

---

# PeopleSoft 9.2: Enterprise Components

---

July 2017

## PeopleSoft 9.2: Enterprise Components

Copyright © 1988, 2017, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

### Documentation Accessibility

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

### Access to Oracle Support

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

# Contents

<b>Chapter 1: Setting Up Pagelets for WorkCenters and Dashboards as a System Administrator.....</b>	<b>9</b>
Understanding WorkCenters and Dashboards.....	9
Adding a User-Defined Link to the My Work Pagelet for PeopleSoft Classic User Interface.....	9
Configuring Filter Definitions and Values.....	10
Pages Used to Configure Filter Definitions and Values.....	10
Configure Filter Definition Page.....	10
Configure Filter Values Page.....	12
Filter Values Inquiry Page.....	14
Validate Filters Page.....	14
Delete Filter Values Page.....	15
Using the Filter Value Copy Wizard.....	16
Select Filters Page.....	17
Select Roles/Users Page.....	17
Create Filter Values Page.....	18
Configuring Pagelets.....	19
Page Used to Configure Pagelets.....	19
Configure Pagelets – WorkCenter/Dashboard Page.....	20
Configure Pagelets - My Work Page.....	22
Set Up Scope Security Page.....	25
Define My Work Link Page.....	26
Import My Work Link Page.....	28
Configure Pagelets - Links Page.....	29
Define Link/Security Page.....	31
Configure Pagelets – Queries Page.....	32
Define Link Page.....	35
Configure Pagelets – Reports/Processes Page.....	36
<b>Chapter 2: Using Datasets.....</b>	<b>39</b>
Understanding Datasets.....	39
Defining Dataset Rules.....	39
Page Used to Define Dataset Rules.....	39
Understanding Dataset Rules.....	39
Dataset Rules Page.....	40
Defining Dataset Roles.....	42
Page Used to Define Dataset Roles.....	42
Dataset Roles Page.....	42
Defining Mobile Data Distribution.....	43
Pages Used to Define Mobile Data Distribution.....	43
Understanding Mobile Data Distribution.....	43
Mobile Data Distribution Page.....	44
Mobile User Rules Page.....	45
<b>Chapter 3: Formatting Addresses.....</b>	<b>47</b>
Understanding Address Formats.....	47
Specifying Address Formats.....	47
Pages Used to Specify Address Formats.....	47
Country Description Page.....	48
Address Format Page.....	48

Valid Address Page.....	50
State/Province Page.....	51
<b>Chapter 4: Using the Find Object Navigation Utility.....</b>	<b>53</b>
Understanding the Find Object Navigation Utility.....	53
Specifying Navigation Path Search Criteria.....	53
Page Used to Specify Navigation Path Search Criteria.....	53
Understanding Navigation Path Search Criteria.....	53
Find Object Navigation Page.....	53
<b>Chapter 5: Working With Currencies and Market Rates.....</b>	<b>59</b>
Understanding Currencies and Market Rates.....	59
Understanding Currency and Market Rate Tables.....	59
Understanding Triangulation.....	59
Understanding Conversion Factor Fields and the Visual Rate.....	61
Understanding Application-Specific Requirements for Currency Conversion.....	62
Defining Currencies.....	62
Page Used to Define Currency Codes.....	62
Currency Code Page.....	62
Defining Currency Quotation Methods.....	64
Page Used to Define Currency Quotation Methods.....	64
Currency Quotation Method Page.....	64
Defining Market Rates.....	67
Pages Used to Define Market Rates.....	67
Market Rate Index Page.....	68
Market Rate Type Page.....	69
Market Rate Definition Page.....	70
Market Rate Page.....	72
Rate Definition Page.....	75
Exchange Rate Detail Page.....	75
Calculating Cross, Triangulated, and Reciprocal Rates.....	78
Page Used to Run the EOP_RATECALC Process.....	78
Understanding the EOP_RATECALC Process.....	78
Calculate Cross/Reciprocal Rate - Parameters Page.....	78
Using the Currency Exchange Calculator.....	81
Page Used to Convert Amounts Using the Currency Exchange Calculator.....	81
Currency Exchange Calculator Page.....	81
<b>Chapter 6: Working With PeopleSoft Forms and Approval Builder.....</b>	<b>83</b>
Understanding PeopleSoft Forms and Approval Builder.....	83
Designing Forms.....	86
Pages Used to Design Forms.....	86
Design Form - Step 1: Basic Information Page.....	86
Design Form - Step 2: Instructions Page.....	88
Design Form - Step 3: Form Fields Page.....	88
Form Field Edits Page.....	90
Design Form - Step 4: Attachment Templates Page.....	93
Design Form - Step 5: Publish to Menu Page.....	94
Design Form - Step 6: Approval Process Page.....	96
Design Form: Complete Page.....	97
Defining Prompt Records.....	98
Page Used to Specify Prompt Records.....	98
Define Prompt Records Page.....	98
Managing Forms.....	98

Page Used to Manage Forms.....	99
Understanding Form Management.....	99
Manage Forms Page.....	99
Working with Forms.....	101
Pages Used to Work with Forms.....	101
Search/Fill a Form Page.....	101
Form Page.....	103
<Portal label (approval preview)> Page.....	105
Form Approval Page.....	106
Integrating Forms with PeopleSoft Applications.....	106
Pages Used to Integrate Forms with PeopleSoft Applications.....	106
Understanding Form Integration.....	106
Form to CI Collection Mapping Page.....	109
Document Form References Page.....	112
Using Forms in PeopleSoft Fluid User Interface.....	112
Pages Used to Manage Forms.....	113
Design Forms Page.....	113
Form Designer Page.....	114
My Forms Page.....	117
Approve Form.....	118
<b>Chapter 7: Configuring Toolbars.....</b>	<b>119</b>
Understanding Toolbars.....	119
Toolbar Elements.....	119
Delivered Toolbars.....	120
Delivered Toolbar Buttons.....	120
Defining Toolbar Buttons.....	121
Page Used to Define Toolbar Buttons.....	121
Toolbar Button Definition Page.....	121
Configuring Toolbars.....	122
Pages Used to Configure Toolbars.....	123
Toolbar Definition - Description Page.....	123
Toolbar Definition - Button Page.....	126
Toolbar Definition - Content Page.....	128
Toolbar Definition - Focus Fields Page.....	129
Viewing the Toolbar at Runtime.....	130
Personalizing Toolbars.....	131
Page Used to Personalize Toolbars.....	131
Personalize Toolbar Page.....	131
<b>Chapter 8: Working with the PeopleSoft Fluid User Interface.....</b>	<b>133</b>
Understanding the PeopleSoft Fluid User Interface.....	133
The PeopleSoft Fluid User Interface.....	133
Fluid Transactions and Conditional Navigation.....	133
Understanding Banners in PeopleSoft Fluid User Interface.....	133
<b>Chapter 9: Using the Comments and Attachments View Framework.....</b>	<b>135</b>
Understanding Comments and Attachments View Framework.....	135
Configuring and Implementing the Comments and Attachments View Framework.....	136
Pages Used to Configure and Implement the Comments and Attachments View Framework.....	136
CAVF Configuration Setup Page.....	136
CAVF Configuration ID Component Mapping Page.....	140
CAVF Configuration ID Page Composer Mapping Page.....	142
<b>Chapter 10: Page Composer.....</b>	<b>145</b>

Understanding Page Composer.....	145
Using Page Composer.....	146
Pages Used to Configure Pages Using Page Composer.....	147
Page Composer Page.....	147
Registering Components in Page Composer.....	150
Pages Used to Register Components in Page Composer.....	151
Registration Page.....	151
<b>Chapter 11: Security Automation.....</b>	<b>157</b>
Understanding Security Automation.....	157
Configuring Metadata for Security Automation.....	157
Pages Used to Configure Metadata for Security Automation.....	157
Manage Permissions Page.....	158
Manage Roles Page.....	159
Manage Menus Page.....	160
<b>Chapter 12: Supplemental Data.....</b>	<b>163</b>
Understanding Supplemental Data.....	163
Establishing Supplemental Data.....	167
Pages Used to Set Up Supplemental Data.....	167
Define Record - Record Page.....	168
Define Record - Fields Summary Page.....	169
Define Record - Fields Detail Page.....	170
Define Display Group Page.....	171
Assign Display Group Page.....	173
Assign Display Group - Conditions Page.....	174
<b>Chapter 13: Using the Configurable Analysis Framework.....</b>	<b>177</b>
Understanding Configurable Analysis Framework.....	177
Understanding Technical Elements of Configurable Analysis Framework.....	178
Factor Types.....	178
Handler Types.....	180
Related Action Levels.....	181
Security.....	182
Setting Up Configurable Analysis Framework.....	183
Pages Used to Set Up Configurable Analysis Framework.....	183
Analysis Handler Registry Page.....	183
Analysis Configuration Page.....	186
Entity Configuration Page.....	188
Factor Configuration Page.....	189
Define Factor Page.....	190
Factor List Configuration Page.....	195
Copy Factor Lists Page.....	196
Related Action Configuration Page.....	197
Define Related Action Page.....	197
Miscellaneous Page.....	200
Analysis Access Control Page.....	201
Using Configurable Analysis Framework.....	202
Pages Used to Utilize Configurable Analysis Framework.....	202
Understanding Configurable Analysis Framework.....	202
Common Elements on the Display Analysis Page.....	203
Analysis Display Page (Comparison Mode).....	204
Analysis Display Page (Analysis Mode).....	207
Understanding Configurable Analysis Framework for Fluid Implementations.....	209

Common Elements for Comparison and Analysis Modes in Fluid Implementations.....	210
Fluid Analysis Display Page (Comparison Mode).....	211
Fluid Analysis Display Page (Analysis Mode).....	211
<b>Chapter 14: Fluid Discussion Service.....</b>	<b>213</b>
Understanding Fluid Discussion Service.....	213
Security Access.....	213
Fluid Discussion Service Implementation Options.....	213
Understanding Default Discussion Type.....	215
Assigning Default Discussion as a Related Content Tile.....	215
Assigning Default Discussion as a Related Action with Context.....	216
Implementing Discussion Service with a New Discussion Type.....	218
Configuring Discussion Service.....	218
Pages Used to Configure Discussion Service.....	218
Discussion User Group Page.....	218
Discussion Type Page.....	219
Assigning New Discussion Type as a Related Action with Context.....	221
Scheduling Notifications.....	223
Pages Used to Schedule Notifications.....	224
Discussion Notification Page.....	224
Viewing All Discussions.....	225
Pages Used to View Discussions.....	225
Discussions Tile.....	225
Discussions Page.....	226





## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#"><u>Configure Filter Definition Page</u></a>	FSFB_FILTER_FIELDS	Set up filter definitions.
<a href="#"><u>Configure Filter Values Page</u></a>	FSFB_FILTER_VALUES	Set up filter values.
<a href="#"><u>Filter Values Inquiry Page</u></a>	EOWC_FLTRVALS_INQ	Understand the correlation between filter fields and its corresponding filter values.
<a href="#"><u>Validate Filters Page</u></a>	RUN_FSFB_VALCLN	Validate filters.
<a href="#"><u>Delete Filter Values Page</u></a>	FSFB_DEL_FLTRVALS	Delete Filter values.
<a href="#"><u>Select Filters Page</u></a>	FSFB_COPY_WIZARD1	Select filter values of a particular user for copying them to one or more users.
<a href="#"><u>Select Roles/Users Page</u></a>	FSFB_COPY_WIZARD2	Select a role and the corresponding users.
<a href="#"><u>Create Filter Values Page</u></a>	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.

**Configure Filter Definition**

Filter ID: AP\_AMINTFC ☒ Public

\*Description: Vouchers not Sent to AM

\*Model Rec: AP\_AM\_FLTR\_VW

---

**Configure Filter Fields**    1-9 of 9

*Field Name	*Status	Field Label ID	Field Label	Prompt Table	Required Flag	Restrict Operands if Required	Exclude Operator III	Display Order
BUSINESS_UNIT	Active	BUSINESS_UNIT	Business Unit	SP_BUS_AP_NONVW	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
VOUCHER_ID	Active	VOUCHER_ID	Voucher ID	VOUCHER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2
VENDOR_ID	Active	FSCM_VENDOR_ID	Supplier ID	VNDR_VNDSET_VW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
ORIGIN	Active	ORIGIN	Origin	ORIGIN_AP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4
GRP_AP_ID	Active	GRP_AP_ID	Control Group ID	AP_WC_GRP_VW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5
INVOICE_DT	Active	INVOICE_DT	Invoice Date		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6
OPRID	Active	CREATED_BY	Created By	OPRID_VW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7
OPRID_LAST_UPDT	Active	OPRID_LAST_UPDT	Last User to Update	OPRID_VW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8
ENTERED_DT	Active	CREATE_DT	Created On		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9

**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 WorkCenters.

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 <i>tables</i> , this field is not available and can't be changes.
<b>Required Flag</b>	Select to indicate that this field must have a value on the Configure Filter Values page.
<b>Restrict Operands if Required</b>	Select to indicate that you want to restrict the operands to “=” (equals) and “in”, on the Configure Filter Values page.
<hr/> <b>Note:</b> 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.	
<b>Exclude Operator IN</b>	Select to remove the “IN” operator only from the operator drop-down list when setting up filter values on the Configure Filter Values page.
<b>Display Order</b>	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.

<b>Permission Type</b>	Select an option that indicates whether user IDs, role names, and permission lists are used to restrict access to the filter criteria.
<b>User/Role/Permission List</b>	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.

<b>Search Field Name</b>	Select a field that determines the name of the field that the system uses to retrieve field values.
<b>Search Field Description</b>	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.

**Configure Filter Values**

User ID DVP1

Filter ID AR\_DEP\_FL Deposit Filter

Deposit Unit	=	US001
Deposit ID	=	
Format Currency	=	
Assigned User ID	=	VP1
User ID	=	
Entered Date	=	
Accounting Date	=	
Posting Status	=	
Posting Action	=	
Balanced Flag	=	
Deposit Type	=	
Bank Code	=	
Bank Account	=	
Bank Account Number	=	
External Bank ID	=	
Control Total	=	
Entered Total	=	

**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 WorkCenters.

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.s that have an active status on the Configure Filter Definition page.

## Filter Values Inquiry Page

Use the Filter Values Inquiry page (EOWC\_FLTRVALS\_INQ) to understand the correlation between filter fields and its corresponding filter values for a particular Filter ID.

### Navigation

Enterprise Components, WorkCenter/Dashboards, Filter Values Inquiry

### Image: Filter Values Inquiry page

This example illustrates the fields and controls on the Filter Values Inquiry page. You can find definitions for the fields and controls later on this page.

