PEOPLESOFT

PeopleSoft 9.2: Enterprise Components

June 2016

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Contents

Chapter 1

Setting Up Pagelets for WorkCenters and Dashboards as a System Administrator

Understanding WorkCenters and Dashboards

WorkCenters are designed for specific roles and provide a central area for users to access key components. They enable users to access various pages and perform daily tasks without leaving the WorkCenter, which reduces the time used to navigate through menus.

WorkCenters are delivered as empty components. The system administrator from your organization is responsible for designing and creating links so that users can view and access specific links and pages.

WorkCenters that are accessed using a mobile device are similar to Classic WorkCenters but are designed using the PeopleSoft Fluid User Interface. Some setup is performed using PeopleSoft Classic pages.

Click to watch a short video about PeopleSoft WorkCenters, for PeopleSoft Classic User Interface.

Click to watch a short video about Configuring WorkCenters: Application Framework, for PeopleSoft Classic User Interface.

Adding a User-Defined Link to the My Work Pagelet for PeopleSoft Classic User Interface

To add a user-defined link to the My Work pagelet in Classic WorkCenters, first create a new filter definition, then create a new Application Class, and finally, add the link to the pagelet.

A series of online help videos demonstrates how to do this by providing an example: how to add a link to the My Work pagelet in the General Ledger WorkCenter.

Step 1: Creating a New Filter Definition

Step 2: Creating a New Application Class for the Criteria

Step 3: Adding the Link to the My Work Pagelet

If your business requires a custom link, contact Oracle technical support for your product.

Configuring Filter Definitions and Values

This topic discusses how to configure filter definitions and values as a System Administrator.

Pages Used to Configure Filter Definitions and Values

Page Name	***Definition Name***	***Usage***
Configure Filter Definition Page	FSFB_FILTER_FIELDS	Set up filter definitions.
Configure Filter Values Page	FSFB_FILTER_VALUES	Set up filter values.
Validate Filters Page	RUN_FSFB_VALCLN	Validate filters.
Delete Filter Values Page	FSFB_DEL_FLTRVALS	Delete Filter values.
Select Filters Page	FSFB_COPY_WIZARD1	Select filter values of a particular user for copying them to one or more users.
Select Roles/Users Page	FSFB_COPY_WIZARD2	Select a role and the corresponding users.
Create Filter Values Page	FSFB_COPY_WIZARD3	Review the selected filters and users, and to create the filter values.

Configure Filter Definition Page

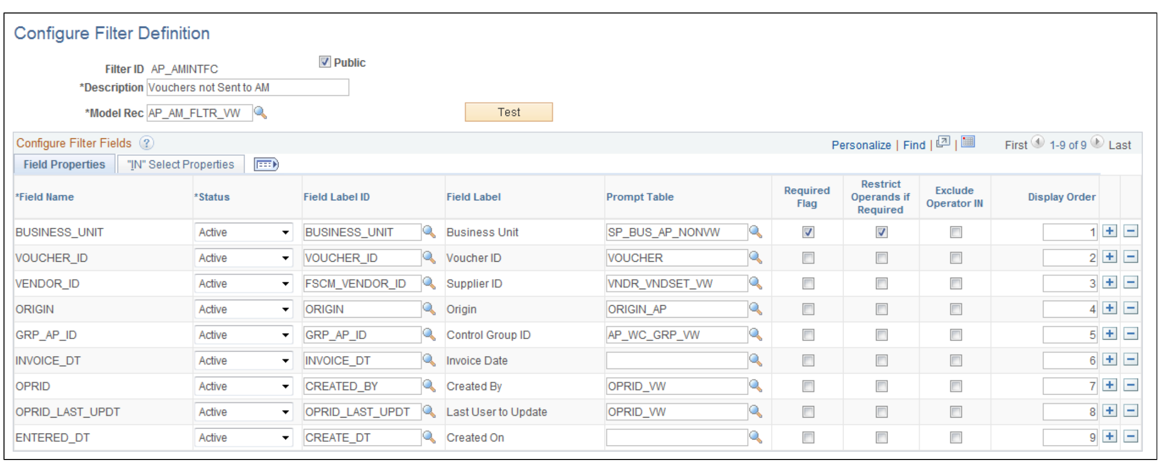
Use the Configure Filter Definition page (FSFB_FILTER_FIELDS) to set up filter definitions as a system administrator.

Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Filter Definitions

Image: Configure Filter Definition page

This example illustrates the fields and controls on the Configure Filter Definition page.



Note: The data that is entered using this page can also be loaded as an Application Data Set using the Data Migration Workbench. For more information about ADS and the Data Migration Workbench for FSCM applications, see *PeopleSoft Application Fundamentals* documentation, Working with and Personalizing WorkCenters, using the Data Migration Workbench for PeopleSoft WorkCetners.

Use this page to define the filter data that is displayed in the My Work pagelet. Filters are used to specify the data that a user views when accessing a My Work pagelet.

Model Rec (model record)	Select a record name that provides the fields to which you will use to filter data.
Public	Select to indicate that the criteria for the filter can be added or modified by end users
Test	Click to view the Test Filter Criteria window. This window displays how the filter option appears to the end user.

Configure Filter Fields

When you select a value in the Model Rec field, the record fields are displayed in this grid.

Status	Select a status for the field. Options are Active and Inactive. Active fields are available for editing on the Configure Filter Values page and are available to end users when filtering data.
Field Label ID	Select an option that corresponds the field label.
Prompt Table	Displays the prompt table that controls the valid values that can be entered on the Configure Filter Values page. For translate and yes or no *fields*, this value defaults from the prompt table that is defined on the record. You can choose to keep the default value or change it. For translate *tables*, this field is not available and can’t be changes.
Required Flag	Select to indicate that this field must have a value on the Configure Filter Values page.
Restrict Operands if Required	Select to indicate that you want to restrict the operands to “=” (equals) and “in”, on the Configure Filter Values page. **Note:** If a security controlled view is used, and security by user, role, and permission list are implemented, then you should select Restrict Operands if Required along with Required Flag fields. This enforces that only those values that are in the secured prompt view will be displayed.
Exclude Operator IN	Select to remove the “IN” operator only from the operator drop-down list when setting up filter values on the Configure Filter Values page.

Display Order — Enter a value that indicates the order in which the filter fields are displayed on the Configure Filter Values page.

Filter Security

This section displays only when the Public check box is not selected.

Permission Type — Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the filter criteria.

User/Role/Permission List — Depending on the option selected in the Permission Type field, select user IDs, role names, or permission lists. Individual users that are associated to the option selected have access to edit the filter criteria.

IN Select Properties Tab

The “IN” Select Properties tab enables you to select search field names and search field descriptions.

Search Field Name — Select a field that determines the name of the field that the system uses to retrieve field values.

Search Field Description — Select the name of the field that the system uses to retrieve the value descriptions.

Configure Filter Values Page

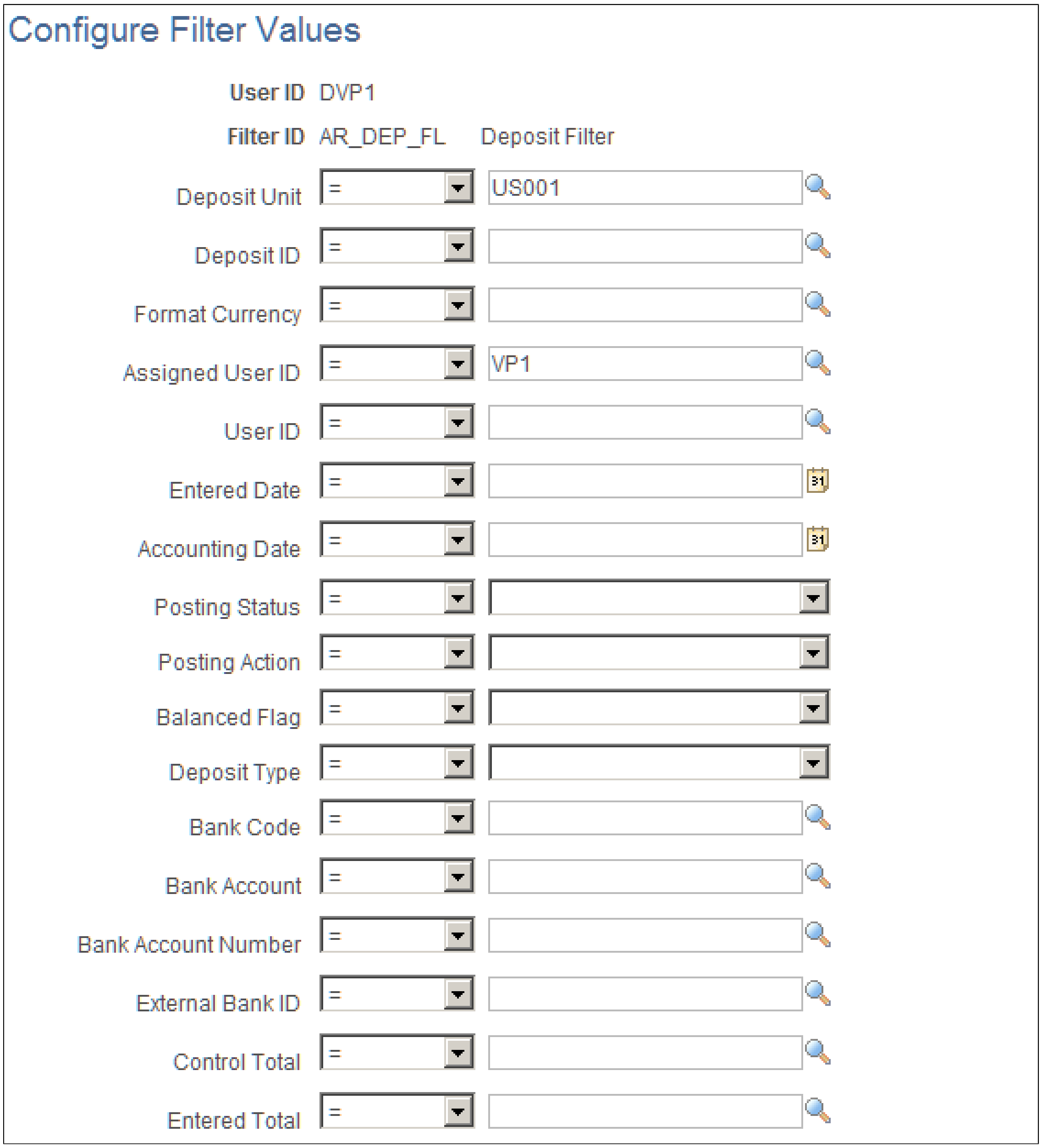
Use the Configure Filter Values page (FSFB_FILTER_VALUES) to set up filter values as a system administrator.

Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Filter Values

Image: Configure Filter Values page

This example illustrates the fields and controls on the Configure Filter Values page.



Note: The data that is entered using this page can also be loaded as an Application Data Set using the Data Migration Workbench. For more information about ADS and the Data Migration Workbench for FSCM applications, see *PeopleSoft Application Fundamentals* documentation, Working with and Personalizing WorkCenters, using the Data Migration Workbench for PeopleSoft WorkCetners.

Use this page to select specific values that the system uses when displaying the My Work pagelet. The fields that appear on this page are the fields that have an active status on the Configure Filter Definition page.

Validate Filters Page

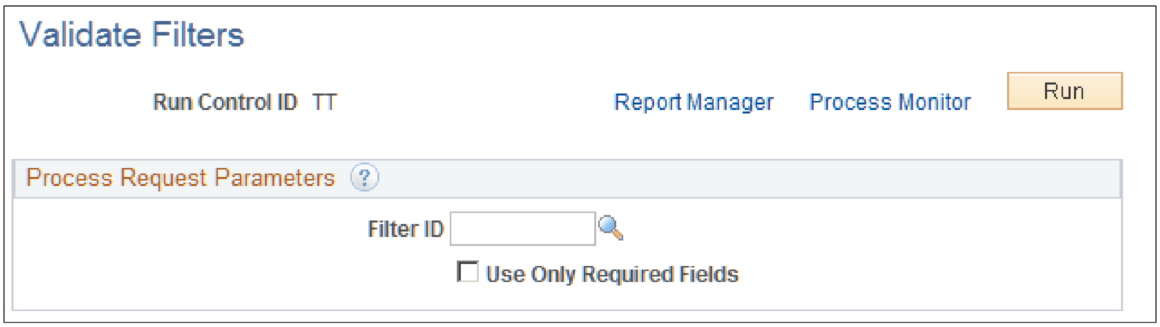
Use the Validate Filters page (RUN_FSFB_VALCLN) to validate filters as a system administrator

Navigation

Enterprise Components, WorkCenter/Dashboards, Validate Filters

Image: Validate Filters page

This example illustrates the fields and controls on the Validate Filters page.



Use this page to validate specific filters. If the Filter ID field is blank, then the system tests all filters.

Filter ID	Select a filter ID to test. If you leave this field blank, the system tests all filters.
Use Only Required Fields	Select to indicate that only the fields that are defined as required on the Configure Filter Definition page, are validated by the system. If this check box is not selected, then the system validates all applicable fields.

Delete Filter Values Page

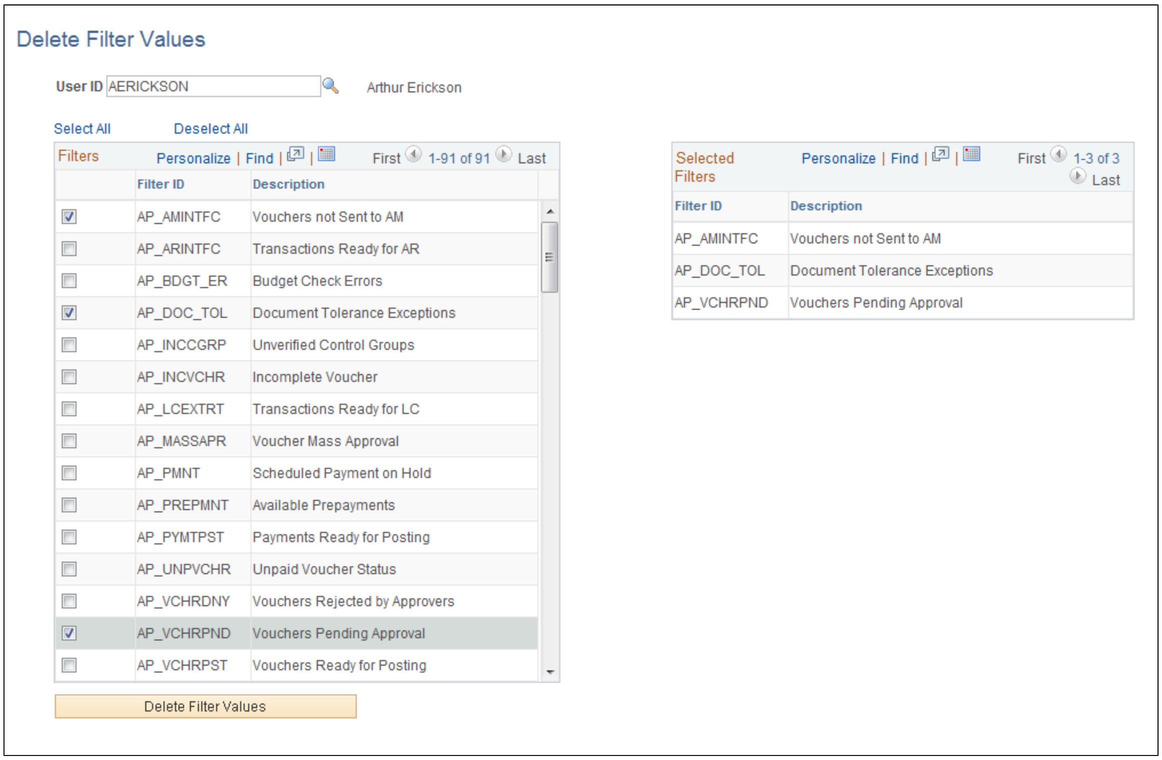
Use the Delete Filter Values page (FSFB_DEL_FLTRVALS) to select and delete filter values for a user.

Navigation

Enterprise Components, WorkCenter/Dashboards, Delete Filter Values.

Image: Delete Filter Values page

This example illustrates the fields and controls on the Delete Filter Values page.



User ID	Select the user for which filter values are to be deleted. The page displays a list of filter values the user has.
Filters	Select one or more filter values to be deleted. Selected filter values are displayed in a grid on the right.
Delete Filter Values	Click the button to delete the selected filter values for the user. After deleting, a confirmation page appears displaying successful deletion of filter values. You can click the *Delete More Filter values* link to go back to *Delete Filter values* and delete more filter values.

Using the Filter Value Copy Wizard

The Filter Value Copy Wizard allows the administrator to set filter values to users by role. Administrators can copy one user's filter values to one or more users. The wizard follows three steps to accomplish this:

1. Select User/Filters to copy, using the Select Filters page
2. Select Role/Users who will be assigned to the filter values, using the Select Role/Users page.
3. Create filter values by reviewing and creating filters, using the Create Filter Values Page

Select Filters Page

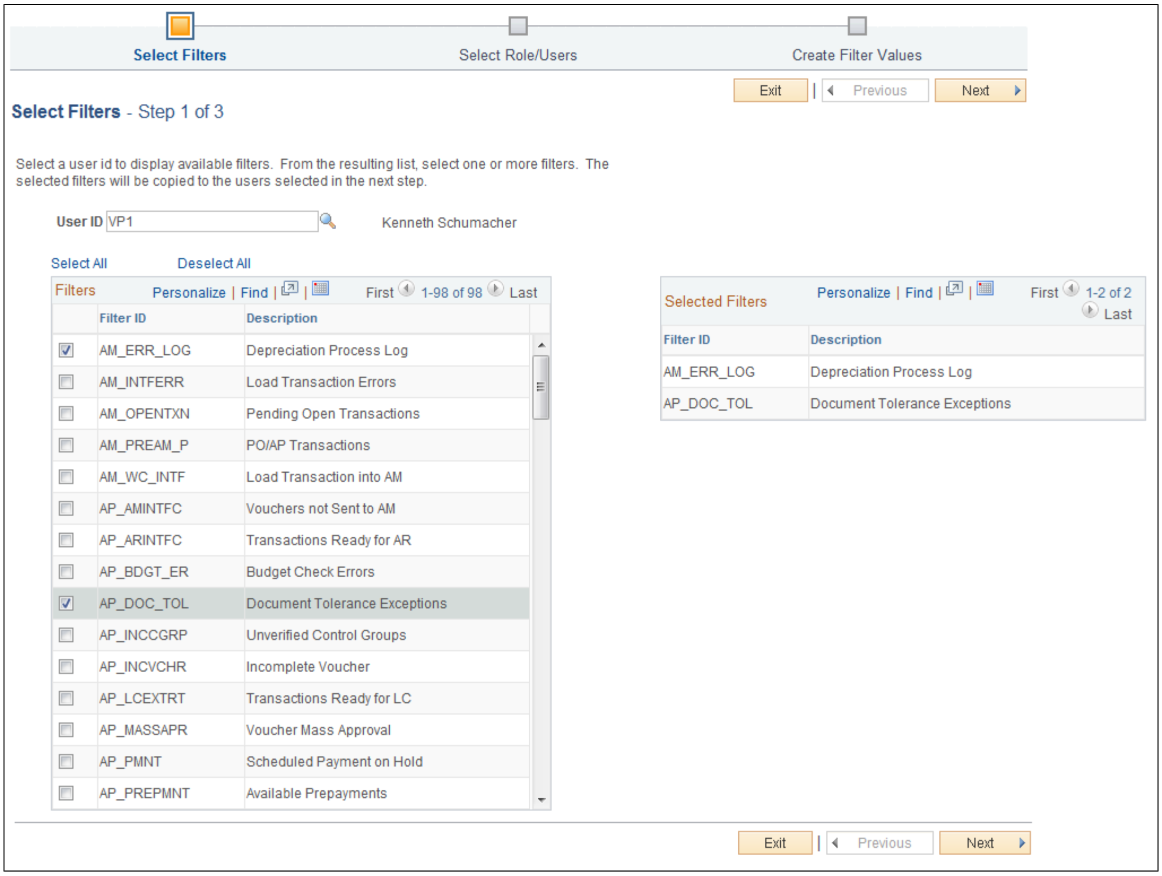
Use the Select Filters page (FSFB_COPY_WIZARD1) to select filter values of a particular user for copying them to one or more users.

Navigation

Enterprise Components, WorkCenter/Dashboards, Filter Value Copy Wizard

Image: Select Filters page

This example illustrates the fields and controls on the Select Filters page.



User ID	Select a user id to display available filter values for the user.
Filters	Select one or more filter values to be copied to the user(s).
Selected Filters	Displays the list of filter values selected.

Select Roles/Users Page

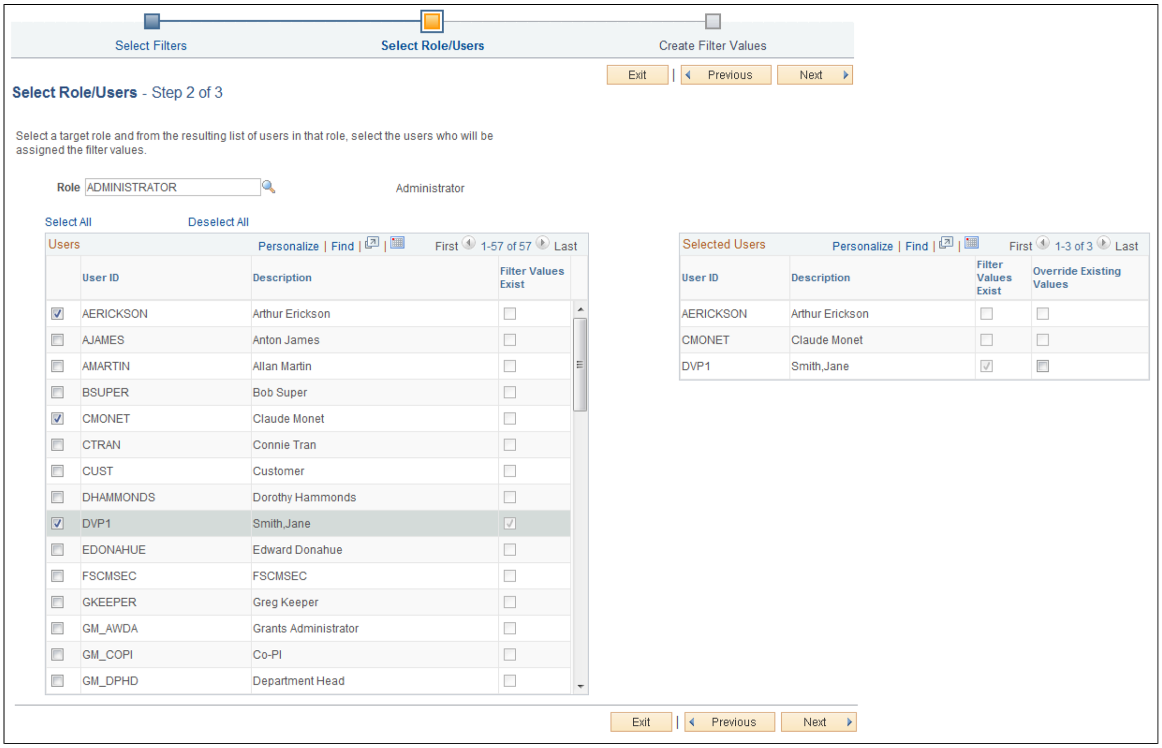
Use the Select Roles/Users page (FSFB_COPY_WIZARD2) to select a role and the corresponding users.

Navigation

Enterprise Components, WorkCenter/Dashboards, Filter Value Copy Wizard. Select the desired filters on the Select Filters page and click Next.

Image: Select Roles/Users page

This example illustrates the fields and controls on the Select Filters page.



Role Select a role to display a list of users in that role.

User ID Select one or more user IDs that will be assigned the filter values selected in the *Select Filters* step. Selected user IDs are displayed in a grid on the right.

Filter Values Exist The system selects the field to indicate that the user ID has values for one or more of the filters selected in the previous step, *Select Filters*.

Override Existing Values Select to override one or more existing filter values for the user IDs that have values for the filters selected in the previous step. This field is disabled for the user IDs that do not have any filter values.

Create Filter Values Page

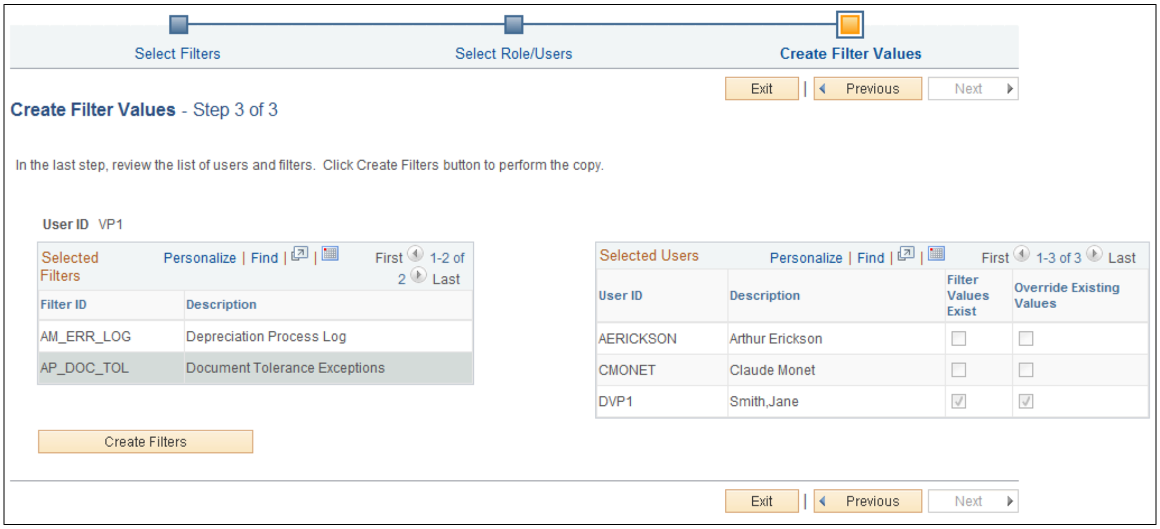
Use the Create Filter Values page (FSFB_COPY_WIZARD3) to review the selected filters and users, and to create the filter values.

Navigation

Enterprise Components, WorkCenter/Dashboards, Filter Value Copy Wizard. Select the desired users on the Select Roles/Users page and click Next.

Image: Create Filter Values page

This example illustrates the fields and controls on the Select Filters page.



Create Filters — Click the button to copy filter values for the selected users. After creating, a confirmation page appears displaying successful creation of filter values. You can click the *Copy More Filter Values* link to go back to *Filter Value Copy Wizard* and copy more filter values.

Configuring Pagelets

This topic discusses how to set up pagelets as a System Administrator..

Page Used to Configure Pagelets

Page Name	***Definition Name***	***Usage***
Configure Pagelets – WorkCenter/ Dashboard Page	FSPC_ADMIN_MAIN	Define configuration IDs for Classic WorkCenters and Dashboards, and Fluid WorkCenters.
Configure Pagelets - My Work Page	FSPC_ADMIN_MYWORK	Set up My Work links for end
Define My Work Link Page	FSPC_ADM_WRK_SEC	Define the type of link that appears on the My Work pagelet.
Import My Work Link Page	FSPC_MYWORK_PROMPT	Import system defined My Work links.

Page Name	***Definition Name***	***Usage***
Configure Pagelets - Links Page	FSPC_ADMIN_LINK	Determine how links appear on a pagelet.
Define Link/Security Page	FSPC_ADMIN_LINK_SEC	Define links and security.
Select a Content Reference Page	FSPC_CRFURL_SELECT	Select a menu item from a tree structure view.
Configure Pagelets – Queries Page	FSPC_ADMIN_QUERY	Determine how query links appear on pagelets.
Define Link Page	FSPC_ADM_QRY_SEC	Define access to query links.
Configure Pagelets – Reports/Processes Page	FSPC_ADMIN_REPORT	Determine how reports and process links appear on pagelets.

Configure Pagelets – WorkCenter/Dashboard Page

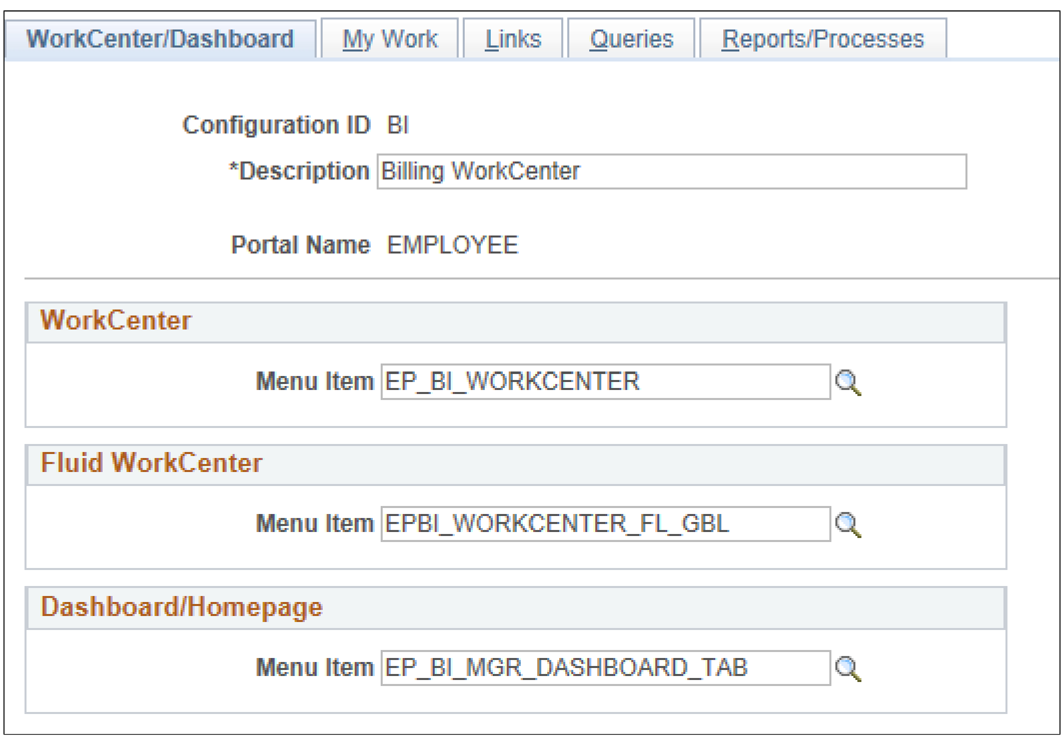
Use the Configure Pagelets – WorkCenter/Dashboard page (FSPC_ADMIN_MAIN) to define configuration IDs for Classic WorkCenters, Fluid WorkCenters, and Dashboards

Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Image: Configure Pagelets – WorkCenter/Dashboard page

This example illustrates the fields and controls on the Configure Pagelets – WorkCenter/Dashboard page.



Use this page to add or maintain the configuration of a pagelet. You can determine if the pagelet configuration is to be used in a Classic WorkCenter, Fluid WorkCenter, or Classic Dashboard, by entering the menu item in which the WorkCenter or Dashboard should appear.

Create one configuration ID for each combination of Classic WorkCenter, Fluid WorkCenter, and Dashboard for your organization.

Each menu item cannot be associated with more than one configuration ID:

- Classic WorkCenter menu items are defined in the Manage WorkCenter Pages component.
- Fluid WorkCenter menu items are defined using the PeopleTools Structure and Content page.
- Classic Dashboard menu items are defined in the Portal as Homepage tabs.

Note: The data that is entered using this page can also be loaded as an Application Data Set using the Data Migration Workbench. For more information about ADS and the Data Migration Workbench for FSCM applications, see *PeopleSoft Application Fundamentals* documentation, Working with and Personalizing WorkCenters, Using the Data Migration Workbench for PeopleSoft WorkCetners.

Configure Pagelets - My Work Page

Use the Configure Pagelets – My Work page (FSPC_ADMIN_MYWORK) to set up My Work links for end users.

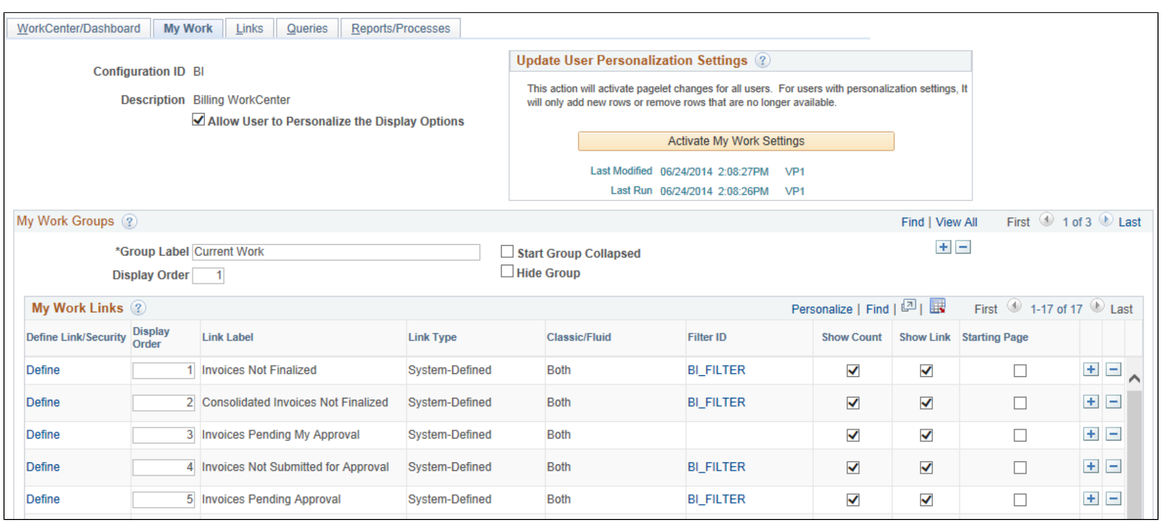
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the My Work tab.

Image: Configure Pagelets - My Work page

This example illustrates the fields and controls on the Configure Pagelets - My Work page.



A system administrator can determine whether an end user can personalize their display options.

Allow User to Personalize the Display Options

Select to indicate that end users who have access to this pagelet can personalize their display options.

If this option is selected, an end user has access to the Personalize page for the pagelet.

If this option is not selected, an end user does not have access to the Personalize page for the pagelet. If an end user tries to access the Personalize page, they receive a message that the user personalization is not enabled for the pagelet.

Update User Personalization Settings

Activate My Work Settings

Click to run the Application Engine process that adds and deletes changes to the user personalization records. This process moves the new configuration to the master record. The last modified and the last run dates and times are displayed so that you know that the process has run after changes have been made.

My Work Groups

Group Label

Enter a label heading for the group of links that appear in the <pagelet> Links grid. Multiple group labels can be added to organize <pagelet> links into logical groups.

This is not a required field, but should be used if more than five links are listed, and the links can be grouped.

Start Group Collapsed

Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links.

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Display Order

Enter an order in which this group of links should display within the <pagelet> section.

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Hide Group

Select to indicate that this group label, and associated links, should not display for an end user.

If selected, the end user does not have access to the group label, and associated links, even if they have authorization to personalize their display options.

My Work Links

Define Link/Security	Select to access the Define Link/Security Page.
Display Order	Enter the order in which you want the links to appear within the group. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Classic/Fluid	Displays whether the link label is available in Classic, Fluid, or Both.
Filter ID	Select a filter ID for PeopleSoft Fluid WorkCenters.
Show Count	Select to display a number in parenthesis at the end of the link. The value of the number indicates how many transactions apply to the link in which the user needs to act upon. Administrators should use caution when selecting this option because it could slow system performance. You should evaluate the show count option on a link by link basis. If you find that one link encounters a performance problem, then you should consider deselecting the Show Count check box for that link. You do not have to be consistent with the Show Count check box from link to link. If you deselect the Show Count check box for a link, then the link remains active if there are transactions to review. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Show Link	Select to indicate that the link is displayed on the pagelet. PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Starting Page	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Define My Work Link Page

Use the Define My Work Link page (FSPC_ADM_WRK_SEC) to define link types and security for My Work Pagelets as a system administrator.

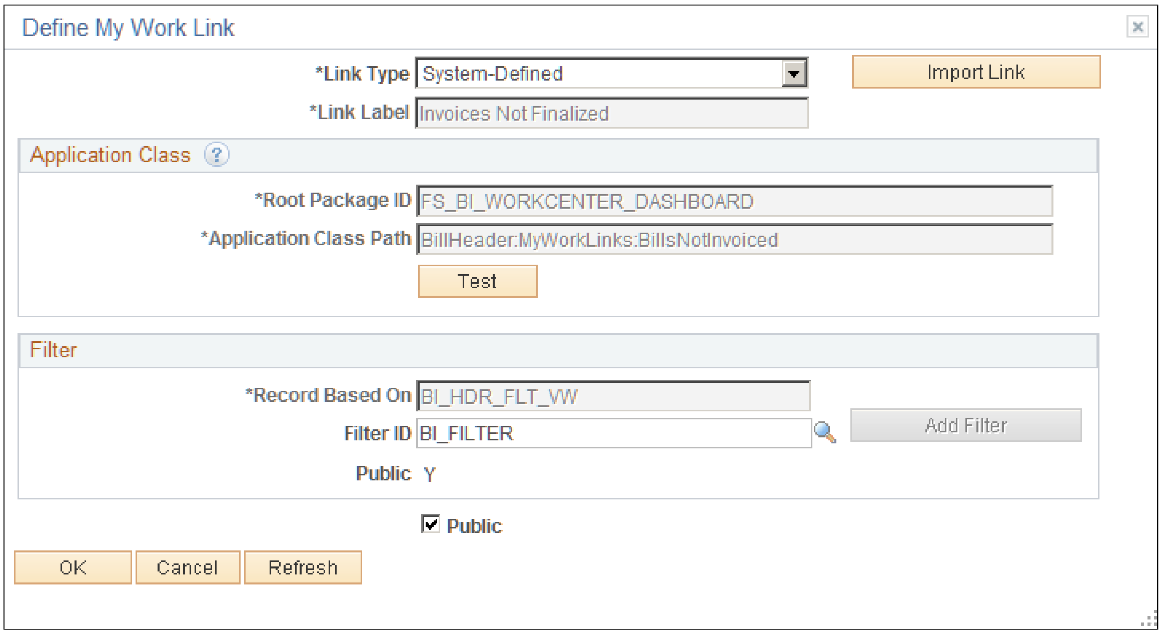
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the My Work tab and then click the Define link in the Define Link/Security column.

Image: Define My Work Link page

This example illustrates the fields and controls on the Define My Work Link page.



Use this page to define the type of link that appears on the My Work pagelet.

Link Type

Select the type of link. The fields in this window change depending on the option selected in this field. Options include:

- Events and Notifications Alert
- System-Defined
- User-Defined
- Worklist

Link Type is Events and Notifications Alert

Process Name

Select a process name that the system must run to display the results of an event or notification alert.

Process Category

Select a process category within the process name selected in the previous field.

Link Label

Displays from the alert and cannot be changed.

Public

Select to indicate that this is a public link.

Link Type is System-Defined

Import Link	Click to access the Import My Work Link page where you can import system-defined links. This button is displayed only when System-Defined is selected in the Link Type field.
Filter ID	Select the Filter ID that will be used to filter the data for this link.
Add Filter	Select to add filters if you don’t want to use what is already defined.
Public	Displays whether the filter is public. This option is display only.
Public	Select to indicate that this is a public link.

Link Type is User-Defined

Import Link	Click to access the Import My Work Link page where you can import system-defined links. This button is displayed only when System-Defined is selected in the Link Type field.
Link Label	Enter a label for the link, which appears on the My Work pagelet. (User defined only)
Record Based On	Enter the view name that will be used for defining filter fields for this link.
Filter ID	Select the Filter ID that will be used to filter the data for this link.
Add Filter	Select to add filters if you don’t want to use what is already defined.
Public	Displays whether the filter is public. This option is display only.
Public	Select to indicate that this is a public link.

Link Type is Workllist

Worklist Name	Select the Worklist to be displayed when the link is selected.
Link Label	Enter a label for the link, which appears on the My Work pagelet.
Public	Select to indicate that this is a public link.

Import My Work Link Page

Use the Import My Work Link page (FSPC_MYWORK_PROMPT) to import system defined My Work links as a system administrator.

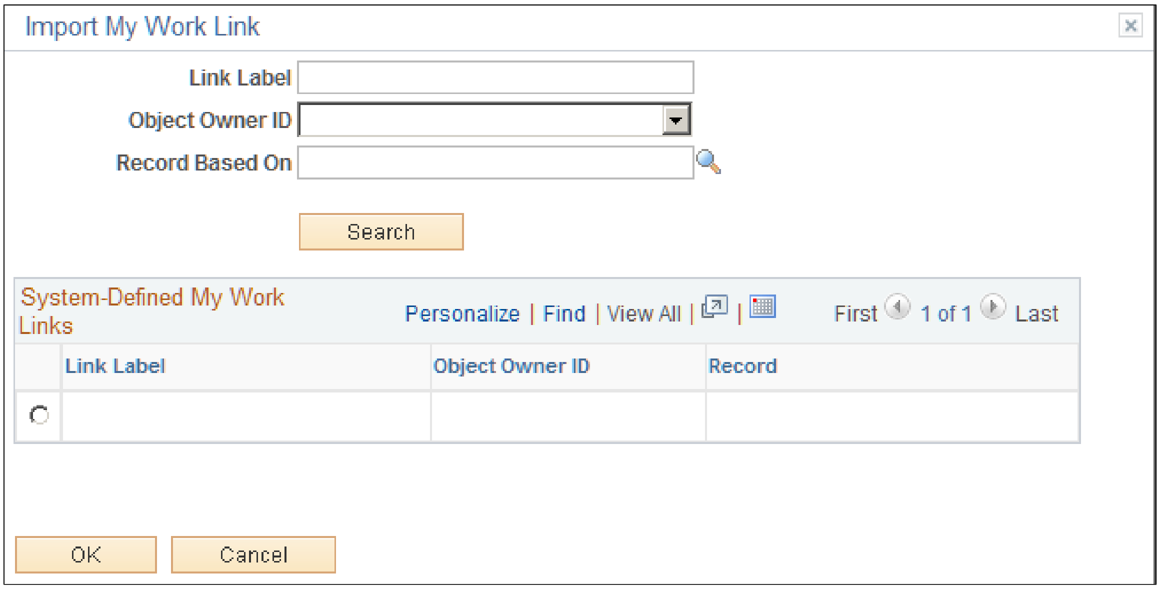
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the My Work tab and then click the Define link in the Define Link/Security column. Click the Import Link button.

Image: Import My Work Link page

This example illustrates the fields and controls on the Import My Work Link page.



Use this page to select an Appclass link that is predefined by a source product (object owner ID).

When the user is importing a link, they can narrow their search by entering a part of the link label name, the Object Owner ID, and the record based on field, or all. Or, they don't have to enter any search criteria.

