, and Project Assignments. As illustrated in the following example, the Resource Finder organization chart generates views for each of these options:

Image: Organization chart View By drop-down list box

The following image is an example of Organization chart View By drop-down list box.



If multiple attribute view options are available for a participant type, and you do not define a default view for a participant type, Resource Finder uses the first available option as the View By default.

If you access the profile for a particular department, the first View By option users see is for the Parent Department, although other options, such as the manager of the department, may be available depending on how you have defined the department participant type.

Image: Organization chart Parent Department View By option

The following image is an example of Organization chart Parent Department View By option.

The default that you set for different participant types on this page also impacts how organization charts are rendered wherever the organization chart View By option appears in Resource Finder, even when it appears on profiles for other participants.

For example, when the user accesses an employee's profile, even though his or her default View By option is MANAGER, if the user chooses to see the employee's Department organization chart view, Resource Finder shows that department hierarchy based on the Parent Department relationship because that is the default you specified for Departments on the Configure Organization Charting page.

In this situation, Resource Finder renders the organization chart for the View By option that you select on the profile based on the default reference attribute ID value that you enter on this page and inserts the participant whose profile you are viewing into the proper place in the hierarchy.

Along these lines, when you access an employee profile and select the organization chart Department View By option, the system renders the organization chart using two layers of associations: employee to department, and department to parent department.

Image: Organization chart Department View By option

The following image is an example of Organization chart Department View By option.

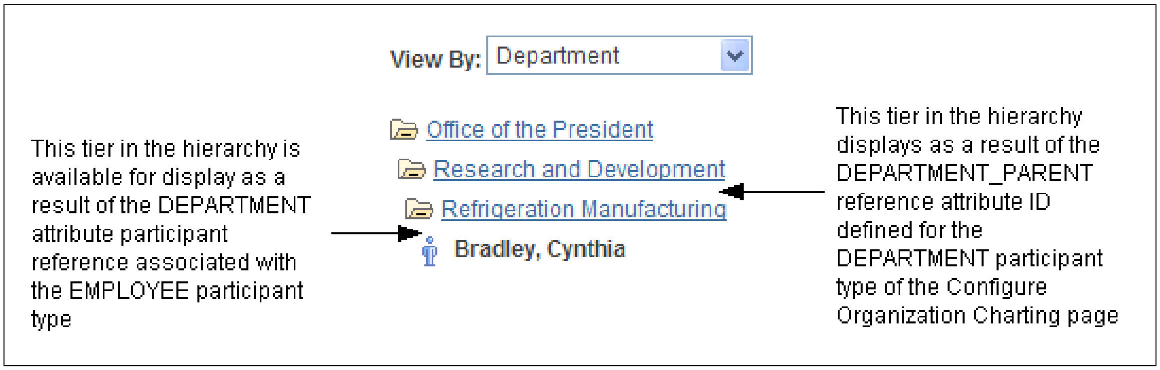
The hierarchy between the employee and the department is created using the connection between the EMPLOYEE participant type and its associated DEPARTMENT participant reference attribute.

The hierarchy between the department and its parent is created using the connection between the DEPARTMENT participant and its DEPARTMENT_PARENT reference attribute ID defined on this page.

The following example illustrates how these tiers in the hierarchy are rendered:

Image: Organization chart View By option rendering

The following image is an example of rendering an organization chart by View By department option.



Other options are available for selection in the organization chart View By drop-down list box. If only one option is available, Resource Finder displays that view and theView By drop-down list box does not appear. If noView By options are available for a Participant Type (for example, you have not associated any participant reference attributes with the participant type, or the available participant reference attributes do not have any values associated with them), Resource Finder does not display an organization chart.

Building Your Resource Finder Search Index

This section discusses how to build your search index.

Build Search Index Page

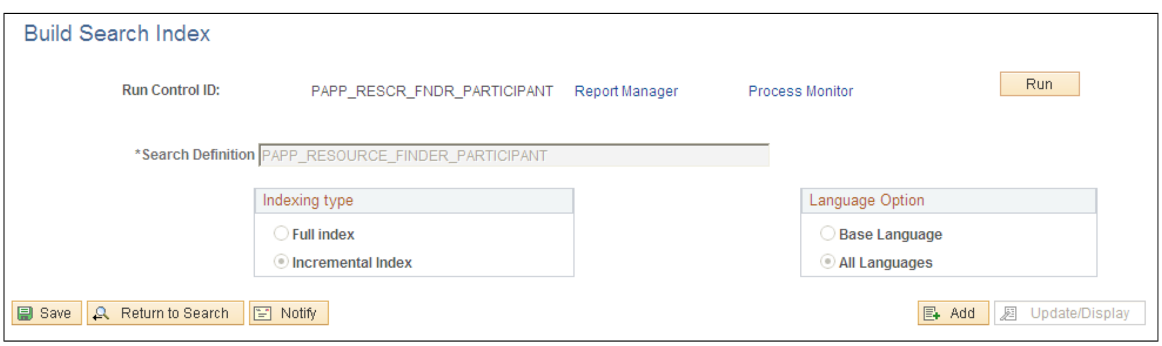
Use the Build Search Index page (PTSF_SCHEDULE_SI) to build search index for Resource Finder.).

Navigation

Portal Administration, Search Administration, Search Administration WorkCenter

Image: Build Search Index page

The following example illustrates the Build Search Index page.



Use the Build Search Index page to run the Build Search Index process. You build your Resource Finder search index by building indexes for the delivered PAPP_RESOURCE_FINDER_PARTICIPANT and PAPP_RESOURCE_FINDER_EXT_COMPONENT search categories.

Related Links

"Building Search Indexes" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

Chapter 6

Importing Participant Data

Understanding Importing Participant Data

You load PeopleSoft Portal Resource Finder with participant data imported from disparate data sources using the Resource Finder Data Import Service. The repository stores this consolidated data in a format optimal for accessibility using Resource Finder.

To use the Data Import Service to load participant data directly into Resource Finder, you must first format your data to fit the Resource Finder XML schema definition (PS_APP_HOME/web/integration/epr.xsd). You then feed the formatted data to the Data Import Service using either the PeopleSoft Integration Broker or the File Import Application Engine process (EPX_FILE_IMP):

Note: If the PeopleSoft Interaction Hub files were not installed in a separate PS_APP_HOME location, then this file will be found in PS_HOME instead.

- Use the PeopleSoft Integration Broker approach if you want to have your source application post participant data XML messages to the Data Import Service by way of Integration Broker.

  You do not need to format the XML data using this approach, but you may need to adjust your XSL for any customizations that you made. The PeopleSoft Integration Broker provides messaging middleware that your external applications can use to publish participant data for subscription by the Resource Finder Data Import Service. If your integrating application is capable of publishing its data into a messaging system such as PeopleSoft Integration Broker, Oracle recommends using this approach.

  See *PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook*

- Use the File Import process approach if your participant data XML files reside on disk and you want to have the data fed to the Data Import Service by way of the File Import process.

  The File Import process provides support for importing flat-file XML participant data into Resource Finder. The XML data in the flat file must conform to the Resource Finder XML schema definition. If your integrating application is not able to publish its data into a messaging system such as PeopleSoft Integration Broker, or you have other technical considerations keeping you from using Integration Broker, export the data in XML format into a flat file and use the File Import process to feed the data to the Data Import Service for loading to Resource Finder. Oracle provides a run control page that you can use to maintain a list of import files and directory references.

  If your integrating application does not have a way to express its data in XML, write a custom program in the language of your choice to transform the data into XML. If you write this transformation application in a language such as Java, you may want to consider just having the integrating application post the transformed output XML to Integration Broker, rather than write it to a flat file for loading by the File Import process.

  See Importing Participant Data Files.

Resource Finder provides a user interface for mapping external data source entities to Resource Finder participant attributes.

Note: You should always load new data into Resource Finder using the services and methods we recommend in this PeopleBook. Do not load data directly from an external data source to underlying database tables of Resource Finder because this circumvents the application-level business logic that governs repository data.

Observe the following rules when working with Resource Finder participant data:

- You cannot manually create new participants in Resource Finder.

  New participants must be loaded by way of the Data Import Service.

- You cannot manually associate participants with new participant types in Resource Finder.

  New participant type associations must be loaded by way of the Data Import service.

- You cannot manually edit values associated with participant attributes with attribute types set to *Image* in Resource Finder.

  Image attribute values must be loaded by way of the Data Import Service.

- After values are associated with participant attributes with attribute types set to *Participant Reference* or*External Asset Reference,* values can be changed, but not deleted.

  You cannot disassociate a value and leave the participant attribute without a value.

Describing Resource Finder Participant Data Import Messaging

Messages can be structured or unstructured in PeopleSoft Integration Broker. A structured message is one in which the message payload, or all fields in the message, is explicitly defined in the message definition. Message definitions used in PeopleSoft prepackaged integrations, as well as all message definitions generated by PeopleSoft applications, are structured. Other external applications may define unstructured messages, in which case the message definition serves primarily as a unique name that identifies the message type.

From the Resource Finder perspective, a message definition is an Integration Broker-related object that you define in Application Designer to tie the Integration Broker messaging into the external application providing participant data. You must create a separate message definition for each external data source.

See *PeopleTools 8.52: PeopleSoft Application Designer Developer's Guide PeopleBook,* "Using PeopleSoft Application Designer," Working With Definitions.

For example, suppose that external application X publishes a message Y to which Resource Finder wants to subscribe and load. You create a message definition Y on both the sending and receiving Integration Broker nodes so that the applications can send and receive Y messages. In the Resource Finder data import scenario, the message Y definition in your PeopleSoft Integration Hub database is always the receiving party, or message consumer. Subscription PeopleCode associated with the message definition Y of Resource Finder calls the Data Import Service.

After you have created a message definition in the Resource Finder Integration Broker node, add the following subscription PeopleCode to the message definition that processes messages of the message type whenever they arrive. The only variable in this PeopleCode from message to message is the reference to the HTML object that contains the transformation XSL, if applicable to the message.

```
import EPX_SERVICE:EPRDataImportMessageHandler; Local
EPRDataImportMessageHandler &EPRDataImportMessageHandler;
&EPRDataImportMessageHandler = create
EPRDataImportMessageHandler(GetMessageXmlDoc(),
GetHTMLText(HTML.XSLT_WORKFORCE_SYNC));
```

Note: This step is not necessary for delivered messages that interact with PeopleSoft Human Capital Management (HCM) applications. The necessary PeopleCode is already in the delivered message definitions.

See Describing Delivered Resource Finder Message Definitions.