**Filter Values Inquiry**

\*Filter ID  Incomplete Voucher

☐ Required Field Only

Field Name  Search

**Filter Fields** Find | View All First 1 of 12 Last

Field Name	BUSINESS_UNIT	Description	Business Unit
<b>Filter Values</b>			
User ID	Description	Field Name	Condition Values
AJORDAN	Alic Jordan	BUSINESS_UNIT	= EGNBU
APS1	Mashad, Marcia	BUSINESS_UNIT	= US001
CADAMS	Cynthia Adams	BUSINESS_UNIT	= US001
DVP1	Smith, Jane	BUSINESS_UNIT	= US001
LADAMS	Linda Adams	BUSINESS_UNIT	= WCGEN
MGR3	Dallas, Eugene	BUSINESS_UNIT	= US001
MLEE	Mei Lee	BUSINESS_UNIT	= US001
RGIANNOTTI	Roberto Giannotti	BUSINESS_UNIT	= EGUBU
RSTARR	Rhonda Starr	BUSINESS_UNIT	= EGUBU
SAMPLE	Theresa Monroe	BUSINESS_UNIT	= US001
VKUTTAPPAN1	Vik Kuttappan	BUSINESS_UNIT	= WCGEN
VP1	Kenneth Schumacher	BUSINESS_UNIT	= US001
VP2	Michael Buhler	BUSINESS_UNIT	= US001

Notify

## 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.

**Delete Filter Values**

User ID  Arthur Erickson

Select All Deselect All

Filters	Personalize	Find	First	1-91 of 91	Last
Filter ID	Description				
<input checked="" type="checkbox"/>	AP_AMINTFC	Vouchers not Sent to AM			
<input type="checkbox"/>	AP_ARINTFC	Transactions Ready for AR			
<input type="checkbox"/>	AP_BDGT_ER	Budget Check Errors			
<input checked="" type="checkbox"/>	AP_DOC_TOL	Document Tolerance Exceptions			
<input type="checkbox"/>	AP_INCCGRP	Unverified Control Groups			
<input type="checkbox"/>	AP_INCVCHR	Incomplete Voucher			
<input type="checkbox"/>	AP_LCEXTRT	Transactions Ready for LC			
<input type="checkbox"/>	AP_MASSAPR	Voucher Mass Approval			
<input type="checkbox"/>	AP_PMNT	Scheduled Payment on Hold			
<input type="checkbox"/>	AP_PREPMNT	Available Prepayments			
<input type="checkbox"/>	AP_PYMTST	Payments Ready for Posting			
<input type="checkbox"/>	AP_UNPVCHR	Unpaid Voucher Status			
<input type="checkbox"/>	AP_VCHRDNY	Vouchers Rejected by Approvers			
<input checked="" type="checkbox"/>	AP_VCHRPND	Vouchers Pending Approval			
<input type="checkbox"/>	AP_VCHRPST	Vouchers Ready for Posting			

Delete Filter Values

Selected Filters	Personalize	Find	First	1-3 of 3	Last
Filter ID	Description				
AP_AMINTFC	Vouchers not Sent to AM				
AP_DOC_TOL	Document Tolerance Exceptions				
AP_VCHRPND	Vouchers Pending Approval				

### 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.

**Select Filters - Step 1 of 3**

Select a user id to display available filters. From the resulting list, select one or more filters. The selected filters will be copied to the users selected in the next step.

User ID:  Kenneth Schumacher

Select All | Deselect All

Filter ID	Description
<input checked="" type="checkbox"/> AM_ERR_LOG	Depreciation Process Log
<input type="checkbox"/> AM_INTFERR	Load Transaction Errors
<input type="checkbox"/> AM_OPENTXN	Pending Open Transactions
<input type="checkbox"/> AM_PREAM_P	PO/AP Transactions
<input type="checkbox"/> AM_WVC_INTF	Load Transaction into AM
<input type="checkbox"/> AP_AMINTFC	Vouchers not Sent to AM
<input type="checkbox"/> AP_ARINTFC	Transactions Ready for AR
<input type="checkbox"/> AP_BDGT_ER	Budget Check Errors
<input checked="" type="checkbox"/> AP_DOC_TOL	Document Tolerance Exceptions
<input type="checkbox"/> AP_INCCGRP	Unverified Control Groups
<input type="checkbox"/> AP_INCVCHR	Incomplete Voucher
<input type="checkbox"/> AP_LCEXTRT	Transactions Ready for LC
<input type="checkbox"/> AP_MASSAPR	Voucher Mass Approval
<input type="checkbox"/> AP_PMNT	Scheduled Payment on Hold
<input type="checkbox"/> AP_PREPMNT	Available Prepayments

**Selected Filters**

Filter ID	Description
AM_ERR_LOG	Depreciation Process Log
AP_DOC_TOL	Document Tolerance Exceptions

#### 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.

**Select Role/Users - Step 2 of 3**

Select a target role and from the resulting list of users in that role, select the users who will be assigned the filter values.

Role:  Administrator

Select All | Deselect All

Users	Personalize	Find	First	1-57 of 57	Last
<input checked="" type="checkbox"/> AERICKSON	Arthur Erickson				
<input type="checkbox"/> AJAMES	Anton James				
<input type="checkbox"/> AMARTIN	Allan Martin				
<input type="checkbox"/> BSUPER	Bob Super				
<input checked="" type="checkbox"/> CMONET	Claude Monet				
<input type="checkbox"/> CTRAN	Connie Tran				
<input type="checkbox"/> CUST	Customer				
<input type="checkbox"/> DHAMMONDS	Dorothy Hammonds				
<input checked="" type="checkbox"/> DVP1	Smith_Jane				
<input type="checkbox"/> EDONAHUE	Edward Donahue				
<input type="checkbox"/> FSCMSEC	FSCMSEC				
<input type="checkbox"/> GKEEPER	Greg Keeper				
<input type="checkbox"/> GM_AIWDA	Grants Administrator				
<input type="checkbox"/> GM_COPI	Co-PI				
<input type="checkbox"/> GM_DPHD	Department Head				

Filter Values Exist

Selected Users	Personalize	Find	First	1-3 of 3	Last
AERICKSON	Arthur Erickson				
CMONET	Claude Monet				
DVP1	Smith_Jane				

Filter Values Exist | Override Existing Values

Exit | Previous | Next

### 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 Filter Values - Step 3 of 3**

In the last step, review the list of users and filters. Click Create Filters button to perform the copy.

User ID VP1

Selected Filters	Personalize	Find	First	1-2 of 2	Last
Filter ID					
Description					
AM_ERR_LOG					Depreciation Process Log
AP_DOC_TOL					Document Tolerance Exceptions

Create Filters

Selected Users	Personalize	Find	First	1-3 of 3	Last
User ID					
Description					
AERICKSON					Arthur Erickson
CMONET					Claude Monet
DVP1					Smith, Jane
				<input checked="" type="checkbox"/>	Filter Values Exist
				<input checked="" type="checkbox"/>	Override Existing Values

Exit Previous Next

### 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 and group boxes as a System Administrator.

**Note:** In PeopleSoft Classic, My Work and Links are considered pagelets. In PeopleSoft Fluid, My Work and Links are considered group boxes. Within pagelets and group boxes are collapsible sections, such as Current Work and Exceptions. The name of a page may not follow this standard, because PeopleSoft Classic WorkCenters were created before PeopleSoft Fluid WorkCenters.

## Page Used to Configure Pagelets

Page Name	Definition Name	Usage
<a href="#">Configure Pagelets – WorkCenter/ Dashboard Page</a>	FSPC_ADMIN_MAIN	Define configuration IDs for Classic WorkCenters and Dashboards, and Fluid WorkCenters.
<a href="#">Configure Pagelets - My Work Page</a>	FSPC_ADMIN_MYWORK	Set up My Work links for end users.
<a href="#">Set Up Scope Security Page</a>	EOWC_VIEWBY_SEC	Determine the users who can access the Scope field on the Fluid & Classic <Application> WorkCenter – My Work group box and pagelet.

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Usage</i></b>
<u>Define My Work Link Page</u>	FSPC_ADM_WRK_SEC	Define the type of link that appears on the My Work pagelet.
<u>Import My Work Link Page</u>	FSPC_MYWORK_PROMPT	Import system defined My Work links.
<u>Configure Pagelets - Links Page</u>	FSPC_ADMIN_LINK	Determine how links appear in a pagelet.
<u>Define Link/Security Page</u>	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.
<u>Configure Pagelets – Queries Page</u>	FSPC_ADMIN_QUERY	Determine how query links appear in a group boxpagelet.
<u>Define Link Page</u>	FSPC_ADM_QRY_SEC	Define access to query links.
<u>Configure Pagelets – Reports/Processes Page</u>	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 Classic pagelets, Fluid group boxes, or both. You can determine if the 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 WorkCenters.

## Fluid WorkCenter Grouplet Display Order

### Display Order

Enter the order in which you want the Fluid WorkCenter group boxes to appear in the Fluid WorkCenter. LFF only. Your administrator is the only person who can change the order of the group boxes, and it must be performed using this field.

## 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.

The screenshot displays the 'Configure Pagelets - My Work Page' interface. At the top, there are tabs for 'WorkCenter/Dashboard', 'My Work', 'Links', 'Queries', and 'Reports/Processes'. The 'My Work' tab is active. Below the tabs, there is a section for 'Configuration ID BI' and 'Description Billing WorkCenter'. A checkbox labeled 'Allow User to Personalize the Display Options' is checked. Below this, there is a checkbox for 'Enable Scope' and a link 'Set Up Scope Security'. To the right, there is a section titled 'Update User Personalization Settings' with a description: 'This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.' Below this is a button 'Activate My Work Settings' and two lines of text: 'Last Modified 04/14/2016 11:09:40AM VP1' and 'Last Run 04/14/2016 11:09:40AM VP1'. Below this, there is a section titled 'My Work Groups' with a search bar and a 'Find' button. Below the search bar, there is a table with columns: 'Define Link/Security', 'Display Order', 'Link Label', 'Link Type', 'Classic/Fluid', 'Filter ID', 'Show Count', 'Show Link', and 'Starting Page'. The table contains 15 rows of links, each with a 'Define' button in the first column. The 'Display Order' column contains numbers 1 through 15. The 'Link Label' column contains various invoice-related labels. The 'Link Type' column contains 'System-Defined' or 'Both'. The 'Classic/Fluid' column contains 'Both'. The 'Filter ID' column contains 'BI\_FILTER'. The 'Show Count' and 'Show Link' columns contain checkboxes, all of which are checked. The 'Starting Page' column contains checkboxes, all of which are unchecked. At the bottom of the table, there are navigation buttons: 'Personalize', 'Find', 'First', '1-17 of 17', and 'Last'.

Define Link/Security	Display Order	Link Label	Link Type	Classic/Fluid	Filter ID	Show Count	Show Link	Starting Page
Define	1	Invoices Not Finalized	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	2	Consolidated Invoices Not Finalized	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	3	Invoices Pending My Approval	System-Defined	Both		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	4	Invoices Not Submitted for Approval	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	5	Invoices Pending Approval	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	6	Installment Invoices Not Generated	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	7	Recurring Invoices Not Generated	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	8	Recurring Schedules Expiring	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	9	Invoices Entered Today	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	10	Recent Invoices	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	11	Recent Credit and Rebill Invoices	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	12	Credit Invoices with AP Vouchers	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	13	Invoices with Open Balances	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	14	Invoices Not Integrated to AP	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	15	Invoices Not Integrated to AR	System-Defined	Both	BI_FILTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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 or group box, 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.

### **Enable Scope**

Select to indicate that certain users have access to the Scope field on the PeopleSoft Classic page let and Fluid <Application> WorkCenter – My Work group box.

When this check box is selected, the Set Up Scope Security link appears.

### **Set Up Scope Security**

Click this link to access the [Set Up Scope Security Page](#).

---

**Note:** If you access the Set Up Scope Security page, but don't set up parameters on that page, when you return to the Configure Pagelets – My Work page, the system displays a message in red text saying, "Please set up Scope security".

---

## **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 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 is available in Classic, Fluid, or Both.

**Filter ID**

Select a filter ID for PeopleSoft 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.

## Set Up Scope Security Page

Use the Set Up Scope Security page (EOWC\_VIEWBY\_SEC) to determine the users who can access the Scope field on the WorkCenter – My Work pagelet.

### Navigation

Enterprise Components, WorkCenter/Dashboards, Configure Pagelets. Click the My Work tab. Click the Set Up Scope Security link.

### Image: Set Up Scope Security Page

This example illustrates the fields and controls on the Set Up Scope Security Page .

### Enable Scope for All

Select this check box to indicate that all users have access to the Scope field on the WorkCenter – My Work page.

When you select this check box, the Security section is hidden.

### Security

This section displays when the Enable Scope For All check box is not selected.

### Permission Type

Select the type of permission. Options include:

- Permission List
- Role
- User

Use this option when you want to restrict access to the Scope field to certain permission lists, roles, or user IDs.

**User/Role/Permission List**

Select a particular user ID, role, or permission list that has access to the Scope field on the WorkCenter – My Work pagelet.

The options available in this field are determined by your selection in the Permission Type field.

**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

<b>Process Name</b>	Select a process name that the system must run to display the results of an event or notification alert.
<b>Process Category</b>	Select a process category within the process name selected in the previous field.
<b>Link Label</b>	Displays from the alert and cannot be changed.
<b>Public</b>	Select to indicate that this is a public link.

## Link Type is System-Defined

<b>Import Link</b>	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.
<b>Filter ID</b>	Select the Filter ID that will be used to filter the data for this link.
<b>Add Filter</b>	Select to add filters if you don't want to use what is already defined.
<b>Public</b>	Displays whether the filter is public. This option is display only.
<b>Public</b>	Select to indicate that this is a public link.

## Link Type is User-Defined

<b>Link Label</b>	Enter a label for the link, which appears on the My Work pagelet. (User defined only)
<b>Record Based On</b>	Enter the view name that will be used for defining filter fields for this link.
<b>Filter ID</b>	Select the Filter ID that will be used to filter the data for this link.
<b>Add Filter</b>	Select to add filters if you don't want to use what is already defined.
<b>Public</b>	Displays whether the filter is public. This option is display only.
<b>Public</b>	Select to indicate that this is a public link.

## Link Type is Worklist

<b>Worklist Name</b>	Select the Worklist to be displayed when the link is selected.
<b>Link Label</b>	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.