Link Label	Enter a label for the link, which appears on the My Work pagelet.
Object Owner ID	Select the application owner of the object. For example: Billling, Contracts, General Ledger, and so on.
Record Based On	Select a table that is used for the link.
Search	Click to search the PeopleSoft database for results based on your selection criteria.
(radio button)	Select one radio button to indicate that you want the system to use that record for the My Work link.

Configure Pagelets - Links Page

Use the Configure Pagelets – Links page (FSPC_ADMIN_LINK) to determine how links appear on the Links Pagelets as a system administrator.

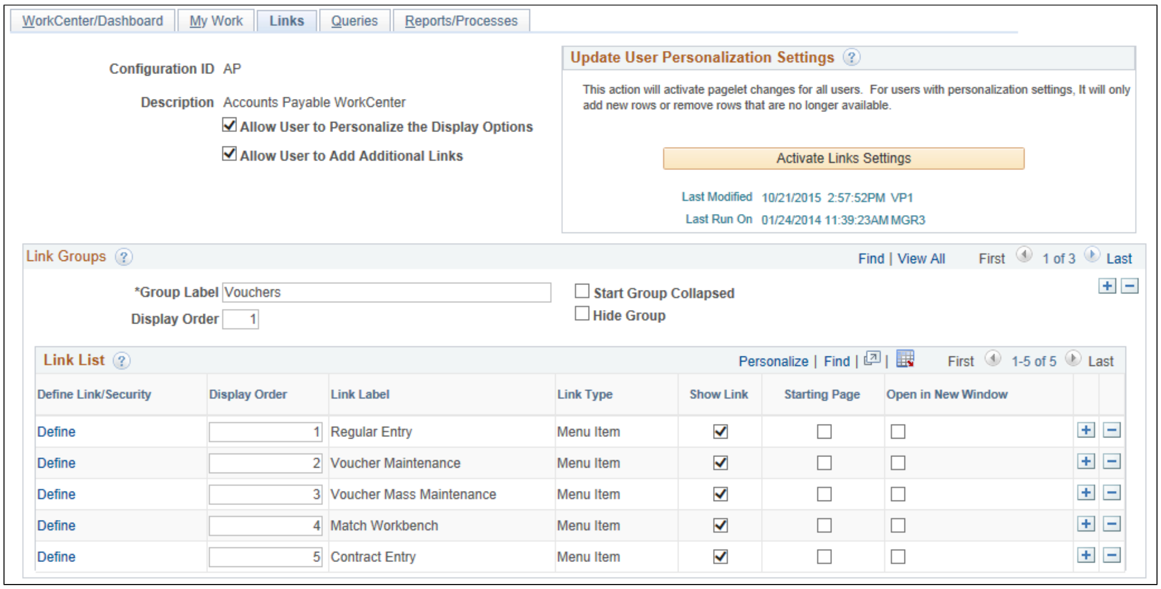
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the Links tab.

Image: Configure Pagelets – Links page

This example illustrates the fields and controls on the Configure Pagelets – Links page.



Use this page to set up links for end users. A system administrator can determine whether an end user can personalize their display options, as well as define group labels and links.

Allow User to Personalize the Display Options

Select to indicate that end users who have access to this pagelet can personalize their display options.

If this option is selected, an end user has access to the Personalize page for the pagelet.

If this option is not selected, an end user does not have access to the Personalize page for the pagelet. If an end user tries to access the Personalize page, they receive a message that the user personalization is not enabled for the pagelet.

Allow User to Add Additional Links

Select to indicate that an end user can add groups and links to the pagelet.

Update User Personalization Settings

Activate Links Settings

Click to run the Application Engine process that adds and deletes changes to the user personalization records. This process moves the new configuration to the master record. The last modified and the last run dates and times are displayed so that you know that the process has run after changes have been made.

Link Groups

Group Label	Enter a label heading for the group of links that appear in the <pagelet> Links grid. Multiple group labels can be added to organize <pagelet> links into logical groups. This is not a required field, but should be used if more than five links are listed, and the links can be grouped.
Start Group Collapsed	Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Display Order	Enter an order in which this group of links should display within the <pagelet> section.
Hide Group	Select to indicate that this group label, and associated links, should not display for an end user. If selected, the end user does not have access to the group label, and associated links, even if they have authorization to personalize their display options.

Link List

Define Link/Security	Click to access the Define Link/Security window where you can define the type of link as well as additional information related to the link type.
Display Order	Enter the order in which you want the links to appear within the group. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Show Link	Select to indicate that the link is displayed on the pagelet. PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Starting Page	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Open in New Window	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Define Link/Security Page

Use the Define Link/Security page (FSPC_ADMIN_LINK_SEC) to define links and external link security as a system administrator.

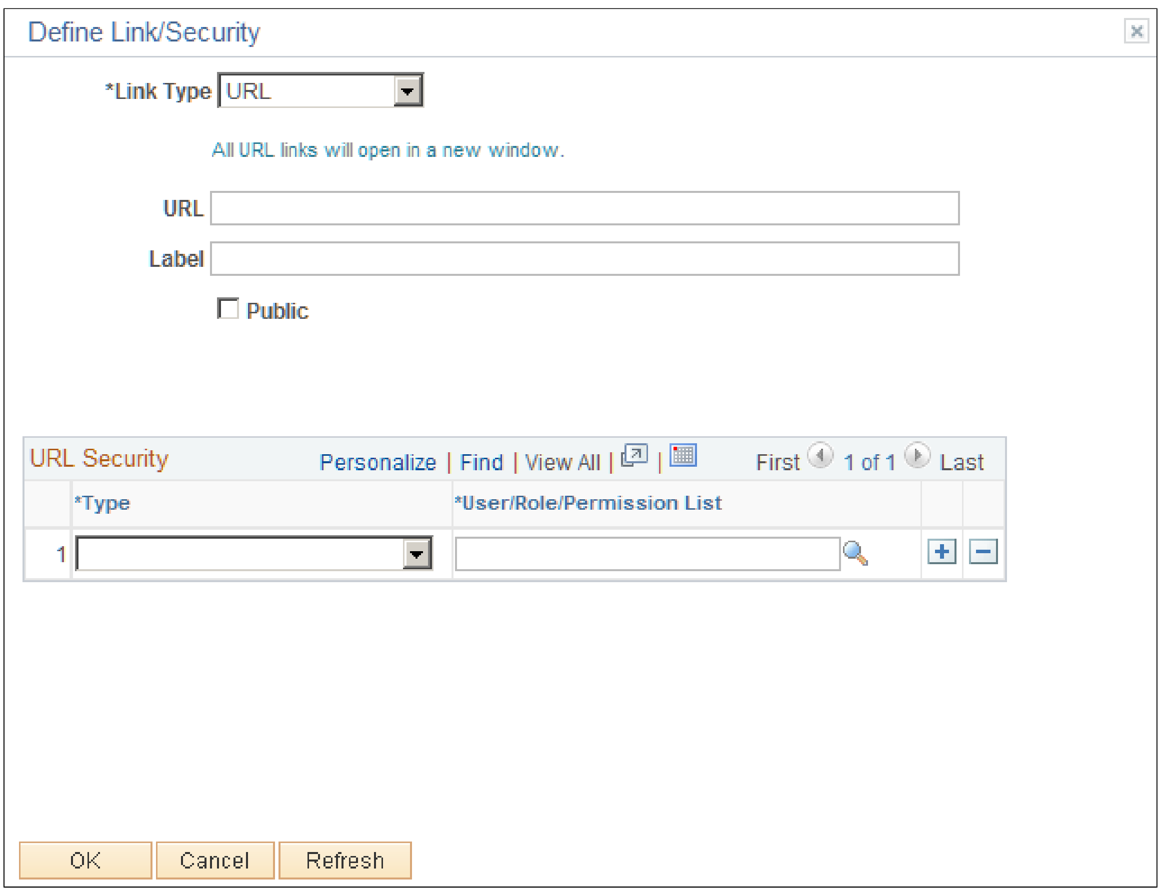
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the Links tab. Click the Define link.

Image: Define Link/Security page

This example illustrates the fields and controls on the Define Link/Security page.



Use this page to define a link, whether the link is public, and if the link is not public to set up security for the link. The fields on this page change depending on the option selected in the Link Type field.

Link Type	Select *Menu Item* or *URL*.
Select Menu Item	Click to access the Select a Content Reference window where administrators can select menu items from a tree structure to use as a link. Only links to which the end user has permission are displayed. This option appears when *Menu Item* is selected in the Link Type field.
URL and **Label**	Enter the URL address and label description. This option appears when *URL* is selected in the Link Type field.
Public	Select to indicate that end users, who have access to this pagelet in the WorkCenter, have access to this URL. Deselect to define specific users, roles, and permission lists that have access to this URL. The URL Security section displays when this check box is not selected. This option appears when *URL* is selected in the Link Type field.

URL Security

Permission Type	Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the link.
User/Role/Permission List	Depending on the option selected in the Permission Type field, select user IDs, role names, or permission lists. Individual users that are associated to the option selected have access to the link.

Configure Pagelets – Queries Page

Use the Configure Pagelets – Queries page (FSPC_ADMIN_QUERY) to determine how queries appear on pagelets.

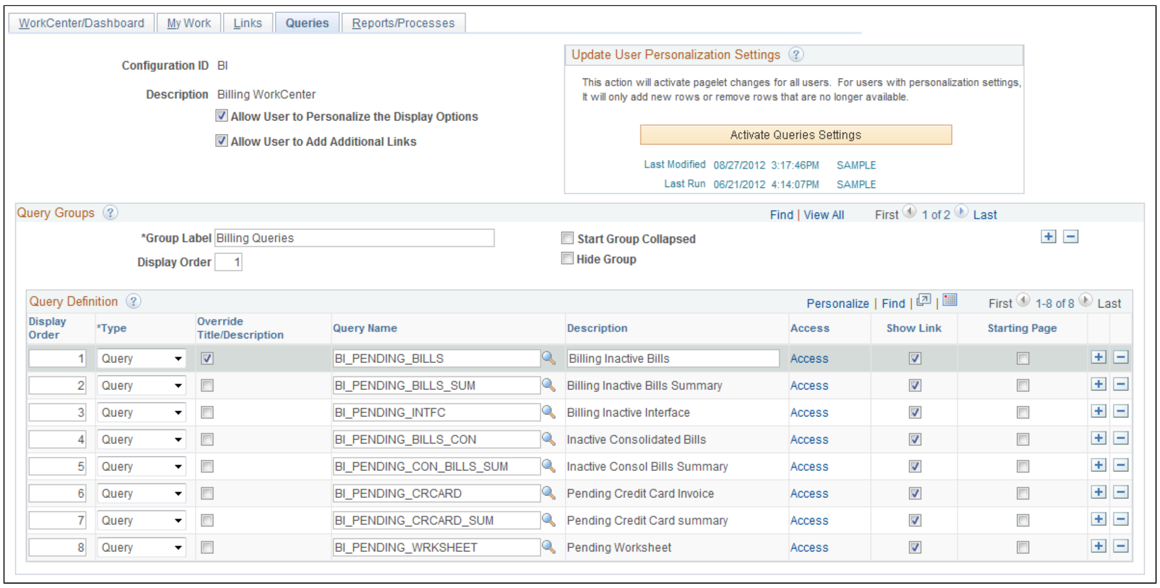
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the Queries tab.

Image: Configure Pagelets – Queries page

This example illustrates the fields and controls on the Configure Pagelets – Queries page.



Use this page to set up query links for end users. A system administrator can determine whether an end user can personalize their display options, add additional links to queries, as well as define group labels and links.

Allow User to Personalize the Display Options

Select to indicate that end users who have access to this pagelet can personalize their display options.

If this option is selected, an end user has access to the Personalize page for the pagelet.

If this option is not selected, an end user does not have access to the Personalize page for the pagelet. If an end user tries to access the Personalize page, they receive a message that the user personalization is not enabled for the pagelet.

Allow User to Add Additional Links

Select to indicate that an end user can add groups and links to the pagelet.

Update User Personalization Settings

Activate Query Settings

Click to run the Application Engine process that adds and deletes changes to the user personalization records. This process moves the new configuration to the master record. The last modified and the last run dates and times are displayed so that you know that the process has run after changes have been made.

Query Groups

Group Label

Enter a label heading for the group of links that appear in the <pagelet> Links grid. Multiple group labels can be added to organize <pagelet> links into logical groups.

This is not a required field, but should be used if more than five links are listed, and the links can be grouped.

Start Group Collapsed

Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links.

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Display Order

Enter an order in which this group of links should display within the <pagelet> section.

Hide Group

Select to indicate that this group label, and associated links, should not display for an end user.

If selected, the end user does not have access to the group label, and associated links, even if they have authorization to personalize their display options.

Query Definition

Display Order

Enter the order in which you want the links to appear within the group.

Type

Select and option that includes: *Query* and *Pivot Grid*.

Depending on the option selected in this field, the other fields in this section vary.

Override Description/Title

Select to override the query description, the pivot grid title, and the query label for the user added queries and pivot grids.

Pivot Grid Name

Select the name of a pivot grid. Queries can optionally be displayed as a pivot grid.

These columns display only when *Pivot Grid* is selected in the Type field.

For more information about setting up Pivot Grids, see *PeopleTools: Pivot Grid*

Query Name	Select from a list of public queries. System administrators can only add public queries.
Access	Click the Access link to access the Define Link window where you can define security access to the query or pivot grid.
Show Link	Select to indicate that the link is displayed on the pagelet. PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time. If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.
Starting Page	If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Define Link Page

Use the Define Link page (FSPC_ADM_QRY_SEC) to define query access as a system administrator.

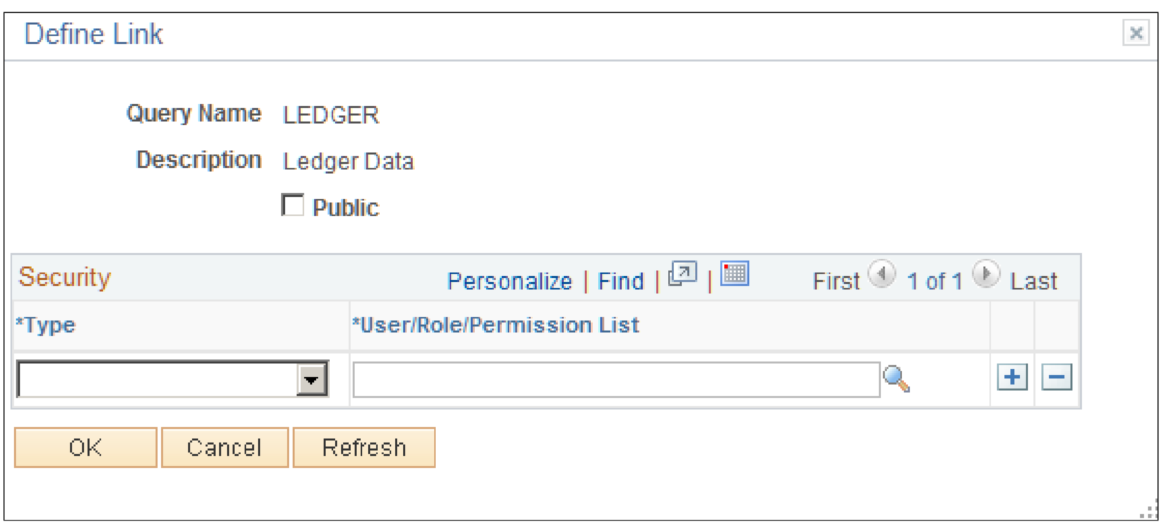
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Click the Queries tab. Click the Access link.

Image: Define Link page

This example illustrates the fields and controls on the Define Link page.



Use this page to define access to query links on the Query pagelet.

Public

Select to indicate that end users, who have access to this pagelet in the WorkCenter, have access to this query or pivot grid.

Deselect to define specific users, roles, and permission lists that have access to this link. The Security section displays when this check box is not selected.

Security

Type

Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the link.

User/Role/Permission List

Depending on the option selected in the Permission Type field, select user IDs, role names, or permission lists. Individual users that are associated to the option selected have access to the link.

Configure Pagelets – Reports/Processes Page

Use the Configure Pagelets – Reports/Processes page (FSPC_ADMIN_REPORT) to determine how reports and process links appear on pagelets as a system administrator.

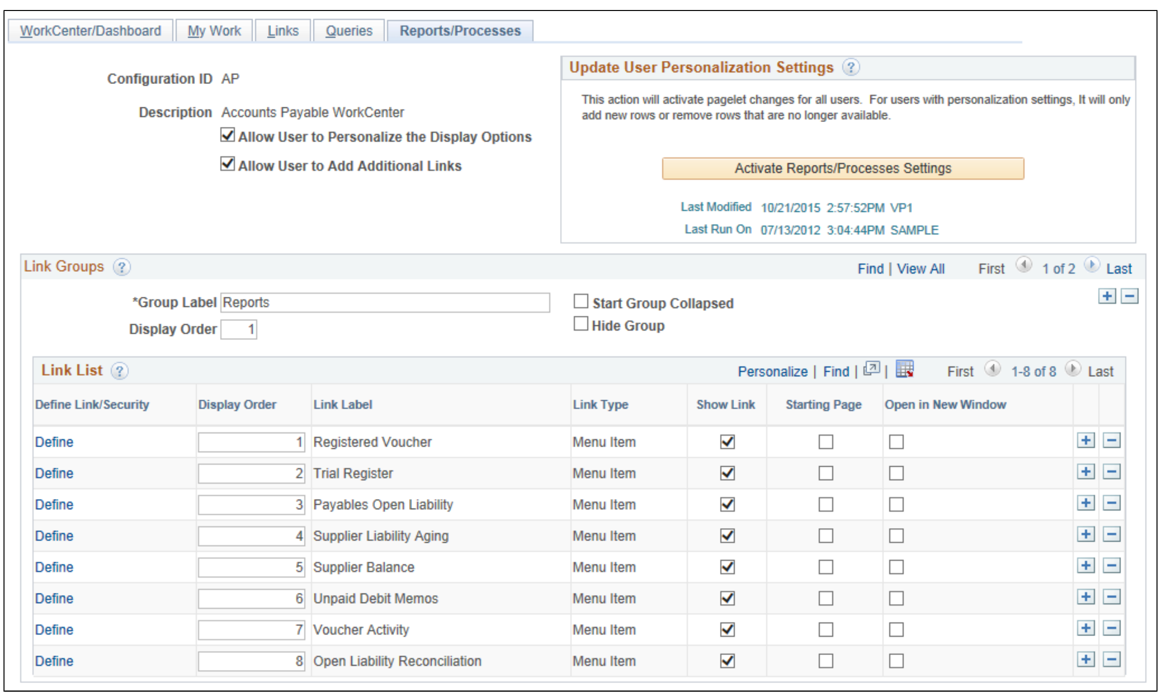
Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets

Select the Reports/Processes tab.

Image: Configure Pagelets – Reports/Processes page

This example illustrates the fields and controls on the Configure Pagelets – Reports/Processes page.



Use this page to set up reports and process links for end users. A system administrator can determine whether an end user can personalize their display options, add additional links to reports and processes, as well as define group labels and links.

Allow User to Personalize the Display Options

Select to indicate that end users who have access to this pagelet can personalize their display options.

If this option is selected, an end user has access to the Personalize page for the pagelet.

If this option is not selected, an end user does not have access to the Personalize page for the pagelet. If an end user tries to access the Personalize page, they receive a message that the user personalization is not enabled for the pagelet.

Allow User to Add Additional Links

Select to indicate that an end user can add groups and links to the pagelet.

Update User Personalization Settings

Activate Reports/Processes Settings

Click to run the Application Engine process that adds and deletes changes to the user personalization records. This process moves the new configuration to the master record. The last modified and the last run dates and times are displayed so that you know that the process has run after changes have been made.

Link Groups

Group Label

Enter a label heading for the group of links that appear in the <pagelet> Links grid. Multiple group labels can be added to organize <pagelet> links into logical groups.

This is not a required field, but should be used if more than five links are listed, and the links can be grouped.

Start Group Collapsed

Select to indicate that this particular group of links should display as collapsed when users access this pagelet. The group label displays, and the user must click the group label to expand the group and access the links.

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Display Order

Enter an order in which this group of links should display within the <pagelet> section.

Hide Group

Select to indicate that this group label, and associated links, should not display for an end user.

If selected, the end user does not have access to the group label, and associated links, even if they have authorization to personalize their display options.

Link List

Define Link/Security — Click to access the Define Link/Security Page where you can define the type of link as well as additional information related to the link type.

Display Order — Enter the order in which you want the links to appear within the group.

Show Link — Select to indicate that the link is displayed on the pagelet.

PeopleSoft delivers some links that a system administrator may choose to hide from end users. If this is the case, then select this check box. This allows system administrators to preserve the link definition, if they decide to display the link at a later time.

If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Starting Page — If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Open in New Window — If the Allow User to Personalize the Display Options check box is selected, this check box is also displayed on the Personalization page for the end user.

Chapter 2

Using Datasets

Understanding Datasets

Datasets enable role-based filtering and distribution of data. You can limit the range and quantity of data displayed for a user by associating dataset rules with a user's dataset roles. The resulting dataset rules are a set of data appropriate to the user’s dataset roles.

You can also limit the range and quantity of data passed to a mobile device by defining data distribution rules based on datasets. Data distribution rules define the selection of data downloaded to a mobile device. The dataset may differ depending on the mobile device.

Note: If you are using PeopleCode to control data distribution, consider using datasets instead.

Defining Dataset Rules

This section provides an overview of dataset rules and discusses how to create dataset rules.

Page Used to Define Dataset Rules

Page Name	***Definition Name***	***Usage***
Dataset Rules Page	EOEC_DATASET	Define the rules that make up a dataset.

Understanding Dataset Rules

Dataset rules define datasets for use in conjunction with each dataset role’s security rules. Defining dataset rules creates Structured Query Language (SQL) statements that select the dataset displayed for each rule.

To use dataset rules and roles:

1. Define dataset rules, which are based on a synchronized record.

   You define a dataset rule to return a subset of rows from the selected synchronized record based on the dataset role to which you will link the rule.

   These dataset rules are based on views that can join to any record in your PeopleSoft system.

   For each rule condition, the user specifies a field that comes from the search record name defined in the dataset rule. When the specified field has neither a prompt or translate table edit, the following system variables, which are delivered as system data to all applications, can be used to filter the condition:

- %Blank
- %Date
- %EmployeeID
- %PersonID
- %Time
- %UserID

2. Assign the dataset rules to dataset roles, according to role security and data requirements.

   Each dataset role can have multiple dataset rules. You can use existing dataset roles, or create new dataset roles by selecting from existing PeopleTools security-based user roles.

   See *PeopleTools: Security Administration*, “Understanding Roles”.

3. Ensure that the original user roles on which dataset roles were based are associated with appropriate user IDs.

   Each user ID can have multiple user roles.

   See *PeopleTools: Security Administration*, “User Profiles - Roles Page”

Dataset Rules Page

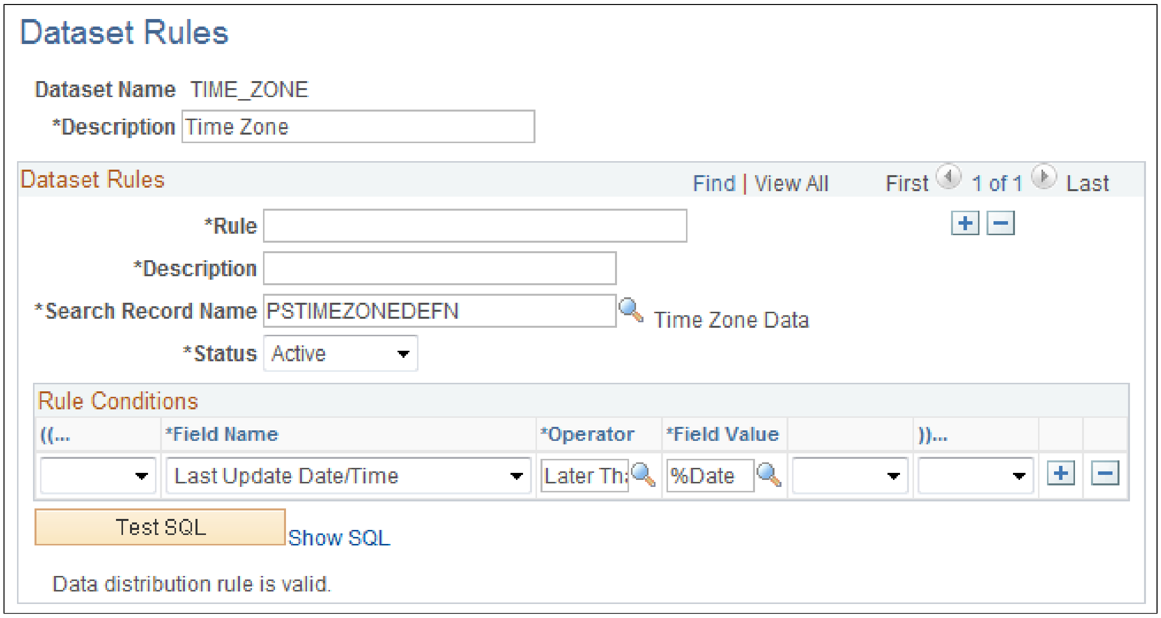
Use the Dataset Rules page (EOEC_DATASET) to define the rules that make up a dataset.

Navigation

Enterprise Components, Component Configurations, Datasets, Dataset Rules

Image: Dataset Rules page

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



The number of rule conditions in a dataset rule is limited only by your performance requirements. You can set a series of rule conditions that can navigate through as many records as necessary.

Dataset Rules

Search Record Name	Select the name of the search record for this rule. You can create a view specifically for use in the rule.
Status	Select *Active* or *Inactive.*

Rule Conditions

...((and **))...**	If the AND or OR field is left blank, specify the nesting level for this condition. Be sure to match opening and closing parentheses.
Field Name	Select the field name on which this rule operates.
Operator	Specify the operation with which to compare the specified field value. Select from standard conditional operators.
Field Value	Specify the value of the specified field against which to compare.
AND or **OR**	For second and subsequent rule conditions, specify *AND* or *OR,* or leave blank if the rule statements are nested.

Test SQL Click to test the validity of the rule conditions. The result is returned below the button.

Show SQL Click to view the SQL statement generated by the rule.

Defining Dataset Roles

This section discusses how to define dataset roles.

Set up user roles by associating dataset rules with user roles.

Page Used to Define Dataset Roles

Page Name	***Definition Name***	***Usage***
Dataset Roles Page	EOEC_MP_ROLE	Define dataset roles that associate existing PeopleTools user roles with dataset rules.

Dataset Roles Page

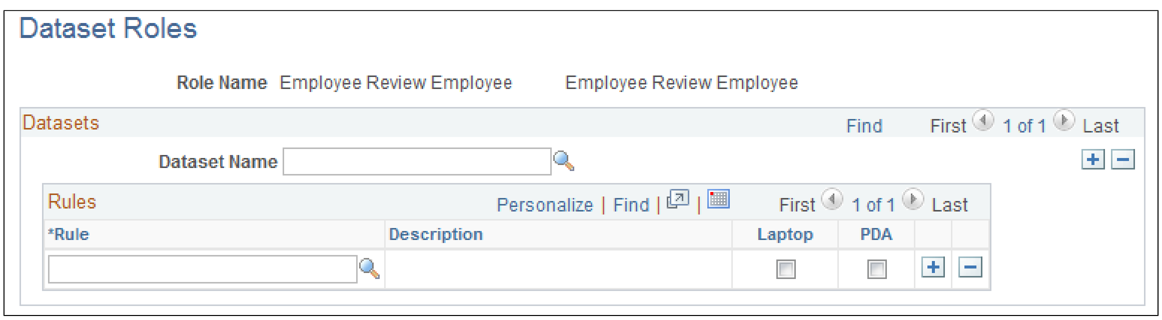
Use the Dataset Roles page (EOEC_MP_ROLE) to define dataset roles that associate existing PeopleTools user roles with dataset rules.

Navigation

Enterprise Components, Component Configurations, Datasets, Dataset Roles

Image: Dataset Roles page

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



Select an existing dataset role for editing, or create a new dataset role by selecting from existing PeopleTools security-based user roles.

See *PeopleTools: Security Administration*, “Setting Up Roles”

Dataset Name Select the dataset with which the component rule is associated.

Rule	Select the component rule.
Laptop and **PDA**	Select to display the resulting data on a laptop computer or PDA. **Note:** If you do not select Laptop or PDA, no data from this rule is displayed.

Defining Mobile Data Distribution

Use datasets to define the data distributed to mobile devices running the PeopleTools Mobile Agent.

Important! PeopleSoft Mobile Agent is a deprecated product. The information in this section exists for backward compatibility only.

This section provides an overview of mobile data distribution.

Pages Used to Define Mobile Data Distribution

Page Name	***Definition Name***	***Usage***
Mobile Data Distribution Page	EOEC_MP_RULE	Define data distribution rules for mobile devices based on datasets.
Mobile User Rules Page	EOEC_MP_USRRULE	Preview the effect of mobile data distribution.

Understanding Mobile Data Distribution

Mobile devices can have limited processing power, storage capacity, and display space. You can limit the range and quantity of data passed to the mobile device by associating dataset rules with synchronizable component interfaces. Mobile data distribution rules define the selection of data from network servers for download to a mobile device. The result of data distribution rules is a set of data appropriate to the user's roles. The set of data may differ depending on the mobile device.

Data distribution for mobile applications implements security and filters the data downloaded to the mobile device. You define data distribution for mobile devices based on datasets by selecting dataset rules assigned to the mobile device user's dataset roles.

Implementing Mobile Data Distribution

To filter data defined by dataset rules to mobile devices, developers must include the function DistributeDataByRules() in the synchronizable component interface's OnSelect PeopleCode method.

For example:

```
Declare Function DistributeDataByRules PeopleCode
FUNCLIB_ECMOBIL.EOEC_ONSELECT FieldFormula;
DistributeDataByRules();
```


See Also

Enterprise PeopleTools 8.49 PeopleBook: Mobile Agent

PeopleTools: PeopleCode Language Reference

Mobile Data Distribution Page

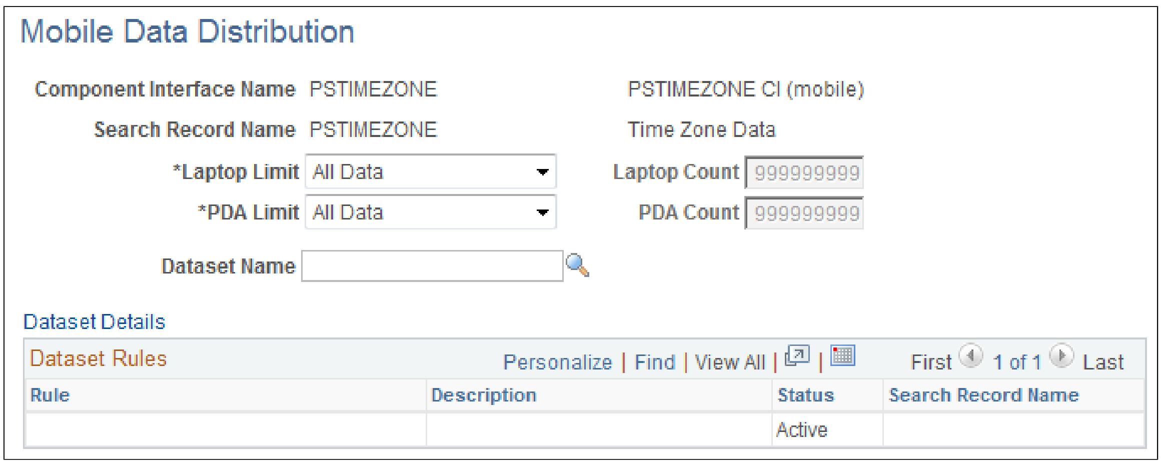
Use the Mobile Data Distribution page (EOEC_MP_RULE) to define data distribution rules for mobile devices based on datasets.

Navigation

Enterprise Components, Component Configurations, Mobile, Mobile Data Distribution

Image: Mobile Data Distribution page

This example illustrates the fields and controls on the Mobile Data Distribution page. You can find definitions for the fields and controls later on this page.



Note: Component interfaces selected for mobile data distribution must be synchronizable; only synchronizable component interfaces are available from the prompt.

Laptop Limit

Select the limiting factor for data instances to be downloaded to a laptop computer during synchronization. Select from:

All Data: Select to download all data matching the rule's conditions.

Limit By Count: Select to download only data matching the rule's conditions up to the specified count. The count is based on the number of rows returned. Referenced data is also included.

Referenced Data Only: Select to download only data only if it is referenced by another component. You would be more likely to select this option for setup data than for transaction data.

	For example, if you have 50,000 products, but the leads you download are related to only 2,000 of the products, select *Referenced Data Only* so that you only download the 2,000 products, instead of the entire set. If *Reference Data Only* is selected for products, downloads do not include products unless other objects such as leads and opportunities that reference products are downloaded.
PDA Limit	Select the limiting factor for data instances to be downloaded to a PDA during synchronization. Select from: *All Data:* All data matching the rule's conditions is downloaded. *Limit By Count:* Only data matching the rule's conditions up to the specified count is downloaded. Referenced data is also included. *Referenced Data Only:* Only data referenced by the component interface is downloaded.
Laptop Count and **PDA Count**	If you select *Limit By Count* in the Laptop Limit field or the PDA Limit field, specify the maximum number of data instances to be downloaded.
Dataset Name	Select the dataset to apply to this mobile data distribution rule.
Dataset Details	Click to access the Dataset Rules page, where you can view and modify the selected dataset definition. See Dataset Rules Page.

The Dataset Rules grid lists rules for the specified dataset.

Mobile User Rules Page

Use the Mobile User Rules page (EOEC_MP_USRRULE) to preview the effect of mobile data distribution.

Navigation

Enterprise Components, Component Configurations, Mobile, Mobile User Rules

A mobile user can specify whether a selected data distribution rule returns data to a selected mobile device. The user must be signed in with a user ID, not as an administrator, to define mobile user rules.

Show Rule Count	Click to view the number of results the mobile data distribution rule returns.
Show Laptop Count and **Show PDA Count**	Click to view the number of results the mobile data distribution rule returns to a laptop computer or PDA based on any limits set for the mobile device on the Mobile Data Distribution page.
Laptop and **PDA**	Select to display the results of this mobile data distribution rule on a laptop computer or on a PDA, or both.

Note: If neither Laptop nor PDA is selected, no data from this mobile data distribution rule is displayed.

Preview Laptop Results and **Preview PDA Results**	Click to preview the data that will be downloaded to a laptop or PDA as a result of this mobile data distribution rule and any limits set for the mobile device on the Mobile Data Distribution page.

Chapter 3

Formatting Addresses

Understanding Address Formats

You can use addresses throughout PeopleSoft applications for customer, vendor, and student locations. The address format pages are used to specify the details and defaults for the way address fields display and how they prompt users.

You can format addresses for any country in the world. You can create country and state descriptions and street, suite, building, and postal zone formats to meet the needs of any country format. For example, the state description can be changed to county, province, district, or other geopolitical designation in use by the country in question. In addition, PeopleSoft applications contain fully populated country code and state code tables that Oracle updates for each major release, according to current changes in national boundaries and designations.

Specifying Address Formats

This section discusses how to specify address formats.

Important! This task, Specifying Address Formats, does not apply to the PeopleSoft Customer Relationship Management application nor the PeopleSoft Financials/Supply Change Management application, because these applications do not use the common address objects.

Pages Used to Specify Address Formats

Page Name	***Definition Name***	***Usage***
Country Description Page	COUNTRY_DEFN	Define countries to be used throughout the system. This is used mainly for currencies and addresses.
Address Format Page	ADDR_FORMAT_TABLE	Customize fields and field descriptions, so addresses conform to the customary address format of the specified country. Once set, the format appears everywhere the system uses the address subrecord.
Valid Address Page	EO_ADDR_VALIDAT	Add valid combinations of address fields.
State/Province Page	STATE_DEFN	Add or review a state, province, county, or other geopolitical region within a country.

Country Description Page

Use the Country Description page (COUNTRY_DEFN) to define countries to be used throughout the system.

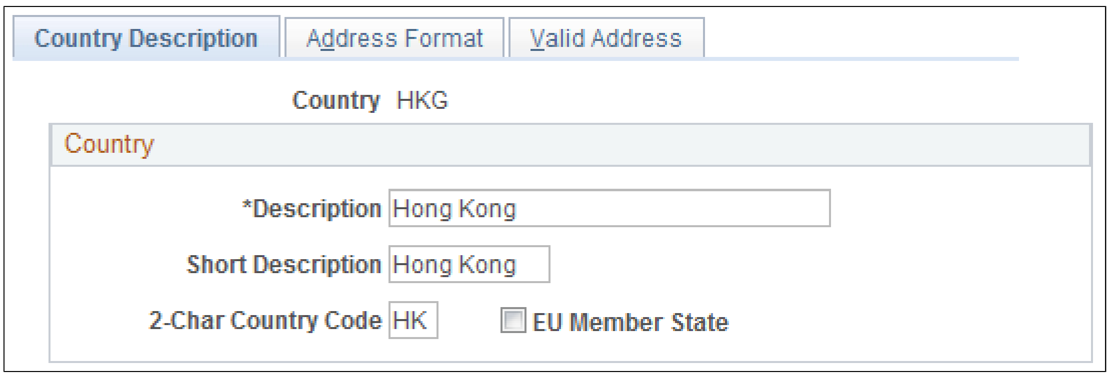
This is used mainly for currencies and addresses.

Navigation

- Set Up <Product Line>, Install, Country Table
- Enterprise Components, Component Configurations, Address - Hidden, Country - Hidden

Image: Country Description page

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



Use this page to define the prompts and fields that display throughout the system.

2-Char Country Code (two-character country code)	Enter the Value Added Tax (VAT) registration ID for the country.
EU Member State (European Union member state)	Select if the country is a member of the European Union. Select to include the country in prompts for intrastate reporting.

Address Format Page

Use the Address Format page (ADDR_FORMAT_TABLE) to customize fields and field descriptions, so addresses conform to the customary address format of the specified country.

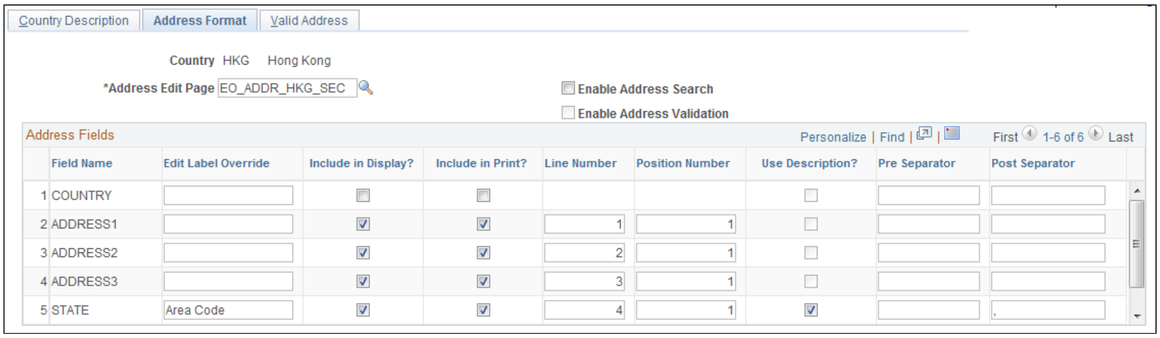
Once set, the format appears everywhere the system uses the address subrecord.

Navigation

- Set Up <Product Line>, Install, Country Table, Address Format
- Enterprise Components, Component Configurations, Address - Hidden, Country - Hidden

Image: Address Format page

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



Use this page to set up the three main aspects of the address: editing, displaying, and printing.

Address Edit Page

Displays the secondary page used for editing the address. You can create a new secondary page using Application Designer. On the new address secondary page you create, use page fields from the DERIVED_ADDRESS record definition. You then need to add a secondary page control to ADDRESS_SBP pointing to your new secondary page. Once you complete these steps, the secondary page is accessible in this field.

Enable Address Search

Select to enable users to search for a valid value. Selecting this check box enables the Used in Search column and the Valid Address page.

The system default is to leave this check box clear.

Enable Address Validation

Available only when Enable Address Search is selected. Select to ensure validation of all values selected. When selected, users must select a value from the search list. If this check box is clear, users can select from the search list or enter a new value.

The system default is to leave this check box clear.

Search Limit

Enter a numeric value to limit the number of search results.

This option enables you to limit the search results retrieved during Address Search.

Field Name

Displays the field options available for the address page.

Edit Label Override

(Optional) Enter an alternative label for the field. The new label is used when prompting for the field. You can customize address formats so that they conform to the address requirements of each location. For instance, for a U.S. address, you would change the Postal field to read ZIP Code.

Keep in mind the distinctions between county and state:

- *County:* The tertiary geopolitical region within a state; the level after country and state. In the UK, the level of state is called a county; you would enter such counties in the State field.
- *State:* The secondary geopolitical region within a country; a state in the U.S., a province in Canada, a county in the UK, and a department in France.

Used in Search

Available only when you select the Enable Address Search check box. Select the fields you want users to be able to search on.

Include in Display

Select to have the PeopleSoft system include this field when an address appears in read-only mode. Clear this check box for specific fields if your organization wants to display addresses in a format that is different than the appearance of the address during data entry.

Include in Print

Select to print the field when printing.

Line Number and **Position Number**

Enter the physical location of the fields for displaying and printing. The line number and position number control the field order in the Address Edit page.

The Line Number field specifies the line in which the address field should appear on the page. If there are more than two fields on the same line, then the Position Number field is used to resolve the conflict.

Use Description

Select to display the description for the field value. For example, for addresses in Japan, select this option to display the description of the state rather than the state code, since the code is numeric.

Pre Separator and **Post Separator**

Enter characters to be used surrounding the address field. For example, in the United States, a comma generally follows the city name, such as in *San Francisco, CA.* In India, there are parentheses around the postal code, for example *(123).*

Valid Address Page

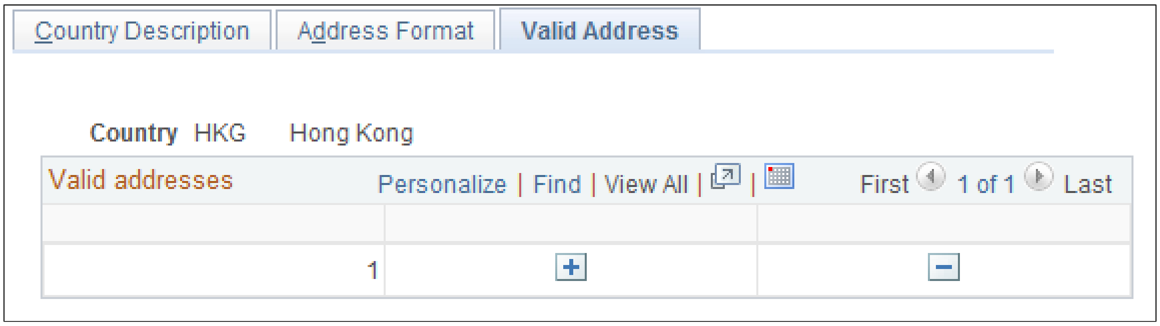
Use the Valid Address page (EO_ADDR_VALIDAT) to add valid combinations of address fields.