The type of messaging used for the Resource Finder data import is asynchronous. The external application publishes a message, which is saved to a persistent message queue. The Resource Finder Integration Broker node polls persistent message queues for which active subscriptions exist. When the node encounters new messages, it triggers this message PeopleCode in the relevant message definition. This Resource Finder message PeopleCode transforms the published message, if necessary, and then forwards it to the Data Import Service.

Resource Finder Message Sync Setup

You can refer to several other areas of documentation for specific information about the setup of Resource Finder message sync. Several sources of information on this topic are available.

See Configuring PeopleSoft Integration Broker to Work with Resource Finder Participant Data Import Messages

PeopleTools: Integration Broker

Related Links

Understanding Resource Finder Search Functions

"Setting Up on the Third-Party Side" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

Describing Delivered Resource Finder Message Definitions

PeopleSoft Portal Resource Finder is delivered with import message definitions as sample participant data for use with PeopleSoft Human Capital Management (HCM).

These message definitions are delivered with subscription PeopleCode that applies the appropriate XSL transformation logic and stores the message data in the Resource Finder repository. Installing these HCM data sources for use with these message definitions requires running message-specific Data Mover scripts that create attributes in Resource Finder with names corresponding to HCM message field names.

The XSL required to transform these messages is stored in HTML objects in the portal database. The subscription PeopleCode retrieves the XSL from the database, passes it to the

EPRDataImportMessageHandler object, which applies the XSL to the incoming message, and then passes the transformed message to the Data Import Service.

The following table contains a listing of the sample HCM participant data import messages mapped to HCM-specific Integration Broker message channels:

HCM Messages	***HCM Message Channels***
PERSON_BASIC_SYNC	PERSON_BASIC
PERSON_BASIC_FULLSYNC	PERSON_DATA
WORKFORCE_SYNC	PERSON_DATA
WORKFORCE_FULLSYNC	PERSON_DATA
COMPANY_SYNC	PERSON_SETUP
COMPANY_FULLSYNC	PERSON_SETUP
JOBCODE_SYNC	HR_SETUP
JOBCODE_FULLSYNC	HR_SETUP
DEPT_SYNC	ENTERPRISE_SETUP
DEPT_FULLSYNC	ENTERPRISE_SETUP
LOCATION_SYNC	ENTERPRISE_SETUP
LOCATION_FULLSYNC	ENTERPRISE_SETUP

When working with applications, such as HCM, which publish messages for import into Resource Finder, you should deselect the Create Message Header andCreate Message Trailer options on the Full Data Publish Rules page. Message headers and trailers are not supported by the Resource Finder Data Import Service.

Describing the Resource Finder XML Schema Definition

The participant Data Import Service requires that data conform to the XML schema definition of Resource Finder prior to being loaded. This schema is a representation of all Resource Finder data types in XML and provides you with a standardized specification for formatting your data for import into the Resource Finder repository.

The Resource Finder XML schema definition resides in the PS_APP_HOME/web/integration/epr.xsd file delivered on your installation CD. The *epr.xsd* file contains definitions for all Resource Finder data structures, not just participant data. However, only participant elements are processed during data import.

Note: If the PeopleSoft Interaction Hub files were not installed in a separate PS_APP_HOME location, then this file will be found in PS_HOME instead.

Describing a Resource Finder Sample Participant Message

In this section, we describe a sample message in Resource Finder format. This message represents a participant and conforms to the Resource Finder XML schema definition (epr.xsd). We deliver a sample XML file that conforms to the XML schema definition: PS_APP_HOME/web/integration/sample.xml

---

Note: If the PeopleSoft Interaction Hub files were not installed in a separate PS_APP_HOME location, then this file will be found in PS_HOME instead.

The outermost element is always *epr*. Import messages should contain one or more nested participant elements. Each*participant* element should contain one*attribute-value-set* element for each distinct attribute for which it contains values.*attribute-value-set* elements must always contain one*attribute-definition-ref* element that references the associated attribute. They should also contain one or more*attribute-value* elements (one for each value).

Just as different types of attributes are available that you define in Resource Finder, different types of *attribute-value* elements are available that you can nest within an*attribute-value-set* element. That is, different elements are available that extend the same element type as*attribute-value*:

- *attribute-ref* (attribute references).
- *participant-ref* (participant references).
- *component-ref* (external asset references).

Following all *attribute-value-set* elements of a*participant* element, at least one*participant-type-ref* element must designate the participant type view of the participant to which the message corresponds in Resource Finder; more than one can exist. Nested within this element should be one*external-key-mapping* element for each field required to uniquely identify the participant in its external data source. For example, if two fields are required to establish a unique identifier, two*external-key-mapping* elements should be nested within the*participant-type-ref* element. The value of the*field-name* attribute should be the same as the key field name defined in the Resource Finder mapping for that data source. The*field-value* attribute should contain the actual key field value.

Notice that in the following sample message, the *ID* attribute of the*participant* element is set to*0* (zero), as are all the values of the*attribute-value* ID attribute. This is because these values are populated by Resource Finder native ID values while being processed by the Data Import Service. The Data Import Service uses the key mapping metadata defined for the data source to either generate new or retrieve existing Resource Finder IDs for participant messages during import.

See the product documentation for *PeopleTools: Security Administration*, “Administering User Profiles."

```
<epr xmlns="http://pt-sun13.peoplesoft.com/epr" xmlns:eo_pe=
"http://pt-sun13.peoplesoft.com/eo_pe" xmlns:xsi=
"http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation=
"http://pt-sun13.peoplesoft.com/epr http://pt-sun13.peoplesoft.com/epr/epr.xsd">

 <!-- Participant is the only type of top-level element that should ever
come in by way of a data feed. -->
 <participant description="participant 1 name" effective-date="1900-01-01"
 id="" data-privacy-waived="false" activity-status="ACTIVE" data-source=
"" operator-id="">

  <!-- Participants can nest multiple attribute-value-sets, each one
representing one or more values associated with a distinct attribute. -->
  <!-- The first one contains a simple attribute-value element with one
value associated with it. -->
  <attribute-value-set>
```



```
   <attribute-definition-ref attribute-name="SSN" external-field-name=
"social_sec_nbr"/>
   <attribute-value id="" activity-status="A" data-source=
"PSFT-HR_WORKFORCE_SYNCH" effective-date="1900-01-01" value="333-22-3423"/>
  </attribute-value-set>

  <!-- This one contains a simple attribute-value element with multiple
values associated with it, and the values are scored. -->
  <attribute-value-set>
   <attribute-definition-ref attribute-name="SKILLS"
external-field-name="competency"/>
   <attribute-value id="" activity-status="A" data-source=
"PSFT-HR_WORKFORCE_SYNCH" effective-date="1900-01-01" value="Java" score="8"/>
   <attribute-value id="" activity-status="A" data-source=
"PSFT-HR_WORKFORCE_SYNCH" effective-date="1900-01-01" value="C++" score="6"/>
  </attribute-value-set>

  <!-- The next attribute-value-set contains an attribute reference.
The value of the PREFERRED_CONTACT_METHOD attribute is the current value
of the WORK_PHONE attribute. -->
  <attribute-value-set>
   <attribute-definition-ref attribute-name="PREFERRED_CONTACT_METHOD"
external-field-name="pref_contact_mthd"/>
   <attribute-ref id="" value="" attribute-name="WORK_PHONE"
external-field-name="work_phone" activity-status="A" data-source=
"PSFT-HR_WORKFORCE_SYNCH" effective-date="1900-01-01"/>
  </attribute-value-set>

<!-- The next attribute-value-set contains a participant reference.
The data import process will have to resolve the referenced participant
(either finding them or creating them if they don't exist in the EPR).
Notice that the referenced participant has its own key mapping info that
can be used to find its EPR key. -->
  <attribute-value-set>
   <attribute-definition-ref attribute-name="SUPERVISOR"
external-field-name="supervisor_id"/>
   <participant-ref id="" value="" referenced-id="0" activity-status="A"
data-source="PSFT-HR_WORKFORCE_SYNCH" effective-date="1900-01-01">
    <participant-type-ref name="MANAGER"/>
    <external-key-mapping field-name="supervisor_id" field-value="34324"/>
   </participant-ref>
  </attribute-value-set>

  <!-- The next attribute-value-set contains two component references.
Like participant references, they have their own key mappings and must be
resolved to external components in the EPR. The difference is, they must
already exist. The data feed process should not create external components. -->
  <attribute-value-set>
   <attribute-definition-ref attribute-name="ARTICLES_PUBLISHED"
external-field-name="article"/>
   <component-ref id="" value="" referenced-id="0" activity-status="A"
data-source="PSFT-HR_WORKFORCE_SYNCH" effective-date="1900-01-01">
    <component-type-ref name="PSFT_CM_DOCUMENT"/>
    <external-key-mapping field-name="article_id" field-value="342"/>
    <external-key-mapping field-name="article_type" field-value="G"/>
   </component-ref>
   <component-ref id="" value="" referenced-id="0" activity-status="A"
data-source="PSFT-HR_WORKFORCE_SYNCH" effective-date="1900-01-01">
    <component-type-ref name="PSFT_CM_DOCUMENT"/>
    <external-key-mapping field-name="article_id" field-value="546"/>
    <external-key-mapping field-name="article_type" field-value="G"/>
   </component-ref>
  </attribute-value-set>
  <participant-type-ref name="EMPLOYEE">
   <external-key-mapping field-name="empl_type" field-value="129"/>
   <external-key-mapping field-name="empl_id" field-value="3333"/>
  </participant-type-ref>
  <participant-type-ref name="MANAGER"/>
 </participant>
```


Describing Message Transformations

External data sources may not support the publication of their data using messaging technology. In a case in which the external data source does not publish its data using messaging, you can build a custom application to extract the data, format it in XML according to the Resource Finder XML schema definition, and post it to Integration Broker.

In a case in which the external data source does publish its data using messaging, the data source is likely to publish its data in an XML format native to representing its data. In this case, you can build logic to transform the external XML format to the Resource Finder XML schema definition. Different ways are available to configure this type of message integration requiring transformation.

- Integration Broker.

  You can define relationships in Integration Broker that specify beginning and resulting transaction types for transactions. For transactions that represent inbound asynchronous messages from publishing data sources, a relationship containing InAsync-to-InAsync transaction modifiers tells the Integration Broker to apply transformations to the associated request messages that transform them into XML that fits the Resource Finder XML schema definition. These transformations can be specified in either PeopleCode or Extensible Stylesheet Language (XSL).

- XSL Transformations (XSLT) in subscription PeopleCode.

  You can apply an XSLT to an inbound message in subscription PeopleCode by calling the PeopleTools built-in function TransformEx()). This approach is entirely programmatic and does not involve launching an Application Engine program to transform each message. All message integrations included with Resource Finder use this approach.