Import My Work Link

Link Label

Object Owner ID

Record Based On

Search

System-Defined My Work Links

Personalize | Find | View All | |

First 1 of 1 Last

	Link Label	Object Owner ID	Record
<input type="radio"/>			

OK Cancel

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: Billing, 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.

Configuration ID AP

Description Accounts Payable WorkCenter

☒ Allow User to Personalize the Display Options

☒ Allow User to Add Additional Links

**Update User Personalization Settings**

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

**Activate Links Settings**

Last Modified 10/21/2015 2:57:52PM VP1  
Last Run On 01/24/2014 11:39:23AM MGR3

**Link Groups**

\*Group Label Vouchers

Display Order 1

☐ Start Group Collapsed

☐ Hide Group

**Link List**

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window
Define	1	Regular Entry	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	2	Voucher Maintenance	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	3	Voucher Mass Maintenance	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	4	Match Workbench	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	5	Contract Entry	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

**Define Link/Security**

\*Link Type

All URL links will open in a new window.

URL

Label

☐ Public

URL Security		Personalize	Find	View All	First	1 of 1	Last
	*Type	*User/Role/Permission List					
1	<input type="text"/>	<input type="text"/>					

OK Cancel Refresh

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.

Configuration ID: BI

Description: Billing WorkCenter

☒ Allow User to Personalize the Display Options

☒ Allow User to Add Additional Links

Update User Personalization Settings ?

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

Activate Queries Settings

Last Modified: 08/27/2012 3:17:46PM SAMPLE

Last Run: 06/21/2012 4:14:07PM SAMPLE

Query Groups ?

\*Group Label: Billing Queries

Display Order: 1

☐ Start Group Collapsed

☐ Hide Group

Find | View All | First 1 of 2 Last

Query Definition ?

Display Order	Type	Override Title/Description	Query Name	Description	Access	Show Link	Starting Page	
1	Query	<input checked="" type="checkbox"/>	BI_PENDING_BILLS	Billing Inactive Bills	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ -
2	Query	<input type="checkbox"/>	BI_PENDING_BILLS_SUM	Billing Inactive Bills Summary	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ -
3	Query	<input type="checkbox"/>	BI_PENDING_INTFC	Billing Inactive Interface	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ -
4	Query	<input type="checkbox"/>	BI_PENDING_BILLS_CON	Inactive Consolidated Bills	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ -
5	Query	<input type="checkbox"/>	BI_PENDING_CON_BILLS_SUM	Inactive Consol Bills Summary	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ -
6	Query	<input type="checkbox"/>	BI_PENDING_CRCARD	Pending Credit Card Invoice	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ -
7	Query	<input type="checkbox"/>	BI_PENDING_CRCARD_SUM	Pending Credit Card summary	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ -
8	Query	<input type="checkbox"/>	BI_PENDING_WKSHEET	Pending Worksheet	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ -

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 an 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.

The screenshot shows the 'Define Link' window. At the top, there's a title bar with 'Define Link' and a close button. Below the title bar, there are three labels: 'Query Name' with the value 'LEDGER', 'Description' with the value 'Ledger Data', and a 'Public' checkbox which is currently unchecked. Below these labels is a section titled 'Security'. This section contains a 'Personalize' link, a 'Find' button, and a list of 'User/Role/Permission' entries. The list has two columns: '\*Type' and '\*User/Role/Permission List'. The '\*Type' column has a dropdown menu. The '\*User/Role/Permission List' column has a search icon and two buttons, '+' and '-'. At the bottom of the window are three buttons: 'OK', 'Cancel', and 'Refresh'.

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.

WorkCenter/Dashboard | My Work | Links | Queries | Reports/Processes

Configuration ID AP

Description Accounts Payable WorkCenter

☒ Allow User to Personalize the Display Options

☒ Allow User to Add Additional Links

**Update User Personalization Settings** ?

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

**Activate Reports/Processes Settings**

Last Modified 10/21/2015 2:57:52PM VP1

Last Run On 07/13/2012 3:04:44PM SAMPLE

**Link Groups** ?

\*Group Label Reports

Display Order 1

☐ Start Group Collapsed

☐ Hide Group

**Link List** ?

Personalize | Find | 1-8 of 8 | First | Last

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window
Define	1	Registered Voucher	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	2	Trial Register	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	3	Payables Open Liability	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	4	Supplier Liability Aging	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	5	Supplier Balance	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	6	Unpaid Debit Memos	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	7	Voucher Activity	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	8	Open Liability Reconciliation	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Dataset Rules Page</a>	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.

Dataset Rules

Dataset Name

TIME\_ZONE

\*Description

Time Zone

Dataset Rules

Find | View All

First 1 of 1 Last

\*Rule

+ -

\*Description

\*Search Record Name

PSTIMEZONEDEFN

Time Zone Data

\*Status

Active

Rule Conditions

((... \*Field Name \*Operator \*Field Value ))...

Last Update Date/Time

Later Than

%Date

+ -

Test SQL

Show SQL

Data distribution rule is valid.

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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Dataset Roles Page</a>	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

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Usage</b></i>
<u>Mobile Data Distribution Page</u>	EOEC_MP_RULE	Define data distribution rules for mobile devices based on datasets.
<u>Mobile User Rules Page</u>	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 <i>Reference Data Only</i> is selected for products, downloads do not include products unless other objects such as leads and opportunities that reference products are downloaded.
<b>PDA Limit</b>	Select the limiting factor for data instances to be downloaded to a PDA during synchronization. Select from:  <i>All Data:</i> All data matching the rule's conditions is downloaded.  <i>Limit By Count:</i> Only data matching the rule's conditions up to the specified count is downloaded. Referenced data is also included.  <i>Referenced Data Only:</i> Only data referenced by the component interface is downloaded.
<b>Laptop Count and PDA Count</b>	If you select <i>Limit By Count</i> in the Laptop Limit field or the PDA Limit field, specify the maximum number of data instances to be downloaded.
<b>Dataset Name</b>	Select the dataset to apply to this mobile data distribution rule.
<b>Dataset Details</b>	Click to access the Dataset Rules page, where you can view and modify the selected dataset definition.  See <a href="#">Dataset Rules Page</a> .

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.

<b>Show Rule Count</b>	Click to view the number of results the mobile data distribution rule returns.
<b>Show Laptop Count and Show PDA Count</b>	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.
<b>Laptop and PDA</b>	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

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Usage</b></i>
<u>Country Description Page</u>	COUNTRY_DEFN	Define countries to be used throughout the system. This is used mainly for currencies and addresses.
<u>Address Format Page</u>	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.
<u>Valid Address Page</u>	EO_ADDR_VALIDAT	Add valid combinations of address fields.
<u>State/Province Page</u>	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.

The screenshot shows a web interface for the 'Country Description' page. At the top, there are three tabs: 'Country Description', 'Address Format', and 'Valid Address'. The 'Country Description' tab is selected. Below the tabs, the page title is 'Country HKG'. The main content area is a form with the following fields and controls:

- Country:** A dropdown menu showing 'Country'.
- \*Description:** A text input field containing 'Hong Kong'.
- Short Description:** A text input field containing 'Hong Kong'.
- 2-Char Country Code:** A text input field containing 'HK'.
- EU Member State:** A checkbox that is currently unchecked.

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

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Usage</b></i>
<u>Find Object Navigation Page</u>	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.

Portal Name	Component Name	Market	Navigation	Hidden	URL
1 CUSTOMER	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
2 EMPLOYEE	ALGORITHM_CHAIN	GBL	Root > PeopleTools > Security > Encryption > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
3 HC_REGISTRY	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
4 MOBILE	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
5 PARTNER	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
6 PORTAL	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
7 PS_SITETEMPLATE	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>

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.

**Find Object Navigation**

Select Navigation By

☐ Component Name  
☒ Page Name  
☐ Secondary Page Name  
☐ Content Reference Name



Component Name

\*Page Name  

Secondary Page

Portal Name

Content Reference

**Results** Personalize | Find |   First 1-7 of 7 Last

	Portal Name	Component Name	Market	Navigation	Hidden	URL
1	CUSTOMER	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
2	EMPLOYEE	ALGORITHM_CHAIN	GBL	Root > PeopleTools > Security > Encryption > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
3	HC_REGISTRY	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
4	MOBILE	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
5	PARTNER	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
6	PORTAL	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>
7	PS_SITETEMPLATE	ALGORITHM_CHAIN	GBL	Root > Algorithm Chain	<input type="checkbox"/>	<a href="#">Algorithm Chain</a>

#### 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.


**Find Object Navigation**

Select Navigation By

☐ Component Name  
☐ Page Name  
☒ Secondary Page Name  
☐ Content Reference Name

\*Component Name

Page Name

\*Secondary Page   Temporary Table Locks

Portal Name

Content Reference

**Results**

Portal Name	Component Name	Market	Navigation	Hidden	URL
1 CUSTOMER	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage	<input type="checkbox"/>	<a href="#">Review Temp Table Usage</a>
2 EMPLOYEE	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage	<input type="checkbox"/>	<a href="#">Review Temp Table Usage</a>
3 HC_REGISTRY	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage	<input type="checkbox"/>	<a href="#">Review Temp Table Usage</a>
4 MOBILE	AE_TEMPTBL_USE	GBL	Root > PeopleTools > Application Engine > Review Temp Table Usage	<input type="checkbox"/>	<a href="#">Review Temp Table Usage</a>

**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.

**Find Object Navigation**

Select Navigation By

☐ Component Name  
☐ Page Name  
☐ Secondary Page Name  
☒ Content Reference Name

Component Name   
 Page Name   
 Secondary Page   
 \*Portal Name    
 \*Content Reference  Register Operators

**Results** Personalize | Find |  First 1-5 of 5 Last

	Portal Name	Component Name	Market	Navigation	Hidden	URL
1	CUSTOMER	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	<input type="checkbox"/>	<a href="#">Register Operators</a>
2	EMPLOYEE	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	<input type="checkbox"/>	<a href="#">Register Operators</a>
3	PARTNER	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	<input type="checkbox"/>	<a href="#">Register Operators</a>
4	PS_SITETEMPLATE	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	<input type="checkbox"/>	<a href="#">Register Operators</a>
5	SUPPLIER	EOCF_OPERATOR_DEFN	GBL	Root > Enterprise Components > Active Analytics Framework > Setup > Register Operators	<input type="checkbox"/>	<a href="#">Register Operators</a>

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.



# 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:

<b><i>Currency Pair</i></b>	<b><i>Quote Method</i></b>	<b><i>Quote Units</i></b>	<b><i>Primary Visual Rate</i></b>	<b><i>RATE_MULT</i></b>	<b><i>RATE_DIV</i></b>
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:

$$(\text{from-currency} / \text{RATE\_DIV}) \times \text{RATE\_MULT} = \text{to-currency}$$

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:

<b>Currency Pair</b>	<b>Quote Method</b>	<b>Quote Units</b>	<b>Primary Visual Rate</b>	<b>RATE_MULT</b>	<b>RATE_DIV</b>
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:

$$100 \text{ USD to GBP (indirect)} = (100 \text{ USD} / 1.6) \times 1 = 62.50 \text{ GBP}$$

$$1000 \text{ CHF to DEM (direct with units)} = (1000 \text{ CHF} / 100) \times 119.335 = 1193.35 \text{ DEM}$$

$$100 \text{ USD to FRF (triangulate)} = (100 \text{ USD} / 1.25) \times 6.8 = 544 \text{ FRF}$$

## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Currency Code Page</a>	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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Currency Quotation Method Page</u>	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.

<b>Triangulate</b>	Select to triangulate conversions between this currency pair using a reference currency.
<b>Reference Currency</b>	Enter the reference currency for a triangulated conversion.
<b>Primary Visual Rate</b>	<p>With triangulated currency pairs, there are three exchange rates to consider:</p> <ul style="list-style-type: none"> <li>• The rate between the from-currency and the reference currency.</li> <li>• The rate between the reference currency and the to-currency.</li> <li>• The calculated cross rate between the from-currency and the to-currency.</li> </ul> <p>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.</p>
<b>Allow Override</b>	For triangulated currency pairs, select to enable users to override the cross rates on the Market Rate page and Exchange Rate Detail page.
<b>Recalculate</b>	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

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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Market Rate Page</u>	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.
<u>Market Rate Definition Page</u>	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.
<u>Rate Definition Page</u>	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.
<u>Exchange Rate Detail Page</u>	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 Index

Index MODEL

\*Rate Category Exchange Rate

\*Description Default

☒ Default Exchange Rate Index

Market rate indexes are stored in the RT\_INDEX\_TBL table.

<b>Index</b>	Displays the key term for the highest level of organization for market rates in the application.
<b>Rate Category</b>	Select a general category for the market rate index, such as <i>Exchange Rate</i> , <i>Commodity Price</i> , or <i>Interest Rate</i> .
<b>Default Exchange Rate Index</b>	<p>Select to indicate that the selected market rate index is the default exchange rate index. This field is available only if:</p> <ul style="list-style-type: none"> <li>The Rate Category field is set to <i>Exchange Rate</i>.</li> <li>No other index is currently defined as the default exchange rate index.</li> </ul> <p>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.</p> <p>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.</p>

## 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.

The screenshot shows a web form titled "Market Rate Type". It contains three input fields:

- Rate Type**: A dropdown menu with the value "ASK" selected.
- Description**: A text input field containing the text "Asked Rate".
- Short Description**: A text input field containing the text "Ask".

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.

The screenshot shows the 'Market Rate Definition' page. At the top, there is a 'Rate Definition' tab. Below it, the title 'Market Rate Definition' is displayed. The page includes a 'Rate Category' dropdown set to 'Exchange Rate'. A search section contains a 'From Currency Code' input field with a magnifying glass icon and a 'Search' button. Below this is a table titled 'Rate Definition' with columns: 'Term', '\*From Currency Code', '\*To Currency Code', 'Maximum Variance', and '\*Error Type'. The table lists eight entries, all with a term of '0' and a maximum variance of '2.50'. The 'From Currency Code' is 'ADP' for all entries, and the 'To Currency Code' values are 'ATS', 'BEF', 'CAD', 'DEM', 'ESP', 'FIM', 'FRF', and 'GBP'. The 'Error Type' for all entries is 'Warning'. Each row has a '+' and '-' button to its right. The table is part of a larger interface with 'Find | View 100' and 'First 1-8 of 3938 Last' controls at the top right.

Term	*From Currency Code	*To Currency Code	Maximum Variance	*Error Type
0	ADP	ATS	2.50	Warning
0	ADP	BEF	2.50	Warning
0	ADP	CAD	2.50	Warning
0	ADP	DEM	2.50	Warning
0	ADP	ESP	2.50	Warning
0	ADP	FIM	2.50	Warning
0	ADP	FRF	2.50	Warning
0	ADP	GBP	2.50	Warning

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.