Navigation

- Set Up <Product Line>, Install, Country Table, Valid Address
- Enterprise Components, Component Configurations, Address - Hidden, Country - Hidden

Image: Valid Address page

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



To enable this page, select the Enable Address Search check box on the Address Format page. This enables the Used in Search column. The fields that you select to be used in the search appear on the Valid Address page as columns. Enter the valid postal code and state combinations that the user can search for and select.

State/Province Page

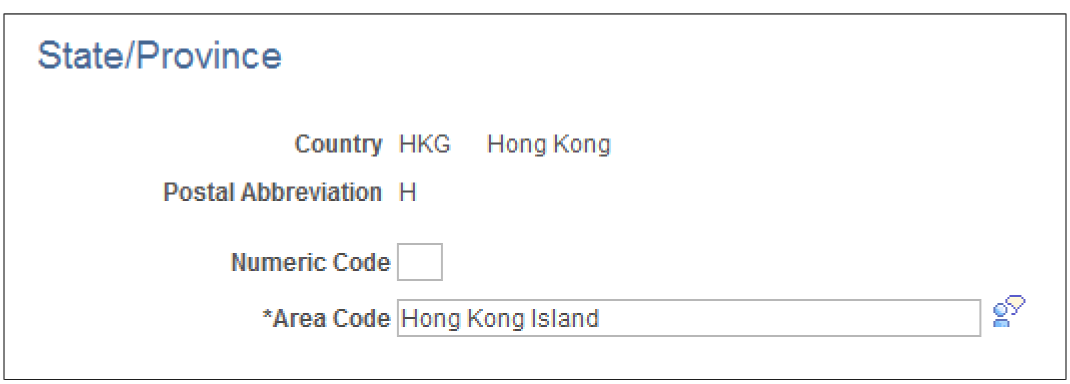
Use the State/Province page (STATE_DEFN) to add or review a state, province, county, or other geopolitical region within a country.

Navigation

- Set Up <Product Line>, Install, State/Province
- Enterprise Components, Component Configurations, Address - Hidden, State - Hidden

Image: State/ Province page

This example illustrates the fields and controls on the State/Province page. You can find definitions for the fields and controls later on this page.



This table provides states, provinces, and equivalent geopolitical entities for all supported countries, such as Dutch communities and French departments. The codes are based on standard postal codes.

Numeric Code	Enter a two digit numeric code for statistical and reporting purposes.
Province	The second enterable field, Province in the preceding example, changes depending on the country. This field has a maximum limitation of 30 characters. Other examples for this field include: • State—if the country is USA, the field label appears as State. • Department—if the country is France, the field label appears as Department. • Community—if the country is Holland, the field label appears as Community.

Chapter 4

Using the Find Object Navigation Utility

Understanding the Find Object Navigation Utility

You can use this utility with any PeopleSoft Pure Internet Architecture page to locate the navigation path for a component, page, content reference, or portal. Select your search criteria and click the Search button. The resulting navigation paths appear with links that enable you to navigate directly to the page that you specified in your search. Frequently, several ways are available to access a page. Reviewing all of the navigation paths may help you find the page in a more intuitive way.

For example, an administrator wants to apply security to all references to Monitor Approvals. This component resides in Enterprise Components, Approvals, Approvals. Some applications can choose to create static reference or links to a page. With this utility, the administrator can find both references and confirm that the appropriate security is applied.

Additionally, when used as an internal tool, this utility can be very helpful during PeopleTools and application upgrades.

Specifying Navigation Path Search Criteria

This section provides an overview of the navigation path search criteria.

Page Used to Specify Navigation Path Search Criteria

Page Name	***Definition Name***	***Usage***
Find Object Navigation Page	EOEC_FIND_NAV	Specify navigation path search criteria.

Understanding Navigation Path Search Criteria

This utility uses the object ID and portal tables to locate the target objects, allowing you to enter a component name, page name, or content reference (CREF) name and portal name to locate all of the navigation paths. Select your search criteria to populate and display a grid with the navigation for your search parameters. The full navigation path is given along with URL links that take you to a new browser for the navigation that you specified.

Find Object Navigation Page

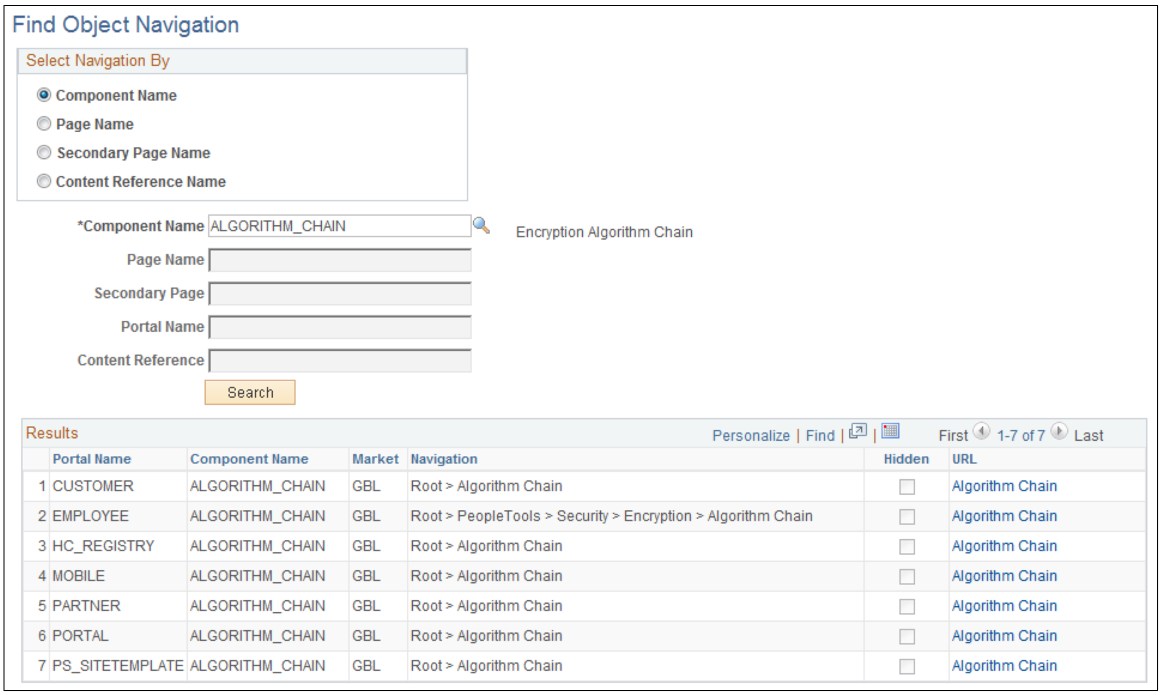
Use the Find Object Navigation page (EOEC_FIND_NAV) to specify navigation path search criteria.

Navigation

- Enterprise Components, Find Object Navigation
- Set Up <Product Line>, System Administration, Utilities, Find Object Navigation

Image: Find Object Navigation page showing search criteria of component name

This example illustrates the fields and controls on the Find Object Navigation page with the navigation grid displaying the path and URL for search parameters of component name. You can find definitions for the fields and controls later on this page.



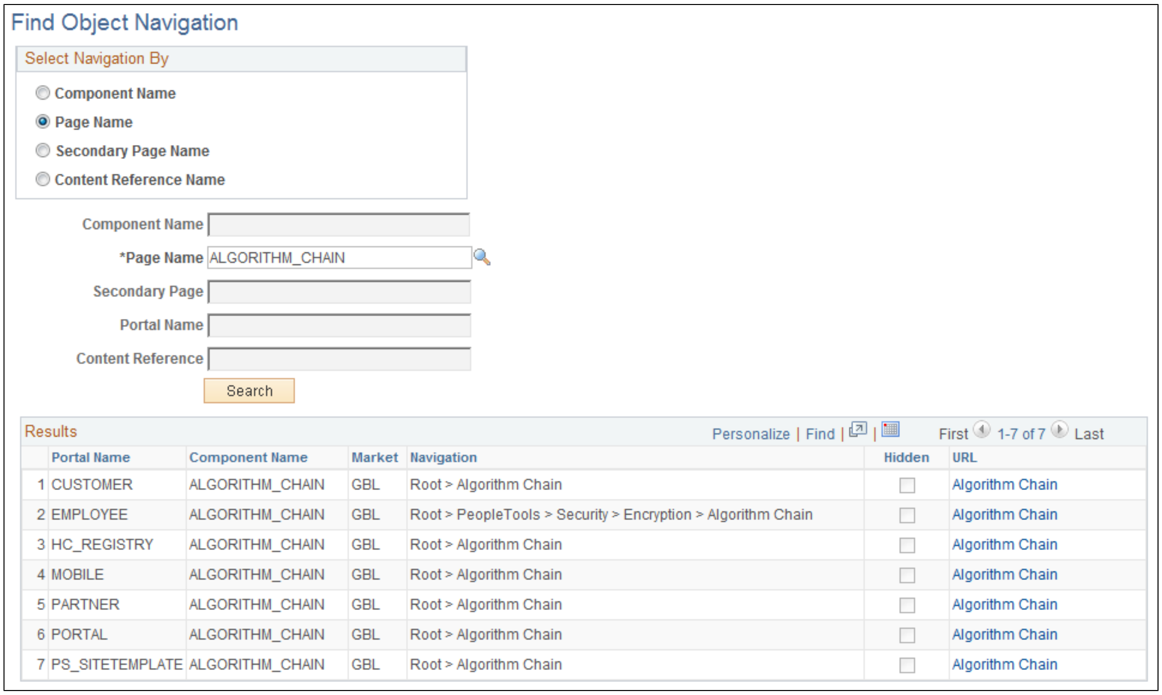
A component is a set of pages that are grouped for a business purpose. Component Interfaces expose components for synchronous access from another application, such as PeopleCode, Java, C/C++, or Component Object Model (COM).

Component Name	Select to search by component name. The system default is *Component Name.*
***Component Name**	This is a required field. Enter the name of the component for the search, or click the prompt to display available component names.
Search	Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL Click to open a browser window that directly accesses the navigation that you select in the grid.

Image: Find Object Navigation page showing search criteria of page name

This example illustrates the fields and controls on the Find Object Navigation page with the navigation grid displaying path and URL for search parameters of the page name. You can find definitions for the fields and controls later on this page.



Page Name Select to search by page name.

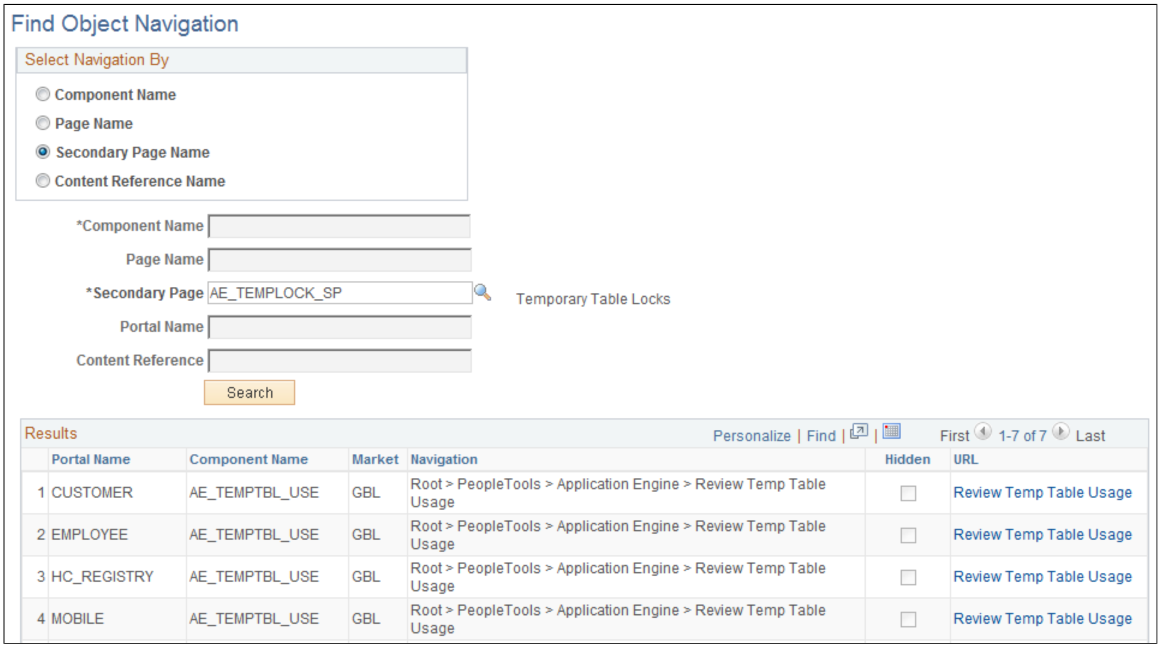
***Page Name** This is a required field. Enter the name of the page for the search, or click the prompt to display available page names.

Search Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL — Click to open a browser window that directly accesses the navigation that you select in the grid.

Image: Find Object Navigation page showing search criteria of secondary page name

This example illustrates the fields and controls on the Find Object Navigation page showing search criteria of the secondary page name. You can find definitions for the fields and controls later on this page.



Secondary Page Name — Select to search by secondary page name.

***Secondary Page Name** — This is a required field. Enter the name of the secondary page for the search, or click the prompt to display available secondary page names.

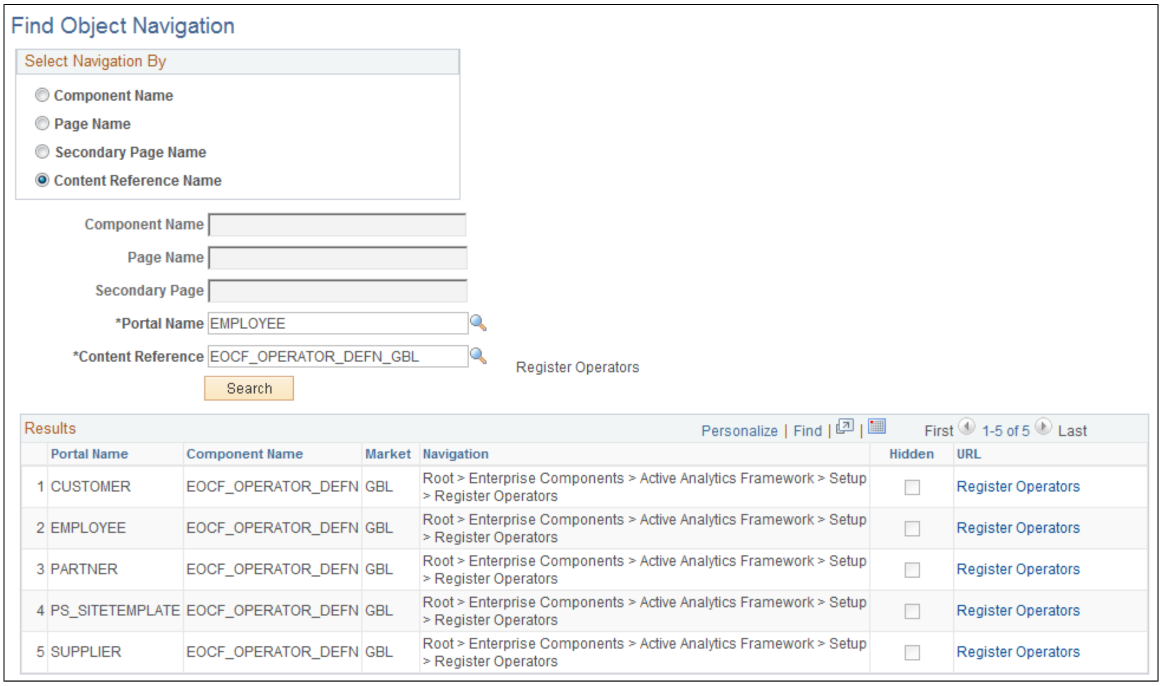
Search — Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL

Click to open a browser window that directly accesses the navigation that you select in the grid.

Image: Find Object Navigation page showing search criteria of CREF name and portal name

This example illustrates the fields and controls on the Find Object Navigation page showing search criteria of content reference name and portal name. You can find definitions for the fields and controls later on this page.



CREFs are pointers to content that is registered in the portal registry. These are typically URLs or iScripts. CREFs fall into three categories: target content, templates, and template pagelets.

Content Reference Name

Select to search by CREF name for the portal that you specify.

When you select Content Reference Name, the Portal Name field becomes available to search for CREF names within a specific portal.

***Portal Name**

This is a required field. Enter the name of the portal for the search, or click the prompt to display available portal names.

The default for this field is *Employee.*

***Content Reference**

This is a required field. Enter the name of the CREF for the search, or click the prompt to display available CREF names.

Search

Click to display a grid that is populated with all of the corresponding navigation paths for your search parameters.

URL

Click to open a browser window that directly accesses the navigation that you select in the grid.

Chapter 5

Working With Currencies and Market Rates

Understanding Currencies and Market Rates

PeopleSoft applications offer a core set of objects (fields, tables, work records, pages, and PeopleCode functions), as well as a recommended set of standard techniques and formulas to support a common approach to converting currency throughout PeopleSoft applications and to define and store market rates. Market rate is a generic term for a currency exchange rate, an interest rate, or a future rate.

This section provides overviews of:

- Currency and market rate tables.
- Triangulation.
- Conversion factor fields and the visual rate.
- Application-specific requirements for currency conversion.

Understanding Currency and Market Rate Tables

The following tables store currency and market rate data:

- CURRENCY_CD_TBL

  Stores currency code data.

- CURR_QUOTE_PNL

  Stores currency quotation method data.

- RT_INDEX_TBL

  Stores market rate index data.

- RT_TYPE_TBL

  Stores rate type data.

- RT_RATE_TBL

  Stores market rate data.

Understanding Triangulation

Triangulation is the process by which a conversion between two currencies takes place by way of a third reference currency. This process may be used in hyperinflationary environments, where all conversions to the local currency are done by way of a stronger, more stable currency. This process may also be used when a country is undergoing a currency revaluation.

To support triangulation, the PeopleSoft system provides a means to define that you want a currency pair to triangulate through a fixed reference currency. The actual conversion process is done in a two-step procedure in which the from-currency amount is first converted to the reference currency and then to the destination currency, using the appropriate exchange rates. Supporting triangulation also affects the user interface, as there are now two or possibly three exchange rates that are relevant to the conversion. When viewing a triangulated conversion at a detailed level, users access three visual rates:

- A rate for converting the from-currency to the reference currency.
- A rate for converting the reference currency to the to-currency.
- A cross rate indicating the rate that would be required to convert the from-currency directly into the to-currency.

The cross rate in a triangulated conversion is not typically maintained directly. The system enables you to maintain those non-triangulated rates that are components of the triangulated rate, then run a process to generate the triangulated exchange rate. However, you can override the cross rate, which causes one of the other exchange rate values to be recalculated to synchronize it with the overridden cross rate.

For example, suppose an implementation was using triangulation to convert from USD to FRF. You would directly maintain the visual rate from the USD to euros (1.25 in the example table) and rate from euros to FRF (6.8 in the example table). You could then run the EOP_RATECALC application engine process to derive the triangulated rate for converting from USD to FRF. The results are shown in the following table:

Currency Pair	***Quote Method***	***Quote Units***	***Primary Visual Rate***	***RATE_MULT***	***RATE_DIV***
USD to Euro	Indirect	1	1.25	1	1.25
Euro to FRF	Direct	1	6.8	6.8	1
USD to FRF	Direct/Triangulate/Euro	1	5.44	6.8	1.25

When performing the actual conversion, applications interpret the visual rates into RATE_MULT and RATE_DIV values based on the quotation method for the exchange, then use the RATE_MULT and RATE_DIV values stored in the Market Rates Data table in the currency conversion formula, either by accessing the values directly or by calling the ConvertCurrency PeopleCode function.

Note: For information on how a specific application supports maintenance of triangulated exchange rates, see the documentation for that application.

Related Links

Calculating Cross, Triangulated, and Reciprocal Rates

Understanding Conversion Factor Fields and the Visual Rate

Support for both direct and indirect currency quotations creates a potential for complex currency conversion formulas in applications. To avoid excess conditional logic in the conversion formula, the PeopleSoft system provides two fields to store the conversion factor, RATE_MULT and RATE_DIV. The rate that you enter is called the *visual rate.* This visual rate is generally stored in either RATE_MULT or RATE_DIV, based on the quote method. The quote units are stored in whichever field does not contain the visual rate. As a result, the formula for currency conversion remains consistent:

(from-currency / RATE_DIV) × RATE_MULT = to-currency

This formula is also used for currency conversion in PeopleCode programs for online processing, as well as in SQR and COBOL processes.

The following table shows a few basic examples of how visual rates are transformed into RATE_MULT and RATE_DIV, according to the quote method and quote units for the currency pair:

Currency Pair	***Quote Method***	***Quote Units***	***Primary Visual Rate***	***RATE_MULT***	***RATE_DIV***
USD to GBP	Indirect	1	1.6	1	1.6
GBP to USD	Direct	1	1.6	1.6	1
DEM to CHF	Indirect	100	119.335	100	119.335
CHF to DEM	Direct	100	119.335	119.335	100
USD to Euro	Indirect	1	1.25	1	1.25
Euro to FRF	Direct	1	6.8	6.8	1
USD to FRF	Direct/Triangulate/ Euro	1	5.44	6.8	1.25
FRF to Euro	Indirect	1	6.8	1	6.8
Euro to USD	Direct	1	1.25	1.25	1
FRF to USD	Indirect/ Triangulate/Euro	1	5.44	1.25	6.8

In all cases, the visual rate for a currency pair remains the same, regardless of the direction. This is consistent with business standards. For a direct quoted rate, you multiply by the visual rate; therefore the visual rate goes into RATE_MULT and 1 (or the quote units) goes into RATE_DIV. For an indirect quoted rate, you divide by the visual rate; therefore the visual rate goes into RATE_DIV and 1 (or the quote units) goes into RATE_MULT.

The following examples show indirect quotation, direct quotation with quote units, and triangulation:

100 USD to GBP (indirect) = (100 USD / 1.6) × 1 = 62.50 GBP

1000 CHF to DEM (direct with units) = (1000 CHF / 100) × 119.335 = 1193.35 DEM

100 USD to FRF (triangulate) = (100 USD / 1.25) × 6.8 = 544 FRF

Related Links

Defining Currency Quotation Methods

Understanding Application-Specific Requirements for Currency Conversion

Each application that shows a visual rate on a page must have an application-specific work record to hold the visual rate and the associated PeopleCode; this can be an existing work record. The suggested name for the field is VISUAL_RATE. The work record should also have a field to store the original rate for purposes of tolerance checking.

The application also typically provides an application-specific table to store RATE_MULT and RATE_DIV values that are stored on the database.

Application-specific PeopleCode needs to format work record fields and call the common functions in various circumstances, such as RowInit or FieldChange on the currency or visual rate.

See Also

PeopleTools: Global Technology

PeopleTools: PeopleCode Developer's Guide

Defining Currencies

This section discusses how to define currency codes.

Page Used to Define Currency Codes

Page Name	***Definition Name***	***Usage***
Currency Code Page	CURRENCY_CD_TABLE	Define currency codes.

Currency Code Page

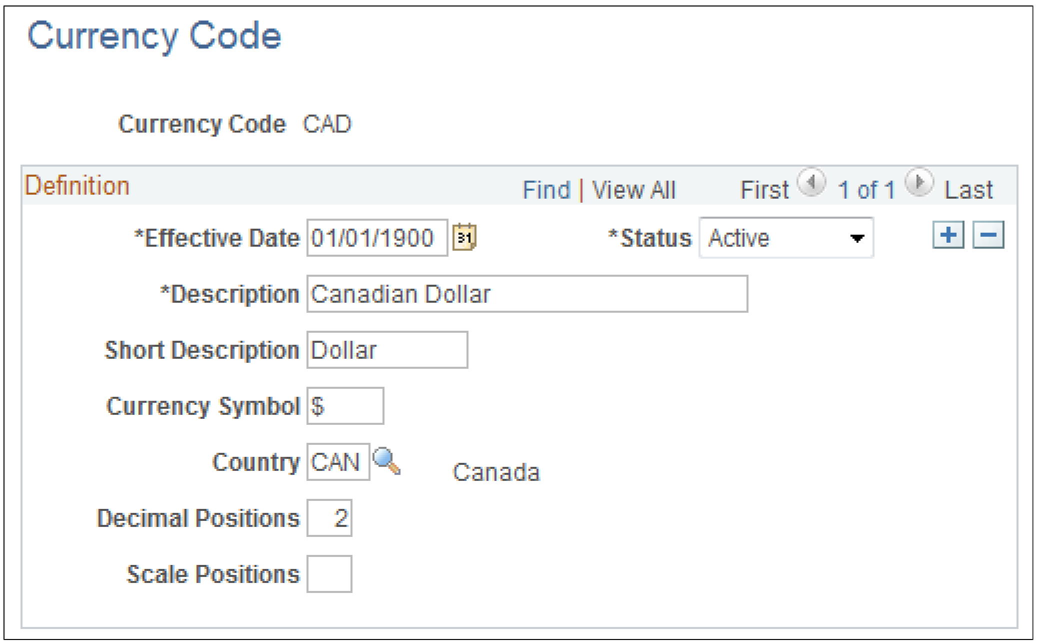
Use the Currency Code page (CURRENCY_CD_TABLE) to define currency codes.

Navigation

- Set Up <Product Line>, Common Definitions, Currency, Currency Code
- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Code
- Portal Objects, Navigation Collections, General Ledger Center, Definition and Administration, Currency

Image: Currency Code page

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



Note: PeopleTools provides the system data in the currency table, CURRENCY_CD_TBL, and Oracle updates this data during major releases. You are also expected to update or adjust the system data in the currency table for your own needs. Enterprise Components maintains the system data in the country table and defines a default currency for each country definition. The currency table has a default country code, but that does not apply in the case of a multi-country currency like the Euro.

Use this page to add and maintain currency codes. These currency codes are used to designate currencies throughout your PeopleSoft system.

Status	Indicate whether the currency code is active or inactive. If you inactivate a currency code that is in use, existing transactions are unaffected. However, the currency code is unavailable for future selections. Some PeopleSoft applications do not allow you to inactivate a currency code that is in use.
Currency Symbol	PeopleSoft applications deliver many currencies with a currency symbol such as $ for Australian dollar (AUD) or £ for British

pound (GBP). You can enter new symbols for delivered currencies or for currencies that you might add.

Country

Select the code for the country from which the currency originates.

Note: PeopleSoft applications deliver fully populated country, state, and province code tables and update these tables as national boundaries and designations change.

Decimal Positions

Enter the number of decimal positions that should appear in the notation for the currency. For example, there are two decimal positions for Australian dollars (500.00 AUD), but no decimal positions for Japanese yen (500 JPY).

Scale Positions

Enter the scale positions you want to round for this currency. This controls how many numbers appear to the left of the decimal when displayed. The data is actually stored with full precision in the database itself.

For example, if you want all million-dollar amounts displayed as the number of millions without the zeros, enter 6 as your scale position. In this case, 24,000,000 is displayed as 24, but is stored in the database as 24,000,000.

Defining Currency Quotation Methods

This section discusses how to define currency quotation methods.

Page Used to Define Currency Quotation Methods

Page Name	***Definition Name***	***Usage***
Currency Quotation Method Page	CURR_QUOTE_PNL	Set up and maintain a currency quotation method for each from-currency and to-currency pair.

Currency Quotation Method Page

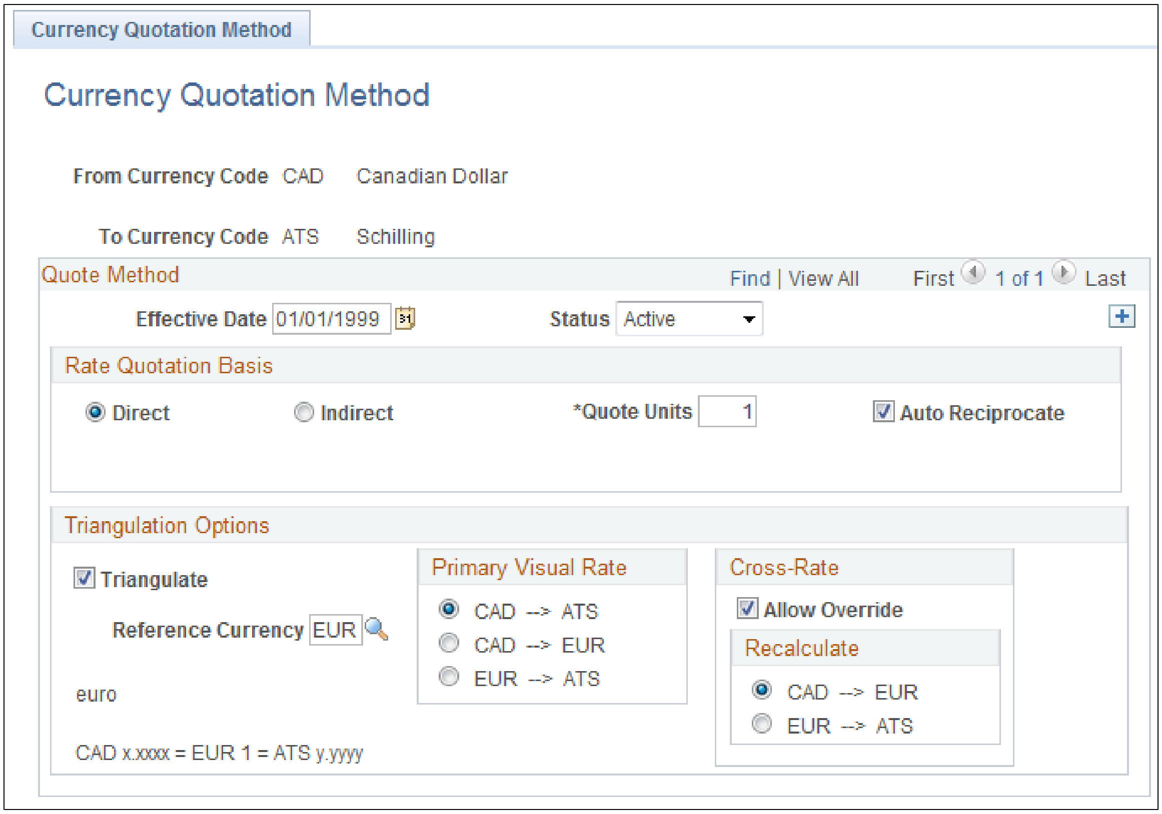
Use the Currency Quotation Method page (CURR_QUOTE_PNL) to set up and maintain a currency quotation method for each from-currency and to-currency pair.

Navigation

Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Quotation Method

Image: Currency Quotation Method page

This example illustrates the fields and controls on the Currency Quotation Method page. You can find definitions for the fields and controls later on this page.



A currency quotation method, defined for an exchange rate, stores data that determines how the application interprets a visual rate entered by a user (or multiple visual rates, in the case of triangulated exchange rates) into the RATE_MULT and RATE_DIV values stored on the Market Rate Data table. Conversely, a currency quotation method also determines how the stored RATE_MULT and RATE_DIV values are interpreted into the visual rate displayed to the user.

The quotation method can be direct or indirect, and it can be non-triangulated or a triangulated conversion using a third reference currency. The currency quotation method also determines the quotation units of the from-currency.

See Understanding Conversion Factor Fields and the Visual Rate.

It is not necessary to define a currency quotation method for every exchange rate. If, during maintenance of market rates, no quotation method is found for an exchange rate, the page logic assumes the following defaults:

- The exchange rate is direct.
- The quotation units are equal to 1.
- The exchange rate is not triangulated.

Note: This use of default values supports backward compatibility with previous exchange rate data, including calculated reciprocal rates, if your implementation requires them.

See Understanding Conversion Factor Fields and the Visual Rate.

Note: You can view the currency quotation method for an exchange rate on the Exchange Rate Detail page while working on the Market Rate page.

See Defining Market Rates.

Direct and **Indirect**

In the Rate Quotation Basis section, indicate whether the rates for this currency pair are quoted directly or indirectly. For example, when defining a currency quotation method for USD and FRF:

- Select *Direct* if you want one USD to equal x.xxxx FRF.
- Select *Indirect* if you want x.xxxx USD to equal one FRF.

Even currency quotation methods for currency pairs that triangulate must be classified as either direct or indirect. In this case, the value is used to display the calculated cross rate.

Support for indirect and direct quotation methods allows applications to eliminate use of calculated reciprocal rates by using a single rate by which you either divide or multiply, depending on whether the conversion method is direct or indirect.

Quote Units

Enter a quote unit for the exchange rate, as is common business practice for some currencies. This field can have any value, but is usually a power of 10.

Sometimes called scaling factors, quote units are often used to preserve more decimal precision. For example, the exchange rate between Swiss francs (CHF) and Deutsche marks (DEM) may be stated as 100 CHF = 119.335 DEM instead of 1 CHF = 1.19335 DEM.

Auto Reciprocate

Select to automatically create or update the rate for the reciprocal currency pair on the Market Rate page whenever an exchange rate is added or updated.

For example, if you create a currency quotation method for USD to EUR. The reciprocal currency quotation method for EUR to USD is automatically created, regardless of this setting.

When you create a rate for USD to EUR on the Market Rate page, the EUR to USD reciprocal rate is automatically created if this Auto Reciprocate option is selected for the currency pair.

If the either rate for the currency pair is updated on the Market Rate page, the reciprocal rate is updated as long as the Auto

Reciprocate option is selected for one of the currencies in the pair.

Triangulate Select to triangulate conversions between this currency pair using a reference currency.

Reference Currency Enter the reference currency for a triangulated conversion.

Primary Visual Rate With triangulated currency pairs, there are three exchange rates to consider:

- The rate between the from-currency and the reference currency.
- The rate between the reference currency and the to-currency.
- The calculated cross rate between the from-currency and the to-currency.

Select which of these three rates you want as the primary visual rate. This is the rate that displays on the primary pages and reports. For online applications, other components of the rate can be viewed and modified on the Exchange Rate Detail page.

Allow Override For triangulated currency pairs, select to enable users to override the cross rates on the Market Rate page and Exchange Rate Detail page.

Recalculate If the Allow Override option is selected, select to indicate which of the two other rates should be recalculated to bring the triangle back into balance. Because the triangulated rate is initially a calculated rate, if you allow it to be overridden, the rates that are used to initially calculate this rate must be recalculated.

Defining Market Rates

This section discusses how to define market rates.

Pages Used to Define Market Rates

Page Name	***Definition Name***	***Usage***
Market Rate Index Page	RT_INDEX_TBL	Create market rate indexes, which provide a means of organizing market rates in the PeopleSoft system.
Market Rate Type Page	RT_TYPE_TBL	Define rate types that further categorize market rates. Examples of rate types include current, commercial, floating, average, and historical.

Page Name	***Definition Name***	***Usage***
Market Rate Page	RT_RATE_PNL	Maintain and view market rates. The fields available on the page vary depending on the rate category. This page shows the rate definition for any two currencies.
Market Rate Definition Page	RT_RATE_DEF_TBL	Define tolerance limits for rates and determine what action occurs if a new rate falls outside the tolerance limit. The Market Rate Definition (RT_RATE_DEF_TBL) page shows all of the rate definitions for a rate index.
Rate Definition Page	RT_RATE_DEF_SEC	View market rate definition details, including the maximum variance and error handling definitions specified for the currency pair on the Rate Definition page.
Exchange Rate Detail Page	EXCH_RT_DTL	Access exchange rate detail information.

Market Rate Index Page

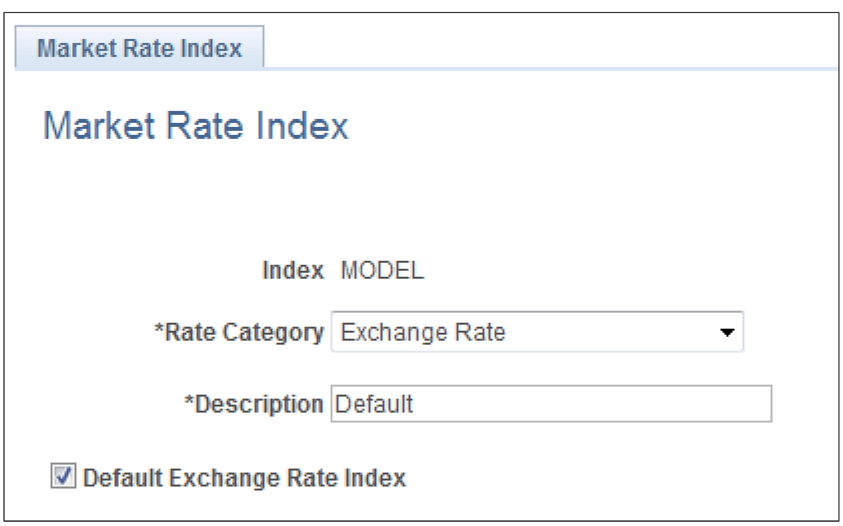
Use the Market Rate Index page (RT_INDEX_TBL) to create market rate indexes, which provide a means of organizing market rates in the PeopleSoft system.

Navigation

Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Market Rate Index

Image: Market Rate Index page

This example illustrates the fields and controls on the Market Rate Index page. You can find definitions for the fields and controls later on this page.



Market rate indexes are stored in the RT_INDEX_TBL table.

Index

Displays the key term for the highest level of organization for market rates in the application.

Rate Category

Select a general category for the market rate index, such as *Exchange Rate, Commodity Price,* or *Interest Rate.*

Default Exchange Rate Index

Select to indicate that the selected market rate index is the default exchange rate index. This field is available only if:

- The Rate Category field is set to *Exchange Rate.*
- No other index is currently defined as the default exchange rate index.

The Market Rates Index page does not ensure that a default market rate index has been defined. However, if no default has been defined, the Market Rate Default view does not return any data.

The Market Rate Definition Default view (RT_DEF_DFLT _VW) selects rows from the Market Rate Definition table that have a term of zero and an index defined as the default exchange rate index.

Market Rate Type Page

Use the Market Rate Type page (RT_TYPE_TBL) to define rate types that further categorize market rates.

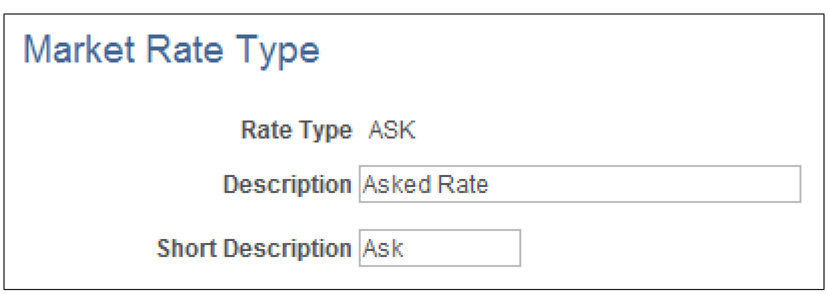
Examples of rate types include current, commercial, floating, average, and historical.

Navigation

- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Exchange Rate Type
- Set Up <Product Line>, Common Definitions, Market Rates, Market Rate Type

Image: Market Rate Type page

This example illustrates the fields and controls on the Market Rate Type page. You can find definitions for the fields and controls later on this page.



Rate types are stored in the RT_TYPE_TBL edit table. Rate types serve as categories within a market rate index. For example, some common types of exchange rates are official rate, spot rate, and free market rate.

Enter a description and short description to define each market rate type that you use.

Market Rate Definition Page

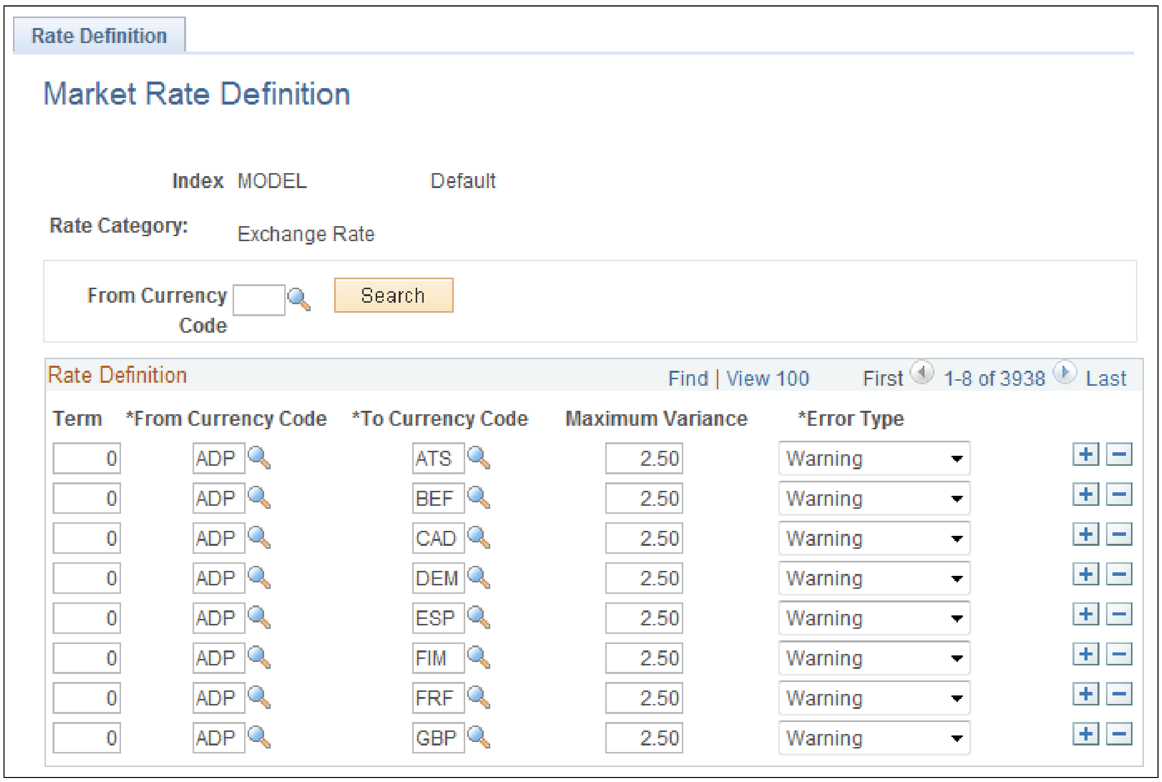
Use the Market Rate Definition page (RT_RATE_DEF_TBL) to define tolerance limits for rates and determine what action occurs if a new rate falls outside the tolerance limit.

Navigation

- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Market Rate Definition
- Set Up <Product Line>, Common Definitions, Market Rates, Market Rate Definition

Image: Market Rate Definition page

This example illustrates the fields and controls on the Market Rate Definition page. You can find definitions for the fields and controls later on this page.