  For example, the HCM WORKFORCE_SYNC message has corresponding XSL that transforms the message into a structure that conforms to the Resource Finder XML schema definition. The XSL is stored in an HTML object called XSLT_WORKFORCE_SYNC. The subscription event script associated with the WORKFORCE_SYNC message includes the following code:

  ```
  import EPX_SERVICE:EPRDataImportMessageHandler; Local
  EPRDataImportMessageHandler &EPRDataImportMessageHandler;
  &EPRDataImportMessageHandler = create
  EPRDataImportMessageHandler(GetMessageXmlDoc(),
  GetHTMLText(HTML.XSLT_WORKFORCE_SYNC));
  ```

  EPRDataImportMessageHandler is a convenience class that attempts to import the current message into the Resource Finder repository. If XSL is passed to the optional second parameter of its constructor, the subscript event script attempts to apply the transformation to the message before attempting to import it.

See the “Importing and Transforming Data for Use with Resource Finder” documentation located in the Documentation Updates section of the My Oracle Support website.

Configuring PeopleSoft Integration Broker to Work with Resource Finder Participant Data Import Messages

While a variety of ways are available in which to implement this configuration, the following list provides a set of high-level checks that you should perform when configuring PeopleSoft Integration Broker to enable applications to publish data messages to your established Resource Finder participant data import message definitions.

1. Ensure that publish/subscribe is activated in both the publishing and Resource Finder application servers.
2. Ensure that the Integration Broker gateways have been set up for each node—the node publishing the messages and the subscribing Resource Finder node.
3. Ensure that both nodes can ping each other.
4. Ensure that relevant message channels are set to run on both nodes.
5. Ensure that relevant message definitions are active on both nodes.
6. Log onto the publishing node, go to the Resource Finder node, and add relevant messages as OutBound asynchronous transactions.
7. Log onto the Resource Finder node, go to the publishing node, and add relevant messages as InBound asynchronous transactions.

Related Links

"Setting Up on the PeopleSoft Side" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

Importing Participant Data Files

This section discusses how to configure and run the File Import process using the Configure File Import component (EPX_FILE_IMPORT).

Understanding the File Import Process

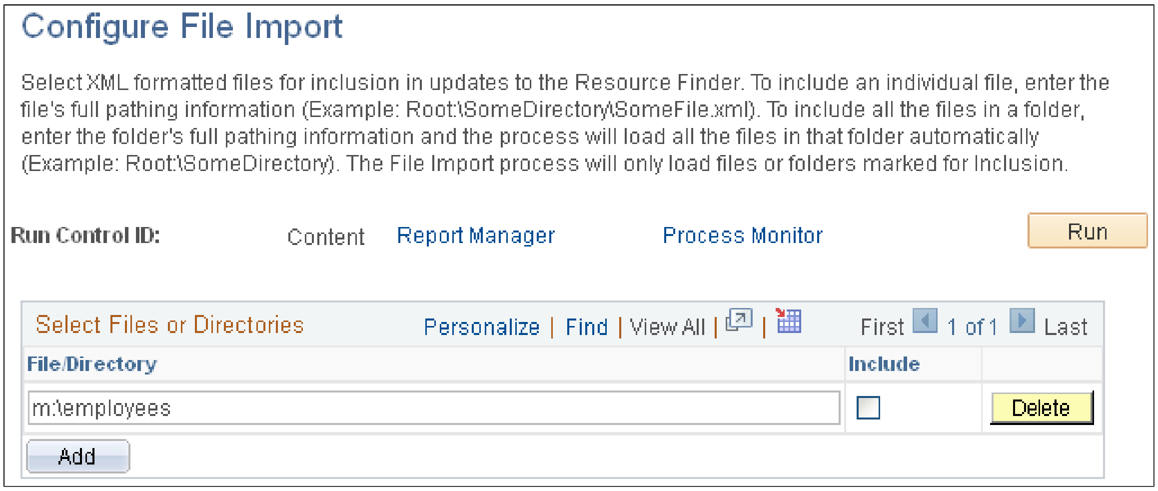
The File Import process provides an alternative means for external applications to push their messages to Resource Finder. Instead of using Integration Broker, you provide a solution for getting external application data into an XML flat file the contents of which conform to the requirements of the Resource Finder XML schema definition. You write this formatted XML data to a file system directory accessible by the Process Scheduler in your Resource Finder installation. The File Import process imports participant data stored in configured XML files into Resource Finder.

Configure File Import Page

Access the Configure File Import page (EPX_FILE_IMPORT) (select Portal Administration, Resource Finder, Batch Processing, Configure File Import).

Image: Configure File Import page

The following screenshot is an example of configuring and importing files page.



Use the Configure File Import page to enter run control parameters for the File Import Application Engine process (EPX_FILE_IMP) and run it.

File/Directory

Enter directory information for XML files that you want to include in an update to Resource Finder.

To include an individual file, enter its full path information as it resides on the Process Scheduler host, for example, *Root:\Directory\File.xml.*

To include all XML files in a folder, enter its full path information as it resides on the Process Scheduler host, for example, *Root:\Directory.*

You must manually enter the file and folder path information because these XML files are located on the Process Scheduler host and browse functionality is available only on local file systems. The Process Scheduler launches an Application Engine process that searches designated directories for relevant files in an attempt to import them. Naturally, the paths the you enter must be accessible to the Application Engine process.

Include

Select this option for a file or folder to include it in the File Import process.

Loading Participant User IDs

This section provides an overview of the Load Participant User IDs Application Engine process (EPX_LOAD_OPR) and discusses how to run the Load Participant User IDs Process using the Load Participant User IDs component (EPX_LOAD_OPR).

Understanding the Load Participant User IDs Process

The Load Participant User IDs process updates Resource Finder participant definitions with corresponding PeopleSoft user ID values. Making this connection between Resource Finder participant definitions and PeopleSoft user IDs enables the Collaborative Workspaces and Content Management features to display a Resource Finder participant profile for a user, when applicable.

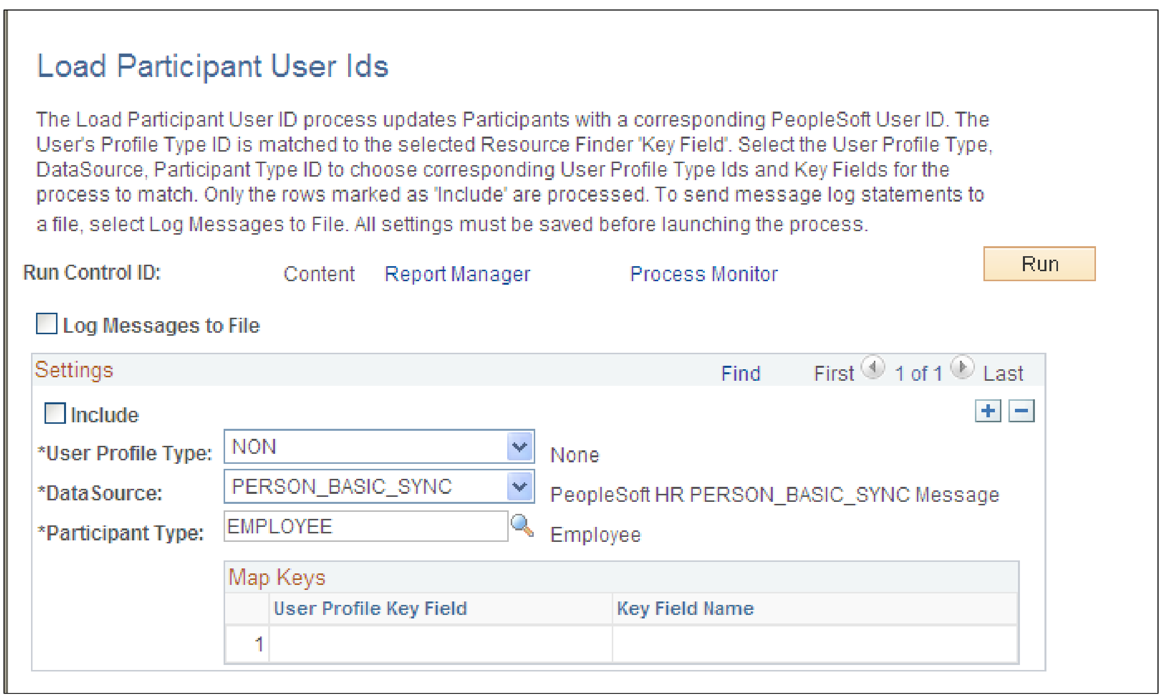
For example, assume that you have a User Profile Key Field field value of*EMPLID* and aKey Field Name field value of*EMPLID* on the Load Participant Users IDs page. If a PeopleTools user profile exists with an EMPLID value of*PSMITH* and a participant profile exists with an EMPLID value of*PSMITH,* this process makes a connection between the user profile and the participant profile and in applicable areas of the Collaborative Workspaces and Content Management features, when a user clicks a user ID link, the Resource Finder participant profile can be displayed. If no connection is made between a user profile and a participant profile, when a user clicks a user ID link, the PeopleTools generic user profile information is displayed.

Load Participant User Ids Page

Access the Load Participant User IDs page (EPX_LOAD_OPR) (select Portal Administration, Resource Finder, Batch Processing, Load Participant User IDs).

Image: Load Participant User Ids page

The following screenshot is an example of running the Load Participant User IDs Process page.



Use the Load Participant User Ids page to set parameters for and run the Load Participant User IDs process, which populates Resource Finder participant definitions with matching user ID (OPRID) values based on data in the PeopleTools tables.

Note: You must save all settings before running the process.

Log Messages to File	Select to enable the process to send message log statements to a file. The log is named *LoadParticipantUserId.log* and is saved to the following directory:*//<tools>/appserver/prcs/<database name>/files/*.

Settings

Include	Select to include a row in the process.
User Profile Type	Select the user profile type for which you are running the process. See the product documentation for *PeopleTools: Security Administration* “Administering User Profiles,” Understanding User Profile Types.
DataSource	Select the Resource Finder data source that you want to use as a source for participant data to be associated with user IDs.
Participant Type	Select the participant type for which you want to load associated user IDs. Available values are derived based on the selected data source.
User Profile Key Field	If the selected user profile type has an associated PeopleTools user profile key field, it appears here.
Key Field Name	Select the Resource Finder key field name defined in the data source that you want to use to associate user profiles with participant profiles.

Chapter 7

Using Participant Profiles and Organization Charts

Understanding Using Participant Profiles

Your ability to view and edit attribute information on a participant profile depends on one or more parameters. The following list describes the parameters that can affect view and edit privileges according to the type of user accessing a participant profile:

- Profile owner.