**Market Rates**

### Market Rate

**Rate Category:** Index MODEL Default Rate Definition

**Rate Type:** ASK Exchange Rate

**Term:** 0 Asked Rate

**From Currency Code:** ADP Andorran Peseta

**To Currency Code:** ADP Andorran Peseta

Rate	Find   View All	First	1 of 1	Last
<b>Effective Date:</b> <input type="text" value="01/01/1999"/>	<b>*Rate:</b> <input type="text" value="1.00000000"/>	<input type="button" value="+"/> <input type="button" value="-"/>		

**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.

<b>Index</b>	Displays the key term for the highest level of organization for market rates in the application.
<b>Rate Category</b>	Displays the general category for the market rate, such as <i>Exchange Rate</i> , <i>Commodity Price</i> , or <i>Interest Rate</i> .
<b>Rate Type</b>	Displays the selected rate type for this market rate.  Some examples of rate types are commercial, average, floating and historical.
<b>Term</b>	Displays the entered term.
<b>From Currency Code</b>	Displays the selected currency that you are converting from.
<b>To Currency Code</b>	Displays the selected currency that you are converting to.
<b>Rate Definition</b>	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

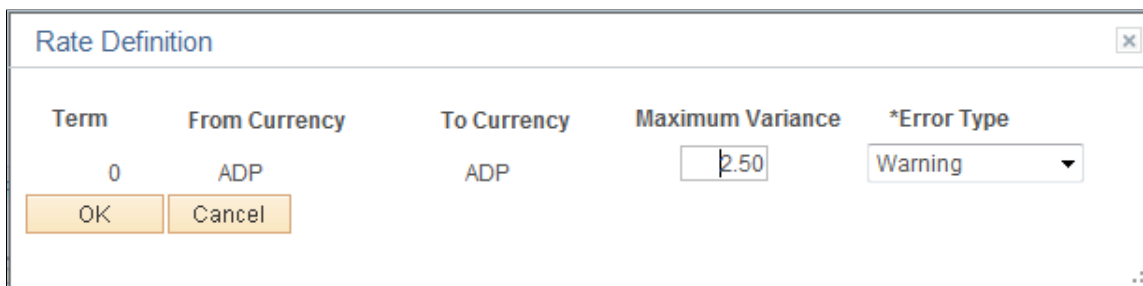
Use the Rate Definition page (RT\_RATE\_DEF\_SEC) to view market rate definition details, including the maximum variance and error handling definitions specified for the currency pair on the Rate Definition page.

### 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.



The screenshot shows a window titled "Rate Definition" with a close button in the top right corner. Inside the window, there are five columns: "Term", "From Currency", "To Currency", "Maximum Variance", and "\*Error Type". The "Term" field contains the value "0". The "From Currency" field contains the value "ADP". The "To Currency" field contains the value "ADP". The "Maximum Variance" field is a text box containing the value "2.50". The "\*Error Type" field is a dropdown menu with "Warning" selected. At the bottom left of the window, there are two buttons: "OK" and "Cancel".

Term	From Currency	To Currency	Maximum Variance	*Error Type
0	ADP	ADP	2.50	Warning

## 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.

**Exchange Rate Detail**

Rate Quotation Basis: Direct

Quote Units: 1

Triangulate: N

Reference Currency:

Current Quote  
1 ADP = 1.00000000 ADP

Historic Quote  
1 ADP = 1 ADP

From	To	Rate
ADP	ADP	1.00000000

OK Cancel

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Calculate Cross/Reciprocal Rate - Parameters Page</u>	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.

The screenshot shows the 'Parameters' page for the Cross/Reciprocal Rate calculation. At the top, there are tabs for 'Run Control ID 1', 'Report Manager', and 'Process Monitor', along with a 'Run' button. Below these is a 'Language' dropdown set to 'English'. The main section is titled 'Report Request Parameters' and contains several input fields: 'Market Rate Index' (MODEL), 'Term' (0), '\*From Common Currency', '\*Exchange Rate Type', and '\*As of Date' (12/12/2012). There are also checkboxes for 'Generate Report' (checked), 'Override Existing Rates', 'Generate Reciprocal Rate' (checked), 'Generate Cross Rates', and 'Rate Triangulate'.

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.

<b>Market Rate Index</b>	Select a market rate index. Applications other than PeopleSoft Treasury should use the default index that you select for the exchange rate.
<b>Term</b>	This value defaults from the value entered on the Market Rate Definition page.
<b>From Common Currency</b>	Select a currency code to calculate a reciprocal rate.
<b>Exchange Rate Type</b>	Select the exchange rate type to use for this calculation.
<b>As of Date</b>	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 calculate reciprocal rates for currency pairs that do not have the Auto Reciprocate option selected 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:

$$(\text{from-currency} / \text{RATE\_DIV}) \times \text{RATE\_MULT} = \text{to-currency}$$

For 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**

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

### **Currency Exchange Calculator Page**

Use the Currency Exchange Calculator page (CURRENCY\_EXCHNG\_PN) to calculate currency exchange between currencies.

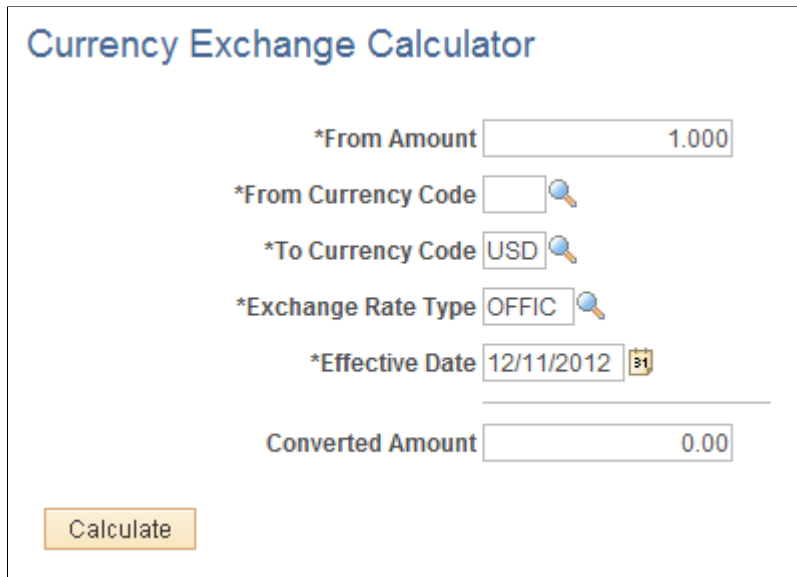
This tool enables you to select a rate type other than the base currency, but does not enable you to override the exchange rate.

#### **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.



Currency Exchange Calculator

\*From Amount 1.000

\*From Currency Code

\*To Currency Code USD

\*Exchange Rate Type OFFIC

\*Effective Date 12/11/2012

Converted Amount 0.00

Calculate

**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.

# 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.

<b>Role Name</b>	<b>Description</b>	<b>Permission Lists</b>	<b>Access Rights</b>
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, <i>and</i> has add/update/display access to the Form Design Wizard component.  Form designers have update/display access to only <i>their</i> forms when using the Manage Forms (FORM_RPT) component.
FORM_ADMIN	Form administrator:  Can complete and submit forms, design forms, and manage <i>all</i> forms.	EOFM1000  EOFM2000  EOFM3000  EOSD2000	The form administrator has the same access as the form designer, and additionally, has update/display access to <i>all</i> 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 <i>all</i> 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

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

## Design Form - Step 1: Basic Information Page

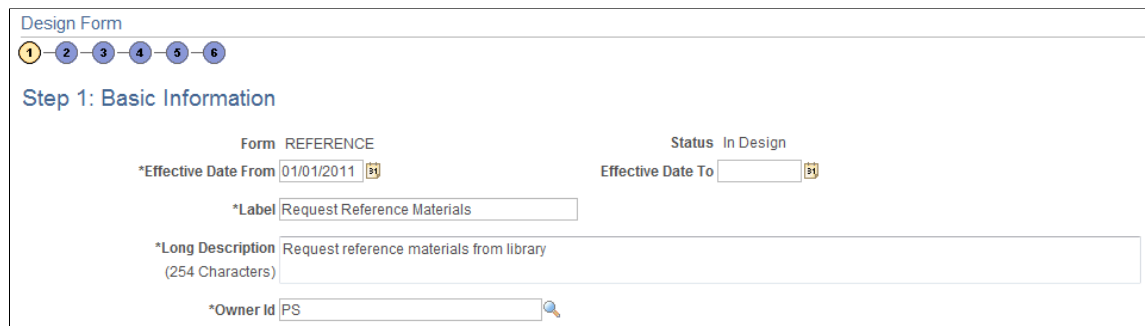
Use the Design Form - Step 1: Basic Information page (FORM\_DSN\_WZR\_MAIN) to define a form's basic information.

### 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.



The screenshot shows the 'Design Form' interface with a progress bar at the top indicating six steps. Step 1, 'Basic Information', is the active step. The form contains several fields: 'Form REFERENCE' and 'Status In Design' at the top right; '\*Effective Date From' with a date picker set to '01/01/2011' and 'Effective Date To' with an empty date picker; '\*Label' with the text 'Request Reference Materials'; '\*Long Description' with the text 'Request reference materials from library' and a '(254 Characters)' limit; and '\*Owner Id' with the text 'PS' and a magnifying glass icon.

### 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.

Design Form

1 2 3 4 5 6

Step 2: Instructions

Form REFERENCE

Instructions

This form must be completed and submitted before requesting any reference materials from library.

Once the managerial staff approve your request, a notification will be sent to your work email automatically, please forward this email to library administrator before you borrow any reference materials.

To adjust the format and content in the form template, please contact the Form Administrator.

< Previous Next > Cancel

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.

**Design Form**

Step 3: Form Fields

Form REFERENCE

Left Column						Personalize   Find   View All   [?]   [X]		First	1-4 of 4	Last
	*Label	*Use Type	*Length	Field Status	Details					
1	Employee ID	Text	20	Activated	Details			↓	+	-
2	Employee Name	Text	20	Activated	Details	↑	↓		+	-
3	Department	Code	4	Activated	Details	↑	↓		+	-
4	Justification	Text	254	Activated	Details	↑			+	-

↓ Move to Right Column      ↑ Move to Left Column

Right Column						Personalize   Find   View All   [?]   [X]		First	1-2 of 2	Last
	*Label	*Use Type	*Length	Field Status	Details					
1	Checkout Date	Date	10	Activated	Details			↓	+	-
2	Return Date	Date	10	Activated	Details	↑			+	-

☐ Single column style  
Fields of right column will be moved under the fields of left column.

< Previous      Next >      Cancel

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.

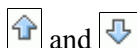
### Field Status

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](#).



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.

The image shows a 'Form Field Edits' dialog box with the following fields and controls:

- Form**: REFERENCE
- Label**: Business Unit
- ☐ **Required**
- ☐ **Uppercase**
- Prompt Record**: [Text Field]
- Set ID**: [Text Field]
- Long Label**: [Text Field]  
(100 characters)

Below these fields is a table with the following structure:

Prompt Control			
Personalize   Find   View All   [Icons]			
First ◀ 1 of 1 ▶ Last			
	*Record Name	*Field Name	
1	[Text Field]	[Text Field]	[+/-]

At the bottom of the dialog are **OK** and **Cancel** buttons.

**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.

**Form Field Edits**

Form REFERENCE

Label Department

☐ Required

Long Label   
(100 characters)

Codes		Personalize   Find   View All	First ◀ 1-4 of 4 ▶ Last
	*Field Value	*Translate Long Name	Field Status
1	DEV	Development	Activated
2	MARK	Marketing	Activated
3	SALE	Sales	Activated
4	SUPP	Support	Activated

Prompt Control		Personalize   Find   View All	First ◀ 1 of 1 ▶ Last
	*Record Name	*Field Name	
1	<input type="text"/>	<input type="text"/>	

OK Cancel

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 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. Note: leave the Prompt Control grid empty.

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.

Design Form

1 2 3 4 5 6

Step 4: Attachment Templates

Form REFERENCE

Form Attachment Templates

Personalize | Find | 1 of 1 | First | Last

Description	Attached File	Attach	Open
1		Attach	Open

< Previous Next > Cancel

#### 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.

Design Form

1 2 3 4 5 6

Step 5: Publish to Menu

Form REFERENCE

Root

Sequence number

Folders	Personalize	Find	View All	First	1-15 of 28	Last
Company Directory						90
Manager Dashboard						91
Talent Summary						92
Org Chart Viewer						95
Self Service						100
Manager Self Service						200
Recruiting						1000
Workforce Administration						1050
Benefits						1100
Compensation						1150

### 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.

Compensation	1150
Stock	1200
Time and Labor	1250
Payroll for North America	1300
Global Payroll & Absence Mgmt	1350
Payroll Interface	1400

Content References	Personalize	Find	View All	First	1-7 of 7	Last
Careers						100
Usage Monitoring						9979
Change My Password						9980
My Personalizations						9983
My System Profile						9986
My Dictionary						9989
My Feeds						9992

< Previous    Next >    Cancel

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Define Prompt Records Page</u>	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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.

The screenshot shows the 'Manage Forms' page. At the top, there is a 'Portal Label' text input field and a '\*Time Period' dropdown menu set to 'Last 30 Days'. Below these is a 'Search' button. The main area features a tabbed interface with 'Forms' selected. Above the table are links for 'Personalize', 'Find', 'View All', and a 'First 1 of 1 Last' indicator. The table has columns for 'Form', 'Portal Label', 'Root Folder', 'Status', and actions 'Activate' and 'Inactivate'. One form is listed: '1 REFERENCE' with portal label 'Request Reference Materials' and root folder 'Enterprise Components', currently in 'In Design' status.

Form	Portal Label	Root Folder	Status	Activate	Inactivate
1 REFERENCE	Request Reference Materials	Enterprise Components	In Design	Activate	Inactivate

### 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:

<b>Form</b>	The Form ID that was defined in the Form Design Wizard component when the form was created.
<b>Portal Label</b>	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.
<b>Portal Folder</b>	The name of the folder the form is published under.
<b>Status</b>	The form's current activation status, either <i>Activated</i> or <i>In Design</i> .

## Activating/Inactivating Forms

Select the Action tab to activate or inactivate forms.

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

## Reviewing Form Counts

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

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

<b>Cancelled</b>	Lists the number of form instances that have been cancelled.
<b>Approved</b>	Lists the number of form instances that have been approved.
<b>Denied</b>	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.