This page shows all of the rate definitions for a rate index.

Market rate definitions specify the valid term, currency, and other appropriate field combinations for market rates. For example, if you have a market rate definition for an exchange rate with a term of 30, a from-currency of CHF, and a to-currency of USD, you can enter a rate using this combination on the Market Rate page.

If you have not created a market rate definition on this page when you create the a market rate on the Market Rate page, the system automatically creates one for you using the default values of 2.5 percent maximum variance and warning message processing.

It is common for applications to support tolerance checking (against user-specified tolerances) in all places where exchange rates can be entered or overridden. With the introduction of indirect quotation methods and quote units, tolerance checking is even more critical to ensure data entry accuracy.

Note: The information you see on this page depends on the selected market rate index. For example, if you select an index associated with a rate category of *Interest Rate,* fields on this page display interest-related data.

From Currency Code

Enter the from-currency code with which you want to populate all From Currency fields on the page.

Refresh

Click to populate the From Currency field with the currency you selected in the From Currency Code field.

Rate Definition

Term

Enter the desired term expressed in days. A zero term indicates that the spot rate = zero term. Only PeopleSoft Treasury uses non-zero terms; all other applications must use a zero term for spot rate.

From Currency Code

In addition to using the From Currency Code field to populate all From Currency field on this page, you can also manually enter the appropriate from-currency. This value is used with its associated To Currency field value as part of an exchange rate pair. When you use triangulation, include a definition row for each of the currency pairs involved in the triangulation.

To Currency Code

Enter the appropriate to-currency. This value is used with its associated From Currency field value as part of an exchange rate pair.

Currency

This field displays when you are working with a rate definition with a rate category set to *Interest Rate*.

Select the currency for which you are creating an interest rate definition.

The From Currency and To Currency fields do not display.

Day Count Basis

This field displays when you are working with an interest rate definition.

Select an interest basis:

30/360

30E/360

Actual/360

Actual/365

Actual/Actual

Maximum Variance

Enter the percentage of variance that is allowed when a user maintains or overrides a market rate. If the change exceeds the tolerance, an error results. The default value is 2.50 (2.5%).

Error Type

Select the type of error that results when the defined maximum variance is exceeded during data entry.

None: No error processing occurs and the new rate is used, even if it exceeds the maximum variance.

Stop: Processing halts and the system prevents you from saving the new rate.

Warning: This is the default value. A warning appears that you can ignore and proceed to save the new rate.

Market Rate Page

Use the Market Rate page (RT_RATE_PNL) to maintain and view market rates.

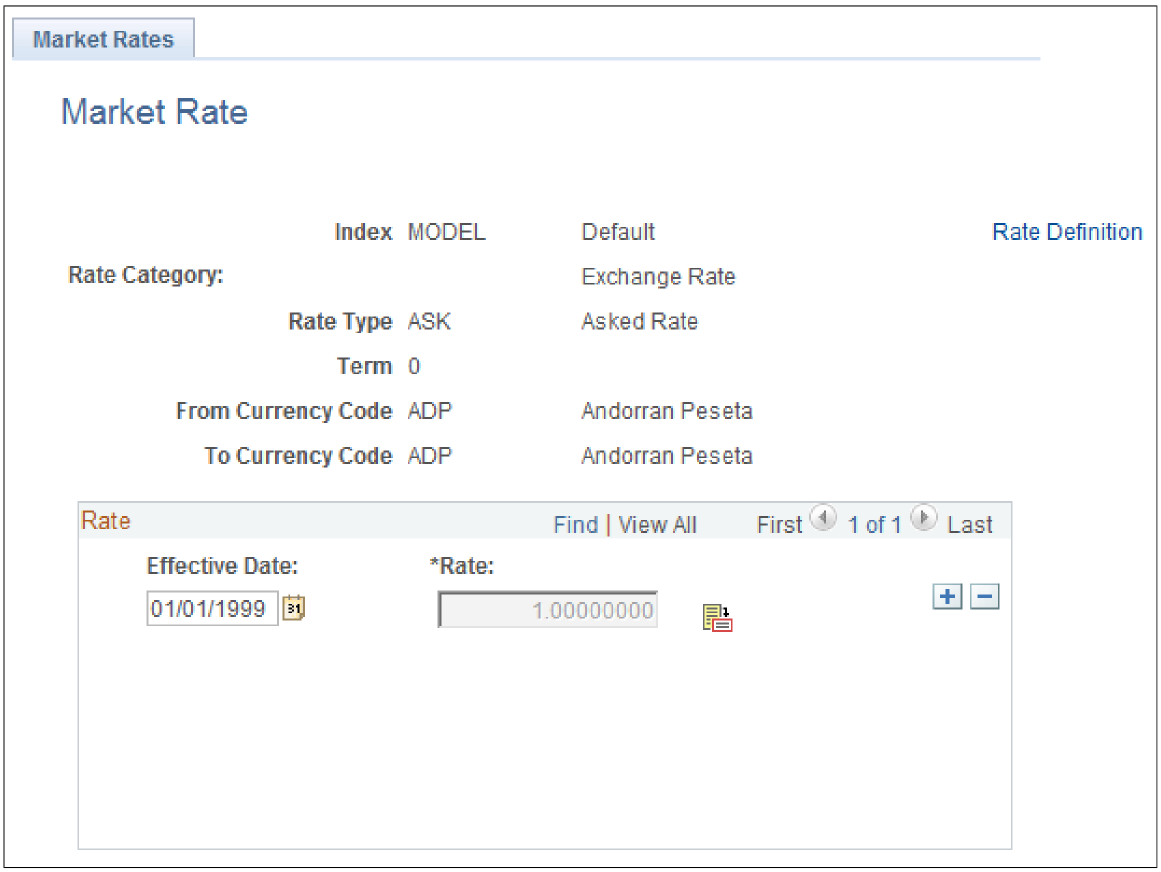
The fields available on the page vary depending on the rate category. This page shows the rate definition for any two currencies.

Navigation

- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Market Rates
- Set Up <Product Line>, Common Definitions, Market Rates, Market Rates

Image: Market Rate page

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



Note: The Market Rate page provides the details about the exchange rate between two currencies. The Exchange Rate Detail page is a secondary page of the Market Rate (RT_RATE_PNL) page. After you access the Market Rate page, you must click the Exchange Rate Detail icon beside the Rate field on the Market Rate page to access the Exchange Rate Details page.

The data you enter on this page is stored in the RT_RATE_TBL table that is the common repository for all types of market rates including exchange rates and interest rates.

You cannot edit this page if all of the following are true:

- The rate is triangulated.
- The primary visual rate is the cross rate.
- The Allow Override option is clear for the exchange rate's quotation method on the Currency Quotation Method page.

Note: When working with interest rates, the From Currency Code and To Currency Code fields may contain the same field value.

Index

Displays the key term for the highest level of organization for market rates in the application.

Rate Category

Displays the general category for the market rate, such as *Exchange Rate, Commodity Price,* or *Interest Rate.*

Rate Type

Displays the selected rate type for this market rate.

Some examples of rate types are commercial, average, floating and historical.

Term

Displays the entered term.

From Currency Code

Displays the selected currency that you are converting from.

To Currency Code

Displays the selected currency that you are converting to.

Rate Definition

Click to access the Rate Definition page and view market rate definition details, including the maximum variance and error handling definitions specified for the currency pair.

Rate

Effective Date

Enter the date that you are initiating the currency exchange.

Rate

Displays the visual rate. If you are working with a triangulated exchange rate, this field displays the primary visual rate, which is typically the cross rate, but can also be one of the other component rates of the triangle.

During online maintenance of market rates, you don't view or change RATE_MULT and RATE_DIV values directly, but instead access this visual rate, which is calculated by page logic based on RATE_MULT, RATE_DIV, and the currency quotation method defined for the currency pair on the Currency Quotation Method page. The visual rate is stored temporarily on a page work record.

Click the Exchange Rate Detail icon to the right of the Rate field to access the Exchange Rate Detail (EXCH_RT_DTL) page, where you can view all three visual rates of a triangulated exchange rate.

If a quotation method has been defined for the currency pair and the Auto Reciprocate option for the currency quotation method is selected, then creating or maintaining a rate for a currency pair on this page automatically creates or updates the rate for the reciprocal currency pair. For example, if you change the USD-to-GBP rate, the GBP-to-USD rate is automatically updated. You can only auto-reciprocate currency pairs for which currency quotation methods have been defined on the Currency Quotation Method page.

See Currency Quotation Method Page.

Note: The results of updating the rate definition do not take effect until you save, close, and reopen the Market Rate page.

Rate Definition Page

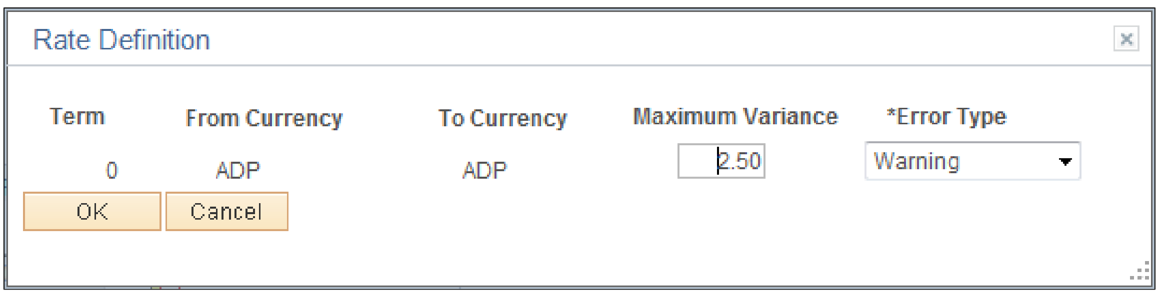
Use the Rate Definition page (RT_RATE_DEF_SEC) to view market rate definition details, including the maximum variance and error handling definitions specified for the currency pair on the Rate Definition page.

Navigation

Click the Rate Definition link on the Market Rate page.

Image: Rate Definition page

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



Exchange Rate Detail Page

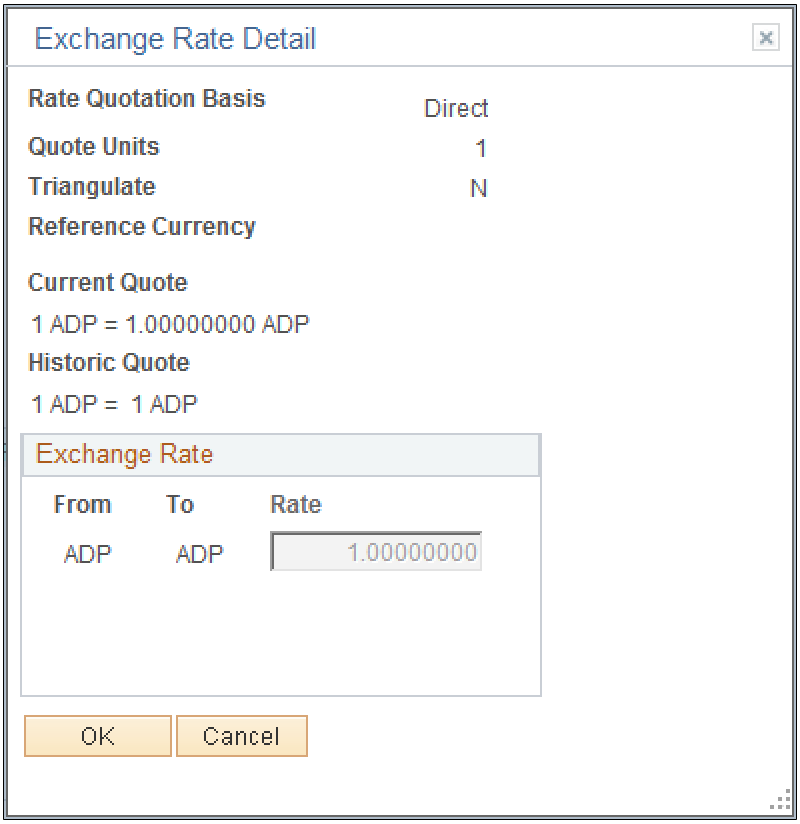
Use the Exchange Rate Detail page (EXCH_RT_DTL) to access exchange rate detail information.

Navigation

Click the Exchange Rate Detail icon on the Market Rate page.

Image: Exchange Rate Detail page

This example illustrates the fields and controls on the Exchange Rate Detail page. You can find definitions for the fields and controls later on this page.



The primary record for this page is the Exchange Rate work record. For triangulated rates, you can update rate values for all three components of the triangulated rate.

Rate Quotation Basis Displays the quotation basis for the exchange rate as defined in the Currency Quotation Method page.

Quote Units Displays the quote units for the exchange rate as defined in the Currency Quotation Method page.

Triangulate Displays the triangulation setting for the exchange rate as defined in the Currency Quotation Method page.

Reference Currency For triangulated exchange rates, displays the reference currency used in the triangulated exchange.

Current Quote Displays the current exchange rate used to convert the from-currency to the to-currency.

For a direct, non-triangulated rate, this field displays quote units (or 1) to the left side of the equal sign and the visual rate on the right. For example:

1 USD = 1.40000000 CAD

For an indirect, non-triangulated rate, this field displays the visual rate to the left of the equal sign and quote units (or 1) on the right. For example:

1.400000000 CAD = 1 USD

For a triangulated rate, this field displays the two component rates of the triangle: the rate for converting the from-currency to the reference currency (USD to EUR) and the rate for converting the reference currency to the to-currency (FRF to EUR). For example:

1.25 USD = 1 EUR = 6.8 FRF

Historic Quote

If page logic determines that the exchange rate, as stored in the database, is inconsistent with the current quotation method, this field displays a quote based on the current quotation method, instead of the quotation method active on the rate effective date.

Data provided in the historic quote field allows you to see how the exchange rate has changed over time, using a consistent quotation method, even if the quotation method has actually changed.

For example, if you are viewing a historical rate where FRF was converted to USD directly using a calculated reciprocal rate of 1 FRF = 0.1470588 USD and the current quotation method for this currency pair is indirect, the conversion function recalculates the visual rate based on indirect quotation, that is 6. 8000001 FRF = 1 USD.

This field also displays a quote if the historic quote method was non-triangulated and the current quote method is triangulated.

A historic quote is also displayed if you override a cross rate and bypass triangulation, because the exchange rate being used is inconsistent with the current quotation method.

If the system determines that the exchange rate is consistent with the current quotation method, the field displays *Not Applicable.*

Exchange Rate

Displays a single visual rate for non-triangulated exchange rates, or all three component visual rates for triangulated exchange rates. You can edit the cross rate for triangulated exchange rates only if the Allow Override option box is selected for the exchange rate on the Currency Quotation Method page.

Calculating Cross, Triangulated, and Reciprocal Rates

This section discusses how to run the EOP_RATECALC Application Engine process to calculate cross, triangulated, and reciprocal rates.

Page Used to Run the EOP_RATECALC Process

Page Name	***Definition Name***	***Usage***
Calculate Cross/Reciprocal Rate - Parameters Page	RUN_EO9030	Set run control parameters and run the EOP_RATECALC Application Engine process that calculates cross, triangulated, and reciprocal rates.

Understanding the EOP_RATECALC Process

Run the EOP_RATECALC process to calculate rates and update the market rates table.

The process performs three functions:

- Generates cross rates for non-triangulated currency pairs.

  For example, an organization subscribes to a rate service that provides all rates respective to USD. Starting with a USD to Canadian dollar rate and a USD to Mexican peso rate, the system can calculate a new Canadian dollar to Mexican peso cross rate.

- Generates triangulated rates for triangulated currency pairs.

  For example, the EUR to an EPC (euro participating currency) fixed rate has been established on the market rate table and a new EUR to USD rate has just been entered. Using this information, the process can create a new USD to EPC triangulated rate. The difference between triangulated rates and cross rates affects how the data is stored in the database. When calculating a cross rate, you actually create a new rate. When calculating a triangulated rate, the individual components of the source rates are stored on the target.

- Generates reciprocal rates for those currency pairs that are not automatically reciprocated.

  For example, using a USD to CAD rate as the source, the process calculates the CAD to USD reciprocal. If currency quote methods are in place, the visual rate remains the same and there is a difference in how the data is stored in the database (RATE_MULT and RATE_DIV are inverse). If currency quote methods are not used, the process actually calculates an inverse rate, meaning that the visual rates will differ.

Calculate Cross/Reciprocal Rate - Parameters Page

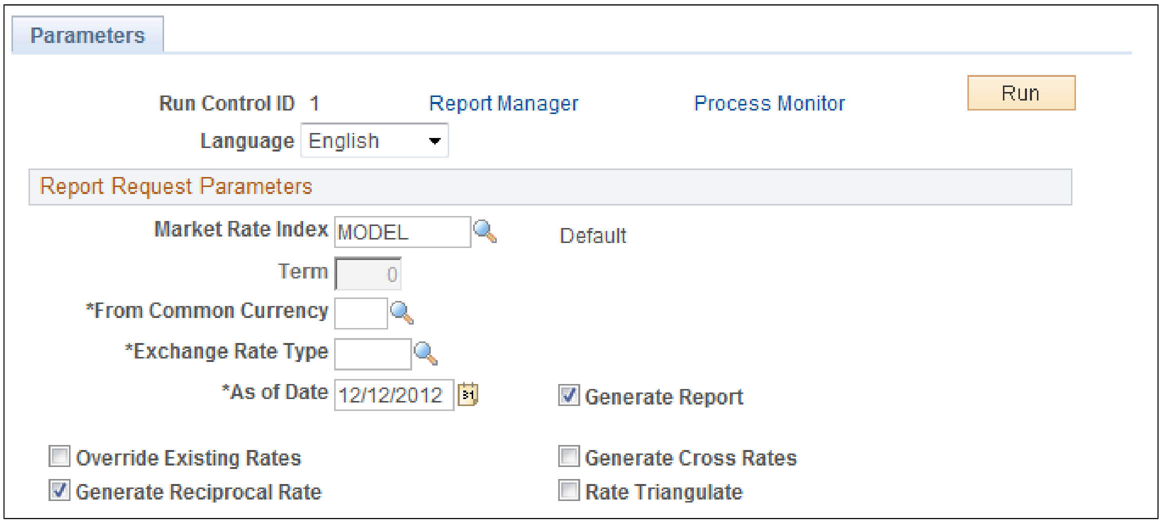
Use the Calculate Cross/Reciprocal Rate - Parameters page (RUN_EO9030) to set run control parameters and run the EOP_RATECALC Application Engine process that calculates cross, triangulated, and reciprocal rates.

Navigation

- Set Up Financials/Supply Chain, Common Definitions, Market Rates, Cross/Reciprocal Rate Calc
- Set Up HCM, Foundation Tables, Currency and Market Rates, Calculate Cross/Reciprocal Rt
- Set Up CRM, Common Definitions, Market Rates, Cross/Reciprocal Rate Calc

Image: Cross/Reciprocal Rate - Parameters page

This example illustrates the fields and controls on the Cross/Reciprocal Rate - Parameters page. You can find definitions for the fields and controls later on this page.



Oracle supports the use of Oracle Business Intelligent Publisher (BI Publisher or BIP) to generate the Cross/Reciprocal Rate Calc (EO9030) report.

Important! This calculation process includes two SQR reports - Cross/Reciprocal Rate Calc (EO9030) and Update History Rates (EO9031). Select to run EO9030 if you do not implement Application Integration Architecture (AIA) in your system. Select to run EO9031 if you are an AIA customer and wish to update history rates via this process.

Market Rate Index	Select a market rate index. Applications other than PeopleSoft Treasury should use the default index that you select for the exchange rate.
Term	This value defaults from the value entered on the Market Rate Definition page.
From Common Currency	Select a currency code to calculate a reciprocal rate.
Exchange Rate Type	Select the exchange rate type to use for this calculation.
As of Date	Select the effective date of the newly created exchange rates, which are the output of the process. The as of date also determines the rates used as the basis for the calculations, which are the input of the process. The report uses the most current currency quotation method for the currency pair as the input to the process. If the as of date

is the current effective rate on the specified date, it can affect triangulation. For example, a USD to EPC (euro participating currency) triangulated rate effective April 1, 2004 might be comprised of the EUR to USD rate also effective April 1, 2004 and the fixed EUR to an EPC rate effective on the date the newly participating EPC officially becomes a euro participating currency.

Generate Report

Select to generate a report that displays the cross, triangulated, and reciprocal rate calculations performed by the process.

Override Existing Rates

Select to have the calculated rates override rates for the exchange rate type, regardless of the as of date.

Generate Reciprocal Rate

Select to calculates reciprocal rates for currency pairs that do not have the Auto Reciprocate option select on the Currency Quotation Method page.

You can select this option alone, or in combination with the Generate Cross Rates and Rate Triangulate options.

This process does not directly manipulate the exchange rates. The system uses numerator and denominator values instead, such that the following is true:

(from-currency / RATE_DIV) × RATE_MULT = to-currency

Fro example, suppose you want a reciprocal rate between USD and CHF and assume a two-to-one ratio. If the exchange rate for USD to CHF is quoted directly (either using a direct quote method that you selected or using the system default), this rate is stored as RATE_MULT = 2 and RATE_DIV = 1. The rate is represented as 1 USD = 2 CHF, with a visual rate of 2.

In turn, the CHF to USD rate must be indirect. The reciprocal is a simple exchange, storing the rate as RATE_MULT = 1 and RATE_DIV = 2. The visual rate remains 2.

If quote methods are not being used, the CHF to USD rate must be quoted directly (the default), so the reciprocal rate is actually a calculated inverse. This rate is stored as RATE_MULT = 0.5 and RATE_DIV = 1, with a visual rate of 0.5.

In this example between USD and CHF, using a quote method and using a calculated inverse produced the same end result, 1/2 equals 0.5. But in actual practice, the manipulation of exchange rates is a major task and is one of the reasons for establishing the currency quote method.

Generate Cross Rates

Select to automatically generate cross rates. For example, to generate cross currency rates for USD, CAD, and MXP, you enter USD to CAD = 1.473 and USD to MXP = 9.8793. The system automatically generates CAD to MXP = 9.8793/1.473 = 6.7069246.

If you choose to generate cross rates, the From Cur (from-currency) and To Cur (to-currency) fields display and you must select a from-currency and a to-currency. You can enter a wild card of % in either or both fields to indicate from all or to all currencies.

Rate Triangulate

Select to convert two currencies through a third currency.

Select to convert two currencies through a third currency. If you select Rate Triangulate, the From Cur (from-currency) and To Cur (to-currency) fields display and you must select a from-currency and a to-currency. You can enter a wild card of % in either or both fields to indicate from all or to all currencies.

Quote Method Required

Select to indicate that you want the process to perform selected calculations only if the currency pairs have an existing currency quotation method definition.

Using the Currency Exchange Calculator

This section discusses how to convert amounts using the currency exchange calculator.

Page Used to Convert Amounts Using the Currency Exchange Calculator

Page Name	***Definition Name***	***Usage***
Currency Exchange Calculator Page	CURRENCY_EXCHNG_PN	Calculate currency exchange between currencies. This tool enables you to select a rate type other than the base currency, but does not enable you to override the exchange rate.

Currency Exchange Calculator Page

Use the Currency Exchange Calculator page (CURRENCY_EXCHNG_PN) to calculate currency exchange between currencies.

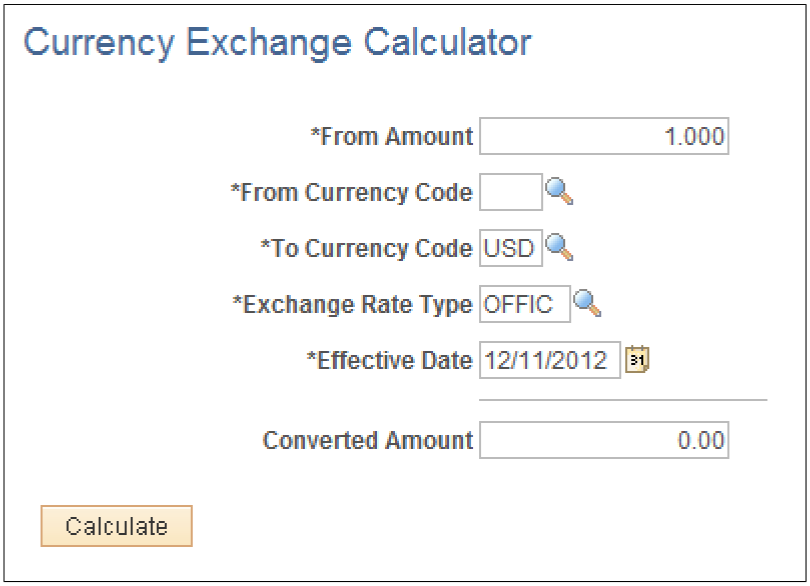
This tool enables you to select a rate type other than the base currency, but does not enable you to override the exchange rate.

Navigation

- Set Up <Product Line>, Foundation Tables, Currency and Market Rates, Currency Exchange Calculator
- Set Up <Product Line>, Common Definitions, Currency, Currency Exchange Calculator

Image: Currency Exchange Calculator page

This example illustrates the fields and controls on the Currency Exchange Calculator page. You can find definitions for the fields and controls later on this page.



From Amount

The currency exchange is based on the from amount that you enter and the current exchange rate set up on the Market Rate page.

See Defining Market Rates.

From Currency Code

Select the currency code from which to calculate the exchange amount.

To Currency Code

Select the currency code to which to calculate the exchange amount.

Exchange Rate Type

Select the type of exchange rate to use for this calculation.

Converted Amount

Click the Calculate button to calculate the amount and display it in this field.

Chapter 6

Working With PeopleSoft Forms and Approval Builder

Understanding PeopleSoft Forms and Approval Builder

The Forms and Approval Builder enables you to design online forms, specify the approval process they require, and deploy them to users within your organization. Use this feature to convert manual procedures within your organization to paperless processes that include workflow-based approvals and an audit trail for tracking progress. No coding is required on your part, and future upgrades to your PeopleSoft system will not require you to update these forms, since the forms you create are not customizations.

Once a form is published, users navigate to the form using the main menu, complete the fields and submit it for approval. Each published form includes three tabs: Form, Instructions, and Attachments. An audit trail of the approval history and comments is automatically generated as the form goes through the approval process. You can review the audit trail to see the history for each step of the approval chain.

Form Design

To create forms, you use the Design Form Wizard component (FORM_DESIGN_WIZARD), which guides you through the following steps of the form creation process:

- Defining the basic information for a form, including the form ID and form owner.
- Providing instructions that describe how to use the form.
- Specifying the fields that appear on the form.
- Attaching files to the form (optional).
- Defining the menu item that is used to access the form.
- Specifying the approval workflow that is required for the form.
- Previewing, testing, and activating the form.

Forms can contain fields arranged into one or two columns. You can specify which fields are required, and define the edits that a field must pass in order for the completed form to be saved. As you design the form, you can use the following field types:

- Numeric
- Text
- Date
- Time
- Yes/No

- Prompt

  Enables form users to select values from existing PeopleSoft records to complete the field.

- Code

  Enables you to build a list of values that appear in a drop-down list. Form users can select a value from the list to complete the field.

- Section

  Enables you to organize the form into multiple sections.

Form Status

It is important to understand the distinction between a form and a form instance. For the purposes of this documentation, when we use the term *form*, we are referring to the "master" form, or template, that form designers create using the Form Design Wizard component. A *form instance* is a deployed form that has been completed by a form user. Each form instance is automatically assigned a unique sequence number, so all completed forms can be tracked and managed independently.

The possible status values for a *form* are:

In Design Indicates a form that is being designed, and is not active.

Activated Indicates a form that is active and available for form users to complete.

Depending on your user role, you can activate a form using the following pages:

- Design Form: Complete page of the Form Design Wizard component.
- Manage Forms page.

Note: Only the owner of a form or a form administrator can activate/inactivate a form or reassign a form to a new owner.

Inactive Indicates a form that has been inactivated by either the form's owner or a form administrator. Form administrators or form owners can inactivate forms by using the Manage Forms page. When a form is inactive, form users are not permitted to complete the form.

The possible status values for a *form instance* are:

Initial When a form user accesses an activated form and begins to complete it, the status of the form instance is set to *Initial.*

Pending When the form user finalizes the form instance and submits it for approval, the status changes to *Pending.*

On Hold When an approver or reviewer requests more information about a submitted form, the status changes to *On Hold.*

Approved, Denied, or ***Cancelled***	As the form instance flows through the required approval chain, the status subsequently updates to approved, denied, or cancelled.

Security and Delivered Roles

User roles determine who has permission to access, design, and administer forms. The following table lists the delivered roles and associated permission lists for Form and Approval Builder.

Role Name	***Description***	***Permission Lists***	***Access Rights***
FORM_USER	Form user: Can complete and submit forms.	EOFM1000	The form user has add/update/display access to forms that have been created with the Form Design Wizard (form instances).
FORM_DESIGNER	Form designer: Can complete and submit forms, design forms, and manage forms that they are assigned to as the owner.	EOFM1000 EOFM2000	The form designer has add/update/display access to forms that have been created with the Form Design Wizard, *and* has add/update/display access to the Form Design Wizard component. Form designers have update/display access to only *their* forms when using the Manage Forms (FORM_RPT) component.
FORM_ADMIN	Form administrator: Can complete and submit forms, design forms, and manage *all* forms.	EOFM1000 EOFM2000 EOFM3000 EOSD2000	The form administrator has the same access as the form designer, and additionally, has update/display access to *all* forms when using the Manage Forms (FORM_RPT) component.
FORM_CI_ DEVELOPERS	Form to component interface (CI) developer: Can complete and submit forms, design forms, manage *all* forms, and map forms to component interfaces (integrate forms).	EOFM1000 EOFM2000 EOFM3000 EOFM4000 EOSD2000	The form to CI developer has the same access as the form administrator, and in addition can set up form integration by mapping forms to component interfaces using the Forms to CI Mapping page.

Row level security is enforced on the completed forms; only the form's owner or approver/reviewer can access the form instance.

Note: A security administrator will need to update existing User IDs and/or create new User IDs to include the appropriate roles before those users begin working with Form and Approval Builder.

See *PeopleTools: Security Administration*, “Administering User Profiles”.

Requirements

Form and Approval Builder is available only on the Employee portal.

Related Links

"Understanding Approval Features" (PeopleSoft 9.2: Approval Framework)

Designing Forms

This section describes designing forms using the Form Design Wizard component (FORM_DESIGN_WIZARD).

Note: Access to the Form Design Wizard component is limited to form designers and form administrators. In addition, only form owners can modify existing forms.

Pages Used to Design Forms

Page Name	*Definition Name*	*Usage*
Design Form - Step 1: Basic Information Page	FORM_DSN_WZR_MAIN	Define a form's basic information.
Design Form - Step 2: Instructions Page	FORM_DSN_WZR_INST	Provide instructions for users that describe how to complete and submit a form.
Design Form - Step 3: Form Fields Page	FORM_DSN_WZR_FLDS	Define the fields that appear on the form.
Form Field Edits Page	FORM_L_FLD_SEC	Define additional requirements for fields.
Design Form - Step 4: Attachment Templates Page	FORM_DSN_WZR_ATCH	Associate file attachments with a form.
Design Form - Step 5: Publish to Menu Page	FORM_DSN_WZR_PRTL	Specify the menu location for a form.
Design Form - Step 6: Approval Process Page	FORM_DSN_WZR_AW	Assign the approval workflow required for a form.
Design Form: Complete Page	FORM_DSN_WZR_DONE	Preview and activate or redesign a form.

Design Form - Step 1: Basic Information Page

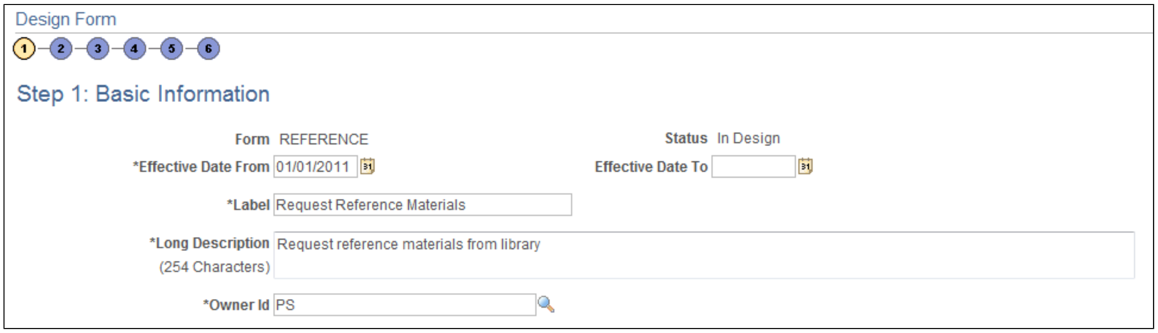
Use the Design Form - Step 1: Basic Information page (FORM_DSN_WZR_MAIN) to define a form's basic information.

Navigation

Enterprise Components, Forms, Design a Form

Image: Design Form - Step 1: Basic Information page

This example illustrates the fields and controls on the Design Form - Step 1: Basic Information page. You can find definitions for the fields and controls later on this page.



Form

The unique identifier for the form. You specify this ID when you add a new form.

Status

Lists the current status of the form. The value for this field is automatically assigned. Values are:

- *In Design:* Indicates the form is being designed and has not yet been published.
- *Activated:* Indicates the form's design is complete, and the form has been published.
- *Inactive:* Indicates a form that has been inactivated by either the form's owner or a form administrator.

  Form administrators or form owners can inactivate forms by using the Manage Forms page. When a form is inactive, form users are not permitted to complete the form.

Effective Date From

Enter the date the form is first available for use.

Effective Date To

Enter the date the form expires. Leave this field blank if you intend to use the form indefinitely.

Label

Enter a label for the menu item that users will select to access the form.

Names can contain only alphanumeric and underscore characters.

Long Description

Enter a description for the form. The description appears below the form's label when users access the published form.

Owner Id

Enter the User ID of the person who is the responsible for the form. Only this person can modify the form design.

Design Form - Step 2: Instructions Page

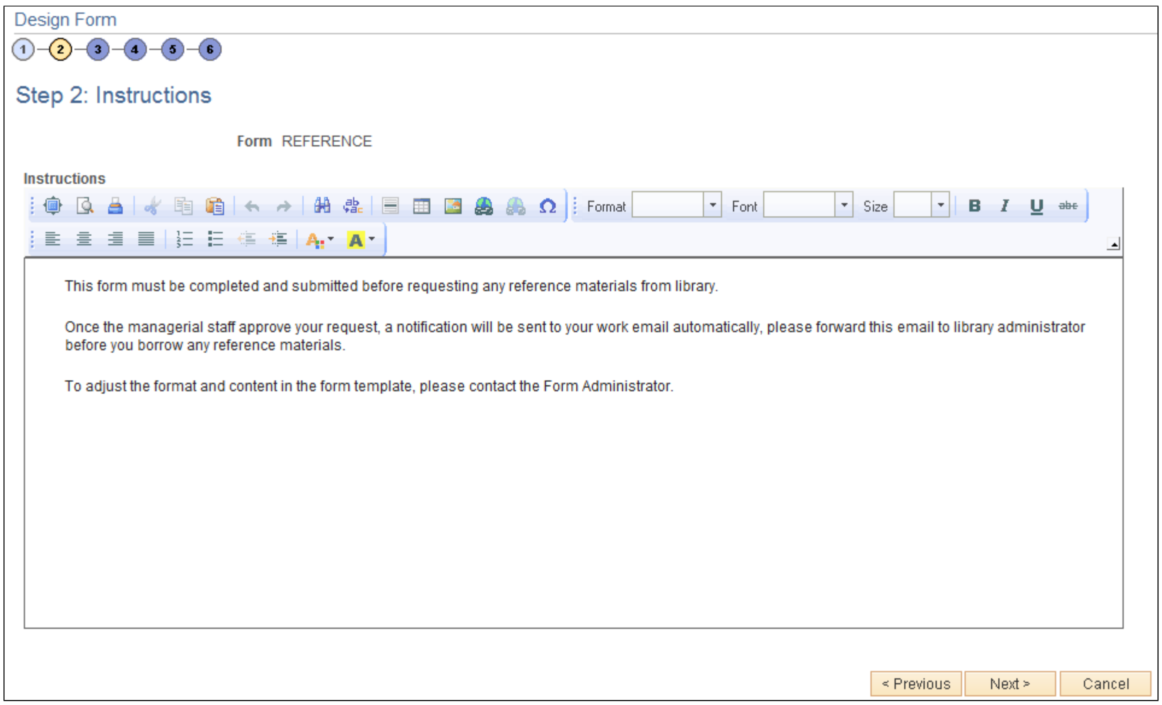
Use the Design Form - Step 2: Instructions page (FORM_DSN_WZR_INST) to provide instructions for users that describe how to complete and submit a form.

Navigation

Click Next on the Design Form - Step 1: Basic Information page of the Forms Design Wizard.

Image: Design Form - Step 2: Instructions page

This example illustrates the fields and controls on the Design Form - Step 2: Instructions page. You can find definitions for the fields and controls later on this page.



Enter instructions for completing the form using the HTML editor. Use the toolbar buttons to copy and paste, format text, and insert graphics or links.

Design Form - Step 3: Form Fields Page

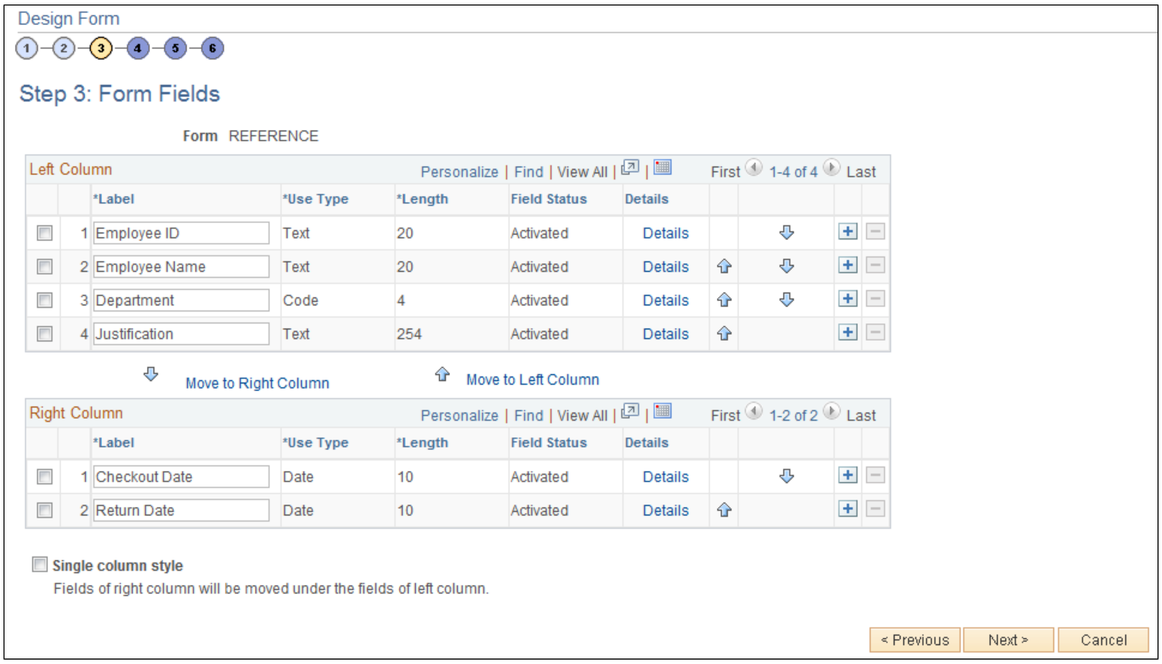
Use the Design Form - Step 3: Form Fields page (FORM_DSN_WZR_FLDS) to define the fields that appear on the form.

Navigation

Click Next on the Design Form - Step 2: Instructions page of the Forms Design Wizard.

Image: Design Form - Step 3: Form Fields page

This example illustrates the fields and controls on the Design Form - Step 3: Form Fields page. You can find definitions for the fields and controls later on this page.



Insert rows within the Left Column and Right Column grids to define the fields that appear on the left and right columns of the form.

For each row, specify values for the following parameters to define the requirements for that field.

Label

Enter the label to use for this field.

Use Type

Select the field type, and field length, if required (depends on the Use Type). Values are:

Code: Use to define a code field that allows the form user to select a response from a list of codes.

Date: Use for dates.

Number: Use for numeric entries (only positive values are allowed).

Prompt: Defines a prompt field that allows the user to select data from existing PeopleSoft database tables.

Section: Use to separate a form into sections. The section can include a header with instructive text, and an HTML editor is provided for you to define the section.

Signed: Use for signed numeric entries (values can be positive or negative).

Text: Use for text entries.

Time: Use for time entries.

Y/N: Use for yes/no responses.

Length

Select the field length. You can modify this field only for Number, Prompt, Signed, and Text fields; the remaining field types use a preset length.

The syntax for numeric fields is *X.Y*, where the value before the decimal *(X)* is the number of integer digits allowed, the value after the decimal *(Y)* is the number of decimal places allowed.

Field Status

Indicates the status of the field, either *Activated* or *In Design.*

Details

Click to access the Form Fields Details page, where you define additional requirements for the field, including whether the field is required, and edits for the field when a user completes the form.

See Form Field Edits Page.

 and 

Click the arrow icons to reposition a field.

Move to Right Column

Click to move selected fields to the right column.

Move to Left Column

Click to move selected fields to the left column.

Single column style

Select to create a form that contains a single column. Any fields that are defined in the right column will appear under the left column fields when you view the form.

Form Field Edits Page

Use the Form Field Edits page (FORM_L_FLD_SEC) to define additional requirements for fields.

Navigation

Click the Details link for a field on the Design Form - Step 3: Form Fields page.

Image: Form Field Edits page displaying an example for a prompt field

This example illustrates the fields and controls on the Form Field Edits page example for a prompt field. You can find definitions for the fields and controls later on this page.