  Profile owners can view all attributes configured to appear on their profiles.

  This configuration involves defining the attribute, adding it to the participant type definition along with viewer security settings, adding the attribute to a display group, and then adding the display group to the participant profile definition.

  Profile owners can edit attributes configured to appear on their profiles when the User Editable option is selected in the attribute definition. When setting up viewer security for profile owners, you want to ensure that they have the security to view the attributes they can edit.

  See Understanding Core Table Objects Understanding Participant Profiles

  PeopleSoft Portal Resource Finder uses the following logic to determine that the current resource accessing the profile is also the profile owner. Resources can be associated with a user ID during data import (the operator-id attribute of the participant XML element). When a user accesses a profile, the current resource's user ID (if present) is compared to the PeopleTools system variable *%UserId.* If the current resource's user ID is not present, the user accessing the profile can only view the profile.

  You can enter a user ID value for a user in the User Profiles component. This information is stored in the PeopleTools Security User Profile definition, and can be set using those pages.

  See Describing a Resource Finder Sample Participant Message.

  See the product documentation for *PeopleTools: Security Administration* "Administering User Profiles."

- Profile manager/notified party.

  Profile managers are given the same edit privileges that profile owners are given. When setting up viewer security for profile managers, you want to ensure that managers have the security to view the attributes they can edit. The profile manager should have at least the same viewer security access as the profile owners for which they manage profiles.

  Profile managers are designated at the participant profile definition level.

  See Specifying Profile Managers.

- Participant type manager

  Participant type managers can edit all attributes on a profile that their user IDs and roles enable them to view on a participant profile. This viewer security is set on the participant type definition. Using this security, you can allow some participant type managers to manage one section of a profile, and delegate management of another section to other participant type managers.

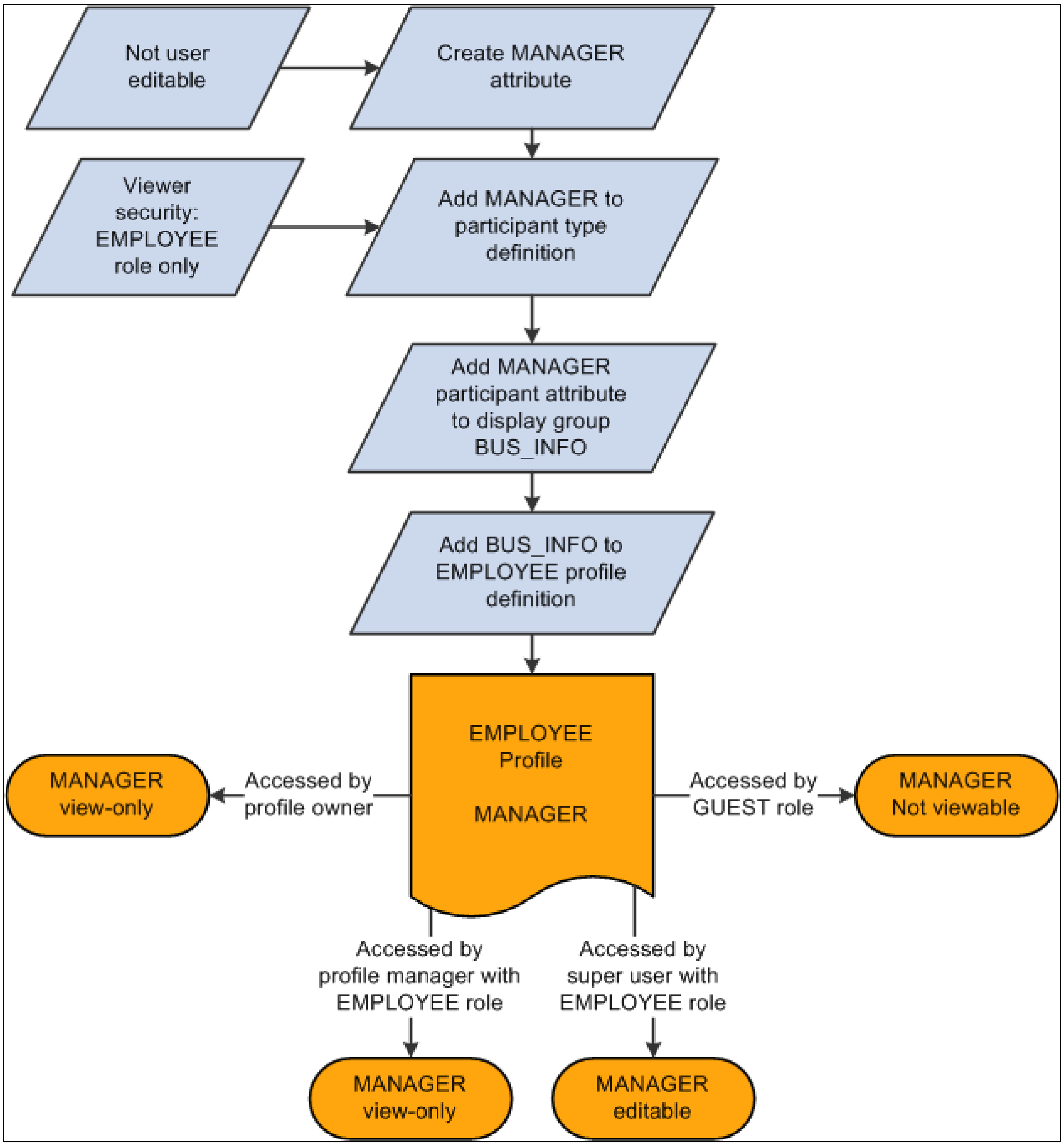
  Participant type managers are designated at the participant type definition level.

  See Configuring Participant Types.

Note: When participant type managers access their own profiles, their view and edit abilities on their profiles are defined by their role as profile owner, rather than their role as participant type manager.

Image: Profile attribute view and edit rendering based on user type

For example, the following diagram illustrates the way the MANAGER attribute is rendered for viewing and editing on an EMPLOYEE profile by these user types:



See Understanding Participant Profiles.

Maintaining Your Participant Profile

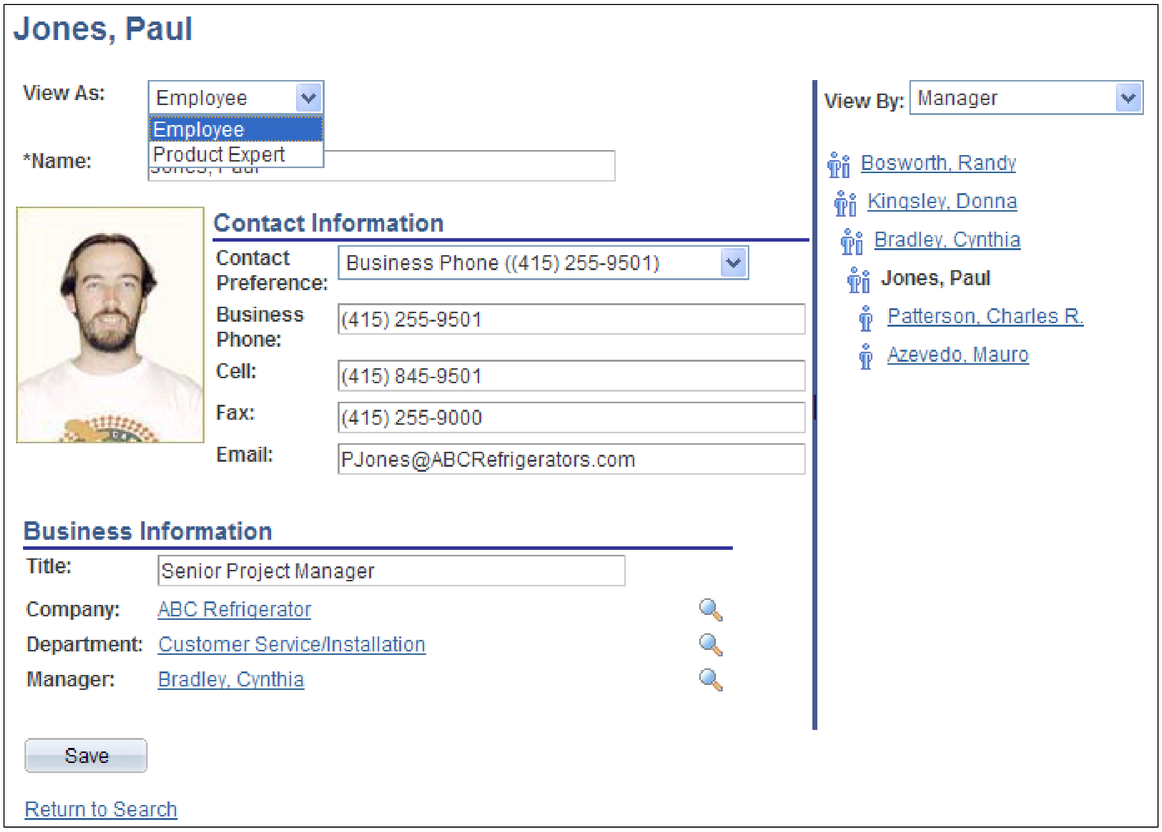
This section discusses how to set up and maintain your participant profile.

Resource Profile page, participant profile, Paul Jones Page

Access your participant profile (EPX_PRF_MAIN) either by the Resource Finder pagelet or by the Resource Finder - Advanced Search page.

Image: Resource Profile page, participant profile, Paul Jones

The following screenshot is an example of maintaining resource Profile page, participant profile details, in this case it is an example of Paul Jones.



Use the Resource Profile page to view information displayed on your profile; and view values for any user-editable fields.

Attributes are viewable and editable on your profile depending on a variety of parameters.

See Understanding Using Participant Profiles.

Editable attributes on your profile may have been configured to provide automatic change notification to a profile manager. If you edit such a field, when you save your profile, Resource Finder sends a notification email to the profile manager. The notification email contains information about the attributes you changed, as well as a link to your participant profile.

When the profile manager accesses your profile for review, the profile manager can view and edit fields for which he or she has security access. Administrators will generally set viewer security to enable your profile manager to view and edit at least the same fields that you can view and edit. They can make any necessary adjustments to editable fields. The profile manager is defined at the profile definition level on the Define Notifications page.

See Specifying Profile Managers.

After you save your profile, any changes are visible on your participant profile immediately and exist as live Resource Finder data.

Note: When participant type managers access their own profiles, their view and edit abilities on their profiles are defined by their role as profile owner, rather than their role as participant type manager.

View As

Displays when the individual for which you are viewing a profile belongs to more than one participant type.