<b>Owner ID</b>	Lists the current owner. To change ownership, select a new owner from the prompt list.
<b>Change Ownership</b>	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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Search/Fill a Form Page</u>	FORM_ADD	Search for an existing form instance to update, or complete a new form instance.
<u>Form Page</u>	FORM FORM2	Complete a form instance and submit it for approval.
<u>&lt;Portal label (approval preview)&gt; Page</u>	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.
<u>Form Approval Page</u>	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.

The screenshot shows a web form titled "Request Reference Materials". At the top, there are three tabs: "Form" (selected), "Instructions", and "Attachments". Below the tabs, the form fields are as follows:

- \*Subject: A text input field.
- Priority: A dropdown menu with "3-Standard" selected.
- Due Date: A date input field with a calendar icon.
- Status: A text input field with "Initial" entered.
- More Information: A large, empty text area.
- Save: A button at the bottom left.

### 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.

The screenshot shows the same "Request Reference Materials" form, but now it contains saved data and additional controls:

- Seq Nbr: 1 (displayed at the top left).
- \*Subject: "My Req #1" (entered in the text field).
- Priority: "3-Standard" (selected in the dropdown).
- Due Date: A date input field with a calendar icon.
- Status: "Initial" (entered in the text field).
- More Information: A large, empty text area.
- Save: A button at the bottom left.
- Preview Approval: A button located below the Status field.
- Submit: A button located to the right of the Preview Approval button.

**Image: Form page showing a posted integrated form instance**

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

The screenshot shows a web form interface. At the top, there are three tabs: 'Form', 'Instructions', and 'Attachments'. The 'Form' tab is selected. Below the tabs, the form is titled 'Request Reference Materials'. The form contains several fields: 'Seq Nbr' with the value '1', '\*Subject' with the value 'My Req #1', 'Priority' with a dropdown menu showing '3-Standard', 'Due Date' with a date picker, 'Status' with the value 'Approved', and a button labeled 'Approver Status'. Below these fields is a section titled 'More Information' with a large text area. At the bottom of the form is a 'Save' button.

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.

**Request Reference Materials**

Subject My Req #1

Review/Edit Approvers

**Request Reference Materials: 1:Initiated** View/Hide Comments

1

**Skipped**  
No approvers found  
Supervisor by UserId

**Not Routed**  
Multiple Approvers  
Error Step

**Comments**

OK Submit

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Form to CI Collection Mapping Page</a>	EODC_CI_MAP	Map form fields to component interfaces.
<a href="#">Document Form References Page</a>	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 EODC4000, 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.

**Form to CI Collection Mapping**

Document Category: Form      \*Description:

Document Name: REFERENCE

Form Type: REFERENCE

\*Mode: Add

**Document Component Interfaces**      Find | View All      First 1 of 1 Last

Component Interface Name:       Level0 Record Name:       Sequence:

Menu Name:

☒ Select All    ☐ Clear All       

**CI Collection Property Mappings**      Personalize | Find | View All |       First 1 of 1 Last

Seq	Form Field Name	CI Scroll Level	CI Key Field	CI Collection	CI Collection Property Name	CI Property Default	Active Flag
<input type="text"/>	<input type="text"/>	Level 0	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

#### 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:

<b>Component Interface Name</b>	Select the component interface to associate with the form.
<b>Menu Name</b>	<p>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.</p> <p>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.</p>
<b>Level0 Record Name</b>	Select the Level0 record of the component interface to associate with the form.
<b>Sequence</b>	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.
<b>Get CI Properties</b>	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.

<b>Seq (sequence)</b>	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.
<b>Form Field Name</b>	Select the name of the form field to map. Only form fields with <i>Active</i> status appear in the selection list.
<b>CI Scroll Level</b>	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:

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

---

## Using Forms in PeopleSoft Fluid User Interface

Use forms to automate processes that include workflow-based approvals. Forms also provide an audit trail for tracking progress. You can design forms based on your business requirements.

---

**Note:** Forms designed in the Fluid forms and approval builder are not accessible in the classic version, and vice versa. For more information on classic forms and approval builder, please refer [Understanding PeopleSoft Forms and Approval Builder](#)

---

For more information on Fluid Forms, refer the Video Feature Overview on PeopleSoft Fluid Forms and Approval Builder.



[PeopleSoft Fluid Forms and Approval Builder](#)



## Pages Used to Manage Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Design Forms	EOFM_DSN_SRCH_FL	To add a form or view the forms already created
Form Designer	EOFM_DSN_FORM_FL	To create a form or edit an existing form.
My Forms	EOFM_CONTAINER_FL	To view the forms created and fill out a new form.
Add Form	EOFM_FORM_FL	To fill out a new form; or update/view a form already filled out.
Approve/Review Form	EOFM_FORM_FL	To approve or review a form submitted.

## Design Forms Page

Use the Design Forms page (EOFM\_DSN\_SRCH\_FL) to create a form or view the forms already created. You can only view forms in Activated or In Design status.

**Note:** User should have Form Designer role assigned to view the design forms in the Employee Self Service home page.

### Navigation

Select the Design Forms tile on the home page.

This tile can be placed on any PeopleSoft Fluid Home page. For additional information about how to add a tile to a PeopleSoft Fluid Home page, see *PeopleTools: Application User's Guide*, Working With PeopleSoft Fluid User Interface, Working With Fluid Homepages, Managing Tiles, Adding Tiles to a Fluid Homepage documentation.

### Image: Design Forms Page

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

Form	Label	Status	Effective Date From	Effective Date To	Actions
1 PRJPR1	Project Postpone Request	Activated	06/15/2016		Edit Add To Homepage Transfer
2 TUITION	Tuition Reimbursement Request	Activated	06/14/2016		Edit Add To Homepage Transfer

### Form

Enter a unique value. The form name can contain letters, digits or underscore. System checks if the value is used by an existing form, or any other supplemental data record.

### Add and Edit

Click to display the Form Designer component.

**Add To Homepage**

Click to add the selected form to the home page as a tile. You cannot have multiple tiles of the same form on the home page.

**Transfer**

Click to transfer the ownership of the form to another user.

---

**Note:** You can view inactive forms on the designer forms page by selecting Show Inactive Forms option in the Actions list menu.

---

## Form Designer Page

Use the Form Designer page (EOFM\_DSN\_SRCH\_FL) to create a form or edit an existing form.

**Navigation**

Click Add or Edit button on the Design Forms page.

**Image: Form Designer - Form Page**

This example illustrates the fields and controls on the Form Designer - Form page. You can find definitions for the fields and controls later on this page.

**Label**

Enter a name for the design.

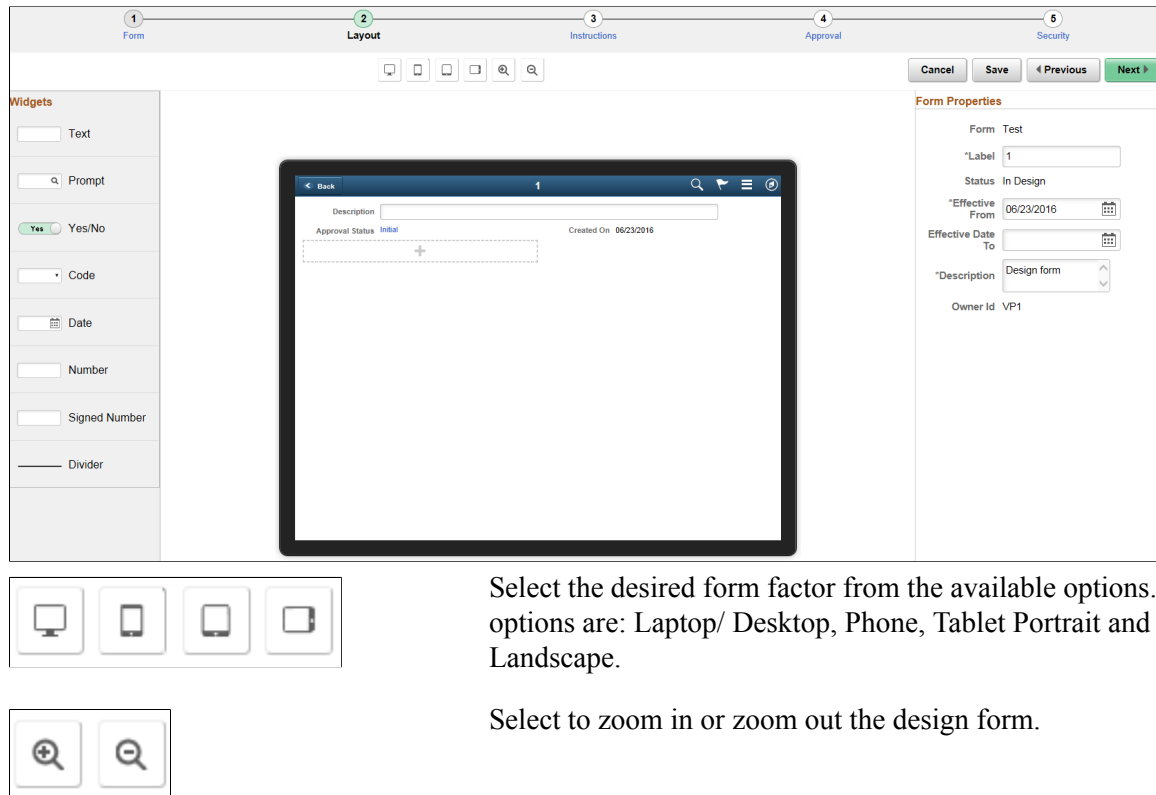
**Status**

The available status options are

- In Design
- Inactivated

## Image: Form Designer - Layout Page

This example illustrates the fields and controls on the Form Designer - Layout page. You can find definitions for the fields and controls later on this page.



Select the desired form factor from the available options. The options are: Laptop/ Desktop, Phone, Tablet Portrait and Tablet Landscape.

Select to zoom in or zoom out the design form.

## Widgets

Drag and drop the desired widget to the design form field.

The widgets available are the following:

- *Text*
- *Prompt*: Allows users to select values from existing PeopleSoft records to complete the field.
- *Yes/No*
- *Code*: Allows users 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.
- *Date*
- *Number*
- *Signed Number*
- *Divider*: Allows users to organize the form into multiple sections.

### Image: Form Designer - Instructions Page

This example illustrates the fields and controls on the Form Designer - Instructions page.

### Image: Form Designer - Approval Page

This example illustrates the fields and controls on the Form Designer - Approval page. You can find definitions for the fields and controls later on this page.

#### Lockdown Options

Select the lockdown option. The available options are:

- Do Not Lockdown
- Lockdown After Approval
- Lockdown After Submit

#### Approver User List

Add an approver. The approver added will be synchronized with the Approval Workflow Engine (AWE) setup.

### Image: Form Designer - Security Page

This example illustrates the fields and controls on the Form Designer - Security page. You can find definitions for the fields and controls later on this page.

#### Role Name

Add a role. The Role added here will be synchronized with the content reference defined in Portal Registry. The form controller will also check this configuration to enforce form level security.

Click to activate the form and the Design Forms page is displayed.

## Related Links

[Defining Prompt Records](#)

## My Forms Page

Use the My Forms page (EOFM\_CONTAINER\_FL) to view the forms created.

### Navigation

Select the My Forms tile on the home page.

### Image: My Forms Page

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

Form	Description	Approval Status	Created Datetime	Submitted Datetime
Project Postpone Request	Postpone Project IMPLEMENTATION by 2 Month	Initial	06/15/16 4:43PM	
Tuition Reimbursement Request	Oracle Database 12c Bootcamp	Cancelled	06/14/16 5:26PM	06/14/2016 5:28PM

### View By

Select to sort the forms by the Approval status or Form names. The available options are: Form and Status.

### Fill out a new form

Click to select and fill a form. You can view all the forms you are allowed to access.

### Image: Form Page

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

### Add Attachment

Click to add an attachment to the form.

### Preview Approval

Click to view the approval hierarchy. The Preview Approval button appears only when you save the form.

### Submit

Click to submit the form. The Submit button appears only when you save the form.

## Approve Form

Use the Approve form page (EOFM\_FORM\_FL) to approve or review a form submitted.

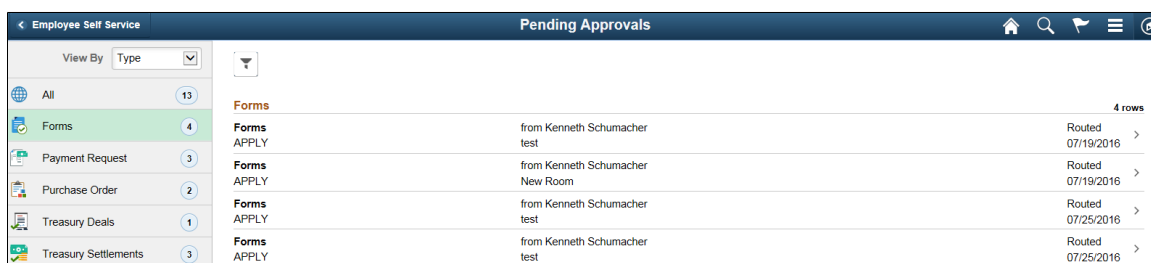
### Navigation

Select the Approvals tile on the home page.

Approvers can login and click the Approvals tile on the home page to access the form to be approved. Click the Forms link on the Fluid Approvals page to list the forms to be approved or reviewed.

### Image: Fluid Approvals Page

This example illustrates the fields and controls on the Fluid Approvals page.



Employee Self Service		Pending Approvals	
View By	Type		
All	13		
Forms	4	<b>Forms</b>	4 rows
Payment Request	3	Forms APPLY	from Kenneth Schumacher test Routed 07/19/2016
Purchase Order	2	Forms APPLY	from Kenneth Schumacher New Room Routed 07/19/2016
Treasury Deals	1	Forms APPLY	from Kenneth Schumacher test Routed 07/25/2016
Treasury Settlements	3	Forms APPLY	from Kenneth Schumacher test Routed 07/25/2016

Click the required form link on the Fluid Approvals page to access the form to be approved or reviewed. Click the Approve or Deny button and enter any comments if required to submit the form and complete the approval process.