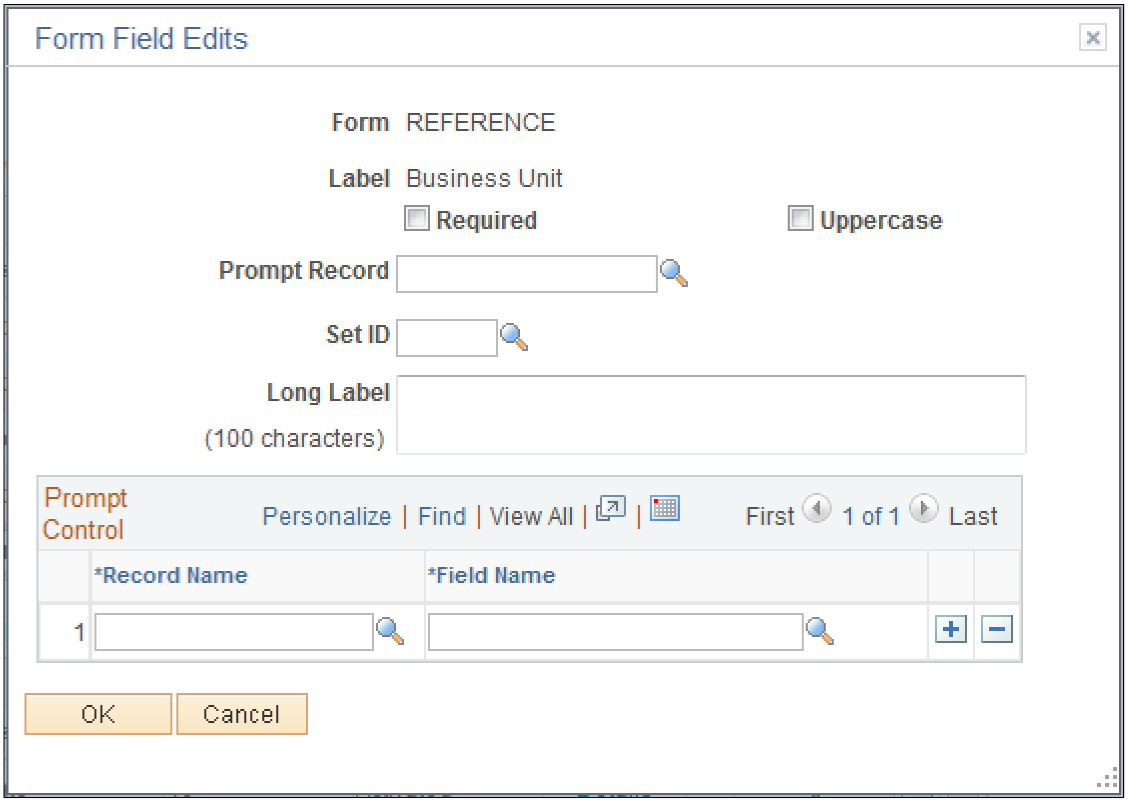
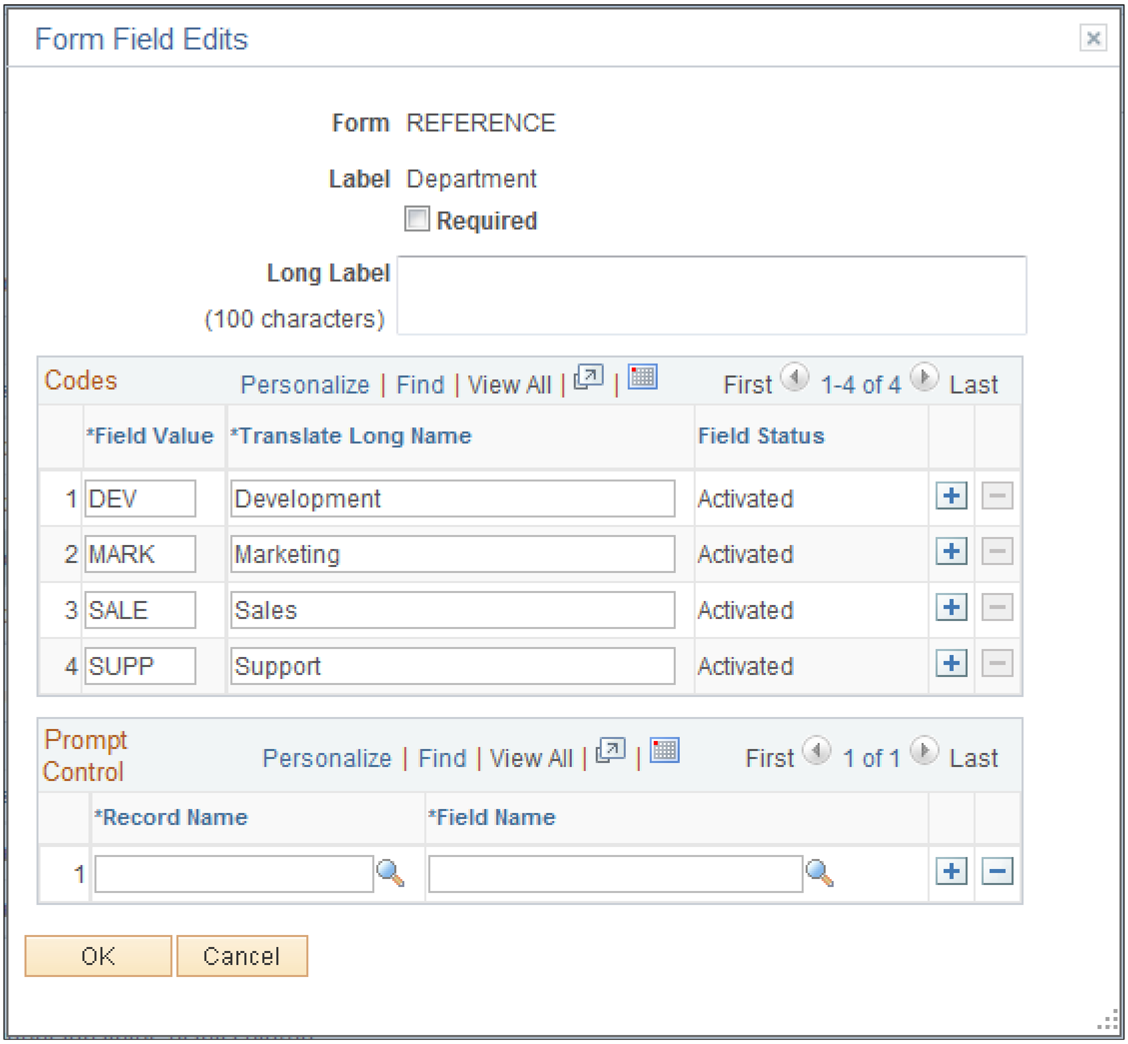


Image: Form Field Edits page displaying an example for a code field

This example illustrates the fields and controls on the Form Field Edits page example for a code field. You can find definitions for the fields and controls later on this page.



The fields that appear on this page differ depending on the field's Use Type. The examples provided show how the page appears for a Prompt field and a Code field. The following information lists all of the possible fields that can appear on this page.

Required	Select to require that a user enter a value in this field in order to save the form.
Uppercase (available only when the Use Type is set to Prompt or Text).	Select to have the system convert the field value to uppercase when the form is saved. Available for only Prompt and Text fields. Use this option for code values, such as department ID, for which it does not matter whether the user enters the value in uppercase or lowercase.
Long Label	Enter up to 100 characters as an alternate label for this field. If you enter a long label, then it will be appear on the form *instead* of the short label (the value specified in the Label field on the Design Form - Step 3: Form Fields page).

Prompt Record and **SetID** (available only when the Use Type is set to Prompt)	Select the record that contains the values to use for this field. For SetID based tables, specify the SetID from which to retrieve the values. To complete this field type, a form user can select one of the values from the prompt list, or they can enter a value by typing it into the field. The records that are available for selection are established by form administrators using the Define Prompt Records page. See Defining Prompt Records.
Prompt Control (available for all Use Types except Section)	To use the value that a form user enters for this field as the key by which to filter the list of available values in one or more prompt fields elsewhere on this form, insert rows in the Prompt Control grid, and select the Record Name and Field Name for each of the form fields that will reference this field. For example, to limit the Project IDs available in a prompt field to only those that are associated with the business unit that the user has already selected while completing the form, when designing the form you would: • Add a row to the Business Unit field's Prompt Control grid and specify the record name that equates to the project record, and the field name in that record that equates to business unit. • Define the Project ID field as a Prompt field, and specify the same record name that was used for the business unit Prompt Control record name as the prompt record for Project ID. The records that are available for selection are established by form administrators using the Define Prompt Records page. See Defining Prompt Records.
Field Value and **Translate Long Name** (appear only when the Use Type is set to Code)	Use to define the codes and their associated translate values that are valid for this field. The translate values appear in the drop-down list when the user completes the field.

Design Form - Step 4: Attachment Templates Page

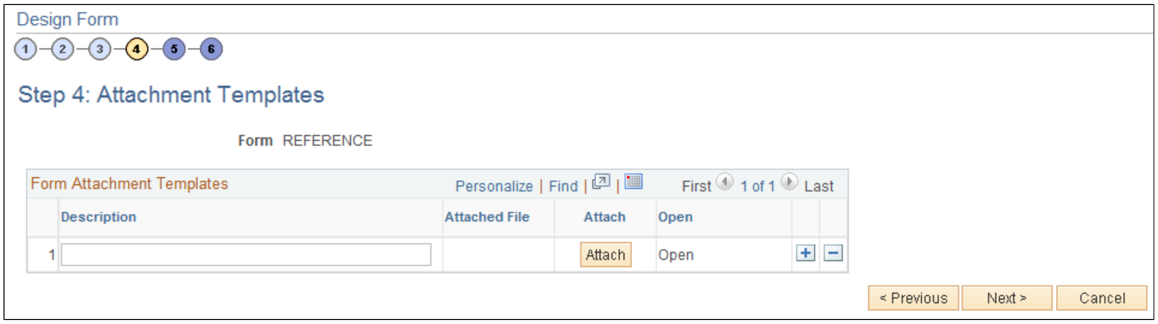
Use the Design Form - Step 4: Attachment Templates page (FORM_DSN_WZR_ATCH) to associate file attachments with a form.

Navigation

Click Next on the Design Form - Step 3: Form Fields page of the Forms Design Wizard.

Image: Design Form - Step 4: Attachment Templates page

This example illustrates the fields and controls on the Design Form - Step 4: Attachment Templates page. You can find definitions for the fields and controls later on this page.



Attach	Click to attach a file. In the window that appears, click the Browse button to navigate to and select the file, then click the Upload button.
Description	Enter a description for the file. If you leave this blank, the file name is used.
Attached File	Displays the file name of the attached file.
Open	Click to open the attached file.

Design Form - Step 5: Publish to Menu Page

Use the Design Form - Step 5: Publish to Menu page (FORM_DSN_WZR_PRTL) to specify the menu location for a form.

Navigation

Click Next on the Design Form - Step 4: Attachment Templates page of the Forms Design Wizard.

Image: Design Form - Step 5: Publish to Menu page (1 of 2)

This example illustrates the fields and controls on the Design Form - Step 5: Publish to Menu page (1 of 2). You can find definitions for the fields and controls later on this page.

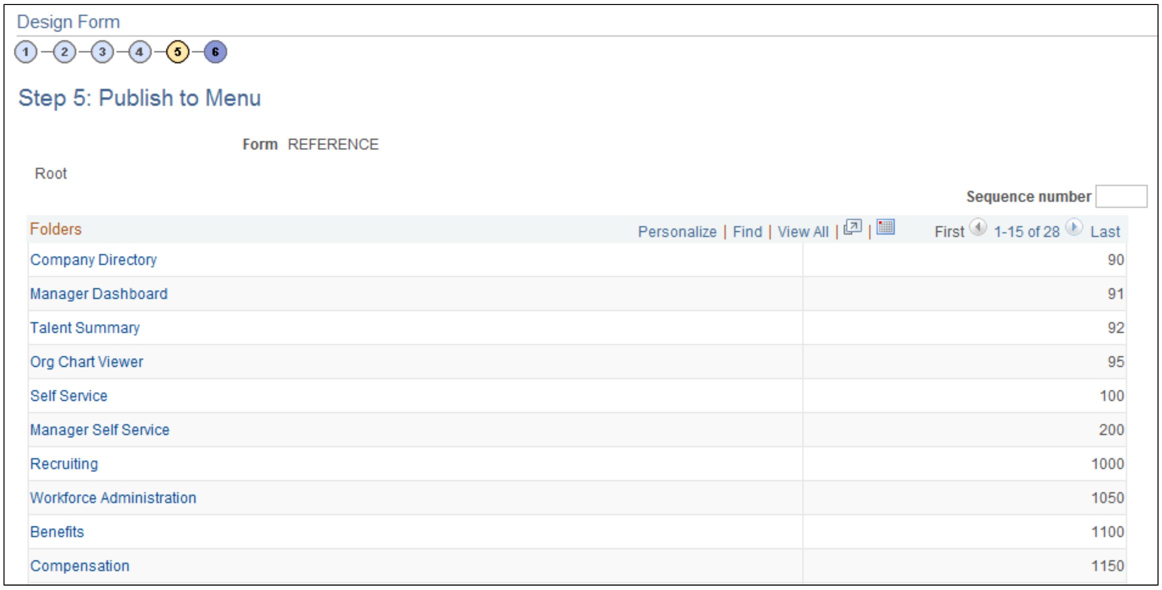
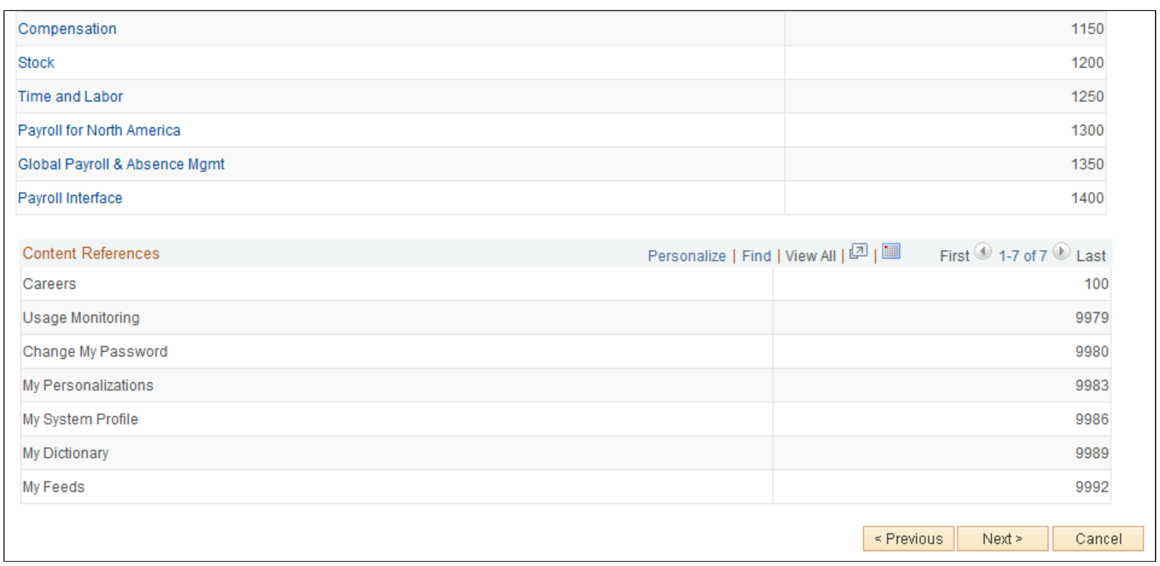


Image: Design Form - Step 5: Publish to Menu page (2 of 2)

This example illustrates the fields and controls on the Design Form - Step 5: Publish to Menu page (2 of 2). You can find definitions for the fields and controls later on this page.



The menu hierarchy appears near the top of the page, below the form name; the highest level, Root, is equivalent to Main Menu in the menu hierarchy. Click the links to navigate to the level of the menu hierarchy in which you want the form to appear. Then, enter a value in the Sequence number to control the order in which it appears in the menu. In the example shown, the form will appear as the last item under Main Menu, Manager Self-Service, along with Review Forecasted Time and Travel and Expense Center.

Sequence number

Enter a value to specify the order within the menu that the form will appear. Items appear in ascending order.

Folders

This grid lists the folders at the currently selected menu level, and their associated sequence number. Click a folder to navigate to that folder level of the menu hierarchy.

Content References

This grid lists the available components at the selected level of the menu hierarchy and their associated sequence number. This is the level at which the form will appear in the menu.

Note: Only the components that your assigned role permits you to access appear in the grid.

Design Form - Step 6: Approval Process Page

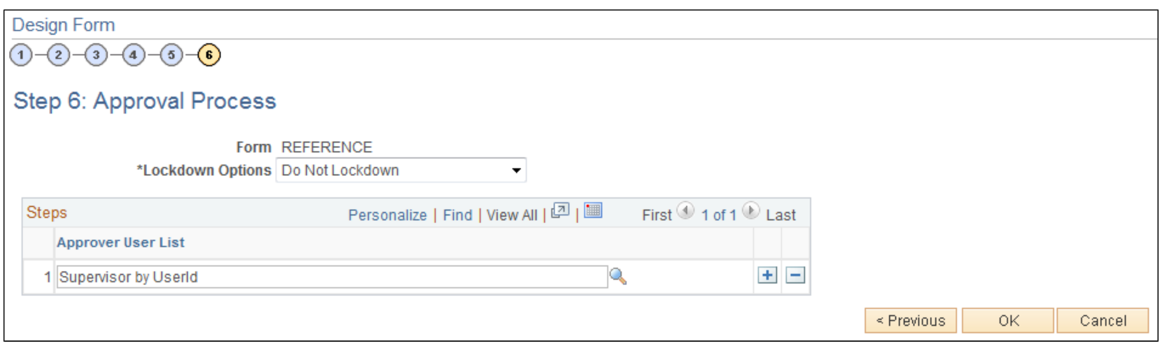
Use the Design Form - Step 6: Approval Process page (FORM_DSN_WZR_AW) to assign the approval workflow required for a form.

Navigation

Click Next on the Design Form - Step 5: Publish to Menu page of the Forms Design Wizard.

Image: Design Form - Step 6: Approval Process page

This example illustrates the fields and controls on the Design Form - Step 6: Approval Process page. You can find definitions for the fields and controls later on this page.



Lockdown Options

Specify if a form instance can be modified after it has been submitted, and under what conditions. Values are:

- *Do not lockdown:* Select this option to allow changes to be made to the form instance at any time. This option enables users to update a form even after it has been submitted and approved.
- *Lockdown after submit:* Select this option to prevent any changes to the form instance after it has been submitted (the approval status is *Pending,* or *Approved.*)
- *Lockdown after approval:* Select this option to prevent any changes to the form instance after it has been approved (

the approval status is *Approved*). Changes can still be made after it has been submitted, up until the time it is approved.

Note: If a form is integrated with PeopleSoft applications, the form cannot be modified after it has been posted to PeopleSoft transactional tables.

Approver User List

Insert rows and select the Approver User Lists required for this form. Approver paths must be sequential, branching is not supported.

Approver user lists are established using the User List Definition page (Enterprise Components, Approvals, Approvals, User List Setup).

see "Defining Users for Approval Framework" (PeopleSoft 9.2: Approval Framework)

After you have specified all the required Approver User Lists, click OK. The system automatically creates the approval Process Definition ID using the same name as the form name.

The predefined form approval configuration supports the following notification events: *Route for Approval*, *Route for Review*, *On Final Approval* and *On Final Denial.*

Design Form: Complete Page

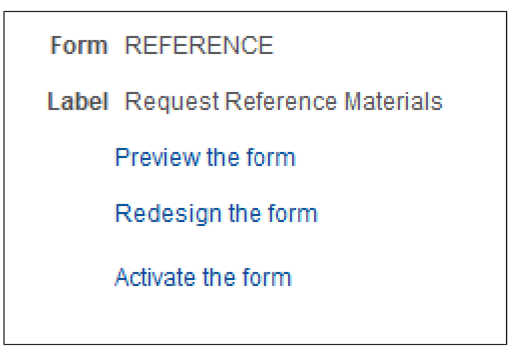
Use the Design Form: Complete page (FORM_DSN_WZR_DONE) to preview and activate or redesign a form.

Navigation

Click OK on the Design Form - Step 6: Approval Process page.

Image: Design Form: Complete page

This example illustrates the fields and controls on the Design Form: Complete page. You can find definitions for the fields and controls later on this page.



This page enables you to preview your form, modify it, if needed, and activate it when you've finalized the design by using the following links:

Preview the form

Click to preview the form. A preview of the designed form appears, as the user would see it when they complete the form. Navigate within the form to preview each page, and interact with the form fields to test them.

Redesign the form

Click to return to the Form Design Wizard component, where you can continue designing the form.

Activate the form

Click to activate and publish the form. A confirmation message appears. The form status updates to *Activated.*

Defining Prompt Records

This section discusses how to specify which PeopleSoft database records can be used as prompt fields in Form and Approval Builder. Access to this page is limited to form administrators.

Page Used to Specify Prompt Records

Page Name	*Definition Name*	*Usage*
Define Prompt Records Page	FS_SD_PROMPTREC	Specify records for prompt fields.

Define Prompt Records Page

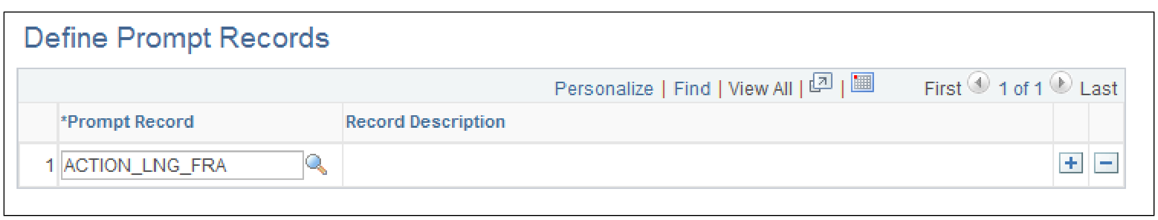
Use the Define Prompt Records page (FS_SD_PROMPTREC) to specify records for prompt fields.

Navigation

Enterprise Components, Forms, Define Prompt Records

Image: Define Prompt Records page

This example illustrates the fields and controls on the Define Prompt Records page. You can find definitions for the fields and controls later on this page.



Prompt Record

Insert rows and select a database record. Only the records specified on this page are available for selection as prompt fields and prompt control fields in the form designer.

Managing Forms

This section provides an overview of form management and discusses how to manage forms.

Page Used to Manage Forms

Page Name	***Definition Name***	***Usage***
Manage Forms Page	FORM_RPT	Manage forms.

Understanding Form Management

Form designers and form administrators can review and manage forms using the Form Management component. Use this page to review how many of each form are in the system, see the current approval status, and activate/inactivate forms. This component works like most inquiry pages; first specify the search criteria, then click the Search button to retrieve the forms that meet the criteria. Data is categorized into the following tabs: Action, Counting, and Owner.

Form designers can access only forms that they are assigned to as owner, form administrators can access all forms.

Manage Forms Page

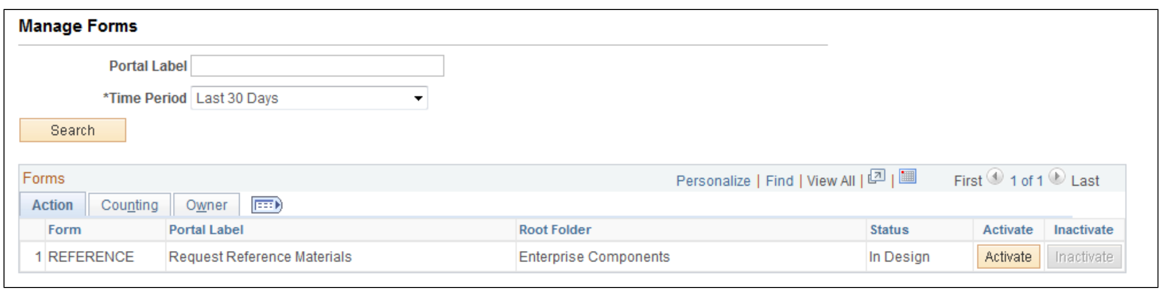
Use the Manage Forms page (FORM_RPT) to manage forms.

Navigation

Enterprise Components, Forms, Manage Forms

Image: Manage Forms page

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



Search Criteria

Enter values in the following fields, then click Search to retrieve form information:

Portal Label

Enter the form's label (the menu item name under which it is published) to view only the subset of forms that have been published to that menu. This is equivalent to the field “Label” when you design a form. Leave this blank to review information for all of your forms.

Time Period

Select the time period to use for determining form instance count totals.

Values are:

- *Custom Time Period*

  Select this option to review forms within a specific date range. Specify the dates by completing the From Date and To Date fields.

- *Last 30 Days*
- *Last 60 Days*
- *Last 90 Days*

Form Fields

These form fields appear on each tab:

Form	The Form ID that was defined in the Form Design Wizard component when the form was created.
Portal Label	The menu item used for the form. This is the value of the Label field that was specified on the Form Design Wizard: Basic Information page during form design.
Portal Folder	The name of the folder the form is published under.
Status	The form's current activation status, either *Activated* or *In Design.*

Activating/Inactivating Forms

Select the Action tab to activate or inactivate forms.

Activate	Click this button to activate an inactive form. If the form's current status is *In Design,* the system transfers you to the Form Design Wizard component, where you can complete the form design and then activate it.
Inactivate	Click this button to inactivate an active form.

Reviewing Form Counts

Select the Counting tab to review form counts for the specified time period.

Total	Lists the total number of form instances (forms that have been completed by form users).
Initial	Lists the number of form instances that have been completed by form users, but have not yet been submitted for approval.
Pending	Lists the number of form instances that have been submitted for approval but have not yet been approved, denied, or cancelled.

Cancelled Lists the number of form instances that have been cancelled.

Approved Lists the number of form instances that have been approved.

Denied Lists the number of form instances that have been denied.

Reassigning Form Ownership

Select the Ownership tab to reassign a form to a new owner.

Owner ID Lists the current owner. To change ownership, select a new owner from the prompt list.

Change Ownership Click to assign the user listed in Owner ID as the new owner of the form.

Working with Forms

This section describes how to work with forms.

Pages Used to Work with Forms

Page Name	*Definition Name*	*Usage*
Search/Fill a Form Page	FORM_ADD	Search for an existing form instance to update, or complete a new form instance.
Form Page	FORM FORM2	Complete a form instance and submit it for approval.
<Portal label (approval preview)> Page	FORM_APPR_MAP	Preview the approval path for a form.
Instructions Page	FORM_INSTR	Review form instructions if needed.
Attachments Page	FORM_ATCH	Download and upload attachments to the form if needed.
Form Approval Page	FORM_APPR_ACTION	Approve or deny a form.

Search/Fill a Form Page

Use the Search/Fill a Form page (FORM_ADD) to search for an existing form instance to update, or complete a new form instance.

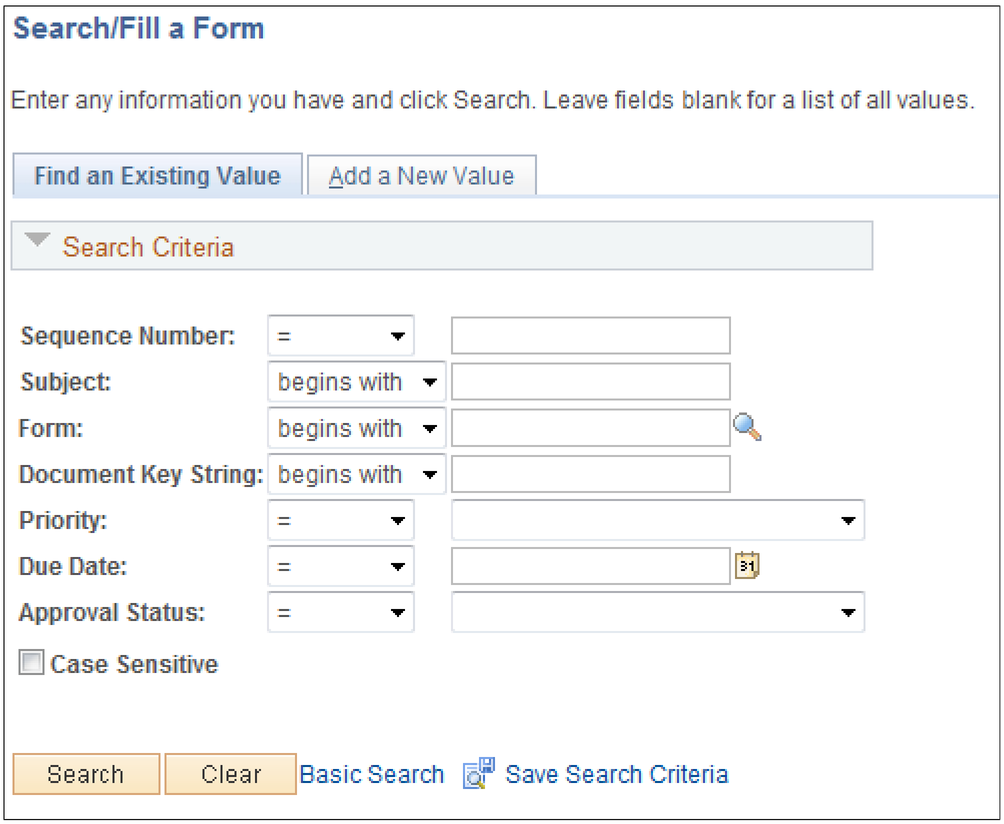
Navigation

The menu navigation to access the form depends on the menu under which it was published. You can access the form by selecting one of these paths:

- Enterprise Components, Forms, Search/Fill in a form
- <Menu Path>, <Form Label>

Image: Search/Fill a Form page

This example illustrates the fields and controls on the Search/Fill a Form page. You can find definitions for the fields and controls later on this page.



To find an existing form instance:

1. Select the Find an Existing Value tab.
2. Enter values in the fields to find the form instances that meet the criteria and click Search.
3. Click the form to view, you will transfer to the Form page where you can review the form.

The Document Key String is a concatenation of a form's key field values separated by the slash character (/).

To add a new form instance, navigate to the Form component pages using the menu under which the form was published.

Form Page

Use the Form page (FORM or FORM2) to complete a form instance and submit it for approval.

Navigation

Access the form using the menu under which it was published.

Image: Form page showing a new form instance that has not been completed

This example illustrates the Form page when a new form instance is added, but has not been completed. You can find definitions for the fields and controls later on this page.

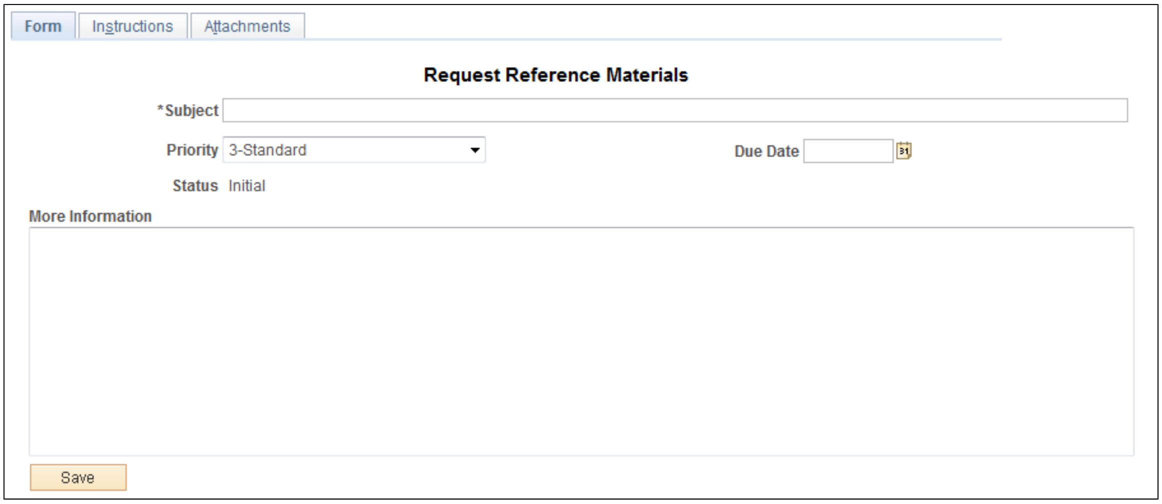


Image: Form page showing a saved form instance that is ready to submit for approval

This example illustrates the Form page when it is saved and ready to submit for approval.

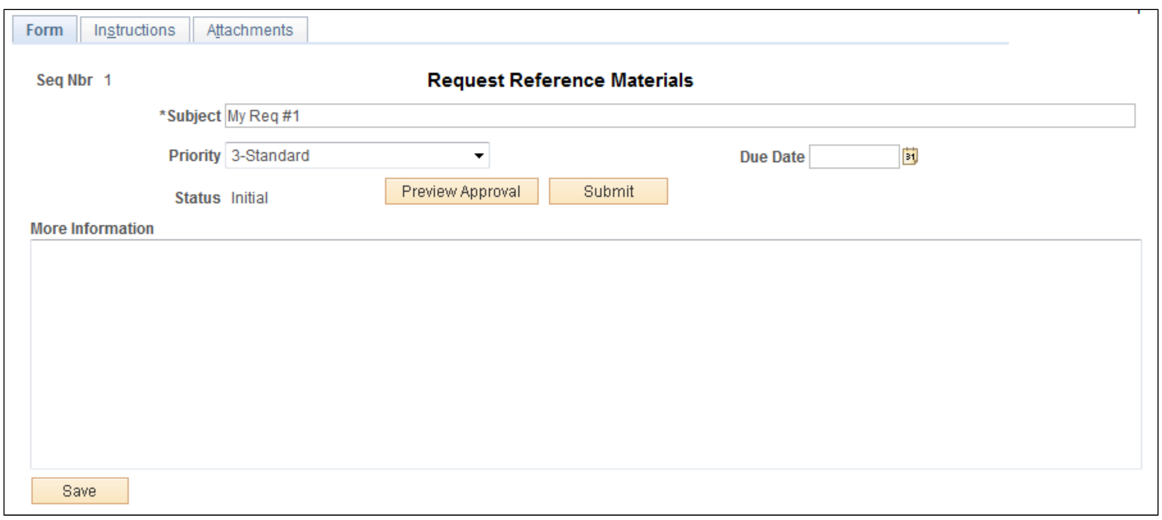
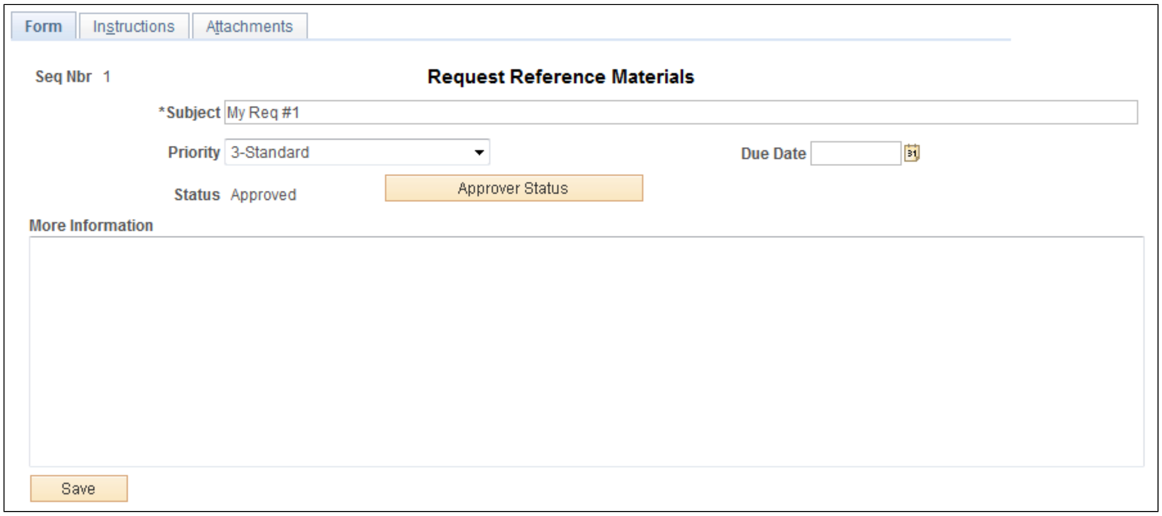


Image: Form page showing a posted integrated form instance

This example illustrates the Form page showing a posted integrated form instance.



Users can complete the fields, review the instructions, and download and upload attachments as required. Each form instance will have the following fields, in addition to the fields defined by the form designer.

Seq. Nbr (sequence number)

The system assigns a unique sequence number to identify each completed form when the form instance is saved.

Subject

Enter a subject. Form users can search for form instances using the subject field.

Priority

Select a priority for the form. This field is for informational purposes only.

Status

Lists the status of the form. This value is automatically assigned.

Due Date

Specify the date the form is required to be approved or denied. This date is for informational purposes only.

More Information

Enter additional information for the form.

The following action buttons appear depending on the form's current status.

Approver Status

Click to view the current approval flow for the form.

Available for forms in Pending status.

Submit

Click to submit the form for approval.

Available for forms in Initial or Cancelled status.

Cancel Approval

Click to cancel the form.

Available for forms in Pending status. Any pending approvals are canceled.

Preview Approval

Click to view the approval workflow.

	Available for forms in Initial or Cancelled status.
Save & Post Form	Click this button to post the data to the transactional tables of the component the form instance is associated with. A message appears to confirm that the form has been successfully posted to the transactional tables. This button is available only for form instances in *Approved* status that have a defined component interface mapping, and only to users that have access to the application component that is associated with the component interface to which the form is mapped. For example, if a user has access to the Department component then they will have access to this button if the form instance has been approved and the form is set up to integrate with the Department component interface.
Related Documents	Click the document key string link within this grid to access the data within the related component. Available only for successfully posted forms.

Attachments

The attachments page enables form users to download any attachments that were defined as part of the form, as well as upload any documents that are required for the form to be approved.

<Portal label (approval preview)> Page

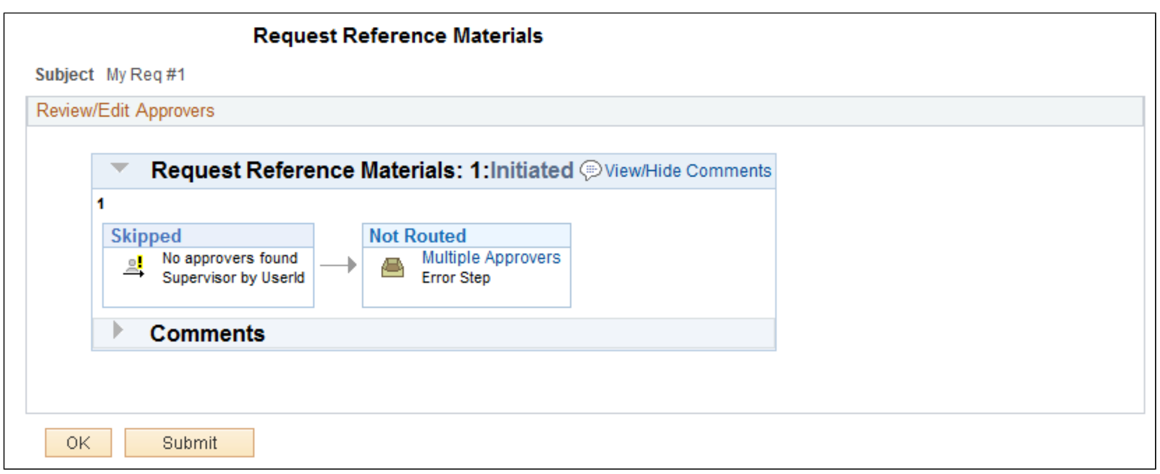
Use the <portal label (approval preview)> page (FORM_APPR_MAP) to preview the approval path for a form.

Navigation

Click the Preview Approval button on the Form page.

Image: <portal label (approval preview)> page

This example illustrates the fields and controls on the <portal label (approval preview)> page. You can find definitions for the fields and controls later on this page.



Click the Submit button to submit the form for approval, or click the OK button to return to the form page.

Click to insert additional approvers after the form has been submitted.

Note: You can only insert ad-hoc approvers.

Related Links

"Understanding Approval Features" (PeopleSoft 9.2: Approval Framework)

Form Approval Page

Use the Form Approval page (FORM_APPR_ACTION) to approve or deny a form.

Navigation

Enterprise Components, Forms, Approve/Review a Form

Approvers can also access pending forms from their worklist.

Enter any comments, then click Approve or Deny to update the form.

Related Links

"Understanding Approval Features" (PeopleSoft 9.2: Approval Framework)

Integrating Forms with PeopleSoft Applications

This section provides an overview of form integration.

Pages Used to Integrate Forms with PeopleSoft Applications

Page Name	***Definition Name***	***Usage***
Form to CI Collection Mapping Page	EODC_CI_MAP	Map form fields to component interfaces.
Document Form References Page	EODC_FORM_XREF	View the form instances that updated a component.

Understanding Form Integration

Forms and approval builder includes a framework that enables you to integrate forms with PeopleSoft application components. Using this integration is optional, and involves creating component interfaces for the components you want the form to integrate with, then mapping the form fields to their associated component interface fields. Only those with PeopleTools expertise should be involved with setting up the integration. The integration can be used only to add new records, not to update existing data.

Integration is limited to simple transactions; only one row per component level can be mapped. For example, you can create a new department with only one effective dated row (Level 1) and one chartfield attribute/value pair (Level 2). You cannot insert multiple rows per level using this feature.

Note: This documentation assumes you have experience with component interfaces, security, and Application Designer. This framework is designed to help implement form integration with the transactional PeopleSoft system; it is not designed for end users. When implementing this feature, care should be taken to follow the standard methodology required for all software development, especially testing the form integration before deploying it to a production environment.

For more information, please refer to the following product documentation:

See *PeopleTools: Application Designer Developer's Guide* and *PeopleTools: Component Interfaces*

Integration Framework

The forms integration framework includes the following objects:

Form to CI Collection Mapping Component (EODC_CI_MAP) (Form to Component Interface Collection Mapping Component)

The pages within this component enable you to:

- Associate a form with one or more PeopleSoft application component interfaces.
- Map form fields to the component interface properties.

These mappings serve as input to the forms integration framework, which is used to post the form data to the PeopleSoft transactional tables, and also provides a link from the form to the transactional components.

See Form to CI Collection Mapping Page.

Forms Integration Framework Application Classes

These application classes use the form to CI mappings to post form instance data to the PeopleSoft application through the component interface.

Approval Framework

Used to provide notifications and worklist entries for forms.

Security

Once a form is approved, form users with add/update access to the application component that the form is associated with (specified by the component interface it is mapped to) are able to post the form to the PeopleSoft application, using the Save & Post button that is available on the Forms page.

After the form has been successfully submitted to the PeopleSoft application, no additional changes to the form are allowed.

Form Integration Implementation Steps

Integrating forms involves the following steps:

1. Determine the component in the PeopleSoft application that you want the form to integrate with.

2. Create a component interface to use for the integration, following the guidelines provided in the Component Interface Guidelines section that follows.

   See the *Component Interface Guidelines* section in this topic.

3. Design the form using the Form Design Wizard, following the guidelines provided in Form Design Guidelines section that follows.

   Keep in mind the structure of the CI you wish to map to. You must ensure the fields of your form are of the correct data type to map to the CI fields, and that you have all of the fields listed on your form that the CI is going to require.

   See the *Form Design Guidelines* section in this topic.

4. Map the form to the component interface properties, using the Form to CI Collection Mapping page.

   See Form to CI Collection Mapping Page.

5. Once the Form Design and Form To CI Mappings have been properly tested, copy them to the production database.

   You need to copy the required integration objects (for example, new component interfaces that you created for the Form to CI Integration, new prompt records, and so on), the form design, and form to CI mappings. The Form To CI Mappings are located in these records: EODC_DOC_HDR, EODC_DOC_LN, and EODC_CI_MAP.