For example, Paul Jones's participant data defines him as both Employee and Product Expert participant. In the preceding example, you can select *Employee* to view Paul's contact and organizational information as an employee. You can select *Product Expert* to view details of Paul's skills and experience as a product expert.

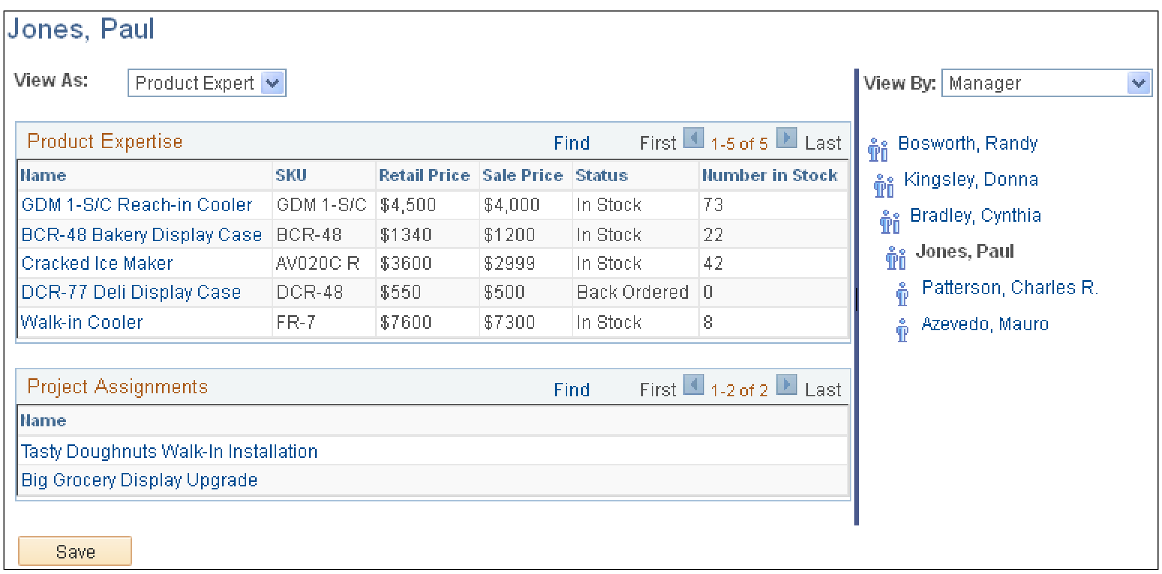
When setting up participant profiles, administrators can choose to spread participant data across multiple targeted profile definitions, rather than create one, possibly large, profile containing every piece of data. These profile definitions may be designed to deliver information about participants as they operate in different roles in an organization.

The XML messages processed by the Data Import Service can specify that a participant is associated with multiple participant types.

See Describing the Resource Finder XML Schema Definition.

Image: Resource Profile page, participant profile

The following example displays Paul Jones's profile with him displayed as a product expert participant.



Reviewing Participant Profile Changes

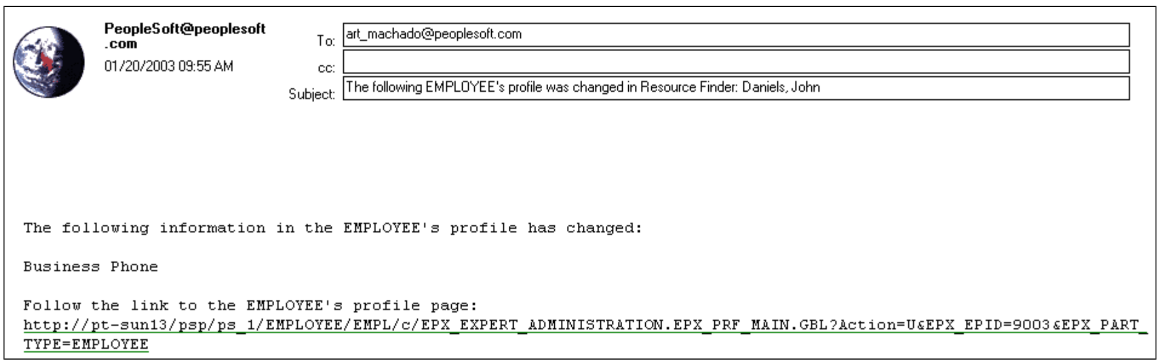
This section discusses how to review participant profile changes about which you have been notified.

Participant profile change notification email Page

Open the participant profile change notification email that you received.

Image: Participant profile change notification email

The following image is an example of Participant profile change notification email page. User can review the edits made in the participant profile page.



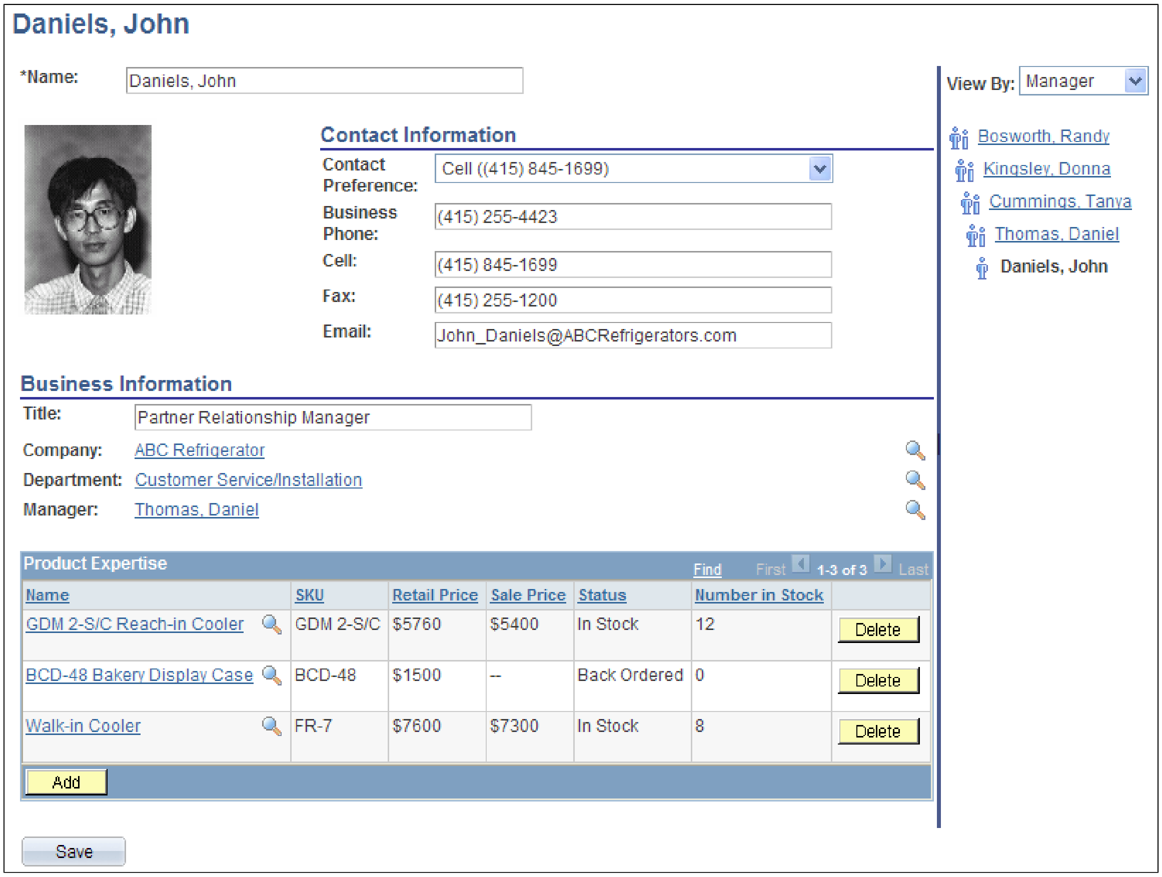
This participant profile change notification email is triggered when users save changes to user-editable attributes on their profiles and the attribute has been configured to require your review.

Editable attributes on profiles can be configured to provide automatic change notification to a profile manager. If such a field is changed by the profile owner, when the profile is saved, Resource Finder sends a notification email to the profile manager. The notification email contains information about the changed attributes, as well as a link to the impacted participant profile.

Click the participant profile link in the email that you received notifying you of changes to a participant profile to access the modified participant profile (EPX_PRF_MAIN).

Image: Resource Profile page, participant profile

The following screenshot is an example of Resource Profile page, participant profile details of Daniels, John.



When you access the modified profile, you are able to view and edit at least the same fields that the profile owner is able to view and edit. You may also be able to view and edit attributes that the profile owner is unable to view and edit.

See Understanding Using Participant Profiles.

Make any necessary adjustments to modified fields. After you save the profile, any changes are visible on the participant profile immediately and exist as live Resource Finder data.

Notification parties for profiles are defined at the profile definition level on the Define Notifications page.

See Specifying Profile Managers.

Note: Attribute changes to participant profiles that are provided by external data sources do not trigger change notification emails to designated parties and are available as live Resource Finder data without review.