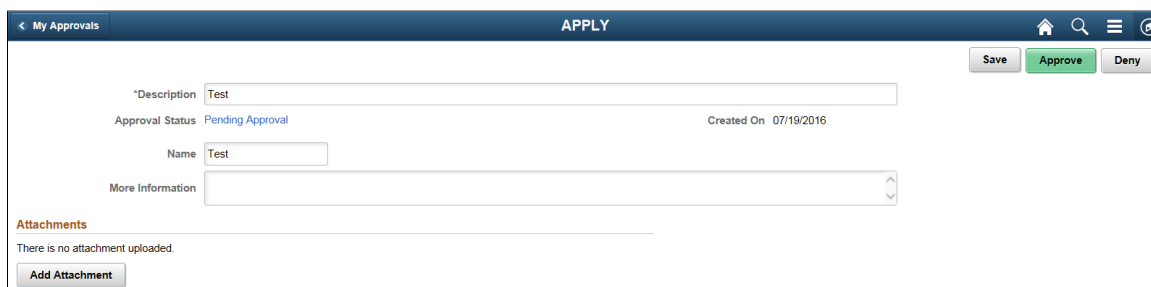
---

**Note:** Only Fluid forms are supported for fluid approvals.

---

### Image: Approval Page

This example illustrates the fields and controls on the Approval page.



**My Approvals** **APPLY**

Save Approve Deny

\*Description: Test

Approval Status: Pending Approval Created On: 07/19/2016

Name: Test

More Information: [Expandable Section]

**Attachments**

There is no attachment uploaded.

Add Attachment

## 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Toolbar Button Definition Page</u>	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 Definition

#### Button Details

Toolbar Button ID

HRS\_ADD\_APPLICATION

\*Description

HRS Add Application

\*Short Description

Applicatio

Class Method

AddApplication

Defined Button

Toolbar Label

Add Application

Content Name

PS\_APPLICATION\_ADD\_ICN

Disabled

Description

Recruiting Solutions Add Application

#### Audit History

Date Created

06/22/11 2:17:43.000000PM

PPLSOFT

Last Modified

06/22/11 2:20:34.000000PM

PPLSOFT

<b>Toolbar Button ID</b>	Displays the unique identifier of the toolbar button. This ID is referenced in PeopleCode to manipulate button properties.
<b>Class Method</b>	<p>Enter the method name of the extended application class, which contains the PeopleCode that executes when a user clicks the button.</p> <p>This value does not contain spaces or special characters.</p> <hr/> <p><b>Note:</b> If you specify a value in this field, leave the Defined Button field blank.</p> <hr/>
<b>Defined Button</b>	<p>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.</p> <hr/> <p><b>Note:</b> If you specify a value in this field, leave the Class Field field blank.</p> <hr/>
<b>Toolbar Label</b>	Enter the default button label, which is used as a tool tip for the button at runtime.
<b>Content Name</b>	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.
<b>Disabled</b>	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.
<b>Description</b>	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

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Usage</i></b>
<u>Toolbar Definition - Description Page</u>	EOTL_TOOLBAR_DEFN	Define general toolbar attributes.
<u>Toolbar Definition - Button Page</u>	EOTL_TOOLBAR_BTNS	Configure toolbar buttons.
<u>Toolbar Definition - Content Page</u>	EOTL_TOOLBAR_DISP	Configure component-specific toolbar content.
<u>Toolbar Definition - Focus Fields Page</u>	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 Definition

Save

Previous

Next

Clone

Personalize

Toolbar ID HRS\_JO\_360

Description

Buttons

Content

Focus Fields

Toolbar Details

\*Toolbar Page Title

Manage Job Opening

Display Page Title

\*Description

Manage Job Opening Toolbar

Comments

Show Date and Time

\*Display Option

Icon and Text Label

\*Width (in pixels)

1232

Clone To

Toolbar Personalization

Allow Toolbar Personalization

Personalizations 0

Reset Toolbar Personalization

Toolbar Summary Area Layout

\*Summary Layout

Column

\*# of Columns

2

\*Width Type

Percentage

Column 1 Width

50

Column 2 Width

50

Toolbar Control Properties

Show Toolbar Footer

Show PeopleTools Buttons

Show PeopleTools Hyperlinks

Audit History

Date Created

06/21/11 4:42:30.000000PM

PPLSOFT

Last Modified

05/03/12 10:19:25.000000AM

PPLSOFT

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.

124

Copyright © 1988, 2017, Oracle and/or its affiliates. All rights reserved.

<b>Description</b>	<p>Enter a description of the toolbar (for example, the name).</p> <p>This is a required field that is used to help users identify the toolbar on the Toolbar Definition component.</p>
<b>Show Date and Time</b>	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.
<b>Display Option</b>	<p>Select <i>Icon Only</i>, <i>Icon and Text Label</i>, or <i>Text Only</i>. 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.</p> <p>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 &lt;&lt; or &gt;&gt; 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.</p>
<b>Width (in pixels)</b>	Enter the width of the toolbar in pixels. The default toolbar width is set to 745 pixels.
<b>Clone To</b>	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

<b>Allow Toolbar Personalization</b>	Select to allow toolbar personalization.
<b>Personalizations</b>	<p>Displays the number of user personalizations that the toolbar currently has.</p> <p>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.</p>
<b>Reset Toolbar Personalizations</b>	<p>Click to delete any toolbar personalizations that users performed.</p> <p>When changes to the toolbar functionality occur, administrators can use this button to refresh users' toolbar settings.</p>

## Toolbar Summary Area Layout

<b>Summary Layout</b>	Select <i>Column</i> or <i>Row</i> . 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.

**Toolbar Definition**

Save | Previous | Next | Clone Personalize

Toolbar ID HRS\_JO\_360

Description | **Buttons** | Content | Focus Fields

**Primary Toolbar Buttons** Personalize | Find | 1-4 of 4

Seq	Button Name	Text Label	Alt. Label	Access Key		
1	Save	Save	Save			+ -
2	Save Change	Save	Save			+ -
3	HRS Interview - Submit	Submit	Submit			+ -
4	HRS Interview - Save for Later	Save for Later	Save for Later (Alt+S)	S		+ -

**Secondary Toolbar Buttons** Personalize | Find | First 1-13 of 13 Last

Seq	Button Name	User Can Hide	Text Label	Alt. Label	Access Key		
2	HRS Return	<input type="checkbox"/>	Return	Return (Alt+R)	R		+ -
3	HRS Return Home	<input type="checkbox"/>	Recruiting Home	Recruiting Home (Alt+H)	H		+ -
4	HRS Search Job Openings	<input type="checkbox"/>	Search Job Openi	Search Job Openings (Alt+F)	F		+ -
5	Previous job opening in list	<input type="checkbox"/>	Previous	Previous (Alt+4)	4		+ -
6	Next job opening in list	<input type="checkbox"/>	Next	Next (Alt+3)	3		+ -
7	Create job opening	<input checked="" type="checkbox"/>	Create New	Create New Job Opening (Alt+N)	N		+ -
8	Clone Job Opening	<input checked="" type="checkbox"/>	Clone	Clone Job Opening (Alt+C)	C		+ -
10	HRS Refresh	<input checked="" type="checkbox"/>	Refresh	Refresh Applicants (Alt+0)	0		+ -
11	Add Note	<input checked="" type="checkbox"/>	Add Note	Add Note (Alt+A)	A		+ -
12	HRS Interview Schedule	<input checked="" type="checkbox"/>	Interviews	Interviews (Alt+I)	I		+ -
13	Update Job Category	<input checked="" type="checkbox"/>	No Category	No Category			+ -
18	Browse Applicants	<input checked="" type="checkbox"/>	Browse Applicants	Browse Applicants (Alt+B)	B		+ -
20	Saved Searches	<input checked="" type="checkbox"/>	Saved Searches	Saved Searches			+ -

### 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.

**Toolbar Definition**

Save | Previous | Next | Clone Personalize

Toolbar ID HRS\_JO\_360

Description Buttons **Content** Focus Fields

Toolbar Content										Personalize	Find	First	1-9 of 9	Last
*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	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
DEPARTME	3	2	Department		35		15	50	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
HRS_SCH_	4	1	Hot Job		35		15	50	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
JOB_OPEN	1	1	Job Opening ID		35		15	50	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
JOB_OPEN	1	2	Status		35		15	50	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
JOB_SEGM	4	2	Segmenting		35		15	50	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
JOB_TITLE	3	1	Job Code		35		15	50	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
POSITION_	4	1	Position Number		35		15	50	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
POSTING_1	2	1	Job Posting Title		35		15	50	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

### 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.



<b>Row</b>	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.
<b>Item</b>	Enter the position of the item in the row. Enter <i>1</i> for the item that appears in the leftmost position in the row, <i>2</i> for the next label to the right, and so forth.
<b>Title</b>	Enter a label for the item.
<b>Width Pixels, Width %, Label Pixels and Label %</b>	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.
<b>Length of text</b>	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.
<b>Truncation Token</b>	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.
<b>Wrap Data</b>	Select to wrap data if its length exceeds what is specified for the text length.
<b>Start New Row</b>	Select if the display item should start on the next new row.
<b>Span Data</b>	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.

Toolbar Definition

Save

Previous

Next

Clone

Personalize

Toolbar ID HRS\_JO\_360

Description

Buttons

Content

Focus Fields

Page Cursor Fields

Personalize

Find

First

1 of 1

Last

*Component	*Market	*Page Name	Page Hidden	*Record	*Field Name		
			<input type="checkbox"/>			<div>+</div>	<div>-</div>

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.

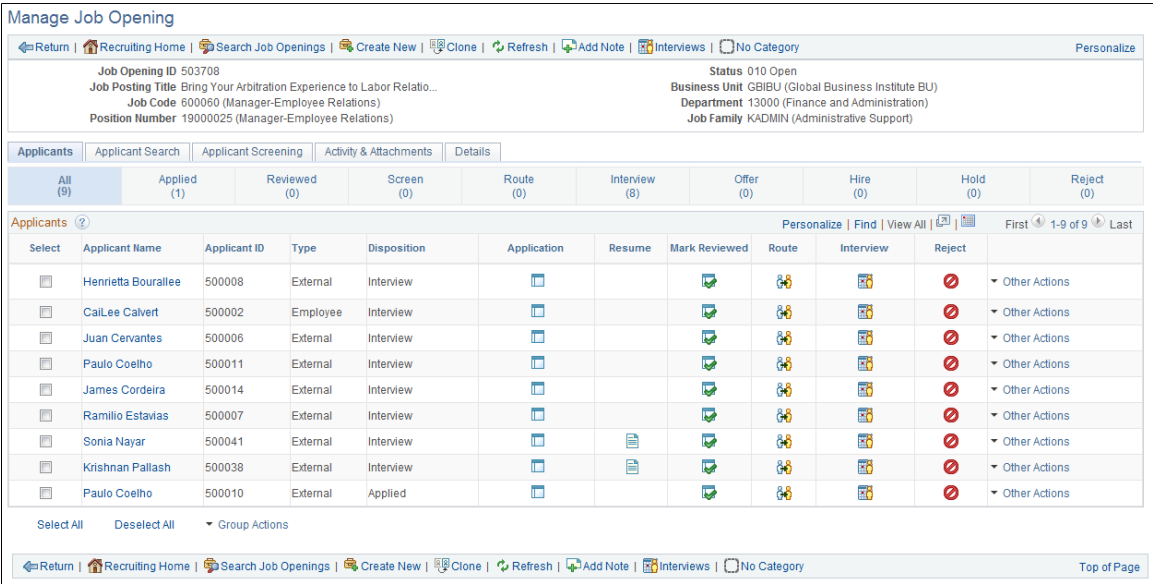
Multiple fields on the same page can be defined. This is useful when you want to set the cursor on a different field when the user enters the page in a different type of transaction mode. The toolbar always puts the cursor to the first editable, available field on the page.

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 page

This example illustrates the fields and controls on the Personalize Toolbar page. 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.

# 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 known 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.

---

---

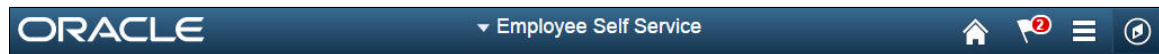
## Understanding Banners in PeopleSoft Fluid User Interface

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.



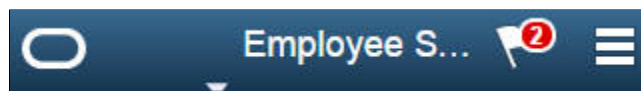
The banner on the tablet will display the following for all pages:

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 Comments and Attachments View Framework

---

## Understanding Comments and Attachments View Framework

The Comments and Attachments View Framework enables users to view comments and attachments at a common location or page. This can be configured in PeopleSoft components where comments or attachments or both need to be displayed.

The steps involved in the configuration, setup and registration of the Comments and Attachments View framework are:

1. DataSource View
2. Configuration Setup
3. Configuration ID Mapping
4. Implementation

### **DataSource View**

The DataSource View should be an SQL query to fetch Comments (or) Attachments (or) both for a transaction. The Query/View has to be with proper keys on each level (Transaction, Comments and Attachments)

### **Configuration Setup**

Configuration ID needs to be setup to use the framework. Based on the Query/View created, appropriate fields appear in the configuration setup. For details on Configuration Setup, see [CAVF Configuration Setup Page](#)

### **Configuration ID Mapping**

Configuration ID Mapping setup used for calling Configuration ID dynamically in PeopleCode event. For more details, see [CAVF Configuration ID Component Mapping Page](#)

## Implementation

# Configuring and Implementing the Comments and Attachments View Framework

## Pages Used to Configure and Implement the Comments and Attachments View Framework

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>CAVF Configuration Setup Page</u>	EOATT_CONFIG_DTLS	Set up the Comments and Attachments View configuration.
<u>CAVF Configuration ID Component Mapping Page</u>	EOATT_MAPCO_PG	Configure the transaction page and to specify where to display the comments and attachments.
<u>CAVF Configuration ID Page Composer Mapping Page</u>	EOATT_MAPPC_PG	Configure the Page Composer page where the Comments and Attachments View framework is to be used

## CAVF Configuration Setup Page

Use the CAVF Configuration Setup page (EOATT\_CONFIG\_DTLS) to create a unique Configuration ID and to configure the comments and attachments.