   If the underlying CI or form design changes after being released to the production database, you must review the mappings and ensure that they are still valid.

Component Interface Guidelines

Because forms generally do not contain a large number of fields, to simplify the form to CI collection mapping, we recommend that you create separate component interfaces when you implement the form integration. Consider the following recommendations when creating these component interfaces:

- Make the CI Collection Name for all levels the same as the Component Level Main Record. This should be the default when creating the Component Interface.
- Make sure that the Read Only attribute of the CI Properties is *not* set to Y.

  Integration may fail if the CI property is set to Read Only
- Remove all unwanted CI Properties so that you expose only those needed for the integration.
- Update the appropriate permission lists (EOFM2000 and EOFM4000, for example) to grant access to the newly created component interfaces.

  Form approvers must have access to the related component interface to be able to post integrated forms.

Form Design Guidelines

Keep the following considerations in mind when designing integrated forms:

- For every form field that will map to a CI property, both the CI property and the corresponding form field must have the same field type and field length.

Note: If the required field length is not available in the form designer, then choose either a shorter or longer field length. If you choose a longer field length, the value will be truncated before it is posted to its associated transaction table.

- For prompt fields, the prompt values must match those in the prompt list of the CI property they map to; this may require you to create a new prompt.
- For code fields, you must ensure that the codes are the same as those of the CI Property being mapped to.
- Set all the required fields according to the base component associated with the CI, otherwise an error message that a required field has not been completed will appear when a form user attempts to save and post the form data.

Form to CI Collection Mapping Page

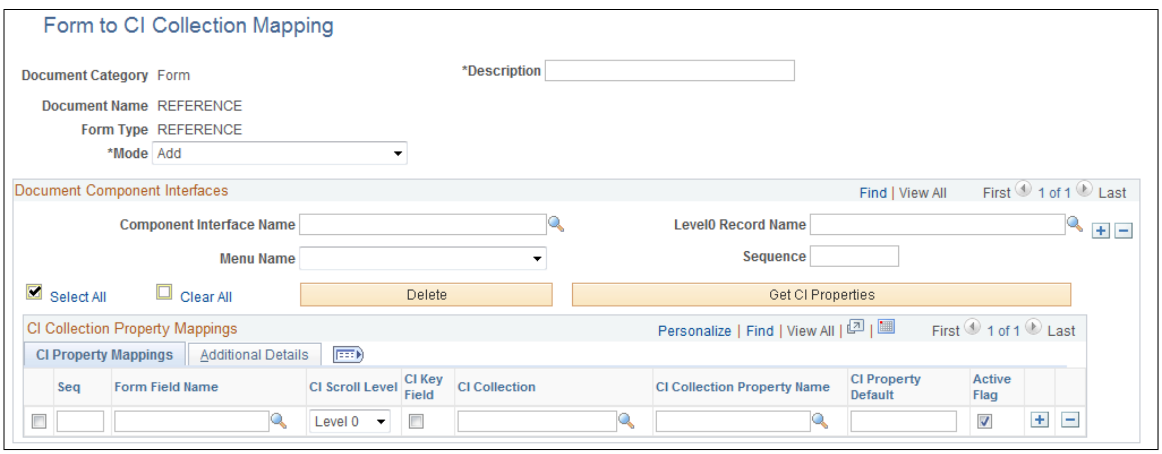
Use the Form to CI Collection Mapping page (EODC_CI_MAP) to map form fields to component interfaces.

Navigation

Enterprise Components, Forms, Form to CI Mapping

Image: Form to CI Collection Mapping page

This example illustrates the fields and controls on the Form to CI Collection Mapping page. You can find definitions for the fields and controls later on this page.



Document Category Indicates the type of document. Currently, *Form* is the only valid value.

Document Name Select the form to map.

Description Enter a description for the mapping.

Form Type Automatically populates to the same value as Document Name. You cannot edit this field.

Mode

Select the action allowed to the component when a form instance is saved. For this release, *Add* is the only permitted option.

Document Component Interfaces

Insert a row for each component interface to associate with the form and complete the following fields:

Component Interface Name

Select the component interface to associate with the form.

Menu Name

Select the name of the registered menu item of the component interface. The value for this field is automatically populated when you specify the component interface name, but if there is more than one menu associated with the CI, then you can select the required one.

When a form user completes an instance of the form, the system transfers them to this menu item when they click Link to Related Component on the form instance.

Level0 Record Name

Select the Level0 record of the component interface to associate with the form.

Sequence

Enter a number to specify the order in which to execute the component interface. When mapping multiple component interfaces to a form, this is especially important if there are data dependencies.

Get CI Properties

Click to populate the CI Collection property Mappings grid with the values for the specified component interface. You can then remove or update any fields as required. Alternatively, you can manually add each row within the CI Collection property Mappings grid.

CI Collection Property Mappings

Define the mapping for each form field in this grid. You can either add rows individually for each form field you want to map (recommended when there are only a few fields to map), or you can click Get CI Property Mapping to populate the grid with all the CI properties, select the form field that maps to each property, specify field defaults, then delete any rows you do not need.

Seq (sequence)

Enter a number to specify the order in which to process the field mapping. Processing order is important because any data in a form that depends on other data must be processed after the data on which it depends is entered.

Form Field Name

Select the name of the form field to map. Only form fields with *Active* status appear in the selection list.

CI Scroll Level

Select the CI component buffer level to map the field to. Three levels are supported.

CI Key Field	Select to specify the field is a key field. You must specify all the key fields associated to the Level0 main record. For lower levels, you specify only any additional keys; you do not need to repeat the Level 0 keys. For example, if Level0 keys are SETID and DEPTID, and Level1 keys are SETID, DEPTID, and EFFDT, then select the CI Key Field check box for SETID and DEPTID for Level 0, for level1 select the CIKey Field check box for EFFDT. The CI Key Field check box is selected initially, so you must review and adjust these for each field.
CI Collection	Select the name of the CI Collection to map to this form field.
CI Collection Property Name	Select the name of the CI Collection property to map to this form field.
CI Property Default	Enter a value in this field to define a default value to assign to this field when the form is used. For example, you could map the SETID form field to the CI Property of SETID and set the default value to SHARE. When a form user creates a new form instance, the SETID field on the form will be initially set to SHARE, but the form user can override the default value as needed. Default values are currently limited to number, text, and date. Date values must be entered in YYYYMMDD format.
Active Flag	Select to activate the field mapping, deselect to inactivate the field mapping. Inactive mappings are ignored by the Form to CI Framework when posting data to the transactional tables.
CI Level Main Record	Select the component level main record that is associated with the CI Collection. This information is required since a CI property can potentially be associated with a work record, and the system needs to know the CI Level Main Record information in the mapping so that the framework can identify it.
CI Parent Collection Name	Lists the parent collection associated with the corresponding CI Collection. For example, for a Level 1 CI Collection, the parent collection will always be PS_ROOT. This value is automatically populated.
CI Record Name	Lists the component record name associated with the corresponding CI Property. This value is automatically populated based on the CI Collection and CI Collection Property.
CI FieldName	Lists the component field name associated with the corresponding CI Property. This value is automatically populated based on the CI Collection and CI Collection Property. The system uses both CI Record Name and CI Field Name to perform the default value validation and conversion (

the default value currently supports only string values, therefore, it needs to be converted to the appropriate field type (Number or Date)).

Document Form References Page

Use the Document Form References page (EODC_FORM_XREF) to view the form instances that updated a component.

Navigation

Enterprise Components, Forms, Document Form References

For each form instance that integrated with the specified component interface, the following information is provided:

Document Key String	Displays the concatenation of the values of all the form's key fields separated by the slash character (/), for example, SHARE/0000000065.
Form	Lists the name of the form.
Form Instance	Lists the unique form instance.
Subject	Lists the form's subject. Click to access the Form page.
Action	Lists the mode by which the component was modified. Currently, only Add mode is supported.
Last Updated By and **Last Update Date/Time**	Lists the user that most recently updated the form, and the date and time it was modified.

Chapter 7

Configuring Toolbars

Understanding Toolbars

This section discusses:

- Toolbar elements.
- Delivered toolbars.
- Delivered toolbar buttons.

Toolbar Elements

A toolbar contains these parts:

- Title area.
- Button bar.
- Component-specific data.
- Toolbar footer.

Title Area

Based on the configuration, the title area includes one or more of these controls:

- Page title, if enabled, is shown left-aligned on top of the toolbar buttons.
- Date and time, if enabled, is shown right aligned on top of the toolbar buttons.

See Toolbar Definition - Description Page.

Button Bar

The button bar is similar to a browser's toolbar. It can include the following elements:

- PeopleTools actions

  This includes buttons such as Save, Refresh, Add, Next in List, Previous in List, Return to Search, and Update/Display, which map to the corresponding buttons (which are available at the bottom of a page) that are defined in PeopleTools.

- Custom actions

  This includes buttons that perform application-specific actions, such as cloning a case. Often, clicking a custom button displays a page on which you complete the action.

- The Personalize action

  This enables users to reconfigure the buttons on the button bar.

You can choose which toolbar elements to display and, for PeopleTools and custom actions, you can define their appearance sequence. There are two kinds of toolbar buttons: primary and secondary. Primary toolbar buttons are orange-colored, rectangular buttons with text label on them. They always appear on the left of the toolbar, and cannot be hidden through user personalizations. Secondary toolbar buttons, on the other hand, can be configured to show only the button icon, the text label, or both. End users can hide secondary toolbar buttons through personalizations, if the buttons are configured to support this functionality in the toolbar definition.

Also, you can modify the delivered toolbar buttons' definitions, or you can create new toolbar buttons using application classes.

See Toolbar Definition - Button Page.

Component-Specific Data

Under the button bar, the toolbar displays summary information about the object that you are viewing. For example, the Manage Job Opening toolbar shows summary information about the current job opening. PeopleCode in the underlying component makes this information available.

When you configure a toolbar, you choose which and how summary data appear.

See Toolbar Definition - Content Page

Toolbar Footer

If a page is too long to be displayed in a single browser window and you need to scroll to see the entire page, you can add a toolbar footer so that toolbar buttons are also available when users are at the bottom of the page. The toolbar footer is the same as the toolbar button area at the top of the page. One exception is that the footer has the Top of Page link instead of a Personalize link as you see in the header. When you click the right or left arrow for more buttons in either direction, the other toolbar shifts at the same time.

Delivered Toolbars

To obtain a list of system-delivered toolbars, and to identify the components and pages that use them, go to the Toolbar Definition component (Enterprise Components, Component Configurations, Toolbar, Toolbar Definition) and click Search without entering search criteria. The system displays all delivered toolbars on the Search Results list.

To review the buttons and display items that are available for use in toolbars, access the Toolbar Definition - Button Page and the Toolbar Definition - Content Page of the selected toolbar definition.

Delivered Toolbar Buttons

To obtain a list of system-delivered toolbar buttons, go to the Toolbar Button Definition component (Enterprise Components, Component Configurations, Toolbar, Toolbar Button Definition) and click Search without entering search criteria. The system displays all delivered buttons on the Search Results list.

Note that before you add a custom button to the toolbar of a component, confirm that the component has the PeopleCode to support the action that the button performs. For instance, do not include the Clone button in the toolbar of a component that does not have the code needed to support cloning.

Defining Toolbar Buttons

To define toolbar buttons, use the Toolbar Button Definition (EOTL_TB_BUTTON) component

Page Used to Define Toolbar Buttons

Page Name	***Definition Name***	***Usage***
Toolbar Button Definition Page	EOTL_TB_BUTTON	Define buttons for a toolbar.

Toolbar Button Definition Page

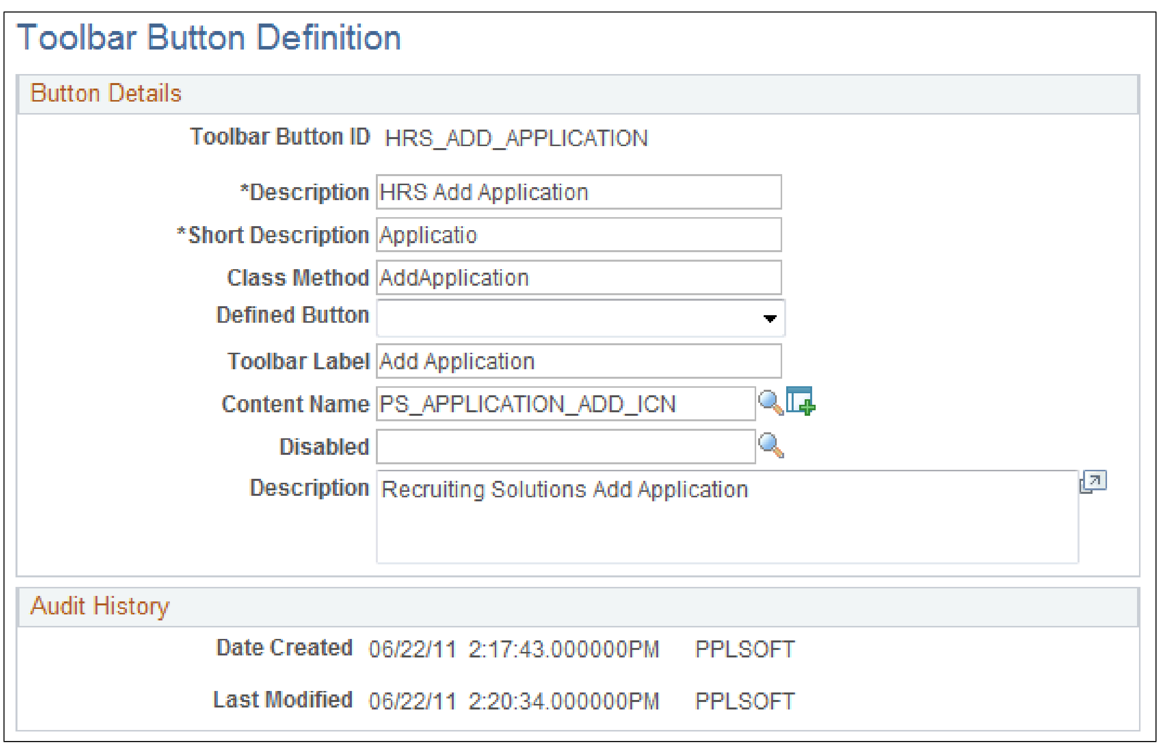
Use the Toolbar Button Definition page (EOTL_TB_BUTTON) to define buttons for a toolbar.

Navigation

Enterprise Components, Component Configurations, Toolbar, Toolbar Button Definition, Toolbar Button Definition

Image: Toolbar Button Definition page

This example illustrates the fields and controls on the Toolbar Button Definition page. You can find definitions for the fields and controls later on this page.



Toolbar Button ID — Displays the unique identifier of the toolbar button. This ID is referenced in PeopleCode to manipulate button properties.

Class Method — Enter the method name of the extended application class, which contains the PeopleCode that executes when a user clicks the button.

This value does not contain spaces or special characters.

Note: If you specify a value in this field, leave the Defined Button field blank.

Defined Button — Select a button value if the button is mapped to a PeopleTools-delivered action. Values are Add, CTI Phone Launch, Correction, Next Page In Component, Next in List, Previous Page In Component, Previous in List, Refresh, Related Links, Return to List, Save, Spell Check, Update/Display, and Update/Display All. These actions are the same as the similarly named PeopleTools buttons that normally appear at the bottom of a page.

Note: If you specify a value in this field, leave the Class Field field blank.

Toolbar Label — Enter the default button label, which is used as a tool tip for the button at runtime.

Content Name — Select the default icon that appears when the toolbar button is active. Select image definitions from the PeopleSoft image catalog. To use a custom graphic, you must add it to the catalog first.

Disabled — Originally used to specify the default icon that appeared when the toolbar button is inactive. Note that inactive toolbar buttons are now hidden rather than displayed: therefore the Disabled image is not used.

Description — Enter a detailed description, such as usage and comments, about the button.

Configuring Toolbars

To configure toolbars, use the Toolbar Definition (EOTL_TOOLBAR) component.

This section discusses how to configure toolbars.

Pages Used to Configure Toolbars

Page Name	***Definition Name***	***Usage***
Toolbar Definition - Description Page	EOTL_TOOLBAR_DEFN	Define general toolbar attributes.
Toolbar Definition - Button Page	EOTL_TOOLBAR_BTNS	Configure toolbar buttons.
Toolbar Definition - Content Page	EOTL_TOOLBAR_DISP	Configure component-specific toolbar content.
Toolbar Definition - Focus Fields Page	EOTL_TOOLBAR_FFLD	Specify the default cursor position for pages.

Toolbar Definition - Description Page

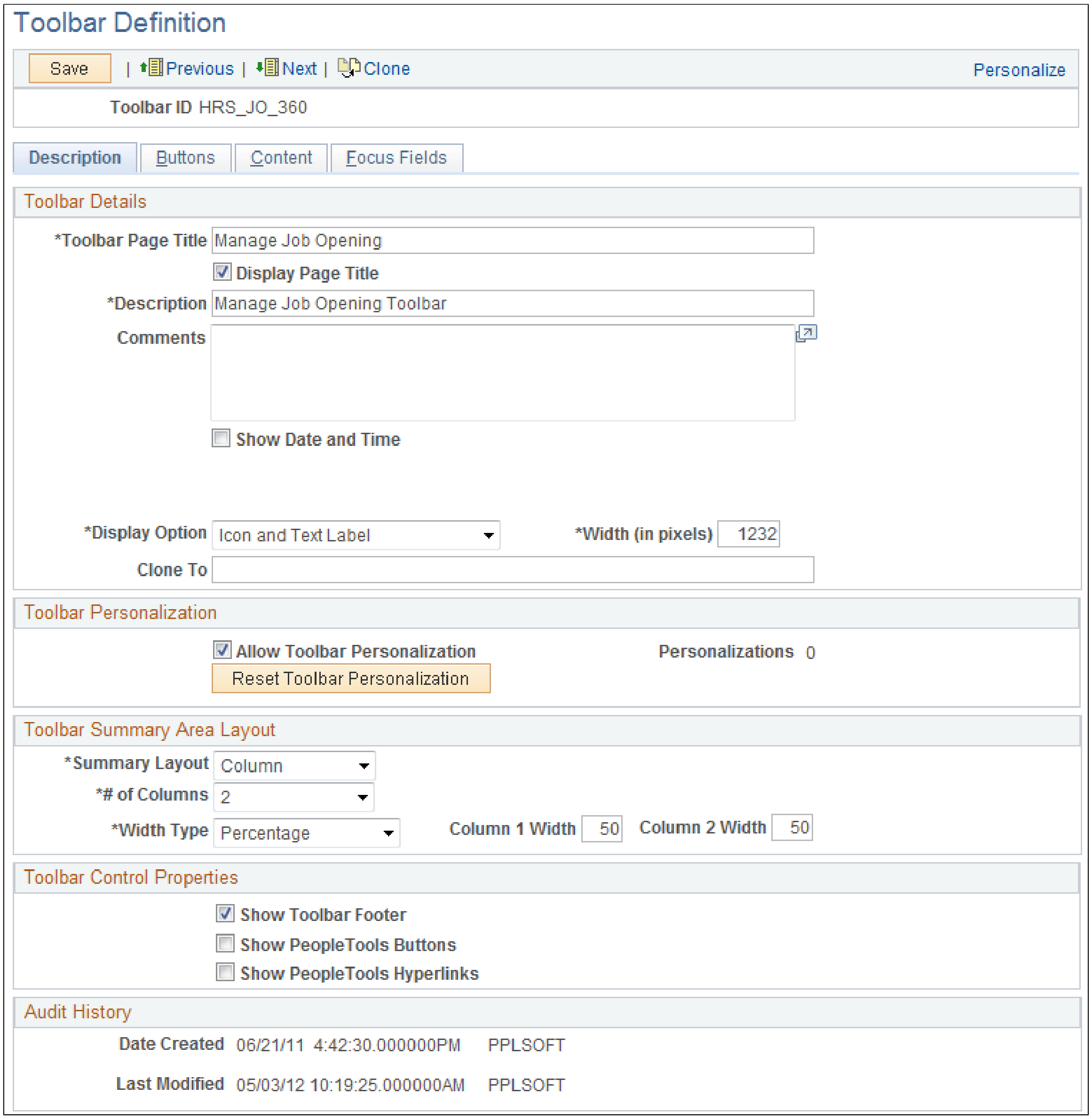
Use the Toolbar Definition - Description page (EOTL_TOOLBAR_DEFN) to define general toolbar attributes.

Navigation

Enterprise Components, Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Description

Image: Toolbar Definition - Description page

This example illustrates the fields and controls on the Toolbar Definition - Description page. You can find definitions for the fields and controls later on this page.



Toolbar ID Displays the toolbar's unique identifier. This ID is referenced in PeopleCode to manipulate toolbar properties.

Toolbar Details

Toolbar Page Title

Enter a page title that is displayed on the left side of the page above the toolbar buttons. A page title is not a required toolbar element, but it is recommended.

Display Page Title

Select to have the page title displayed. The default state for page title is set to *On*. Page title can be set dynamically through PeopleCode.

Description

Enter a description of the toolbar (for example, the name).

This is a required field that is used to help users identify the toolbar on the Toolbar Definition component.

Show Date and Time

Select to have the date and time (in the user's time zone) appear on the toolbar when the user accessed the component associated with the toolbar.

Display Option

Select *Icon Only, Icon and Text Label,* or *Text Only.* You can see about seven buttons on the toolbar at a time, if both the button and text are displayed. This number varies depending on the length of text and language used in the application. Grey vertical separators appear between each button.

Text links are active links all the time, not just on the roll over state. Buttons are clickable as well as any space between the button and the text. Any remaining buttons can be accessed by using the << or >> button on the left and right side of the buttons. Only secondary buttons are scrollable; primary buttons always appear. When you scroll to the right, the last button to the right becomes the first button on the next scroll set. The same is true when you scroll to the left.

Width (in pixels)

Enter the width of the toolbar in pixels. The default toolbar width is set to 745 pixels.

Clone To

Enter the ID of the new toolbar that the system clones from the current toolbar when a user clicks the clone button on the toolbar of this page.

Toolbar Personalizations

Allow Toolbar Personalization

Select to allow toolbar personalization.

Personalizations

Displays the number of user personalizations that the toolbar currently has.

This information helps administrators to evaluate the usability of the current toolbar settings and to determine the impact that updating a toolbar has on users.

Reset Toolbar Personalizations

Click to delete any toolbar personalizations that users performed.

When changes to the toolbar functionality occur, administrators can use this button to refresh users' toolbar settings.

Toolbar Summary Area Layout

Summary Layout	Select *Column* or *Row.* The summary information area will be displayed under the button bar only after a customer or contact has been selected. Depending on the application, the summary area may contain other information besides customer information. The information in the content area is displayed in a two-column format, with the number of fields being configurable.
# of Columns (number of columns)	You can select a one or two column display if you select columns for the summary layout. The recommended number of columns is *2.*
Width Type	Define the width of the columns using either a pixel or percentage amount.
Column 1 Width and **Column 2 Width**	Enter the width of the item display area in pixels or as a percentage of the total toolbar width. If pixel is used, be sure that the sum of width of the columns does not equal or exceed the toolbar width value (some border and spacing values make the total width less than the toolbar width specified). If percentage is used, be sure that the width of all columns does not exceed 100%.

Toolbar Control Properties

Select to have the toolbar footer, PeopleTools buttons, and PeopleTools links displayed. It is suggested that you disable the PeopleTools buttons and links from being displayed because it may cause confusion to users if the button used for the same function appears twice on a page. When using a new toolbar, it is recommended that you disable the PeopleTools generated folder tabs from the component property settings.

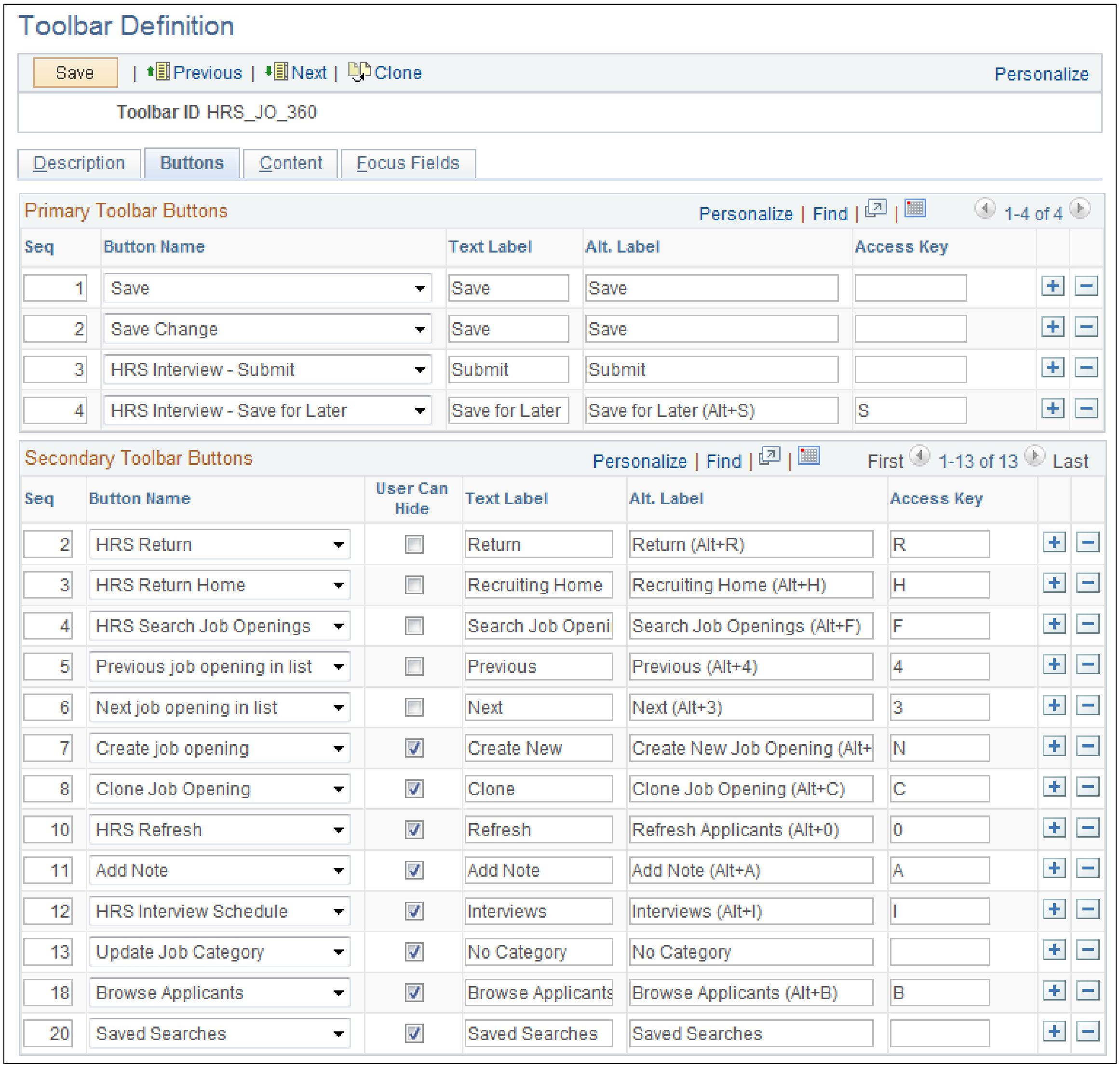
Toolbar Definition - Button Page

Use the Toolbar Definition - Button page (EOTL_TOOLBAR_BTNS) to configure toolbar buttons.

Enterprise Components, Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Buttons

Image: Toolbar Button Definition - Buttons page

This example illustrates the fields and controls on the Toolbar Button Definition - Buttons page. You can find definitions for the fields and controls later on this page.



Seq (sequence)

Enter sequence numbers to determine the order of the toolbar buttons.

Button Name

Select the button to place on the toolbar. Buttons that perform custom actions cannot necessarily be shared between components because these actions can be component-specific.

Use the separator image (a vertical line) as needed to group buttons.

User Can Hide

Select to allow users to show or hide the button from the toolbar on the Personalize Toolbar page.

You may not want to give users the ability to manipulate the visibility of some basic yet important toolbar functions, such as Save or Add. In this case, clear the check box of these buttons. These buttons become required buttons that users cannot manipulate on the Personalize Toolbar page. They always show up in the toolbar.

Text Label

Specify the text that is displayed on the button (for primary toolbar buttons) or next to the button (for secondary toolbar buttons) if the toolbar is configured to show both button icon and text.

Alt. Label (alternate label)

Enter the text that users can see if they put the mouse over the button.

Access Key

If you enter an access key, the keyboard shortcut Alt + *access key* brings the system focus to the associated button.

You must terminate the access key with the enter key to execute the toolbar button function associated with the hotkey. Access key is disabled in toolbar footers.

Toolbar Definition - Content Page

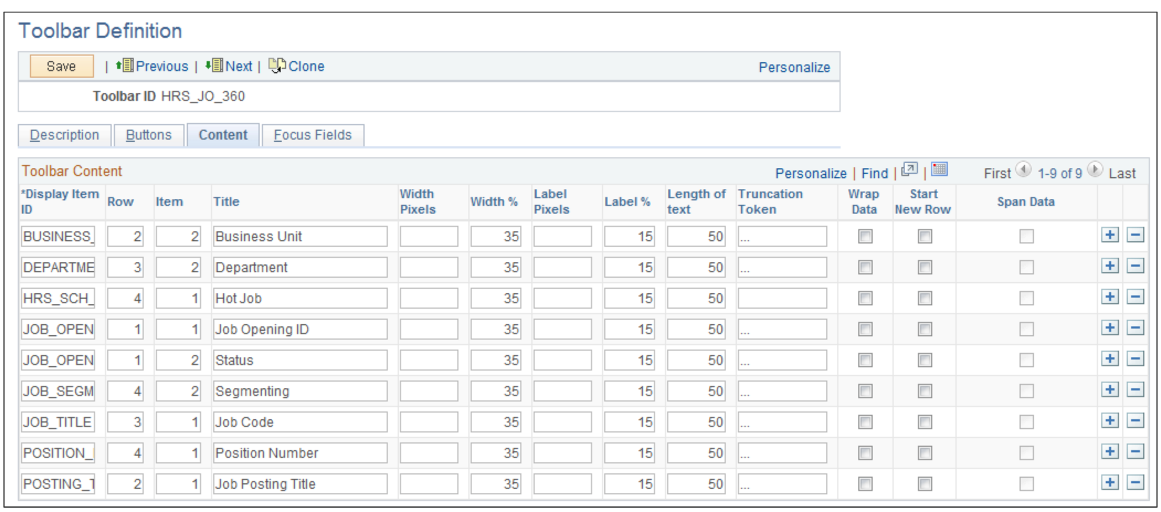
Use the Toolbar Definition - Content page (EOTL_TOOLBAR_DISP) to configure component-specific toolbar content.

Navigation

Enterprise Components Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Content

Image: Toolbar Definition - Content page

This example illustrates the fields and controls on the Toolbar Definition - Content page. You can find definitions for the fields and controls later on this page.



*Display Item ID	Row	Item	Title	Width Pixels	Width %	Label Pixels	Label %	Length of text	Truncation Token	Wrap Data	Start New Row	Span Data
BUSINESS_	2	2	Business Unit		35		15	50	...			
DEPARTME	3	2	Department		35		15	50	...			
HRS_SCH_	4	1	Hot Job		35		15	50				
JOB_OPEN	1	1	Job Opening ID		35		15	50	...			
JOB_OPEN	1	2	Status		35		15	50	...			
JOB_SEGM	4	2	Segmenting		35		15	50	...			
JOB_TITLE	3	1	Job Code		35		15	50	...			
POSITION_	4	1	Position Number		35		15	50	...			
POSTING_1	2	1	Job Posting Title		35		15	50	...			

Display Item ID	Enter the ID of the data to appear on the toolbar. The ID and the data that it references come from an array that component PeopleCode populates.
Row	Enter the toolbar row in which the content appears. Row 1 appears under the button bar. If you define display items for additional rows, those rows appear in order under row 1.
Item	Enter the position of the item in the row. Enter *1* for the item that appears in the leftmost position in the row, *2* for the next label to the right, and so forth.
Title	Enter a label for the item.
Width Pixels, Width %, Label Pixels and **Label %**	Enter the width of the display item label and data in pixels or as a percentage of the total toolbar width. If the latter, be sure that the total percentage for all fields on the same row does not exceed 100%. It is recommended that you indicate widths in percentage because the toolbar layout is adjusted automatically. The general guideline is 20% for the display item label, and 30% for the display item data. If pixel is used (for advanced HTML usage), the total width of all display columns on the same row should not equal or exceed the width of the toolbar as defined.
Length of text	Enter the maximum number of characters of data (not label text) that can appear in this row. The text is truncated with the specified truncation token if it exceeds the length of text value, and is wrapped if it is too long for the width that you specify.
Truncation Token	Enter the characters that indicate truncated data. This appears when the data is longer than the value that you entered in the Length of text field.
Wrap Data	Select to wrap data if its length exceeds what is specified for the text length.
Start New Row	Select if the display item should start on the next new row.
Span Data	Select to let the display item span across horizontally to use the other column to display its long item value. This option is enabled only when Start New Row field is selected.

Toolbar Definition - Focus Fields Page

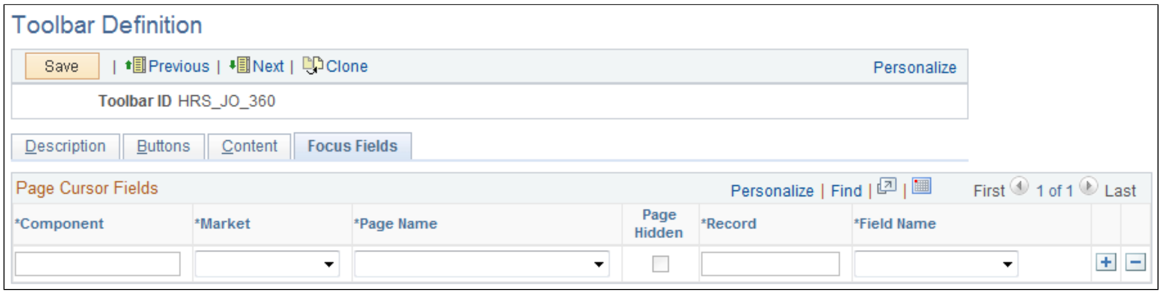
Use the Toolbar Definition - Focus Fields page (EOTL_TOOLBAR_FFLD) to specify the default cursor position for pages.

Navigation

Enterprise Components, Component Configurations, Toolbar, Toolbar Definition, Toolbar Definition - Focus Fields

Image: Toolbar Definition - Focus Fields page

This example illustrates the fields and controls on the Toolbar Focus Fields Definition page. You can find definitions for the fields and controls later on this page.



For pages that uses the toolbar, you can specify the field in which the cursor always appears when the page is rendered. The toolbar doesn't set the cursor position for any page that either doesn't have a focus field defined in the toolbar definition or its focus field doesn't exist on the page, for example, the button is hidden, or is removed from the page after the toolbar definition.

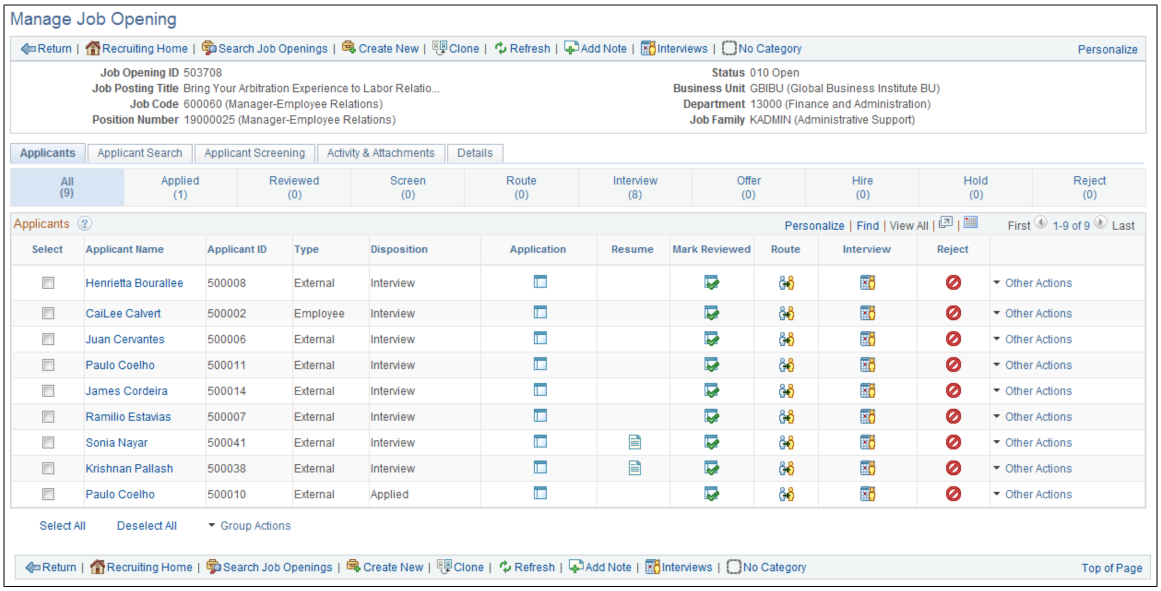
Component, Market, and **Page Name**	Enter the component and market of the page in which the selected toolbar definition is referenced. The component you enter determines the drop-down values for page names.
Record and **Field Name**	Enter the record where the focus field resides and the focus field itself. The record you enter determines the drop-down values for field names. Multiple fields on the same page can be defined. This is useful when you want to set the cursor on a different field when the user enters the page in a different type of transaction mode. The toolbar always puts the cursor to the first editable, available field on the page.

Viewing the Toolbar at Runtime

Access any PeopleSoft page that uses the toolbar.

Image: Toolbar used on the Manage Job Opening page (HRS_JO_360)

This example illustrates the toolbar used on the Manage Job Opening page (HRS_JO_360).



Confirm that the toolbar buttons, content, and other controls work and are displayed as intended.

At runtime, you can find out which toolbar that a page is using (for debugging purposes). To do so, right click on the toolbar area of the page to view the HTML source code, and look for keywords *TOOLBAR ID* If the page uses the toolbar, a comment appears in the source code that indicate the actual toolbar being used, for example:

```
<!-- TOOLBAR ID: [HRS_JO_360] -->
```

Personalizing Toolbars

End users can personalize which buttons appear on the toolbar. Personalized configurations are associated with user IDs and do not affect the base toolbar definition. As an administrator, you can decide (during setup) whether users can personalize toolbars, and specify which buttons in the toolbar can be hidden by users in the personalization process.

This section discusses how to set toolbar preferences.

Page Used to Personalize Toolbars

Page Name	***Definition Name***	***Usage***
Personalize Toolbar Page	EOTL_TB_USER_PRSN	Set toolbar preferences.

Personalize Toolbar Page

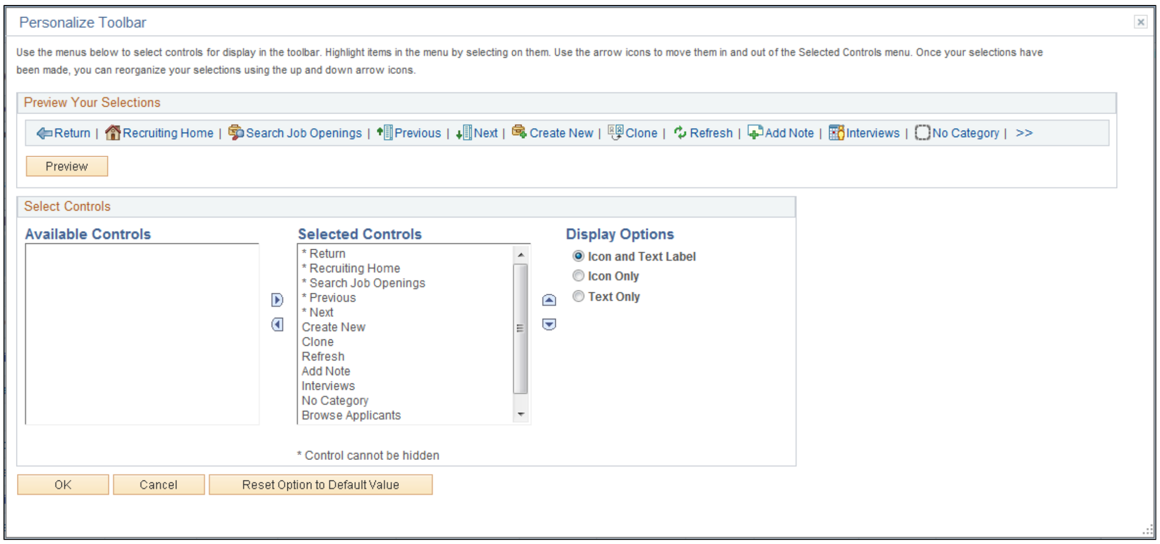
Use the Personalize Toolbar page (EOTL_TB_USER_PRSN) to set toolbar preferences.

Navigation

Click the toolbar's Personalize link on the page whose toolbar you want to personalize.

Image: Personalize Toolbar age

This example illustrates the fields and controls on the Personalize Toolbar age. You can find definitions for the fields and controls later on this page.



Note: If the Personalize link is not present on a toolbar, then that toolbar is not user-configurable.

Select Controls

Users can move buttons from Available Controls to Selected Controls for them to be displayed on the toolbar. In addition, the user can choose to view icons or text or both. Buttons with an asterisk are not subject to user personalization. They always show up in the toolbar.

After making some changes, click the Preview button to view the toolbar updated in real time.

Upon return from the page, the Personalized setting is automatically saved.

Chapter 8

Working with the PeopleSoft Fluid User Interface

Understanding the PeopleSoft Fluid User Interface

This overview discusses the PeopleSoft Fluid User Interface.

The PeopleSoft Fluid User Interface

Oracle's PeopleSoft has two user interfaces

- PeopleSoft Classic User Interface, which was designed to be used on a laptop and desktop. This interface was previously know as PIA (PeopleSoft Internet Architecture).
- PeopleSoft Fluid User Interface, which was designed to be used on mobile devices, but can also be used on a laptop and desktop. Oracle delivers fluid pages for a variety of PeopleSoft self-service transactions across its various modules.

PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

- *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.
- *PeopleTools: Fluid User Interface Developer's Guide*

Fluid Transactions and Conditional Navigation

If a user on a mobile device navigates to a transaction for which a fluid page exists, the fluid page appears regardless of whether the user navigated using a home page tile or the classic menu structure. For example, when users on mobile devices use the classic menu to view their paychecks, the system automatically displays the Pay fluid page rather than the View Self-Service Paycheck classic page. The logic that displays a fluid page when a user navigates from the classic menu is known as conditional navigation. Conditional navigation is also the mechanism that displays the fluid home when users initially access the system on a mobile device.