Modifying Participant Profiles Using Participant Type Manager Access

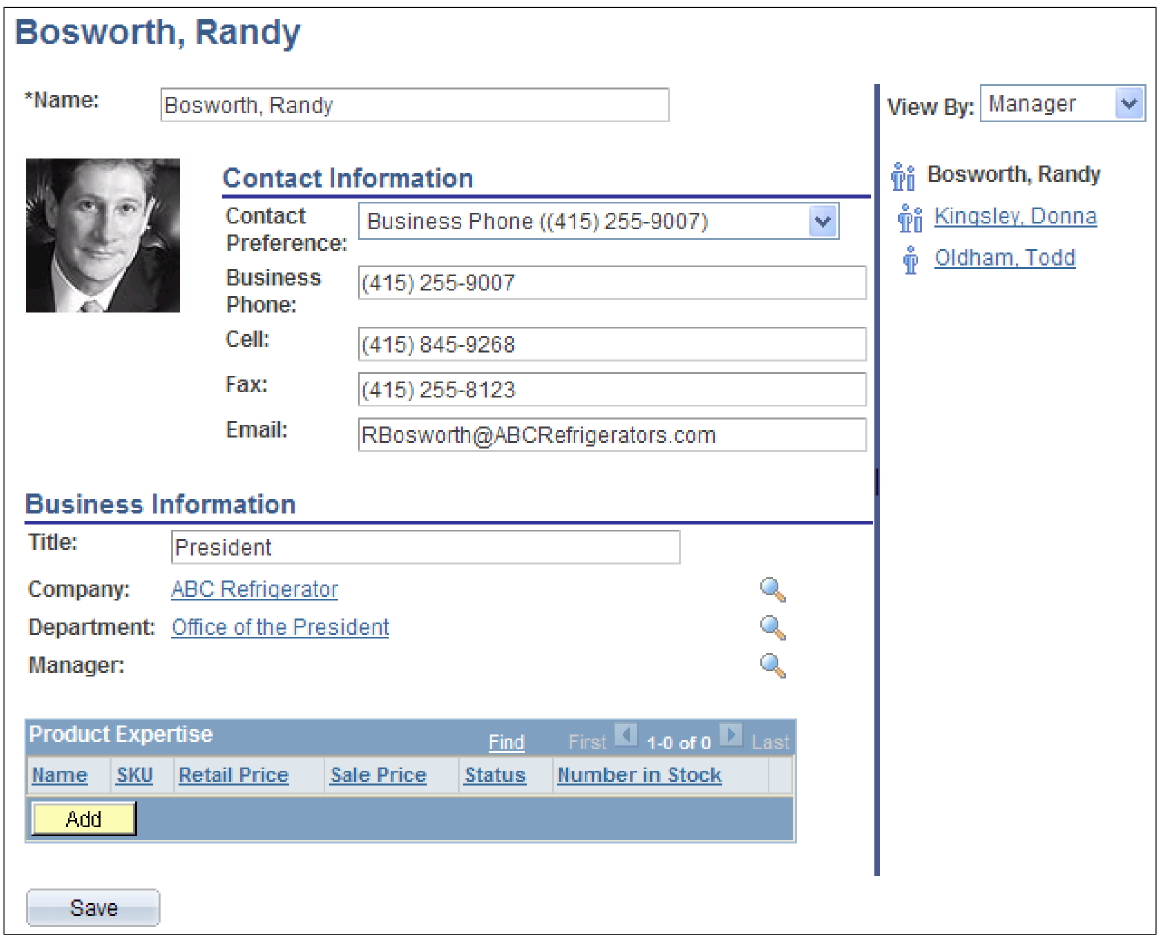
This section discusses how to modify participant profiles for which you have been given participant type manager update/add access.

Resource Profile page, participant profile Page

Access a participant profile (EPX_PRF_MAIN) for which you have been given participant type manager update/add access either by the Resource Finder pagelet or by the Resource Finder - Advanced Search page (select Portal Administration, Resource Finder, Profile Management, Participant Profiles, Advanced Search).

Image: Resource Profile page, participant profile

The following screenshot is an example of modifying Profiles Using Participant Type Manager Access page.



Use the Resource Profile page to view and modify information displayed on a profile for which you have been given participant type manager update/add access. As a participant type manager, you can edit all attributes on participant profiles within the participant type for which you have been given viewer security access.

See Understanding Using Participant Profiles.

Participant type managers are the only users who can edit the participant Name field on profiles. ThisName field value is the description that Resource Finder assigns to the participant ID.

Participant type manager update/add access is defined by participant type on the Participant Types - Specify Add/Update Privileges page.

Navigating Organization Charts

This section discusses how to use organization charts.

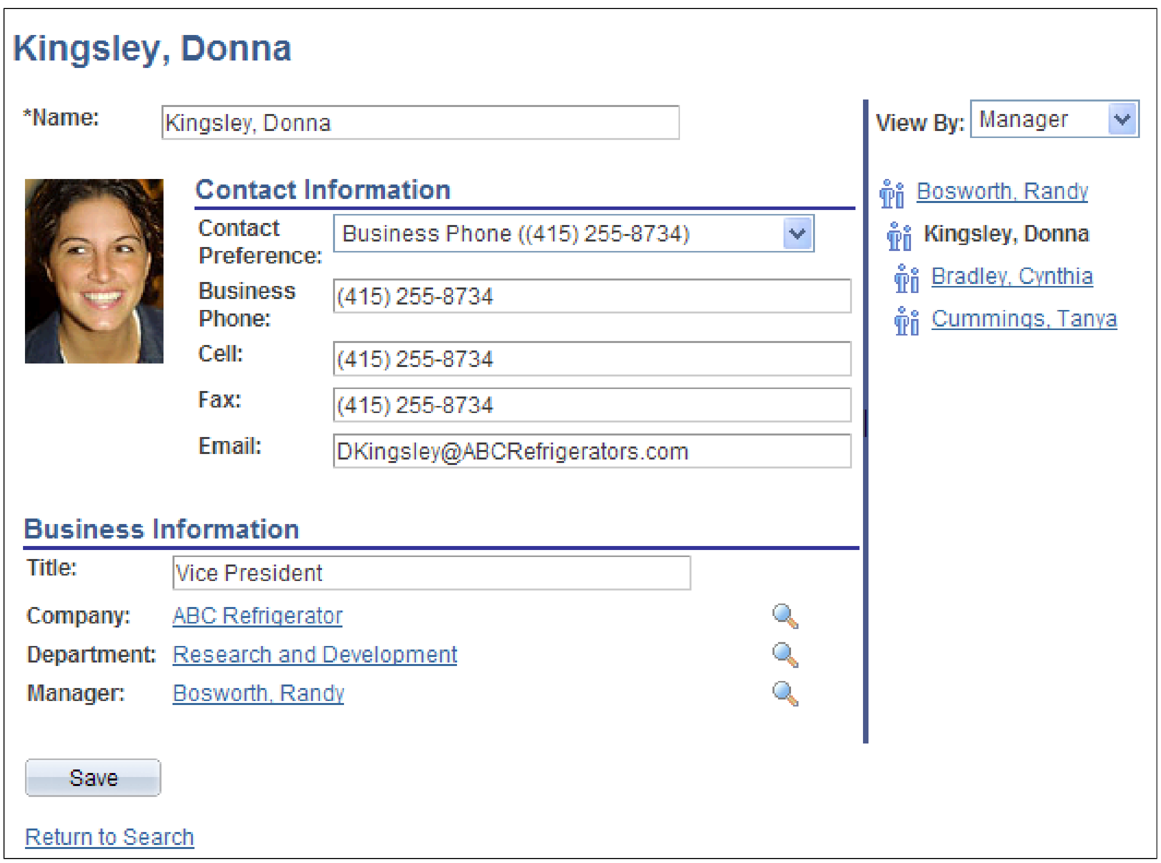
Resource Profile page, Donna Kingsley Page

Access a participant's organization chart (EPX_PRF_MAIN) using either the Resource Finder pagelet or the Resource Finder - Advanced Search page (select Portal Administration, Resource Finder, Administration, Search Options).

Note: The participant's related organization chart is displayed alongside participant profile content.

Image: Resource Profile page, Donna Kingsley

The following screenshot is an example of navigating Organization Charts of Donna Kingsley alongside participant profile content page.



Use the Resource Profile page to view the selected participant in an organization chart based on available participant reference attributes.

Use the View By drop-down list box to select the participant reference attribute on which you want to base the hierarchy of the organization chart. If a default organization chart participant reference value has been defined for your participant type on the Configure Organization Charting page, when you first access your participant profile, the organization chart is displayed according to this participant reference value.

Organization charts are automatically rendered based on connections between different participants, regardless of their type. These connections are made by way of participant references defined for attributes. These participant references are set at the attribute definition level. For the participant to be eligible for inclusion in an organization chart for a participant type, these attributes must be defined as a part of the participant type profile.

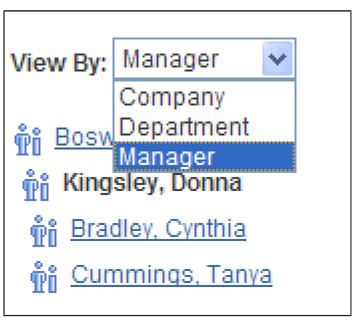
Note: Organization charts are generated based on active participant type references, even if the participant type references are not displayed on the profile page.

See Define Attribute - Configure Participant References Page.

Consider the preceding example. Donna Kingsley's profile contains three attributes that have participant references. They are Company, Department, and Manager. Resource Finder is able to automatically generate organization chart views based on Donna's relationship with each of these participant references. These participant references are available for selection in the View By drop-down list box.

Image: Organization Chart

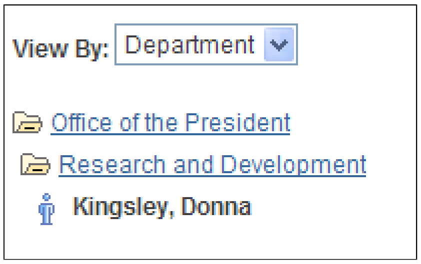
The following image is an example of Organization Chart generated based on active participant type references.



For example, selecting the *Manager* view-by option displays Donna in an organization chart based on managers and the participants they manage. Selecting the*Department* view-by option displays Donna in an organization chart based on the department in which she works.

Image: Organization Chart

The following image is an example of Organization Chart generated for a manager by selecting view by department option.For example, if the system can detect a hierarchy in which the department fits, it draws a department hierarchy and displays Donna Kingsley within the hierarchy.



See Configuring Organization Charts.

Chapter 8

Performing Resource Finder Searches

Using the Resource Finder Pagelet

This section provides and overview of the Resource Finder pagelet and discusses how to:

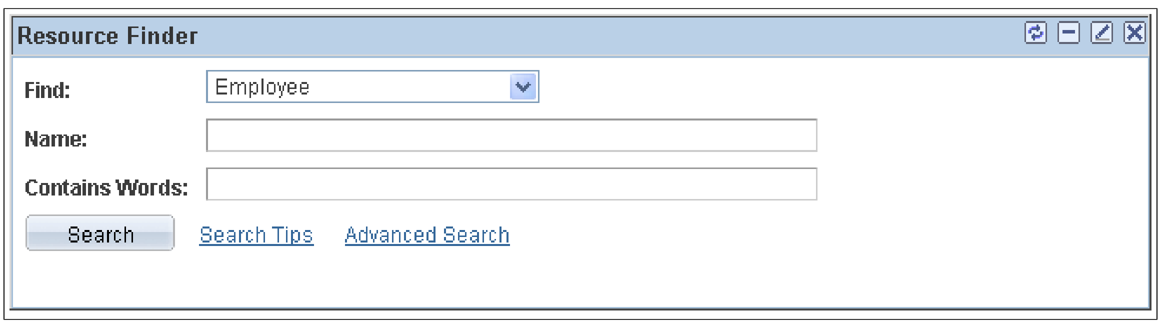
- Personalize your Resource Finder pagelet.
- Search with the Resource Finder pagelet.

Understanding the Resource Finder Pagelet

Access the Resource Finder pagelet (click the Content link from the menu bar on the homepage, and then select theResource Finder option in the Personalize Content page).