### Navigation

Enterprise Components, CA View Framework, CAVF Configuration Setup



Image: CAVF Configuration Setup screenshot 1 of 2

CAVF Configuration Setup screenshot 1 of 2

CAVF Configuration Setup

Configuration IDAP\_PR\_ATTACH

\*DescriptionPayment Request Attachments

\*Product AreaFAPPayables

\*Date Source ViewAP\_PR\_ATTACH\_VW

Default Attributes

File Attachment Server Details

DataSet 1

Preview

Field Details

PersonalizeFindFirst1-7 of 7Last

Field Name	Sequence Number	Field Type	Key ?	Display ?	Header ?	Field Label ID	Label Type	Field Label		
REQUEST_ID	1	Transaction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Long	Request ID	<input type="button" value="+"/>	<input type="button" value="-"/>
SCM_ATTACH_ID	2	Attachment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Attachment Id	<input type="button" value="+"/>	<input type="button" value="-"/>
ATT_VERSION	3	Attachment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Att Version Wrk	<input type="button" value="+"/>	<input type="button" value="-"/>
ATTACHSYSFILENAME	4	Attachment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Unique Sys Filename	<input type="button" value="+"/>	<input type="button" value="-"/>
ATTACH_DESCR	5	Attachment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Long	Attachment Description	<input type="button" value="+"/>	<input type="button" value="-"/>
OPRDEFNDESC	6	Attachment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ENTERED_BY	Shor	Entered By	<input type="button" value="+"/>	<input type="button" value="-"/>
ATTACHUSERFILE	7	Attachment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Long	Attached File	<input type="button" value="+"/>	<input type="button" value="-"/>

DataSet 1 Header Title

Msg SetMsg Num

Attachment Defaults

☒ Display Sequence Number☒ Display Attachment Type Icon

Line Level Defaults

☐ Show Line Title☐ Line Title From Field Value

Line Title

Comment Defaults

☐ Comment Title From Field Value☐ Display Sequence Number

Comment TitleAttachments

Image: CAVF Configuration Setup screenshot 2 of 2

CAVF Configuration Setup screenshot 2 of 2

DataSet 2

Preview

Field Details

PersonalizeFindFirst1 of 1Last

Field Name	Sequence Number	Field Type	Key ?	Display ?	Header ?	Field Label ID	Label Type	Field Label		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="button" value="+"/>	<input type="button" value="-"/>

DataSet 2 Header Title

Msg SetMsg Num

Attachment Defaults

☒ Display Sequence Number☒ Display Attachment Type Icon

Line Level Defaults

☐ Show Line Title☐ Line Title From Field Value

Line Title

Comment Defaults

☐ Comment Title From Field Value☒ Display Sequence NumberAfter title

Comment Title

SaveReturn to SearchPrevious in ListNext in ListRefresh

AddUpdate/Display

The fields and description are mentioned below in this page.

**Configuration ID**Unique ID for the configuration.

**Description**Description of the configuration.

<b>Product</b>	Product Information.
<b>Data Source View</b>	The query that drives the framework.
<b>Default Attributes</b>	Set up the UI related defaults. If this is left blank, the values will be picked up from the framework defaults.
<b>File Attachment Server Details</b>	Enter the details of the file server for the attachments for a configuration ID. For more details see the section on File Attachment Server Details in this page.

## File Attachment Server Details

### Image: File Attachment Server Details

File Attachment Server Details

The screenshot shows a dialog box titled "File Attachment Server Details". It contains the following fields and controls:

- Configuration ID:** AP\_PR\_ATTCH
- Default Server:** ☒ (checked)
- Attachment Server Type:** A dropdown menu currently showing "DB".
- Server/Record Name/URL Id:** A text field containing "PV\_ATT\_DB\_SRV".
- PATHNAME:** An empty text field.
- Administer File Attachments:** A blue hyperlink.
- Buttons:** "OK", "Cancel", and "Refresh" at the bottom.

<b>Configuration ID</b>	CAVF Configuration Setup ID.
<b>Default Server</b>	For PeopleSoft FSCM, this checkbox needs to be ticked for the system to take in the default server and path.  If this is unchecked, provide the details in the below fields.
<b>Attachment Server Type</b>	Choose the type of file server. Available types are DB, FTP and URL.
<b>Server/Record Name/Url Id</b>	specify the server name or record name or URL.
<b>PATHNAME</b>	specify the path details from where to pick the attachments.
<b>Administer File Attachments</b>	Use this link to manage the file servers. Users can add or make changes to existing file servers.

## Data Set 1

<b>Field Name</b>	Field names for the attachment.
-------------------	---------------------------------

<b>Sequence Number</b>	sequence number for the fields. This determines the order in which they are displayed
	<hr/> <b>Note:</b> The attachment file should be given the last sequence. <hr/>
<b>Field Type</b>	Type of field. Available types are Transaction, Attachment and Comment.
<b>Key</b>	Check this option if it is a Key Field.
	<hr/> <b>Note:</b> In Attachment Field Type, keep only one Key Filed and it should be ATTACHSYSFILENAME <hr/>
<b>Display</b>	Choose whether or not to display this field.
	<hr/> <b>Note:</b> For the Comments Field Type, the display field that stores the actual comments should be given the maximum sequence. For the Attachments Field Type, the display field that is shown as the attachment link should be given the maximum sequence. <hr/>
<b>Header</b>	Choose which field data to be the header. Only the Transaction Field Type should be made the header.
<b>Filed Label ID</b>	ID of the Field Label.
<b>Label Type</b>	Choose whether to display long or short label.
<b>Field Label</b>	this is automatically populated based on the Field Label ID.
<b>Msg Set</b>	The Message Set for the DataSet 1 Header Title.
<b>Msg Num</b>	The Message Number for the DataSet 1 Header Title.
<b>Display Sequence Number</b>	Choose whether to display the sequence number of the attachment.
<b>Display Attachment Type Icon</b>	Choose whether to display icon against each attachment.
<b>Show Line Title</b>	Choose whether to show line title.
<b>Line Title From Field Value</b>	Choose whether to show the Field value as Line Title.
<b>Line Title</b>	Specify a custom Line Title.
<b>Comment Title From Field Value</b>	Choose whether to show the Field value as Comment Title.
<b>Display Sequence Number</b>	Choose whether to display the sequence number of the comment.
<b>Comment Title</b>	Specify a custom Comment Title.
<b>Preview</b>	Preview the configuration. See below for more information on the preview page.

**Image: CAVF Preview Page**

CAVF Preview Page

CAVF Preview Page

Configuration ID

AP\_PR\_ATTCH

[Return to Configuration Setup](#)

Request ID

View In

Classic

▼

View Mode

Comments and Attachments

▼

Help Text

Preview Data

<b>Configuration ID</b>	CAVF Configuration ID.
<b>&lt;Transaction Key&gt;</b>	A maximum of five transaction level keys are displayed. The label for the field is displayed as per the default label set for the transaction keys.
<b>View In</b>	Select to view in Classic or Fluid mode.
<b>View Mode</b>	Select View Mode. either Comments or Attachments or Both to view in the Details (Comments/Attachments View) page.
<b>Help Text</b>	This is an optional field. It is the summary text for the transaction, which will is displayed on the top of the Details page.
<b>Preview Data</b>	Transfers to the Comments/Attachments View page.

**Data Set 2**

The usage of Data Set 2 is same as Data Set 1. Users can use this set to configure a type different from what is configured in Data Set 1. For example, if Attachments were configured in Data Set 1, Comments can be configured in Data Set 2.

**CAVF Configuration ID Component Mapping Page**

Use the CAVF Configuration ID Component Mapping page (EOATT\_MAPCO\_PG) to configure the transaction page and to specify where to display the comments and attachments.

## Navigation

Enterprise Components, CA View Framework, CAVF Configuration ID Mapping  
(choose the Component tab).

### Image: CAVF Configuration ID Mapping of Component.

CAVF Configuration ID Mapping of Component.

#### Product Area

Select the Product Area.

#### Component

Select the Component within the selected Product Area.

#### Page

Select the Page associated with the Component.

#### Record

Select the record in the Page.

#### Field

Select the Field in the Record.

#### Configuration ID 1

Select the Configuration ID of Data Set 1.

#### View Mode 1

Select the Data Set 1 View Mode.

#### Configuration ID 2

Select the Configuration ID of Data Set 2.

#### View Mode 2

Select the Data Set 2 View Mode.

### Image: CAVF Component Mapping Authorization

CAVF Component Mapping Authorization

#### Component

Select the Component.

- User List Source

Select the User List Source. Available options are Application Class, Query, Role, SQL Definition.
- Application Class/Query/Role/SQL Definition

Select the appropriate Class/Query/Role or Definition.
- Access type

Select the Attachment Type. Available types are Attachments, Comments, Comments and Attachments.

Image: CAVF Mapping File Securing

CAVF Mapping File Securing

Component

Page Composer

Product Area

FAP

Payables

Mapping Details

Personalize | Find | View All |

First 1 of 1 Last

Details

Authorization

File Security

Component	Extension List Name	Display Option		
1 PYCYCL_APPROVA	FILEEX_XMLP	Display Only		

Save

Refresh

Component

Page Composer

- Component

Name of the Component.
- Extension List Name

File extension list name.
- Display Option

Choose to display or hide.

CAVF Configuration ID Page Composer Mapping Page

Use the CAVF Configuration ID Page Composer Mapping page (EOATT\_MAPPC\_PG ) to configure the Page Composer page where the Comments and Attachments View framework is to be used.

Navigation

Enterprise Components, CA View Framework, CAVF Configuration ID Mapping  
(choose the Page Composer tab).

Image: CAVF Mapping to Page Composer — Details

CAVF Mapping to Page Composer — Details

Component

Page Composer

Product Area

FAP

Payables

Mapping Details

Personalize | Find | View All | First 1 of 1 Last

Details

Authorization

File Security

AWE Process ID	Page	Configuration ID 1	View Mode 1	Configuration ID 2	View Mode 2
1 PaymentRequestAp	EOAWMA_MAIN_FL	AP_PR_ATTCH	Comments and Attachmer	AP_PR_ATTCH	Comments and Attachmen

Save

Refresh

Component | Page Composer

AWE Process ID

Select the Approval Process ID associated to the Product Area.

Page

Select the Page Composer page where the Comments and Attachments View framework is being used.

Configuration ID 1

Select the Configuration ID of Data Set 1.

View Mode 1

Select the Data Set 1 View Mode.

Configuration ID 2

Select the Configuration ID of Data Set 2.

View Mode 2

Select the Data Set 2 View Mode.

Image: CAVF mapping to Page Composer Authorization

CAVF mapping to Page Composer Authorization

Component

Page Composer

Product Area

FAP

Payables

Mapping Details

Personalize | Find | View All | First 1 of 1 Last

Details

Authorization

File Security

AWE Process ID	Page	User List Source	Role Name	App Class Method	Access Type
1 PaymentRequestAp	EOAWMA_MAIN_FL	Role	ADMINISTRATOR		Comments and Attachr

Save

Refresh

Component | Page Composer

AWE Process ID

Select the Approval Process ID associated to the Product Area.

Page

Select the Page Composer page where the Comments and Attachments View framework is being used.

Use List Source

Select the User List Source. Available options are Application Class, Query, Role, SQL Definition.

**Note:** If Application Class is selected an additional Field called Application Class Path also need to be filled.

Role Name

Select the Role.

**App Class method**

Select the Application Class method.

**Access Type**

Select the Attachment Type. Available types are Attachments, Comments, Comments and Attachments.

**Image: CAVF Mapping to Page Composer File Security**

CAVF Mapping to Page Composer File Security.

Component | Page Composer

Product Area  Payables

**Mapping Details** Personalize | Find | View All | First 1 of 1 Last

Details | Authorization | **File Security**

AWE Process ID	Page	Extension List Name	Display Option
1	PaymentRequestAp	EOAWMA_MAIN_FL	FILEEX_XMLP

Display Only

Save Refresh

Component | Page Composer

**AWE Process ID**

Select the Approval Process ID associated to the Product Area.

**Page**

Select the Page Composer page where the Comments and Attachments View framework is being used.

**Extension List name**

Select the file extension list name. The File Extensions List ID is defined at PeopleTools, Utilities, Administration, Administer File Processing, File Extension List.

**Display Option**

Choose to display or hide.



# Page Composer

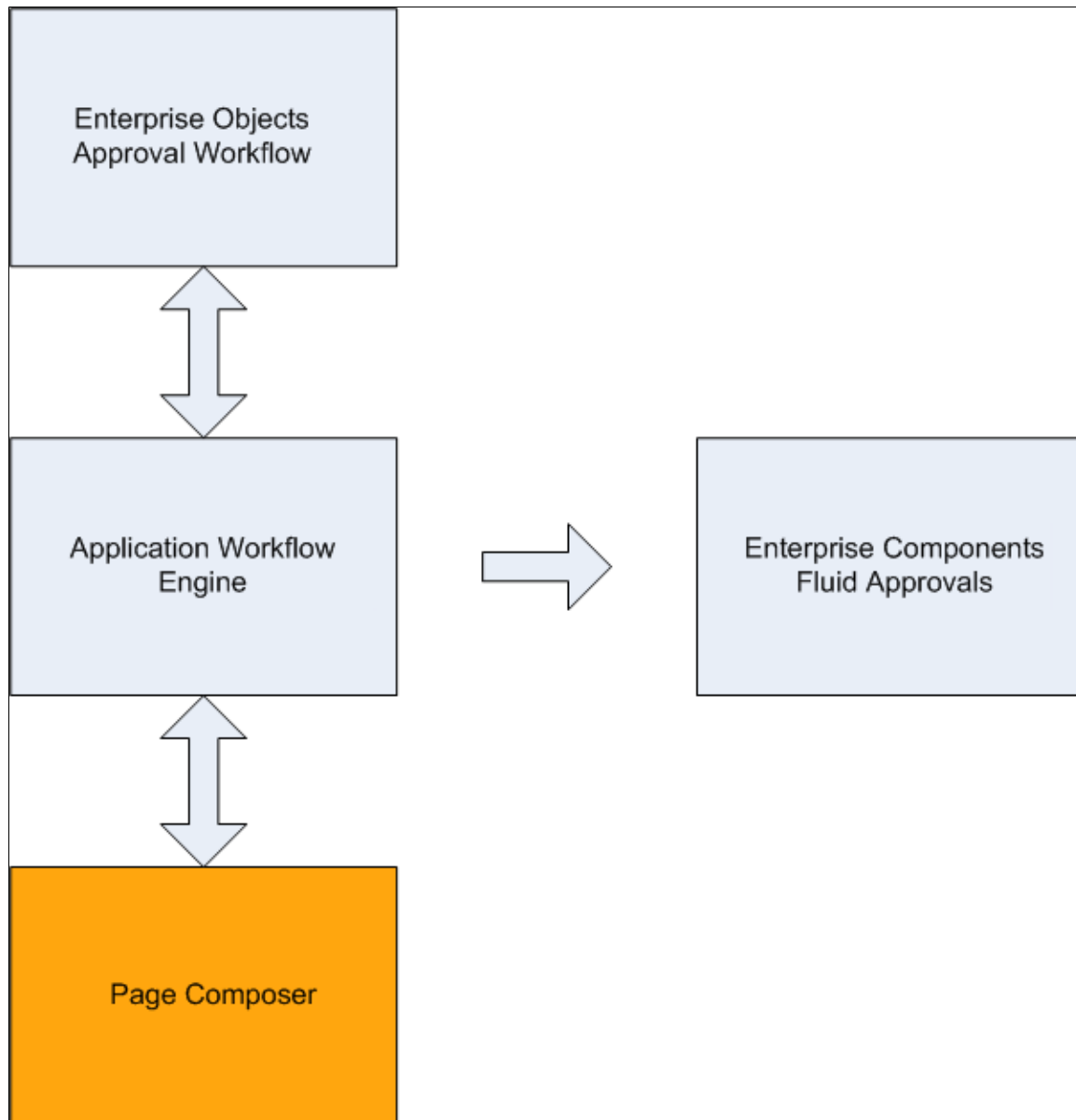
---

## Understanding Page Composer

The Page Composer feature enables users to design their own Fluid Application Pages to make it more in line with the business needs. The feature allows users to design pages for different form factors and to include fields and tabs using the registered components delivered with the feature. It is metadata driven so the users can modify the styling and layout of select areas on component pages without having to code or customize delivered PeopleSoft application pages

**Image: Page Composer**

Page Composer design



---

## Using Page Composer

Page Composer gives users the flexibility to edit the design of the Fluid Approval pages based on the available page components that are already registered for Page Composer. Users can design the existing placement of the fields in the fluid approval pages and can also add buttons and links in line with specific business requirements.