Note: The user needs to have the appropriate Fluid role to be transferred to the Fluid page. If a user on a desktop or laptop accesses a fluid home page and taps a tile, conditional navigation logic does not redirect the users to a classic page.

Understanding Banners in PeopleSoft Fluid User Interface

A standard banner appears at the top of every fluid page. The banner includes the page title and some standard buttons. They appear differently for phone and tablet devices.

PeopleSoft Fluid User Interface Banner for Tablets

Image: Example of the page banner for the tablet

This example illustrates the fluid page banner for the tablet.

The banner on the tablet will display the following for all pages:

Back Button	The Back button with text indicates the last page the user was on.
Page Title	This displays the name of the current Fluid User page.
Home Icon	Takes you to your home page.
Search Icon	Enables you to search.
Alerts Icon	Tap to view actions and alerts in a notifications window.
Actions Icon	Tap to see a list of available actions for the current window. Access pages to personalize home page content or sign out.
NavBar Icon	Tap to expand the NavBar window, where you can select window content from options, such as Recent Places, My Favorites, Navigator, My Preferences, and Fluid Home. Tap again to collapse the NavBar window.

PeopleSoft Fluid User Interface Banner for Smartphones

Image: Example of the page banner for the smartphone

This example illustrates the fluid page banner for the smartphone.

The typical banner on a phone displays the following:

Back Button	This is a icon with only an image and takes you to the last page that you were on.
Page Title	This displays the name of the current Fluid User page.
Alerts Icon	Tap to view actions and alerts in a notifications window.
Menu Icon	Tap to access Pending Approvals, History and other Fluid User Interface menu items like Home, About, Sign Out.

Using the PeopleSoft Fluid User Interface to Work with Approvals

This topic discusses the various mobile approval options in the PeopleSoft Fluid User Interface. The Mobile approval options are displayed as per the configurations set in the Mobile Approval Options component.

Note: To enable a user to receive PeopleSoft Fluid User Interface for approvals, the user should be a member of the Approvals Fluid role. See Mobile Approval Installation document on My Oracle Support (support.oracle.com), note number 1990593.1.

Understanding PeopleSoft Fluid User Interface to Work with Approvals

PeopleSoft Fluid User Interface is designed for users to access PeopleSoft pages using multiple form factors:

- SFF: Small Form Factor, such as smart phones.
- MFF: Medium Form Factor, such as tablets.
- LFF: Large Form Factor, such as some tablets, laptops, and desktops.

Note: PeopleSoft Mobile Approvals uses the Approval Workflow Framework as configured for the specific application. Make sure that the Approval Workflow Framework has been enabled and configured properly for each application before implementing Mobile Approvals for the transactions.

Pages Used to Configure the Mobile Approval Options

Page Name	***Definition Name***	***Usage***
Mobile Approval Options - General Settings Page	HMAP_MBL_TYPE_SET	Configure the general settings for Mobile Approvals.
Mobile Approval Options - Transactions Page	HMAP_MBL_TYPE_SET2	Configure the transaction settings for Mobile Approvals.

Mobile Approval Options - General Settings Page

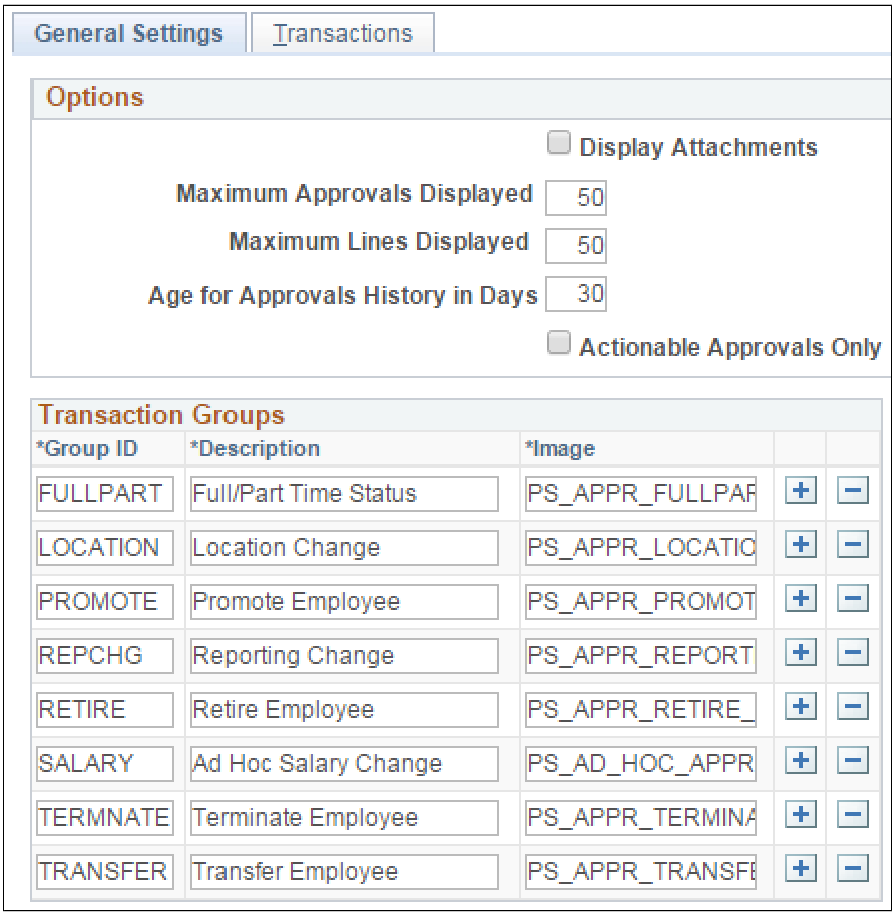
Use the Mobile Approval Options page (HMAP_MBL_TYPE_SET) to set the general options for mobile approvals.

Navigation

Enterprise Components, Approvals, Approvals, Mobile Approval Options

Image: Mobile Approval Options - General Settings page

This example illustrates the fields and controls on the Mobile Approval Options - General Settings page.



Display Attachments

Select to allow, at the enterprise level, approvers to view attachments. If you select this option, you must also select a process scheduler server for the Process Server field with proper distribution node setup.

Note: Attachments are not available for all transactions.

Maximum Approvals Displayed

The maximum number of approvals to be displayed in Mobile Approvals for each transaction type that is activated in the Transactions tab.

Maximum Lines Displayed

The maximum number of approval lines to be displayed for each transaction that contains approvals at the line level.

Age of Approvals History in Days

The number of days prior to today’s date to include when displaying approval history.

Actionable Approvals Only	Select to view only those transactions that require your approval action.

Note: These three approval options (Maximum Approvals Displayed, Maximum Lines Displayed, and Age of Approvals History in Days) can be synchronised between multiple pillars. For example, If you have configured multiple systems, such as HCM and FSCM for mobile approvals, changes made to these options from any one system are propogated to other systems when the Mobile Approval Options page is saved. To do this, enable the service operation HMAP_GEN_OPTIONS in PeopleTools, Integration Broker, Integration Setup, Service Operations.

Group ID	Unique ID for the Transaction group.
Description	Name for the group which is displayed in Mobile Approvals
Image	The image associated with the group to display in Mobile Approvals.

Mobile Approval Options - Transactions Page

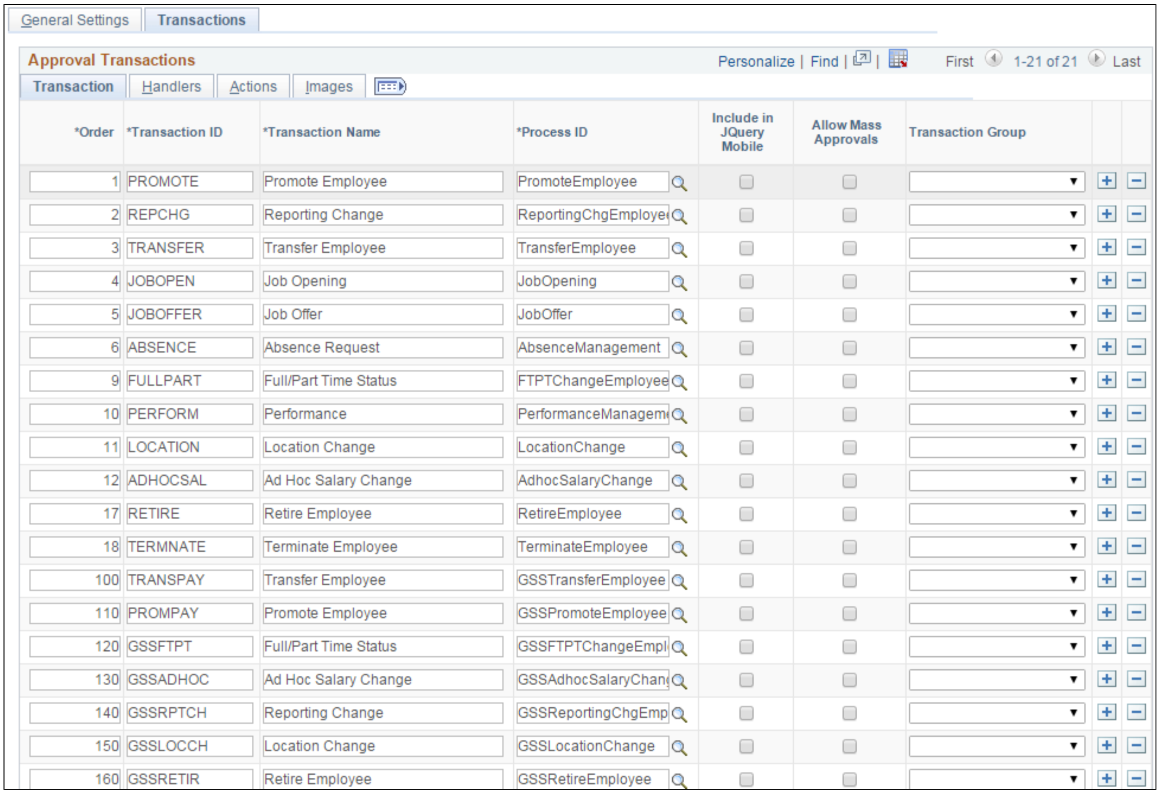
Use the Mobile Approval Options — Transactions page (HMAP_MBL_TYPE_SET2) to set the transaction options for mobile approvals.

Navigation

Enterprise Components, Approvals, Approvals, Mobile Approval Options, Transactions

Image: Mobile Approval Options - Transactions page: Transaction tab

This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Transaction tab.



General Settings | Transactions

Approval Transactions — Personalize | Find | First 1-21 of 21 Last

Transaction | Handlers | Actions | Images

*Order	*Transaction ID	*Transaction Name	*Process ID	Include in JQuery Mobile	Allow Mass Approvals	Transaction Group
1	PROMOTE	Promote Employee	PromoteEmployee			
2	REPCHG	Reporting Change	ReportingChgEmploye			
3	TRANSFER	Transfer Employee	TransferEmployee			
4	JOBOPEN	Job Opening	JobOpening			
5	JOBOFFER	Job Offer	JobOffer			
6	ABSENCE	Absence Request	AbsenceManagement			
9	FULLPART	Full/Part Time Status	FTPTChangeEmployee			
10	PERFORM	Performance	PerformanceManagem			
11	LOCATION	Location Change	LocationChange			
12	ADHOCSAL	Ad Hoc Salary Change	AdhocSalaryChange			
17	RETIRE	Retire Employee	RetireEmployee			
18	TERMNATE	Terminate Employee	TerminateEmployee			
100	TRANSPAY	Transfer Employee	GSSTransferEmployee			
110	PROMPAY	Promote Employee	GSSPromoteEmployee			
120	GSSFTPT	Full/Part Time Status	GSSFTPTChangeEmpl			
130	GSSADHOC	Ad Hoc Salary Change	GSSAdhocSalaryChan			
140	GSSRPTCH	Reporting Change	GSSReportingChgEmp			
150	GSSLOCCH	Location Change	GSSLocationChange			
160	GSSRETIR	Retire Employee	GSSRetireEmployee			

Order — Enter a display order for each transaction ID.

Transaction ID — Select the Transaction ID(s) to enable for the Mobile Approvals application.

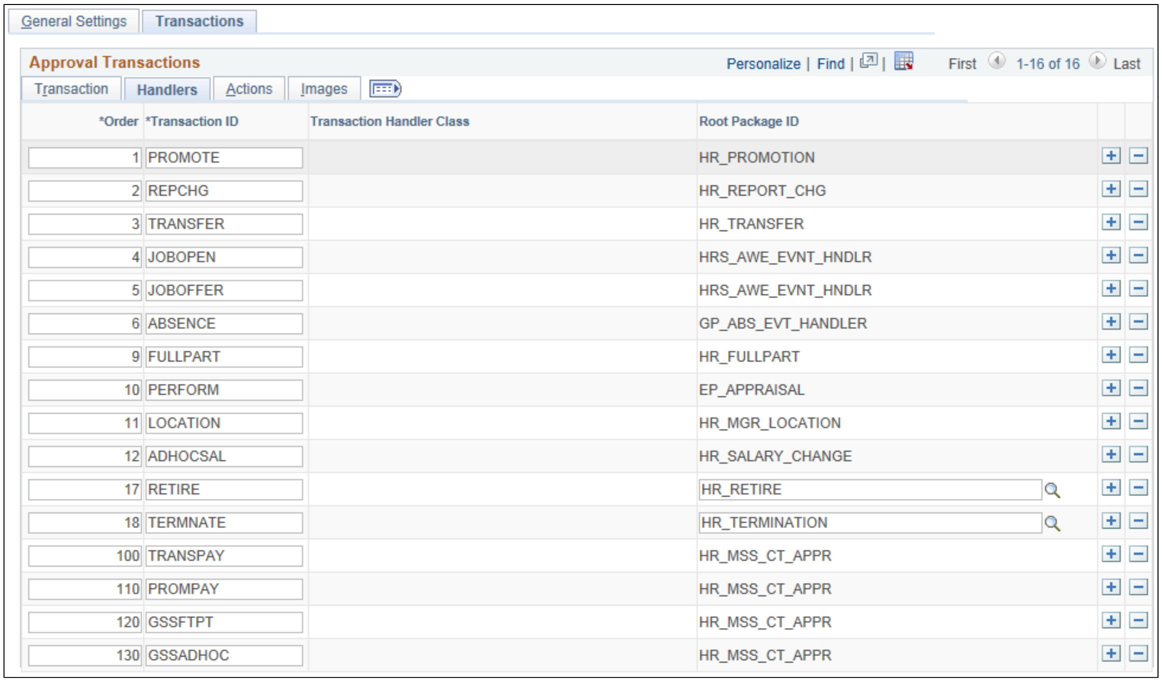
Allow Mass Approvals — Indicates whether or not users can select multiple transactions in the list when viewing by type and perform approval action against all of them. Users can allow mass approvals for all or only for some of the transactions in the same transaction group.

Transaction Group

This is an optional field. It allows user to add multiple transactions into a group (as defined on General Settings tab) to display them together in the transaction list.

Image: Mobile Approval Options - Transactions page: Handlers tab

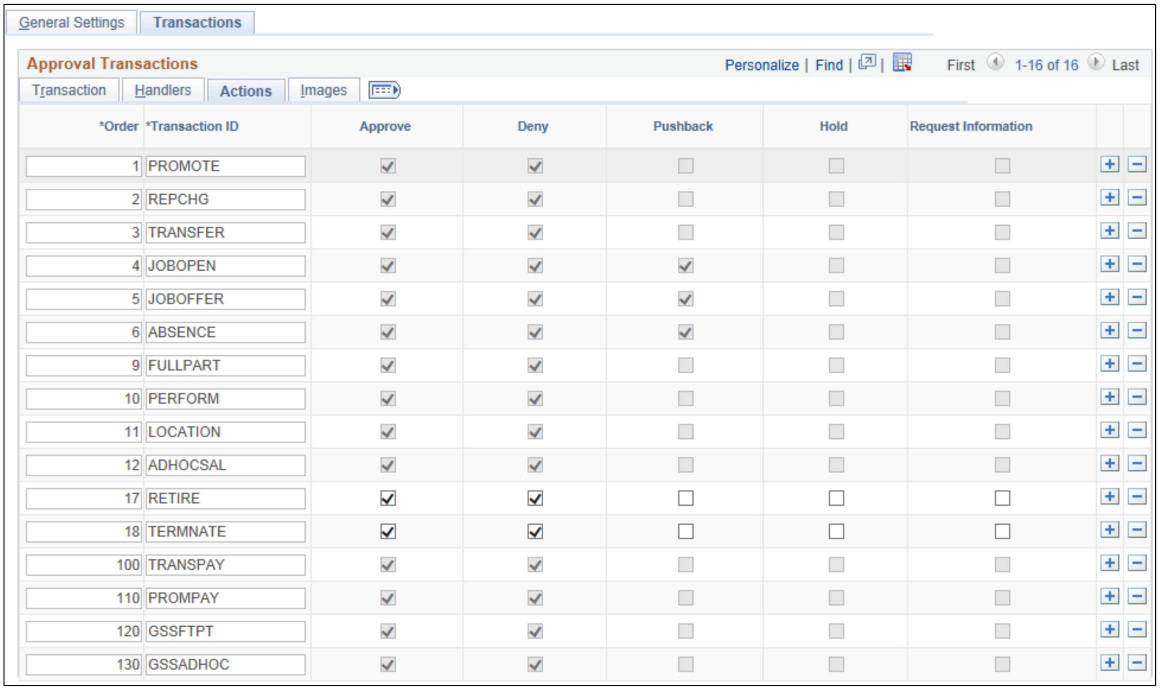
This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Handlers tab.



Root Package ID The application package that holds the DataHandler, DetailDocuement and SubPage classes for the transaction.

Image: Mobile Approval Options - Transactions page: Actions tab

This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Actions tab.

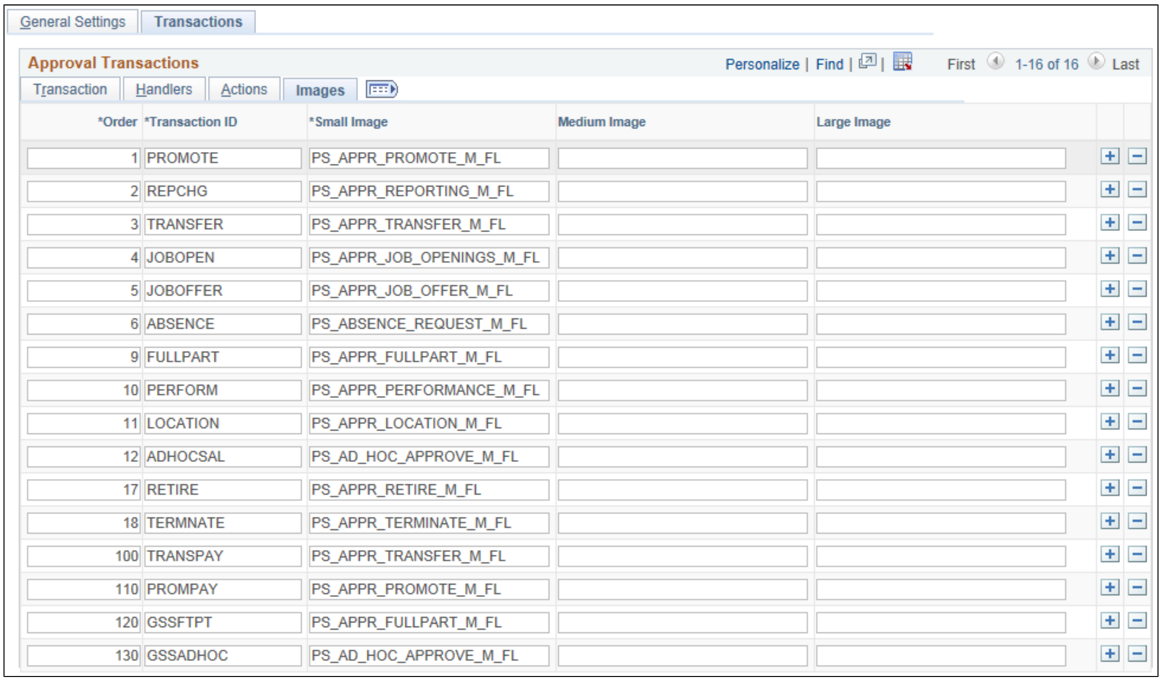


Select the approval Actions that are visible as push buttons in mobile approvals in PeopleSoft Fluid User Interface.

Note: The approval transaction handler must support the transaction.

Image: Mobile Approval Options - Transactions page: Images tab

This example illustrates the fields and controls on the Mobile Approval Options - Transactions page: Images tab.



Small Image field is required by Approvals in PeopleSoft Fluid User Interface. This is the image displayed in the transaction list for the associated transaction.

Pages Used for PeopleSoft Fluid User Interface Mobile Approvlas

Page Name	***Usage***
Approvals Tile	Review pending and historical approval requests that are associated with the logged-in manager.
Pending Approvals Page	Lists pending approval requests requiring the attention of the logged-in manager.
Pending Approvals - <Transaction Details> Page	Review the approval request details, enter a comment, and approve, deny, or push back the request.
Approvals History Page	Lists approvals you have worked on in the past.

Approvals Tile

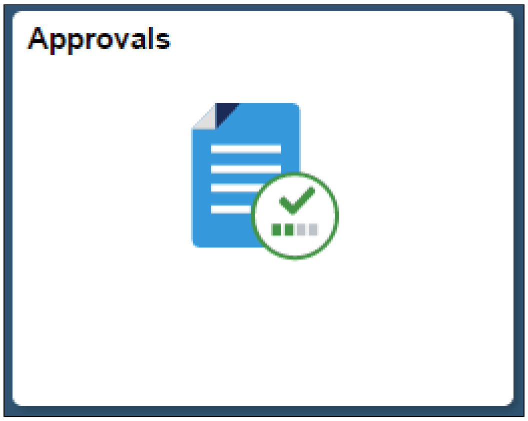
Use the Approvals tile (HMAP_APPR_TILE_FL) to review pending and historical approval requests that are associated with the logged-in manager.

Navigation

Select Fluid Home under the main menu. On the page that appears, select Manager Self Service. The Approvals tile is available on the Manager Self Service landing page. As a manager, you can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

Image: Approvals Tile

This is an example of the Approvals tile that appears on the Manager Self-Service home page.



The tile shows the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

Pending Approvals Page

Tap the Approvals tile to access the Pending Approvals page without using traditional menu navigation to review and approve different transactions.

Navigation

Tap the Approvals tile on the Manager Self Service home page.

Image: (Tablet) Pending Approvals page

This example illustrates the fields and controls on the Pending Approvals page for the tablet.

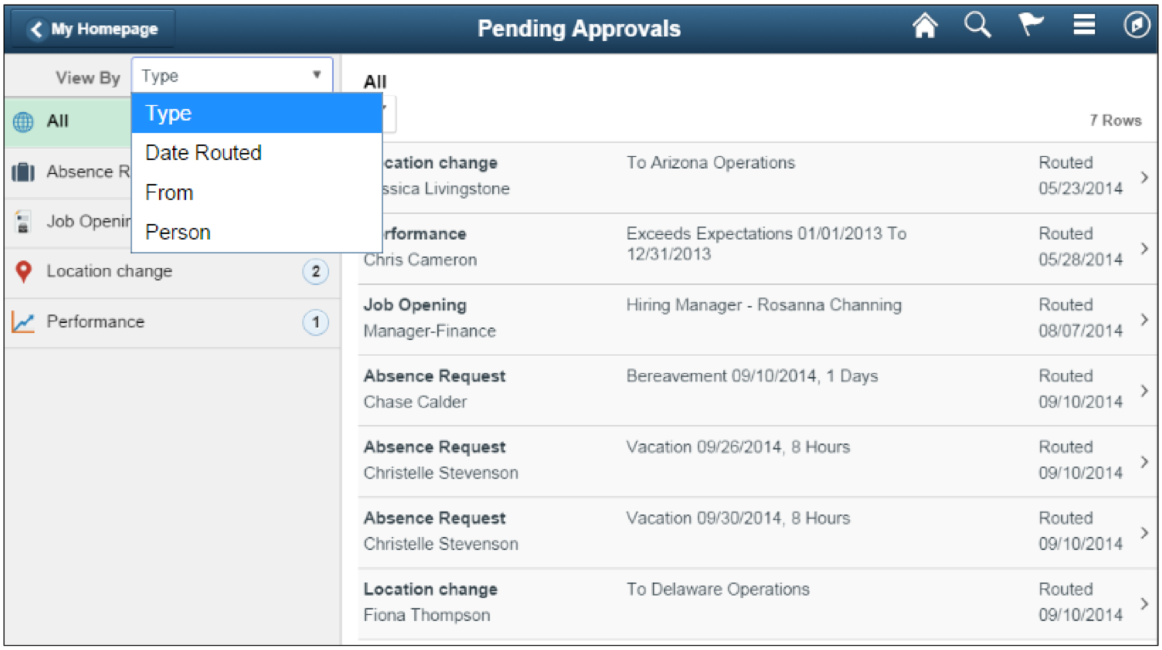
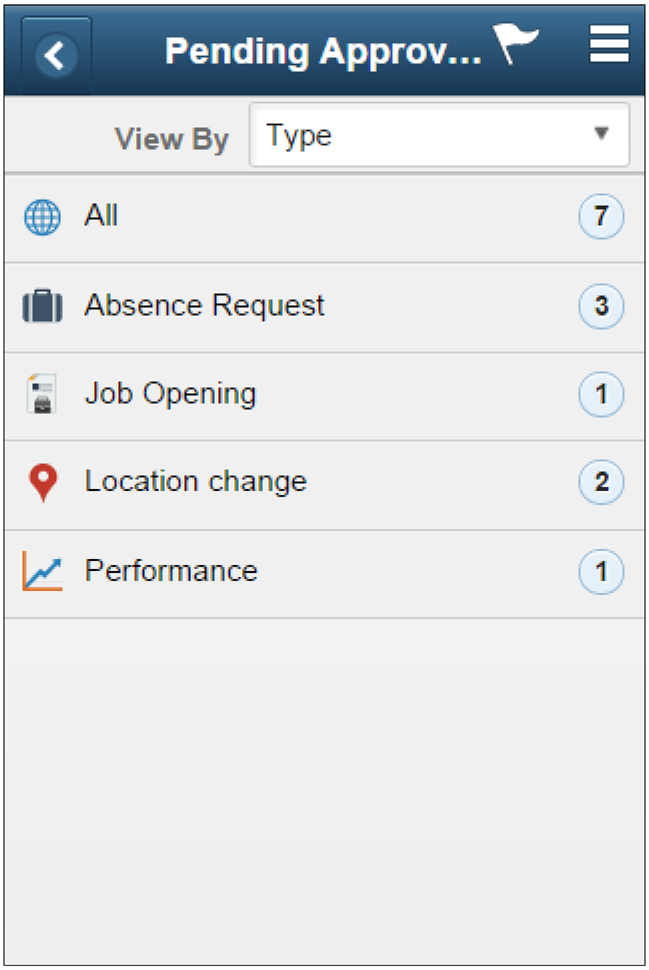


Image: (Smartphone) List of transaction categories on the Pending Approvals page

This example illustrates the list of transaction categories on the Pending Approvals page for the smartphone.



Both Landscape and Portrait views are supported on a tablet. The approvals landing page has two panels in landscape mode and the left panel is locked in place and is not collapsible. The left panel defaults to the Type grouping with the All category selected and the right panel displays all pending approvals in the user's queue sorted by the date/time on which they were received with the oldest one displayed first. The right panel title displays the name of the selected category. The number of rows are displayed at the top-right of the list and a filter button is displayed to the top-left of the list.

In Portrait mode, the left panel is hidden and only the right panel is displayed as a full page. The left panel can be invoked as an overlay. Even though the left panel is hidden, the All category of the Type grouping will be defaulted. The page in portrait mode displays all pending approvals in the approver's queue.

Viewing Pending Approvals Summary

On a Phone, when a user launches Approvals, the user is presented with list of pending approvals grouped by transaction type. The page title will be Pending Approvals. The user can view approvals that are in a Pending status for them.

Pending Approvals can be categorized in 5 views:

1. Type (default view)

2. Date Received
3. Priority (not available in HCM)
4. Person (not available in FSCM)
5. From

The user can switch between the different groupings by selecting a grouping from the grouping drop-down. Priority and Person grouping are not applicable to all transactions. If none of the transactions in an approver's pending approvals queue has a priority or person associated, the grouping will not be displayed in the drop-down.

When the user taps on any category on the left panel, the right panel is refreshed with pending approvals for the selected category. The panel title on the right panel reflects the selected category. A user can filter the list of approvals by tapping on the grid filter icon. The Filter window gives the following filter options:

Type	Drop-down displaying transaction types that the user has pending approvals for.
Priority	Drop-down displaying priorities that the user has pending approvals for. One of the values will also be "No Priority Associated". Priority is not available in HCM.
Received	Drop-down displaying the date groupings that the user has pending approvals for – applicable values from This Week, Last Week, 2 Weeks Ago, Older.
From	Drop-down displaying the last sender for each approval. The last sender could be either the last approver in the approval chain or the requestor of the transaction if the current approver is the first approver in the chain.
Person	Drop-down displaying a list of persons that the user has pending approvals for. One of the values may be "No Person Associated" if there are approvals that are not related to a person (example, Job Opening).

Each Pending Approvals row on the right panel will display the information about the approval request in 3 columns.

Column 1	This column displays the Transaction Name and the Object Name for this transaction (Person, Position etc.)
Column 2	This column displays the Transaction Summary and Priority (if applicable).
Column 3	This column displays the date on with the approval was received.

Pending Approvals - <Transaction Details> Page

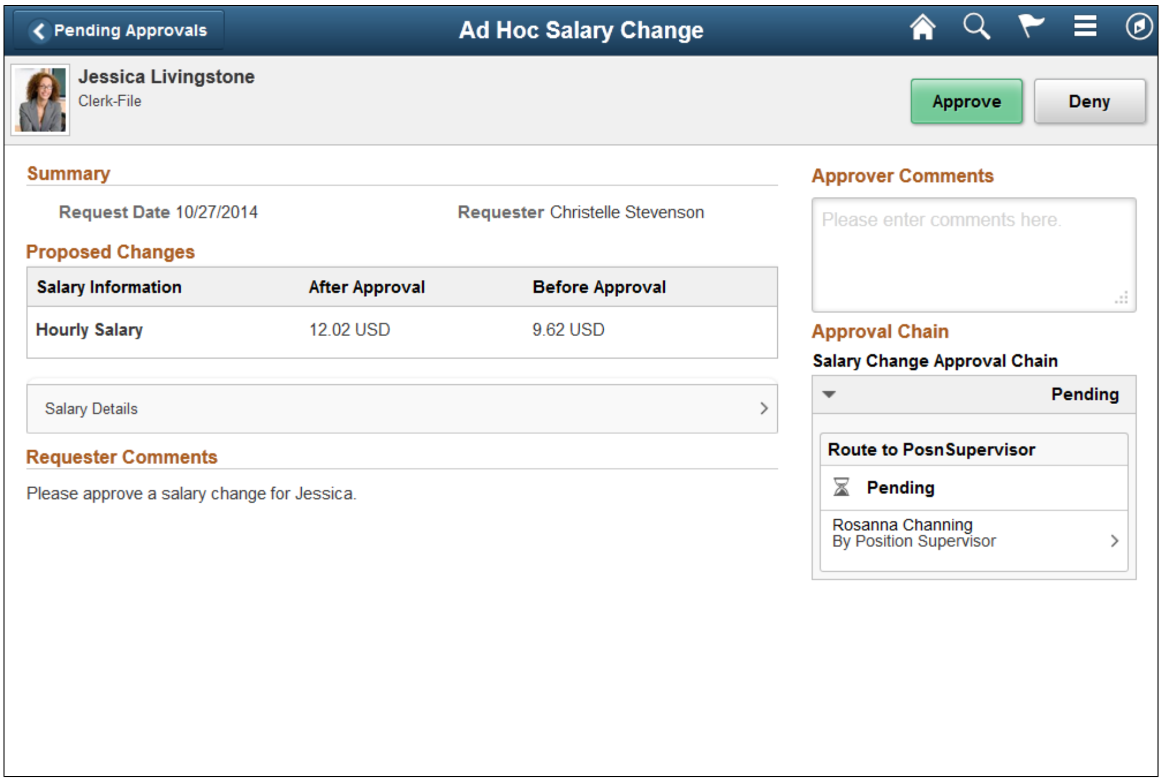
Use the Pending Approval - <Transaction Details> page to review the approval request details, make a comment, and approve, deny or pushback the request.

Navigation

Tap an individual approval request transaction from the Pending Approvals page.

Image: Approval Details - <Transaction Details> page

This example illustrates the fields and controls on the Pending Approvals - <Transaction Details> page.



Actions for Pending Approvals

In PeopleSoft Fluid User Interface, you can take five actions on any approvals based on how the transaction has been configured.

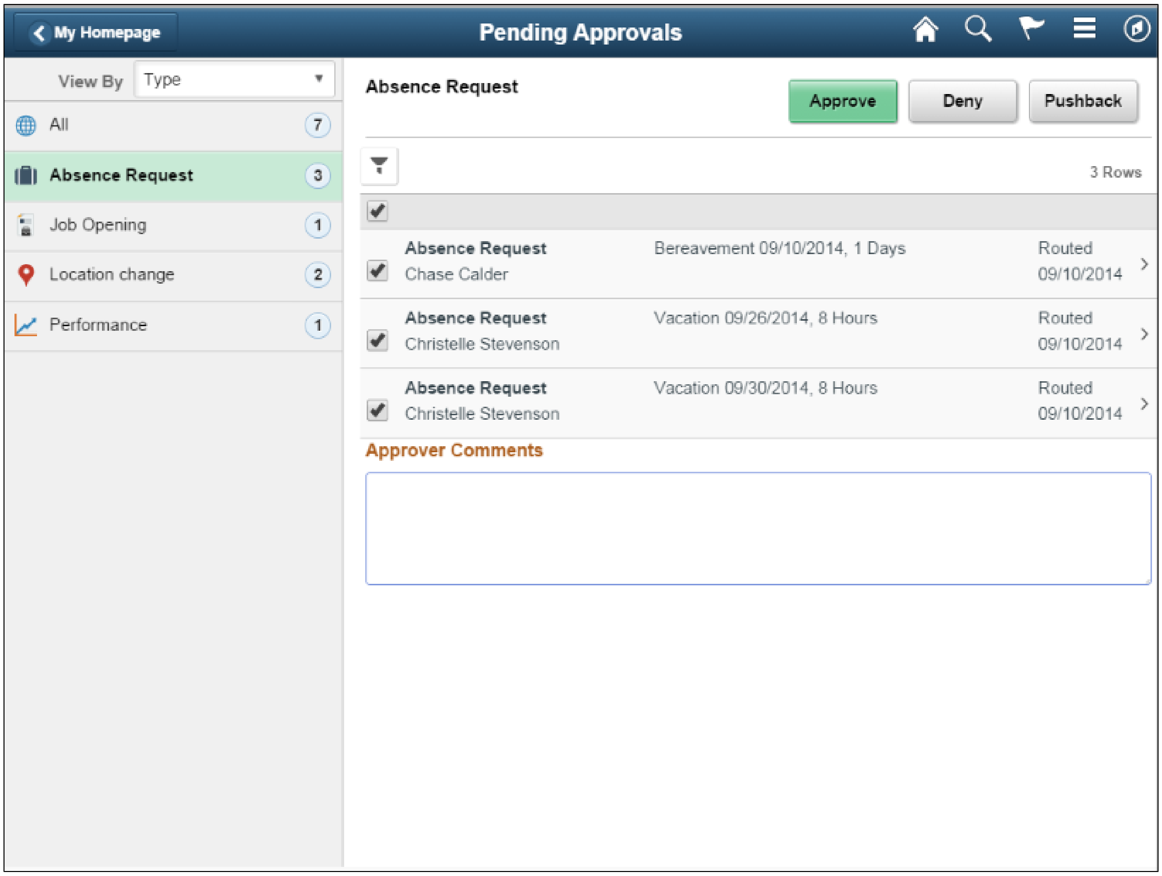
1. Approve
2. Deny
3. Pushback
4. Hold
5. Request Information

The applicable action buttons are displayed on the sub-banner to the right.

Mass Action for Pending Approvals

Image: Mass action on the Pending Approvals page

This example illustrates the fields and controls on the Pending Approvals page when Mass Approvals is enabled for a transaction category.



Mass approval is available for the following approvals:

- When the user has Type selected in the View By drop-down.
- When the particular transaction has been configured for mass approval.
- When an individual transaction or transaction group has been selected.

When a transaction type that is enabled for mass approvals is selected in the left panel, the approval requests in the right panel is displayed with check boxes in each row. Applicable action buttons are displayed on the top-right of the grid. The approval requests are deselected by default and the approval action buttons are disabled. The action buttons will be enabled only if at least one row is selected. A Select All check box is available above the grid to select all approvals in the grid. The approver can enter comments before taking an approval action. The comments will be applied to all selected requests.

Approvals History Page

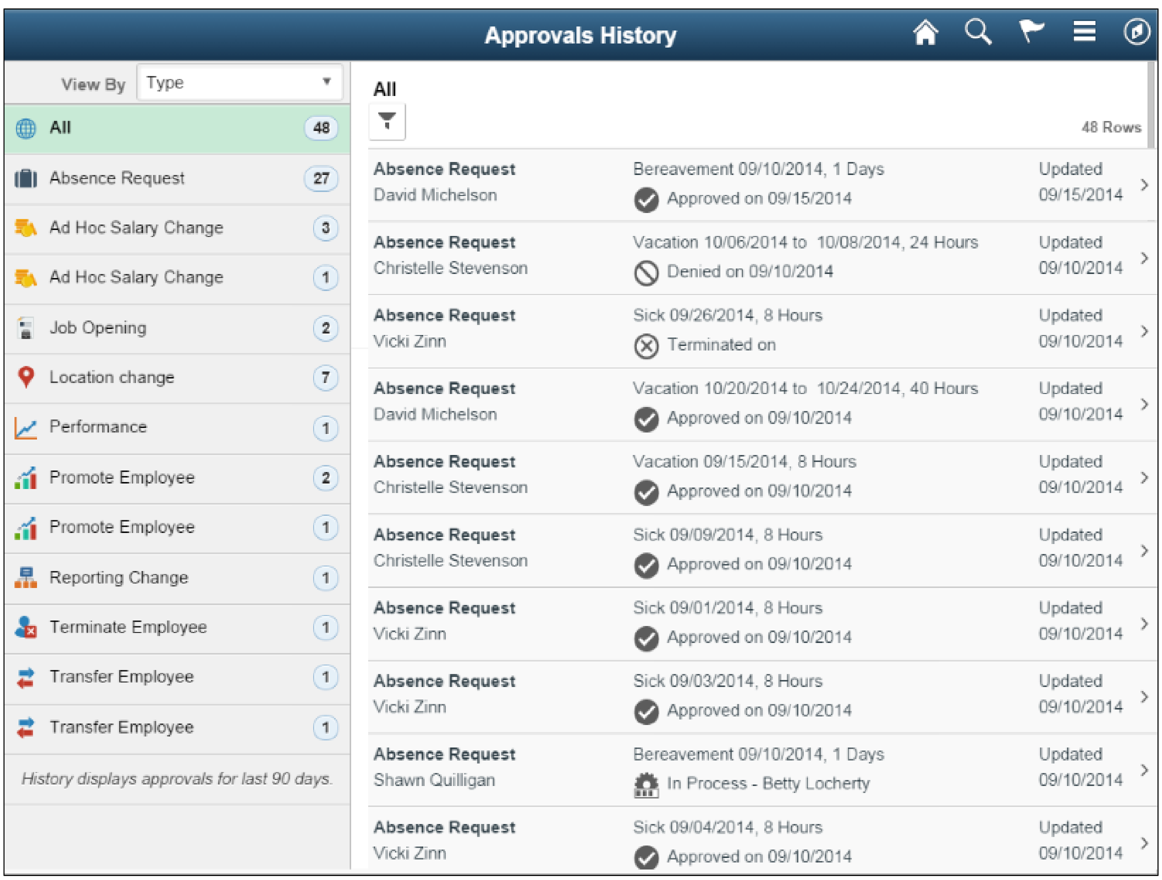
A user can view approvals requests that they already worked on by going to Approvals History. The menu icon in the banner displays a list of options which includes Pending Approvals and Approvals History. These serve as a toggle between the Pending Approvals and Approvals History views.

Image: Approvals History Menu

Menu option to view Approvals History.

Image: Approvals History page

This example illustrates the fields and controls on the Approvals History page.



When the user switches to History, the title in the banner changes to Approvals History. Landscape and Portrait behavior will be the same as Pending Approvals. The History view is also displayed using a two-panel layout, similar to Pending Approvals. There are five views by which a user can view historical approvals.

- Type
- Status
- Priority (not available for HCM)
- Person (not available for FSCM)
- From

Priority and Person grouping are not applicable to all transactions. If none of the transactions in an approver's approval history have a priority associated, the Priority grouping will not be displayed in the dropdown. The same holds true for the Person grouping. A configuration is available to administrators to define how far back in time should the history be displayed. The left panel displays a message at the end of the last category indicating the time period for which the history is displayed, example, "History displays approvals for last 90 days." If this configuration has not been set, no such message will be displayed. For more details on the settings, see Mobile Approval Options - Transactions Page

Chapter 9

Security Automation

Understanding Security Automation

The PeopeSoft Secutity Automation tool allows users to automate the customization of pre-existing permission lists, roles and menus. It allows setting the permission list security for:

- Pages
- Component Interfaces
- Query Trees (Access Groups)
- ADS (Access Groups and general settings)
- Process Groups (Process Groups and general settings)
- Web Services

It allows adding or removing permission lists from roles, adding or removing items to, or from a menu that points to new or deprecated components. The required changes are put together by user and is stored in a table as metadata. This is then run by the Security Update Automation Engine process. There are three AE process to be run for security updates for Permission Lists, Role and Menu

Configuring Metadata for Security Automation

There are three metadata pages that users can use to set security for Permissions, Roles and Menus

Pages Used to Configure Metadata for Security Automation

Page Name	***Definition Name***	***Usage***
Manage Permissions Page	EOPM_SUPD_PERM	Set security metadata for new permissions or change the security for existing permissions
Manage Roles Page	EOPM_SUPD_ROLE	Set security metadata for new roles or change the security for existing roles.
Manage Menus Page	EOPM_SUPD_MENU	Set security metadata for new menus or change the security for existing menus.