Image: Resource Finder pagelet

The following screenshot is an example of understanding the Resource Finder Pagelet.



Find	Select the type of resource that you want to find. **Note:** You can access the Resource Finder - Personalize Resource Finder page to define an option that enables you to set up your Resource Finder pagelet and display your most commonly used resource type by default.
Name	Enter text that you want to find as a part of the resource's name. This search acts only upon the resource's name.
Contains	Enter text that you want to find as a part of a resource's entire profile. This search acts upon all searchable text in resource profiles.
Search	Click to perform your search and display results on the Resource Finder - Advanced Search page.

	Search results may include links to relevant resource profiles. You can also use the Resource Finder - Advanced Search page to perform another search.
Search Tips	Click to access the Resource Finder - Search Tips page, where you view an outline of search techniques that you can use to expand and constrain searches.
Advanced Search	Click to access the Resource Finder - Advanced Search page, where you can perform detailed Resource Finder searches and access relevant participant profiles.

Related Links

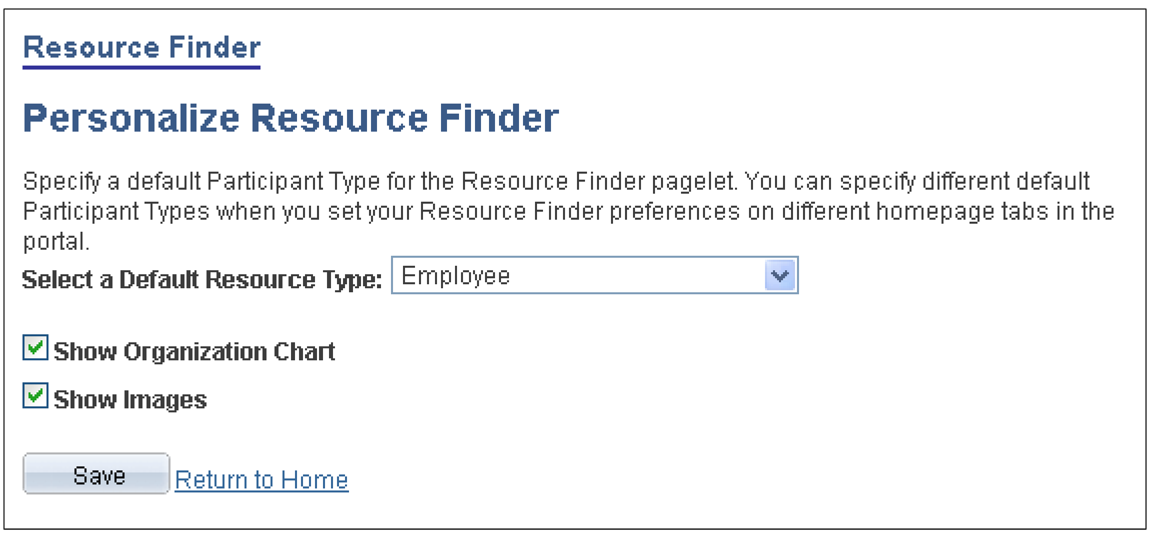
Understanding Resource Finder Search Functions

Resource Finder - Personalize Resource Finder Page

Access the Resource Finder - Personalize Resource Finder page (EPX_YELLOWPG_PREF) (click the Customize icon on the Resource Finder pagelet).

Image: Resource Finder - Personalize Resource Finder page

The following screenshot is an example of personalizing Your Resource Finder Pagelet.



Use the Resource Finder - Personalize Resource Finder page to personalize your Resource Finder pagelet and Resource Finder - Advanced Search page to display a default participant type for your searches, and set your organization chart and image display options. You can also specify different default participant types and display options for each home page tab on which the Resource Finder pagelet appears in your PeopleSoft Interaction Hub.

Select a Default Resource Type	Select the Resource Finder resource type that you want to display by default on your Resource Finder pagelet and Resource Finder - Advanced Search page.

	For example, if you commonly use Resource Finder searches to search for customers, select the *Customer* resource type value.
Show Organization Chart	Select to display organization charts when you access participant profiles. The Show Organization Chart option (on the Configure Organization Charting page) set at the administration level overrides end-user settings defined on this page. If theShow Organization Chart option is clear, selecting this option in this page does not display organization charts for the individual user. In this case, the setting at the administrative level overrides the setting at the end-user level. If theShow Organization Chart option is selected, selecting this option in this page hides organization charts for the individual user. In this case, the setting at the end-user level overrides the setting at the administrative level.
Show Images	Deselect this option to enable the Resource Finder to not display pictures in profiles and icons in organization charts. You may want to keep this option deselected if your implementation has low bandwidth access considerations.

Performing Advanced Resource Finder Searches

This section discusses how to use the Resource Finder advanced search and describes Resource Finder search tips and details.

Pages Used to Perform Advanced Resource Finder Searches

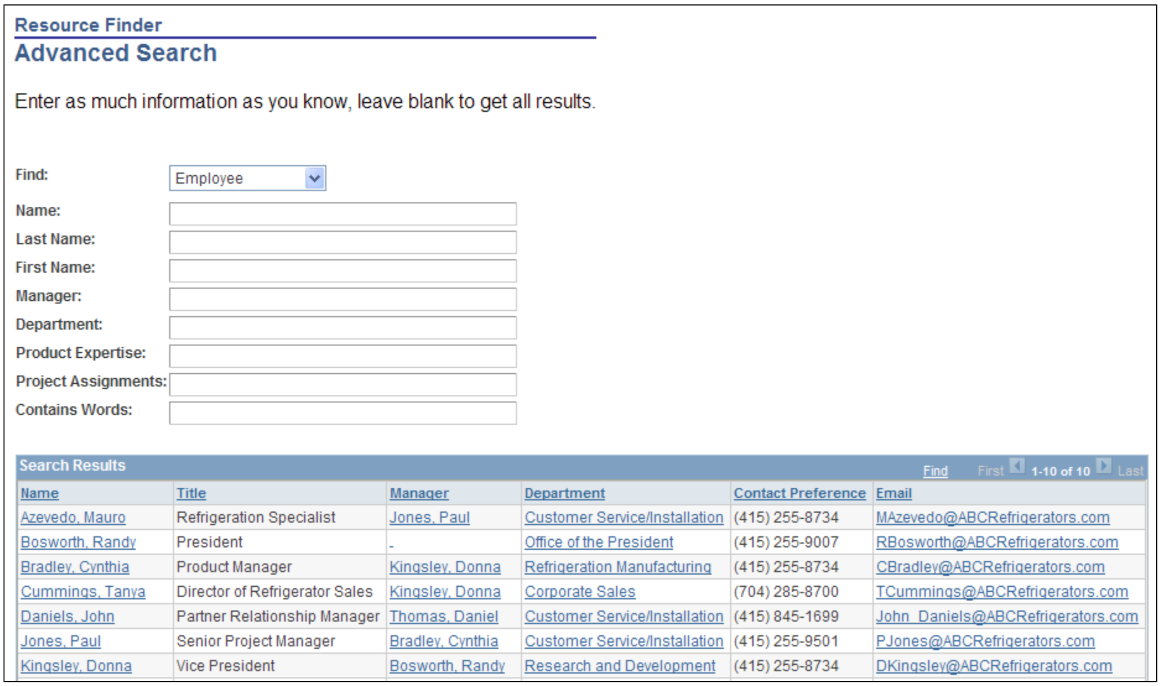
Page Name	***Definition Name***	***Usage***
Resource Finder - Advanced Search Page	EPX_YELLOWPG_SRCH EPX_PRF_SEARCH	View results for Resource Finder pagelet searches. Perform detailed Resource Finder searches. Access relevant participant profiles.
Resource Finder - Search Tips Page	EPX_SEARCH_TIPS	View an outline of search techniques you can use to expand and constrain searches.

Resource Finder - Advanced Search Page

Access the Resource Finder - Advanced Search page (click the Advanced Search link on the Resource Finder pagelet.)

Image: Resource Finder - Advanced Search page

The following screenshot is an example of using the Resource Finder Advanced Search page.



Enter search criteria to find a resource. Leave all fields blank to return all members of the selected resource type.

Available search parameters are defined on the Define Advanced Search Option page. Available search parameters can also depend on role and user ID filters defined on the Select Search Parameter Attributes - Set Viewer Security page.

See Configuring Advanced Search Parameters.

Name

This resource attribute always appears as a search parameter, regardless of any search parameter display filters that have been configured.

Enter text that you want to find as a part of the resource's name. This search acts upon only the resource's name.

Contains Words

This field always appears as a search parameter.

Enter text that you want to find as a part of a resource's entire profile. This search acts upon all searchable text in resource profiles.

Search Tips

Click to access the Resource Finder - Search Tips page, where you view an outline of search techniques you can use to expand and constrain searches.

If you have accessed this page by carrying out a search from the Resource Finder pagelet, your search criteria are transferred to this page and any resulting matches are displayed in the Search Results section.

Search Results

View the results of your search.

Search result attributes that appear are defined on the Specify Result Attributes page. Available search result attributes can also depend on role and user ID filters defined on the Select Search Parameter Attributes - Check Viewer Security page.

If you have accessed this page by carrying out a search from the Resource Finder pagelet, your search criteria are transferred to this page and any resulting matches are displayed in this section.

Search result attributes may appear as links and perform actions depending on their configurations on the Define Attribute page.

See Configuring Advanced Search Result Attributes, Define Attribute Page.

Name

Displays the name of the participant.

This participant attribute always appears as a search result, regardless of any search result display filters that have been configured.