Manage Permissions Page

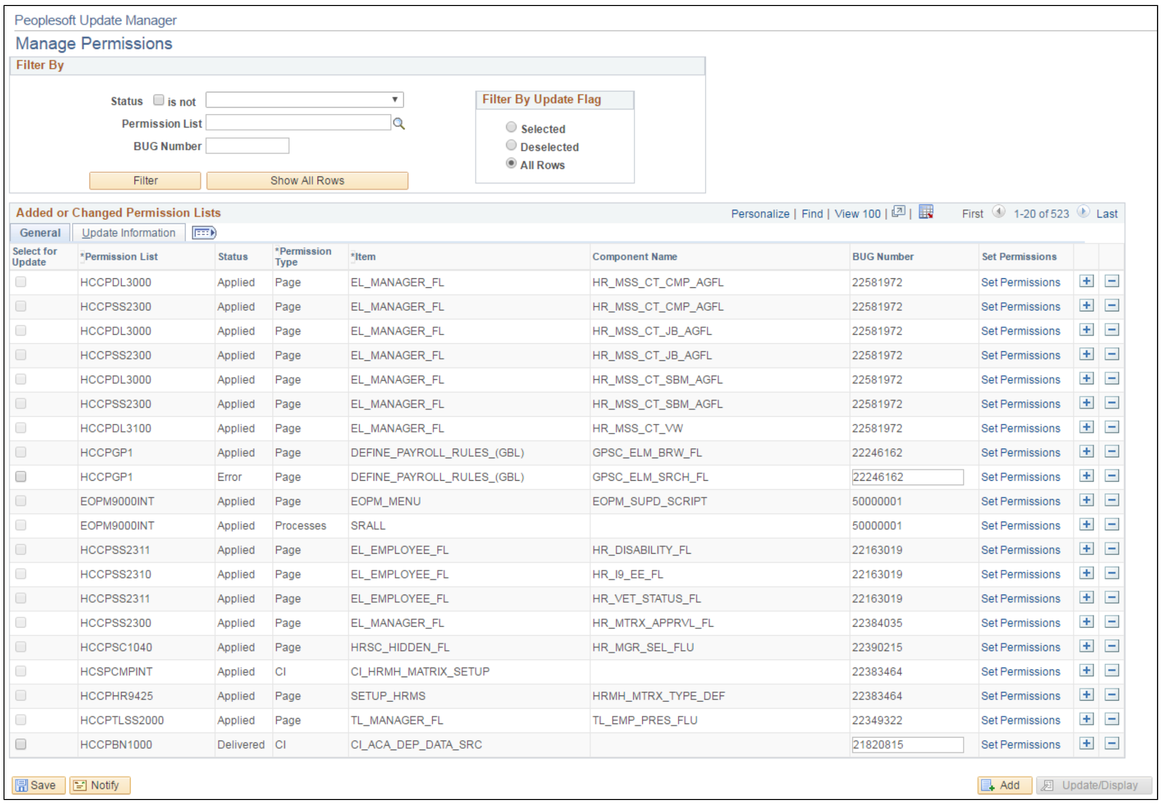
Use the Manage Permissions page (EOPM_SUPD_PERM) to set security for new permissions or to change the security for existing permissions.

Navigation

Enterprise Components, PeopleSoft Update Manager, Update Permission Lists

Image: Manage Permissions page

This example illustrates the fields and controls on the Manage Permissions page.



Users can filter on existing rows of the metadata. Filtering can be done based on:

- Status (whether = or <>)
- Permission List
- Bug Number
- Update Flag

The following are the field definitions for the permission lists:

Select for Update	Select the check box to run the AE update for the permission list.
Permission List	Enter the permission List that is used to update.
Status	New — When new data is entered.

	Changed — When an existing data is changed. Delivered — When the Permission update project is exported to the DAT file. Applied — When an AE change is successfully applied Tested — When the AE was started in Test mode Error — When the applied change is not successful
Permission Type	The user can define the type of permission they want to define metadata for. Available values are: • Page • CI (Component Interfaces) • QRY (Query Trees) • ADS (Access Group Permission) • SES (Search Groups) • PRCS (Process Groups and Process Profile Permissions) • Web (Web services)
Menu/CI/Tree/Search	The name for the corresponding Menu/CI/Query Tree/SES permission type.
Component Name	This is available if the Permission Type is Page.
Bug Number	This is populated by the developer delivering the fix but it is not mandatory.
Set Permissions	Depending on the Permission type, different modal windows are opened to set permission
+/-	Add or remove rows from the grid

Manage Roles Page

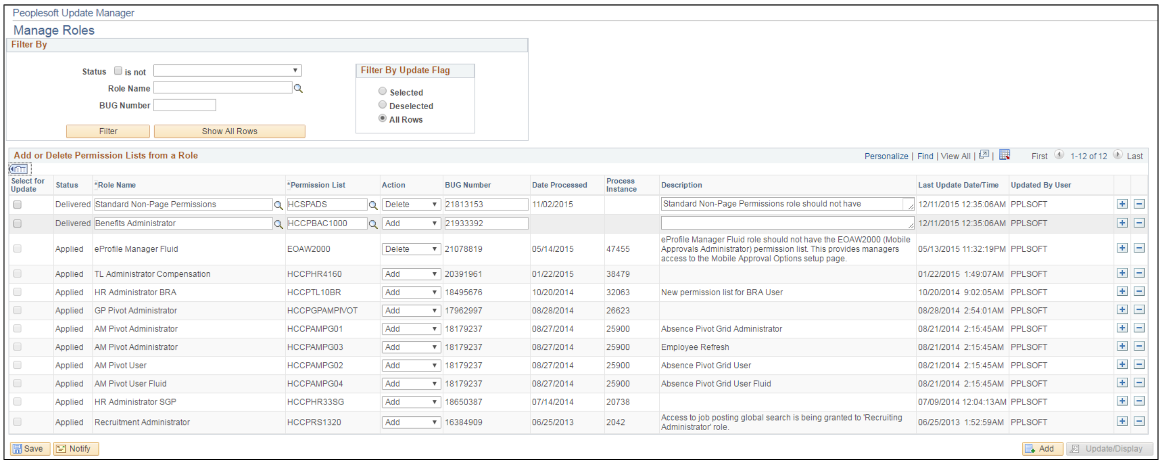
Use the Manage Roles page (EOPM_SUPD_ROLE) to set security for new permissions or to change the security for existing permissions.

Navigation

Enterprise Components, PeopleSoft Update Manager, Update Roles

Image: Manage Roles page

This example illustrates the fields and controls on the Manage Permissions page.



Select for Update	Status	*Role Name	*Permission List	Action	BUG Number	Date Processed	Process Instance	Description	Last Update Date/Time	Updated By User
	Delivered	Standard Non-Page Permissions	HCSPADS	Delete	21813153	11/02/2015		Standard Non-Page Permissions role should not have	12/11/2015 12:35:06AM	PPLSOFT
	Delivered	Benefits Administrator	HCCPBAC1000	Add	21933392				12/11/2015 12:35:06AM	PPLSOFT
	Applied	eProfile Manager Fluid	EOAW2000	Delete	21078819	05/14/2015	47455	eProfile Manager Fluid role should not have the EOAW2000 (Mobile Approvals Administrator) permission list. This provides managers access to the Mobile Approval Options setup page.	05/13/2015 11:32:19PM	PPLSOFT
	Applied	TL Administrator Compensation	HCCPHR4160	Add	20391961	01/22/2015	38479		01/22/2015 1:49:07AM	PPLSOFT
	Applied	HR Administrator BRA	HCCPTL10BR	Add	18495676	10/20/2014	32063	New permission list for BRA User	10/20/2014 9:02:05AM	PPLSOFT
	Applied	GP Pivot Administrator	HCCPGPAMPIVOT	Add	17962997	08/28/2014	26623		08/28/2014 2:54:01AM	PPLSOFT
	Applied	AM Pivot Administrator	HCCPAMPG01	Add	18179237	08/27/2014	25900	Absence Pivot Grid Administrator	08/21/2014 2:15:45AM	PPLSOFT
	Applied	AM Pivot Administrator	HCCPAMPG03	Add	18179237	08/27/2014	25900	Employee Refresh	08/21/2014 2:15:45AM	PPLSOFT
	Applied	AM Pivot User	HCCPAMPG02	Add	18179237	08/27/2014	25900	Absence Pivot Grid User	08/21/2014 2:15:45AM	PPLSOFT
	Applied	AM Pivot User Fluid	HCCPAMPG04	Add	18179237	08/27/2014	25900	Absence Pivot Grid User Fluid	08/21/2014 2:15:45AM	PPLSOFT
	Applied	HR Administrator SGP	HCCPHR33SG	Add	18650387	07/14/2014	20738		07/09/2014 12:04:13AM	PPLSOFT
	Applied	Recruitment Administrator	HCCPRS1320	Add	16384909	06/25/2013	2042	Access to job posting global search is being granted to 'Recruiting Administrator' role.	06/25/2013 1:52:59AM	PPLSOFT

Select for Update Select the check box to select the role for AE execution.

Status see the description for Status for the Manage Permissions Page.

Role Name Name of the Role

Permissions List Permission List for that role.

Action Action to be taken for the permission for that role.

Bug Number Bug number delivered by the developer. This is not mandatory.

Date Processed date processed.

Process Instance Process Instance.

Description Description for the role.

Last Updated Date/Time Last updated date and time

Updated by user User name that ran the update.

Manage Menus Page

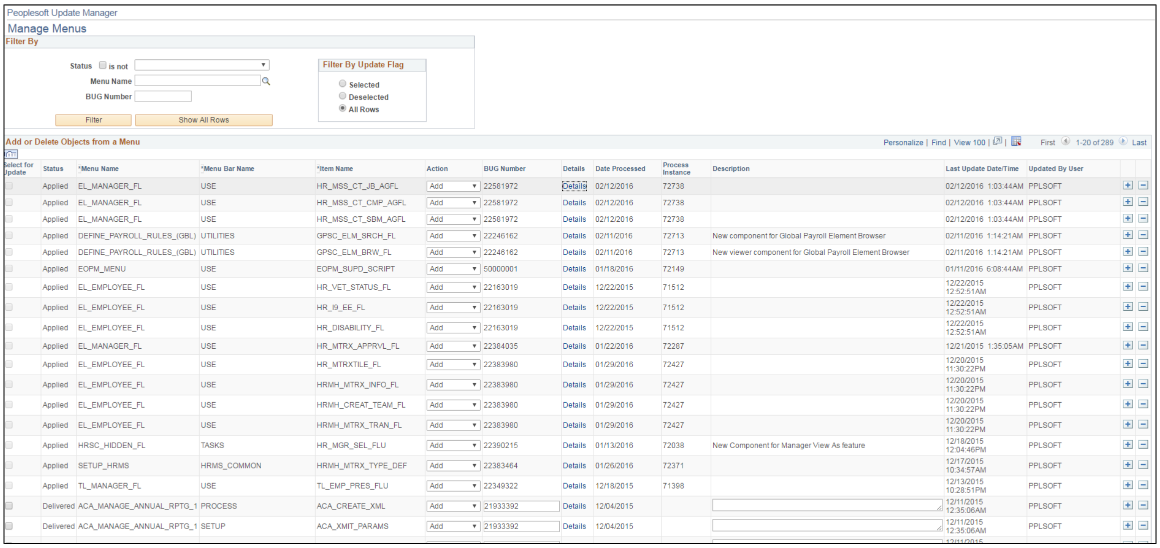
Use the Manage Menus page (EOPM_SUPD_Menu) to set security for new menu or to change the security for existing menu.

Navigation

Enterprise Components, PeopleSoft Update Manager, Update Menus

Image: Manage Menus Page

This example illustrates the fields and controls on the Manage Menus page.



Select for Update	Select the check box to select the role for AE execution.
Status	see the description for Status for the Manage Permissions Page.
Menu Name	Select the Menu name
Menu Bar Name	select the Menu Bar name
Item Name	Select the Menu Item
Action	Select the action to be performed on the Menu
Bug Number	This is delivered by developer. This is optional
Details	This is a modal window that shows the Menu Item details
Date Processed	Date of processing.
Process Instance	Processing instance
Description	Menu Item description.
Last Updated Date/Time	Last updated date and time
Updated by User	User name that ran the update.
+/-	Add or remove rows from the grid

Chapter 10

Supplemental Data

Understanding Supplemental Data

Because every organization has different data requirements for work orders based upon unique business processes and regulatory issues, PeopleSoft Maintenance Management includes the Supplemental Data component to provide a way to define additional work-order related data. This component enables system administrators to extend the information that is stored for an object without requiring modifications to the object's base table (record) and without requiring additional PeopleCode or PeopleTools customizations. The supplemental data framework uses the PeopleSoft Common Components Active Analytic Framework (AAF) to define the business rules for the additional data.

Supplemental data is valuable when you want to capture information about a subset of object instances with fields that are relevant only to these particular object instances. Objects include records, pages and components, which you must configure specifically to accept supplemental data. For example, PeopleSoft defines and enables the Service Request, Work Order Header, and Work Order Task to include supplemental data for PeopleSoft Maintenance Management. Supplemental data may be a field that is embedded in the page or displays on a secondary page. PeopleSoft defines and registers both the supplemental data store records associated with a base record and the components to be used for supplemental data. Be aware that adding any additional objects is regarded as a customization and requires familiarity with PeopleTools.

When you set up supplemental data, you define records and fields and map them to a data storage record. These definitions are not stored in the PeopleTools metadata tables but in the supplemental data's own metadata tables. You define supplemental data page elements to display on the page in two columns. You must also group supplemental data fields within a display group for display purposes. You assign display groups to pages that are enabled for supplemental data. Once you have made this designation, you can define the conditions under which the application should use the supplemental data. You may perform a search on one display group. The pages within the Supplemental Data component enable you to accomplish these tasks.

Considerations and Limitations

The decision to add supplemental data to your application should be based on how applicable the data objects are to instances of the object. If the data objects apply to a significant number of instances of the object, then it may be better to add a field to the table using Application Designer instead of using attributes to capture the data. If the data elements apply to a much smaller percentage of the objects, then attributes may be the solution. While supplemental data provides a large amount of flexibility in terms of adding data elements without changing the underlying data model, you should consider the following limitations when you are evaluating whether to implement supplemental data:

- Supplemental data does not fall under the normal upgrade capabilities that are provided with PeopleTools.

  Because supplemental data records are not a type of PeopleTools object, you cannot use the standard upgrade facilities that are provided by PeopleTools, such as the Upgrade Copy or Upgrade Compare process, to upgrade supplemental data from one database to another. The mechanism for migrating supplemental data is to extract the data from the source database and move the data to the target database, which can be accomplished, for example, by using Data Mover or a similar tool. PeopleSoft does not deliver any utilities, such as data mover scripts, for migrating supplemental data.

- Because supplemental data records are stored in separate tables (distinct from the base table), it can be difficult to incorporate supplemental information into reports.
- Supplemental data can only be displayed in a two-column format.
- Performance issues can occur if you have too many supplemental data records in the system.

  Use supplemental data only if the data elements are truly dynamic in nature or if they apply to certain instances of an object. Never use supplemental data simply because it is easier to create than standard PeopleTools fields.

Terms

The following terms are used when discussing supplemental data:

Supplemental Data Field — Defined in the Supplemental Data Record, mapped to fields of the data store record. Also referred to as "Field" in the context of supplemental data setup.

Display Group — Grouping of supplemental data fields, for display purpose.

Supplemental Data Page — The page where supplemental data will be displayed or entered in runtime. Also referred to as *Page* in the context of supplemental data setup.

Supplemental Data Record — Logical data model for supplemental data. Also referred to as *Record* in the context of supplemental data setup.

Supplemental Data Store — The physical table where supplemental data is stored. Also referred to as *Data Store* or *Data Store Record.*

Search Record — Record that saves search criteria for the base record.

Supplemental Search Record — Record that saves search criteria for the base record. The criteria are based on the supplemental data defined for the base record.

Supplemental Data Record Details

The Supplemental Data components, Register Record and Register Component are system-defined by PeopleSoft. The purpose of these options is to associate the supplemental data storage and optional search records with a PeopleSoft Maintenance Management base record and a PeopleSoft Maintenance Management component.

For each base PeopleSoft Maintenance Management record, there is an associated supplemental data storage record:

Base Record	***Supplemental Data Storage Record***
WM_WO_HDR	WM_WO_HDR_SD

Base Record	Supplemental Data Storage Record
WM_WO_TSK	WM_WO_TSK_SD
WM_WR_HDR	WM_WR_HDR_SD

The following components and pages are enabled for supplemental data. There are AAF contexts and terms defined for the components. You can define an AAF condition to show different display groups based on business rules.

Component	Page	Base Record
WM_ADD_WR_SS	WM_WORK_REQUEST_SS	WM_WR_HDR
WM_ADD_WR_WIZARD	WM_WR_SUMMARY_WIZ	WM_WR_HDR
WM_ADD_WR_WIZARD	WM_WR_SUPLDATA_WIZ	WM_WR_HDR
WM_WO	WM_TSK_SD_SEC	WM_WO_TSK
WM_WO	WM_WO_DETAIL	WM_WO_HDR
WM_WO	WM_WOHDR_SD_SEC	WM_WO_HDR
WM_WO_WR	WM_WOHDR_SD_SEC	WM_WO_HDR
WM_WOE_SD	WM_WOE_SD	WM_WO_TSK
WM_WORK_REQUEST	WM_WORK_REQUEST	WM_WR_HDR

The following delivered system data enables users to search work order tasks based on a work order header's supplemental data. There can be supplemental display groups with no AAF condition on a search page. Since the advanced search page is implemented as a secondary page, which users can invoke from the main page, you need to have the same assignment for these two pages:

Base Record	Storage Record	Base Search Record	Supplemental Data Search Record
WM_WO_HDR	WM_WO_HDR_SD	WM_TSK_SRCH	WM_TSK_SRCH_SD

The system stores the search criteria in the Supplemental Data Search Record using the same mapping defined for the Supplemental Record. There are no AAF contexts and terms defined for the components used for the search:

Component	Page	Base Record
WM_WOE_TWP	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOE_TWP	WM_WOE_TWP	WM_WO_HDR

Component	***Page***	***Base Record***
WM_WOE_WB1	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOE_WB1	WM_WOE_WB	WM_WO_HDR
WM_WOTSK_WORKBENCH	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOTSK_WORKBENCH	WM_WOTSK_WORKBENCH	WM_WO_HDR

Example

PeopleSoft Maintenance Management serves as an excellent example of how supplemental data is set up and used in an application. For example, an organization may need to create work orders to assign and schedule resources to repair vehicles and uses PeopleSoft Maintenance Management. Part of this repair process includes the requirement to track any hazardous waste that was created while performing this work. This organization wants a Hazardous Waste group box to display, which contains the fields labeled as Date Generated (DATE), Description (DESCR), Notes (NOTES), Quantity (QTY), Unit of Measure (UOM), and Waste Code (WASTE_CD) when you create or update a work order task for this type of work.

Based on the registered records and components, you access the Define Record component and define each supplemental data record such as PS_HAZARD_WASTE, associate it with a supplemental data stored record, such as WM_WO_TSK_SD, and add all the field names and their associated details that you want to include in this record. Based on the hazardous waste example, you would add the fields: DATE, DESCR, NOTES, QTY, UOM, and WASTE_CD. You create a field name (WASTE_CD), a field label (Waste Code), select how the field will be used (code), the field length displays based on the field's use type (4 displays for code), and select a supplemental database field (SD_TEXT_4_1) in which to store each field's data. Since the use type for the field in this example is *code,* an additional group box displays where you can define all the field values and the order in which you want each value to display on the drop-down list For example, the WASTE_CD values might be D001, D002, D003, D004, D005, D006. Initially the status in the Record page is *In Design.* You must change the status in the Record page to *Activated* before saving the data and exiting this option.

Note: If you access the Define Record component for an existing record, you must change the status field to *In Design* before making any changes. After you add the new field, you must change the status field back to *Activated* before saving and exiting the component.

Once you have defined and activated all of your fields, you must access the Define Display Group component and create a display group, such as PS_HAZARD_WASTE, and associate it with a base record, such as WM_WO_TSK. You then must identify the fields and their associated records that you want to appear in either the left or the right column of the page. If a label is not associated with the field name, you may enter a label here. For example, for the PS_HAZARD_WASTE record, you might want to put the fields DATE, DESCR, and NOTES fields in the right column, and the QTY, UOM, and WASTE_CD fields in the left column.

Once you create a display group, you associate one or more of the display groups that you created to a component, such as the WM_WO component. This is also where you identify whether the condition is editable or read-only. If the condition is editable, you may access the condition term page where you may edit and add conditions for this display group. When you access the Work Order component in PeopleSoft

Maintenance Management and access the WM_WO_DETAIL page, the supplemental data group box containing the supplemental data fields appear on the page.

Establishing Supplemental Data

To establish supplemental data, use the following components:

- Register Record (FS_SD_REG_REC) component.
- Register Component (FS_SD_REG_COMP) component.
- Define Record (FS_SD_RECDEFN) component.
- Define Display Group (FS_SD_GRPDEFN) component.
- Assign Display Group (FS_SD_PAGE_GRP) component.

This section discusses how to define a supplemental data record, define and map supplemental data record fields to data store records, specify details for supplemental data record files, define a supplemental data display group, assign a supplemental data display group, and define conditions for display groups.

Pages Used to Set Up Supplemental Data

Page Name	***Definition Name***	***Usage***
Register Record Page	SD_REG_REC	Registers the supplemental data base record and optionally registers the record that saves the search criteria for the base record. This is PeopleSoft system-defined data and is not set up by users. It should not be modified.
Register Component Page	SD_REG_COMP	Registers and enables the component and the pages for supplemental data. This is PeopleSoft system-defined data and is not set up by users. It should not be modified.
Define Record - Record Page	SD_RECDEFN	Defines the supplemental data record associated with the base record and identifies where to store this record.
Define Record - Fields Summary Page	SD_RECFLD	Maps fields to the data storage fields.
Define Record - Fields Detail Page	SD_RECFLD_DTL	Defines a field's detail information.
Define Display Group Page	SD_GRPDEFN	Defines a display group and associates any records and fields, as well as identifies the order in which the fields appear on the page.

Page Name	Definition Name	Usage
Assign Display Group Page	SD_PAGE_GRP	Assigns one or more display groups to a supplemental data-enabled component and page.
Assign Display Group - Conditions Page	SD_PHRASE_SEC SD_TERM_SEC	Specify conditions that control when a display group appears.

Define Record - Record Page

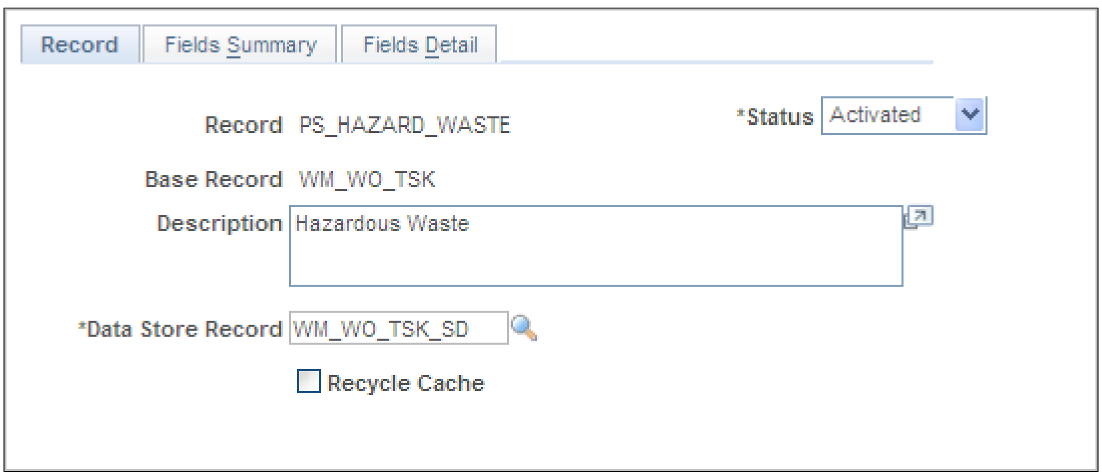
Use the Define Record - Record page (SD_RECDEFN) to defines the supplemental data record associated with the base record and identifies where to store this record.

Navigation

Enterprise Components, Supplemental Data, Define Record, Record

Image: Define Record - Record page

This example illustrates the fields and controls on the Define Record - Record page. You can find definitions for the fields and controls later on this page.



Record

Enter a name for a supplemental data record. For example a possible supplemental data record name used for PeopleSoft Maintenance Management may be PS_WASTE.

Base Record

Select a base record on the Define Record page to associate with this supplemental data record. For example, a PeopleSoft Maintenance Management base record is WM_WO_TSK.

Status

Select a status of *In Design* during the time that you are defining this record. Change the status to *Activated* to indicate that you completed mapping the supplemental data fields.

	Note: If you update a record, before you add a field or make changes to a record, you must change this status back to *In Design.* When you have completed the modification, you must change the status back to *Activated* before saving and exiting the component.
Data Store Record	Select one of the data store records that you previously registered that you want to use to store this supplemental data record. For example, the data store record for this supplemental data record in PeopleSoft Maintenance Management is WM_ WO_TSK_SD.

Define Record - Fields Summary Page

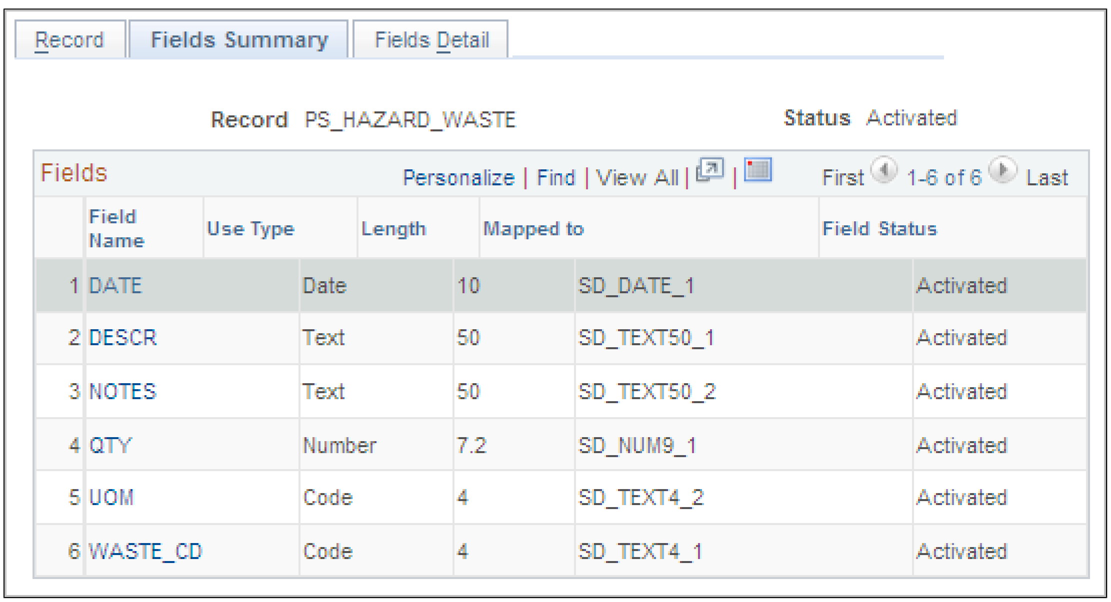
Use the Define Record - Fields Summary page (SD_RECFLD) to maps fields to the data storage fields.

Navigation

Enterprise Components, Supplemental Data, Define Record, and select the Fields Summary tab.

Image: Define Record - Fields Summary page

This example illustrates the fields and controls on the Define Record - Fields Summary page. You can find definitions for the fields and controls later on this page.



	Field Name	Use Type	Length	Mapped to	Field Status
1	DATE	Date	10	SD_DATE_1	Activated
2	DESCR	Text	50	SD_TEXT50_1	Activated
3	NOTES	Text	50	SD_TEXT50_2	Activated
4	QTY	Number	7.2	SD_NUM9_1	Activated
5	UOM	Code	4	SD_TEXT4_2	Activated
6	WASTE_CD	Code	4	SD_TEXT4_1	Activated

Field Name, Use Type, Length, Mapped to and **Field Status**	Click the Field Name link to access the Fields Detail page. The remaining fields on this page are all defined in the Fields Detail page. Once you finish adding all the fields and their descriptions on the Field Details page, and change the Status value in the Record page to *Activated,* each new field name and its characteristics appear on this summary page. You may then click on each field name and access the field name's detail information in the Define Record - Fields Detail page.

Define Record - Fields Detail Page

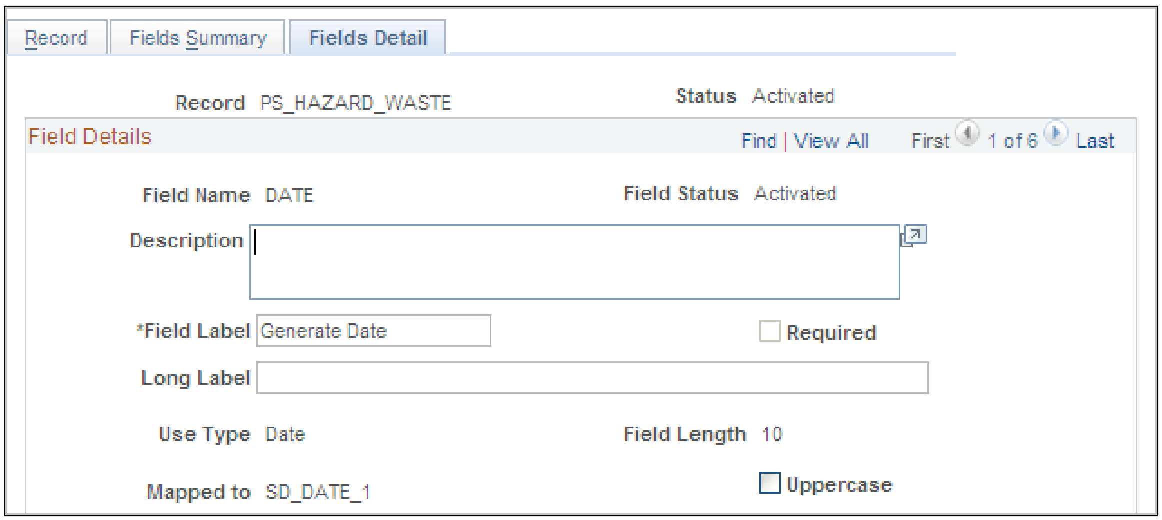
Use the Define Record - Fields Detail page (SD_RECFLD_DTL) to defines a field's detail information.

Navigation

- Enterprise Components, Supplemental Data, Define Record, Fields Detail
- Click a field name on the Define Record - Fields Summary page.

Image: Define Record - Fields Detail page

This example illustrates the fields and controls on the Define Record - Fields Detail page. You can find definitions for the fields and controls later on this page.



Field Name

Enter a name for the supplemental data field and a description of the field. For example, in PeopleSoft Maintenance Management this field might be called WASTE_CD.

Field Label

Enter the a label to display on the page for this field. For example, in PeopleSoft Maintenance Management this field might be *Waste Code.*

Use Type

Select one of the following based on how the field will be used:

- *Code*
- *Date*
- *Number*
- *Prompt*
- *Section*
- *Signed*
- *Text*
- *Time*

- *Yes/No*

Field Length

Select a length based on the selected Use Type:

- If the use type is a number or signed number consisting of an integer or decimal position, the field lengths may only be: 9.0, 7.2, and 15.4.
- If the use type is text, the field length may be 4, 20, 50, or 100.
- If you select any of the remaining use types, each type's field length is dictated by the specific length of the selected use type.

Mapped To

Select the data store field to which you want to map this field.

Note: Once you change the status to *Activated* on the Record page, the information listed above, with the exception of the description and field label, becomes read-only and cannot be modified.

Codes

This group box displays if you selected *code* as a Use Type and identifies a list of code values for a drop-down list.

Sequence

Enter a number to represent the order in which you want to see these codes listed in a drop-down list or lookup page.

Field Value and **Translate Long Name**

Enter each valid code in this list along with the text that you want to appear on the list when the drop-down list displays.

Field Status

Displays the current status of the field. Initially this value will be *In Design.* The value changes to *Activated* after you change the record status to*Activated* on the Define Record - Record page.

Reorder

Click this button to assign each code a unique sequential number and reorganize the sequence numbers in top-down numerical order.

Define Display Group Page

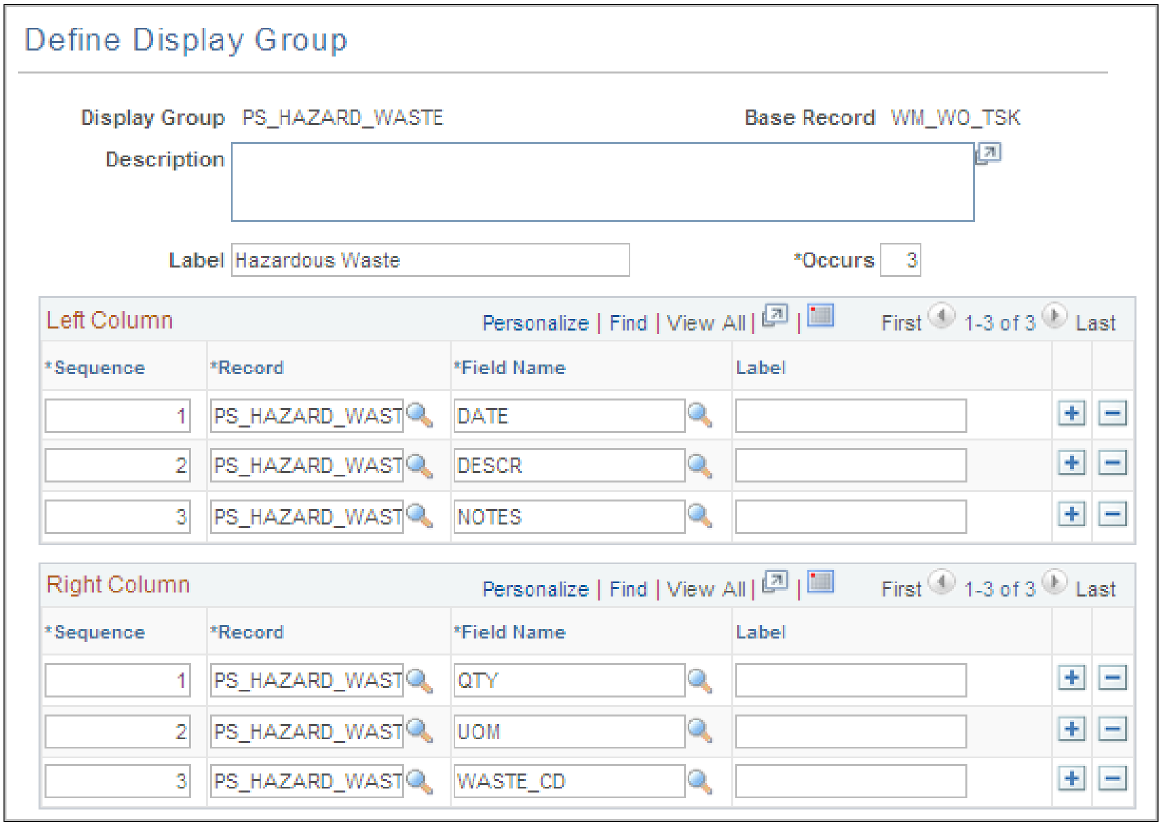
Use the Define Display Group page (SD_GRPDEFN) to defines a display group and associates any records and fields, as well as identifies the order in which the fields appear on the page.

Navigation

Enterprise Components, Supplemental Data, Define Display Group

Image: Define Display Group page

This example illustrates the fields and controls on the Define Display Group page. You can find definitions for the fields and controls later on this page



Display Group

Select a base record to associate this new display group with and enter a name for this display group in the Define Display Group Add page.

Label

Enter a label for the display group data group box.

Occurs

Enter the number of rows of data to display in the group box.

Left and Right Columns

The supplemental fields that you want to appear on a page are defined in left and right columns.

Sequence, Record, Field Name, and **Label**

Select the record and field name, enter a label that you want to display on the page for the field name for each supplemental data field. Enter a sequence number to determine the order in which the fields should display on the page for each column.

Assign Display Group Page

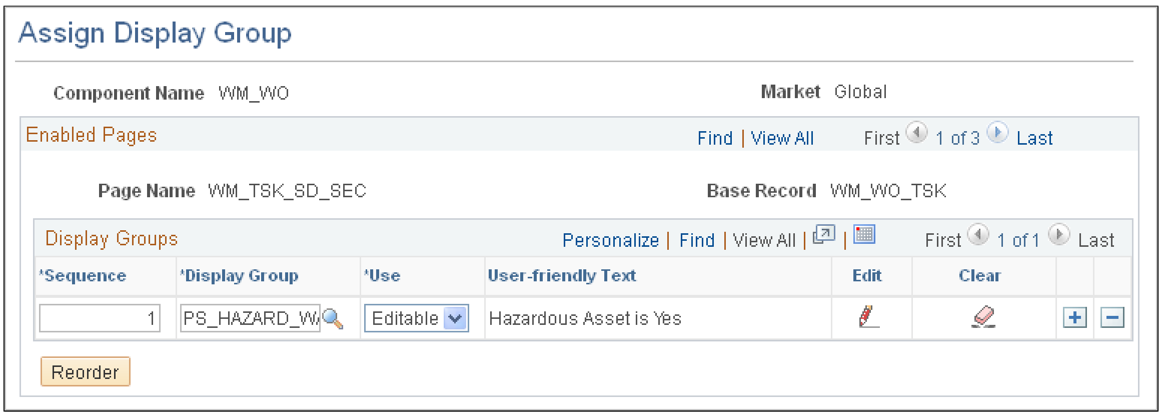
Use the Assign Display Group page (SD_PAGE_GRP) to assigns one or more display groups to a supplemental data-enabled component and page.

Navigation

Enterprise Components, Supplemental Data, Assign Display Group

Image: Assign Display Group page

Use the Assign Display Group page (SD_PAGE_GRP) to assigns one or more display groups to a supplemental data-enabled component and page



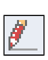
Component Name and **Market** — Select the component that is enabled for supplemental data and with which you want to associate a supplemental data display group in the Assign Display Group Search page. The Market for which this component was defined displays as read-only along with the Component Name.

Enabled Pages and Display Groups

This group box displays the name of the pages within the component that are enabled for supplemental data, their associated base record, and any associated display groups. You may also add the display groups that you want to appear in this component and page.

Sequence, Display Group, Use — Add a supplemental data display group that you want to associate with this component and this page, and select whether you want the text associated with the display group to be *Editable* or *Read-only.*

User Friendly Text — Describes the condition associated with this display group in easy to understand terminology.



Click the Edit icon to access the Assign Display Group - Conditions page where you can establish conditions that control when a display group appears. For example, you could set a condition so that a display group appears only when there is a hazardous asset associated with a work order task, or when the work order is of the type *CM* (corrective maintenance).

Click the Clear icon to remove the condition that is associated with this display group.

Note: If the supplemental data page is registered as a search page, then you may add only one display group to the page; you must select 1 as the value in the Occurs field for the selected display group; you must define all fields for this display group for the same record definition; and you must map this record to a data store record defined with a Search Supplemental Search record. With PeopleSoft Maintenance Management, you can only search based on supplemental data for the Work Order Header.

Assign Display Group - Conditions Page

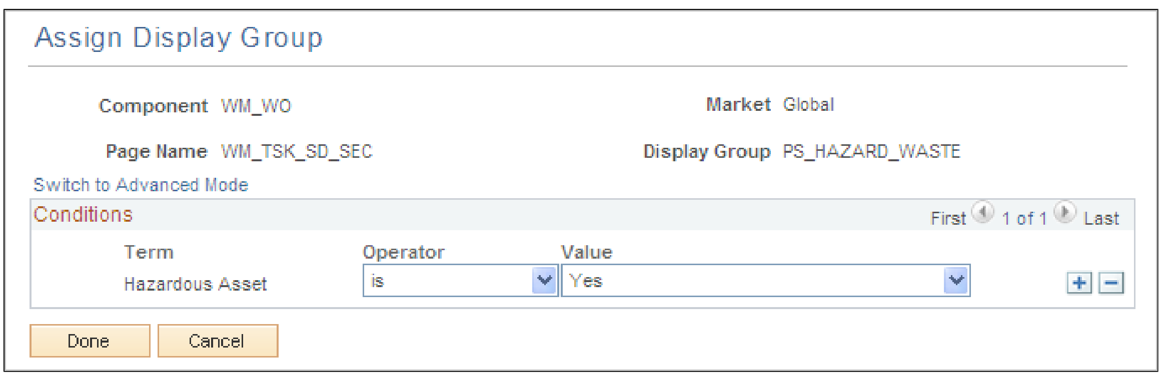
Use the Assign Display Group - Conditions page (SD_PHRASE_SEC) to specify conditions that control when a display group appears.

Navigation

Click the Edit icon on the Assign Display Group page.

Image: Assign Display Group - Conditions page

Use the Assign Display Group - Conditions page (SD_PHRASE_SEC) to specify conditions that control when a display group appears



Supplemental data depends on the Active Analytics Framework (AAF) to define and resolve the conditions for a supplemental data display group. AAF is a PeopleSoft Enterprise Component that includes the following components:

- Data Library Framework.
- Rule Evaluation Engine.
- Rule Builder Framework.
- Action Framework.

PeopleSoft Maintenance Management utilizes all of these AAF components with the exception of the Action Framework.

You define a condition using a combination of a term, an operator, and a value or term. A term is a nontechnical name that refers to the information (data) that can be retrieved or computed and is the object evaluated within a condition. This page enables you to build conditions by viewing and selecting the terms, operators, and value/term that define the condition.

To add a condition:

1. Select a term.
2. Select an operator.
3. Enter or select values or terms to define the right side of the condition equation, if required by the selected operator.

Note: To add conditions for values derived from control tables that are keyed by SetID (for example, Work Type, Service Group ID), you must use one of the "in list" operators *(is in list,* or *is not in list).*

There are two modes that you can use to specify conditions:

- Basic.

  This is the default mode. When you select this option, the Select Subject Area group box appears, with a folder hierarchy of subjects. Navigate through the subjects and select one to view the terms available in an adjacent group box. Click a term to select it and insert it into the condition.

  If the criteria you define includes more than one condition row, the system uses AND logic for the conditions, therefore all of the conditions must be met for the criteria to evaluate as true.

- Advanced.

  This mode enables you to group condition rows using parenthesis, specify the logical operator for each condition row (AND, OR), and specify terms as values in the right-hand side of the condition equation.

Switch to Advanced Mode	Click to activate advanced mode.
Switch to Basic Mode	Click to activate basic mode.
Switch to Search Mode	Click to activate search mode, where you can execute a search for defined terms.
Switch to Browse Mode	Click to activate browse mode, where you can browse defined terms.
Select Term	Click to insert the term into the condition.
Term	Displays the term name used in the condition that is evaluated against the Value.
Operator	Select the operator to use for the condition. The list of available operators depends on the term upon which the condition is based.
Value	Displays the value to which the Term is compared.
Done	Click to create the condition and return to the Assign Display Group page.
Cancel	Click to cancel building the condition.