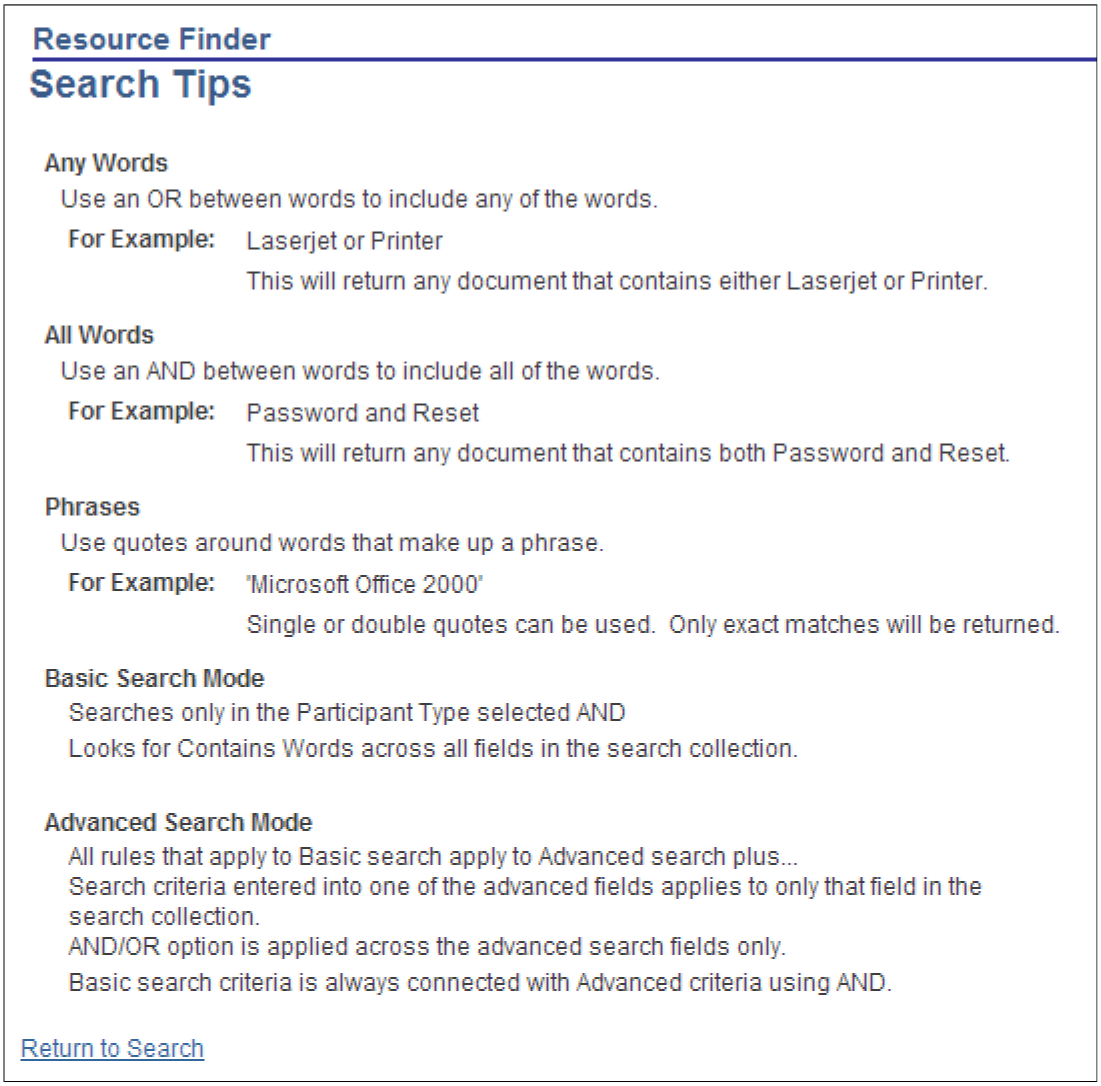
Select the name link to access the participant's profile.

Resource Finder - Search Tips Page

Access the Resource Finder - Search Tips page (enter search criteria on the Resource Finder pagelet and click the Search button; click theSearch Tips link on the Resource Finder - Advanced Search page).

Image: Resource Finder - Search Tips page

The following screenshot is an example of describing Resource Finder Search Tips and Details page.



In addition to the information provided on this page, consider the following search details:

- Resource Finder search results reflect the search engine techniques used to find matches for search parameters.

  Resource Finder search engine functionality includes native Verity functionality, including case insensitivity, stemming, and so forth.

- For parameterized searches, match requests are always considered to be requests for partial matches.

  For example, although an attribute can have multiple values, if any of the values partially match the search criteria, that attribute is considered a match. Matches are always judged on a LIKE *keyword%*

basis. This means that if any value of the designated attribute starts with the keyword, the attribute is considered a match.

- The Resource Finder assumes an OR value between any words that you enter in the search parameter fields.

  For example, if you enter *Cynthia Oldham* in the Name field, the Resource Finder provides search results containing anyName values containing the words *Cynthia* or *Oldham.*

See Understanding Resource Finder Search Functions.

Appendix A

Migrating Data from the Content Provider Using PeopleSoft Integration Broker

Prerequisites and Additional Considerations

Several steps are involved when you are migrating data for use in PeopleSoft Interaction Hub Resource Finder from PeopleSoft Integration Broker. This chapter provides examples of how this can be accomplished. The information provided in this documentation is used to convey basic example scenarios. Please consult respective PeopleBooks for PeopleSoft Integration Broker and PeopleSoft Human Capital Management for specific details.

This appendix provides prerequisites and additional considerations for migrating data from content providers to Resource Finder, and discusses how to:

- Set up incremental sync from the content provider to Resource Finder.
- Set up full sync from the content provider to Resource Finder.

Before beginning this process, ensure that setup data exists for the delivered sample messages. For example, the data for the data sources, participant types, attributes, participant mappings, and so forth must exist for COMPANY_SYNC, LOCATION_SYNC, and so forth. If these data sources do not exist, you must run the epx_msg_setup_imp.dms script along with the epx_msg_setup_imp.dat file. This script imports Resource Finder setup data for the PeopleSoft Human Capital Management (HCM) data sources into the Portal Solutions system database.

Setting Up Incremental Sync from the Content Provider to Resource Finder

This section discusses how to:

- Set up messages for the PeopleSoft Interaction Hub.
- Set up messages for the content provider.
- Test the migration process.

Setting Up Messages for the PeopleSoft Interaction Hub

To set up a message, COMPANY_SYNC as in this example, for the PeopleSoft Interaction Hub:

1. Set up PeopleSoft Integration Broker so that it can ping the portal node successfully.

Ensure that the ping shown on the Node Status page for the content provider node (such as HCM) is successful.

2. Activate the COMPANY_SYNC message for the PeopleSoft Interaction Hub in PeopleSoft Application Designer.

   To do this, select the Active option on the Use tab of the Message Properties dialog box.

3. Activate the message subscription.

   To do this, select the Active option on the Use tab of the Message Subscription Properties dialog box.

4. Ensure that the message channel is running.

   To do this, ensure that the Run option on the Use tab of the Message Channel Properties dialog box is selected.

5. Add the message to the node definition.

   To do this, select PeopleTools, Integration Broker, Integration Broker Setup, Node Definitions in the PeopleSoft Interaction Hub database, open the content provider node, and select the Transactions tab. For example, if you are editing the COMPANY_SYNC message for the HCM node, edit the PSFT_HR node. On the Transactions tab, add the COMPANY_SYNC message with an*InAsync* transaction type to the transaction.

6. Add the message channel security to the permission lists needed.

Setting Up Messages for the Content Provider

To set up a message, COMPANY_SYNC as in this example, for the content provider:

1. Set up PeopleSoft Integration Broker so that it pings the portal node.

   Ensure that the ping shown on the Node Status page for the content provider node (such as HCM) is successful.

   See the product documentation for *PeopleTools: Integration Broker Service Operations Monitor* “Pausing, Testing, and Pinging Nodes.”

2. Activate the COMPANY_SYNC message for the content provider in PeopleSoft Application Designer.

   To do this, select the Active option on the Use tab of the Message Properties dialog box.

3. Ensure that the message channel is running.

   To do this, ensure that the Run option on the Use tab of the Message Channel Properties dialog box is selected. Ensure that the message channel name is the same for both the portal and the content provider.

4. Add the message to the node definition.

   To do this, select PeopleTools, Integration Broker, Integration Broker Setup, Node Definitions in the content provider database, open the PeopleSoft Interaction Hub node, and select the Transactions tab. For example, if you are editing the COMPANY_SYNC message for the PeopleSoft Interaction Hub node, edit the PSFT_PA node. On the Transactions tab, add the COMPANY_SYNC message with an*OutAsync* transaction type to the transaction.

5. Add the message channel security to the permission lists needed.

Testing the Migration Process

After performing setup, test the process. You can test this process in the HCM database where you maintain transactions. In this example, in which we used COMPANY_SYNC, navigate to the page used to define the Company table. The incremental sync is launched any time the page is accessed and updated or saved. Consult HCM PeopleBooks for navigation details.

To test the setup for regular incremental syncs from the application:

1. Add a row of data or update an existing row of data in the Company table, for example.
2. In the content provider database, such as HCM, navigate to the Monitor Message - Message Instances page to ensure that the publication status is set to *Done.*
3. In the portal database, navigate to the Monitor Message page to ensure that the subscription status is set to *Done.*
4. Perform a query for the PS_EPX_PARTICIPANT table to ensure that the new participant has been added.

Setting Up Full Sync from the Content Provider to Resource Finder

This section discusses how to:

- Set up a full sync.
- Run the full sync.
- Run the full data publish.

Setting Up a Full Sync

If a full sync of the application must be performed, follow these steps.

Note: Be aware that the FULLSYNC messages are used rather than the regular messages. This procedure uses COMPANY_FULLSYNC as an example, instead of COMPANY_SYNC.
In some cases, improved performance with FULLSYNC messages can be achieved by decreasing the message size to be within the range of 25,000–100,000 bytes.

To set up a full sync:

1. Activate the message definitions in PeopleSoft Application Designer for both the PeopleSoft Interaction Hub and the content provider.

2. Activate the message subscriptions in the Message Subscription Properties dialog box in PeopleSoft Application Designer for the PeopleSoft Interaction Hub.

3. Ensure that the message channel is running for both the PeopleSoft Interaction Hub and the content provider.

4. Edit the permission list to add security to the message channel in the PeopleSoft Interaction Hub and the content provider.

5. Add the appropriate transactions to the nodes on the Node Definition page.

   - In the HCM database, add the message transaction with an *OutAsync* transaction type to the portal node.

   - In the PeopleSoft Interaction Hub database, add the message transaction with an *InAsync* transaction type to the HCM node.

6. You are now ready to run a full sync.

Running the Full Sync

To run the full sync:

1. Access the Full Table Publish Rules page in the HCM database.

   Consult the HCM PeopleBooks documentation for the correct navigation path.

2. Select the full sync message name, activate the status, and save the transaction.

Running the Full Data Publish

To run the full data publish:

1. Access the Full Data Publish page in the HCM database.

   Consult the HCM PeopleBooks documentation for the correct navigation path.

2. Select a Process Frequency value of *Once.*

3. Select the full sync message name in the Message Name field.

4. Save the transaction.

5. Click the Run button.

6. On the Process Scheduler Request page, select to run the Table Replication Publish Application Engine process (EOP_PUBLISHT) to run the full sync.

7. Access the Monitor Message page in both the content provider database and the PeopleSoft Interaction Hub database to ensure that the publication and subscription, respectively, are set to *Done* and do not show any errors.

8. Query the table with a select statement from PS_EPX_PARTICIPANT to ensure that the data synchronized successfully.