## Pages Used to Configure Pages Using Page Composer

Page Name	Definition Name	Usage
Page Composer Page	EOPC_MAIN_FL	Create page compositions.

### Page Composer Page

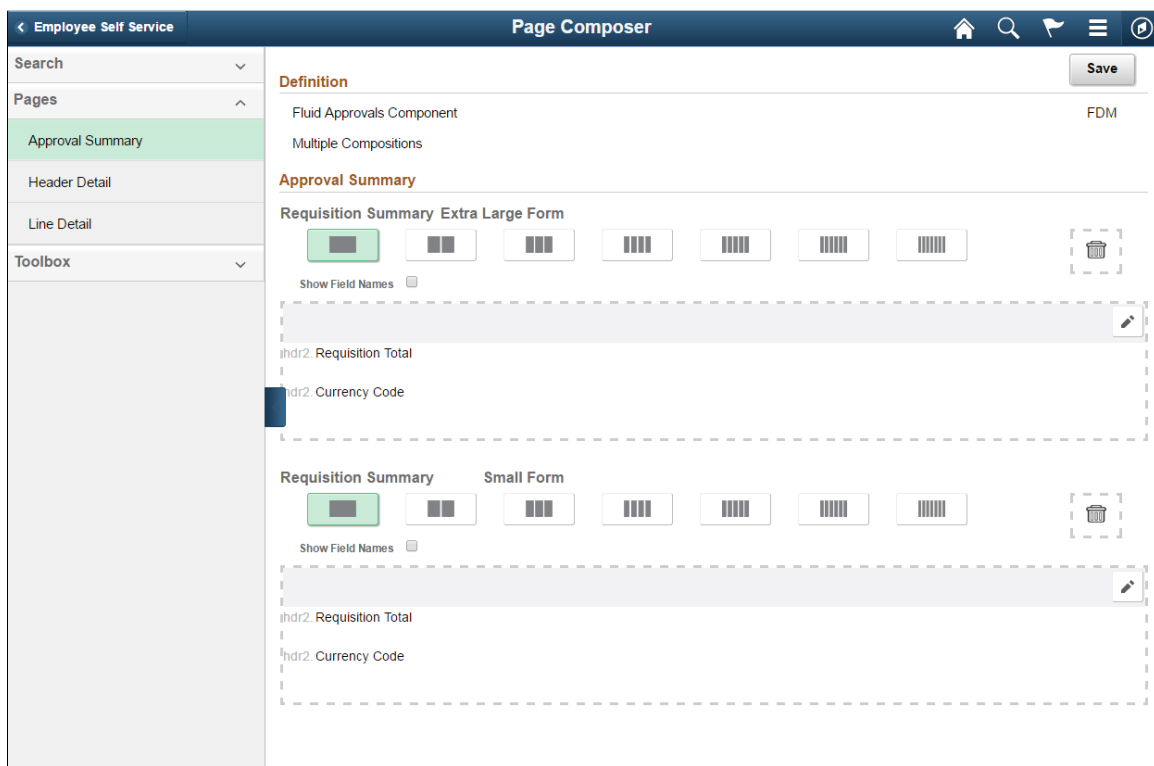
Use the Page Composer page (EOPC\_MAIN\_FL) to create page compositions..

#### Navigation

Enterprise Components, Page Composer, Page Composer

#### Image: Page Composer Main Page

Page Composer Main Page



The Page Composer main page consists of the left and right panel. Use the Search field in the left panel to search for the definitions.

**Note:** Only Fluid Approvals definition is available in Page Composer.

## Search

### Image: Search panel

Search panel

The image shows a 'Search' panel with the following components:

- Search** (expandable section)
  - \*Definition**: Search input field with 'APPROVALS' and a magnifying glass icon.
  - Object Type**: Dropdown menu.
  - System Source**: Search input field with a magnifying glass icon.
  - Search** (green button) and **Clear** (gray button) buttons.
- Pages** (expandable section)
- Toolbox** (expandable section)

#### Definition

Search from the list of available definitions. Currently, only the Approvals definition is available.

#### Object Type

Search based on the Object Type from the list. Listed object types are Component, Email HTML Page, Email Rich Text HTML, Stand-Alone HTML Area. Currently users can compose only Component.

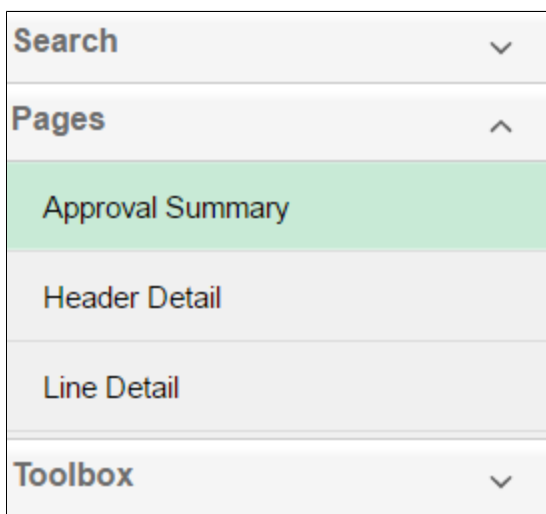
#### System Source

Search based on the system source.

## Pages

### Image: Pages panel

Pages panel



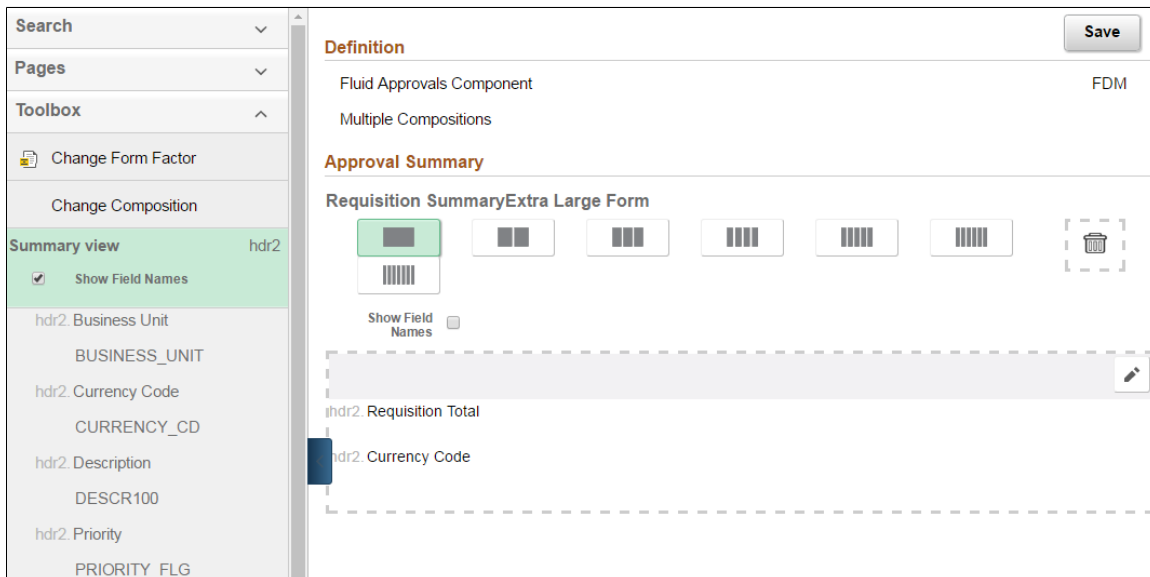
The Page Composer allows users to compose and configure the view of three sections in the Fluid approval pages.

- Approval Summary
- Header Detail
- Line Detail

## Toolbox

### Image: Toolbox panel

Toolbox panel



Use the Toolbox panel to configure the different sections in the Fluid Approval page.

## Change Form Factor

Change the form factor. Available form factors are Large, Medium, Small and X-Large.

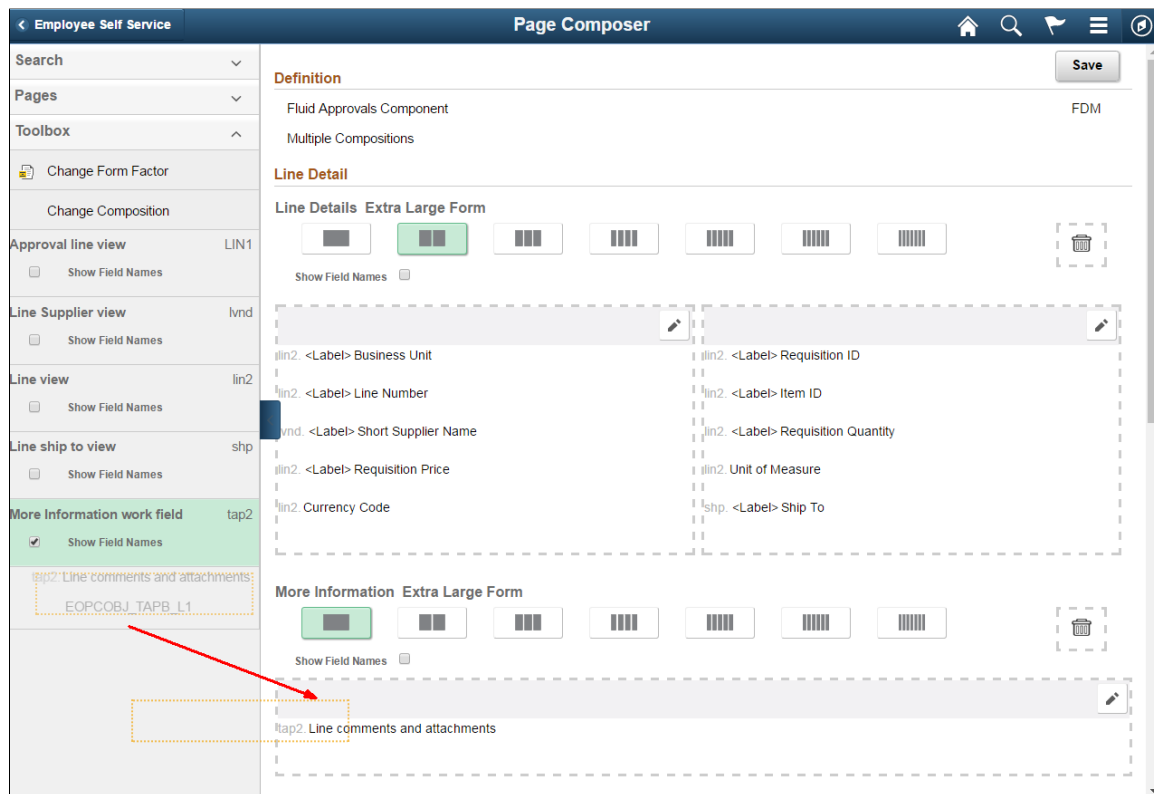
## Change Composition

Change the composition of the form. The Change Composition tool allows users to access the records already registered in Page Composer and to view the fields available under each record.

Users can then simply drag and drop the relevant Fields to the Summary, Header or Line details area of the form to compose the particular fluid approval page.

## Image: Drag and Drop Fields

Drag and Drop the fields to page sections.



## Registering Components in Page Composer

The Developer Registration page of Page Composer has a list of registered components. Users cannot add new components for registration. Existing components can be edited for your business needs. The components registered and the changes made to them are then available in the Toolbox panel in Page Composer.

## Pages Used to Register Components in Page Composer

Page Name	Definition Name	Usage
<u>Registration Page</u>	EOPC_DEVREG_FL	Use and edit the components available in the Registration page for Page Composer.

### Registration Page

Use the Registration page (EOPC\_DEVREG\_FL) to view and edit the records available for Page Composer.

#### Navigation

Enterprise Components, Page Composer Administrator, Developer Registration.

#### Image: Page Composer Registration page

Page used to Register Page Composer transactions.

The screenshot displays the 'Registration' page in the Page Composer. The left sidebar contains a search pane with filters for Definition (APPROVALS), Object Type, and System Source (FDM). The main area shows the definition details for 'Fluid Approvals Component' (FDM). Below this, the 'Pages and Sections' tab is active, showing a table of registered sections.

Description	Edit	Display Type	Page Name	Form Factor	Sequence
Requisition Summary	Edit	Page	EOAWMA_RSLT_SBF	Small	1
Requisition Summary	Edit	Page	EOAWMA_RSLT_SBF	X-Large	1
Summary	Edit	Page	EOAWMA_TXNHDTL_FL	Small	1
More Information	Edit	Page	EOAWMA_TXNHDTL_FL	Small	2
Requisition Header Detail - 3	Edit	Page	EOAWMA_TXNHDTL_FL	Small	3
Requisition Header Detail - 4	Edit	Page	EOAWMA_TXNHDTL_FL	Small	4
Requisition Header Detail - 5	Edit	Page	EOAWMA_TXNHDTL_FL	Small	5
Lines	Edit	Page	EOAWMA_TXNHDTL_FL	Small	6

The Approvals definition the only definition currently registered for Page Composer. Use the Search pane to search for the Approval transactions that are registered to AWE

<b>Definition</b>	Name of the definition.
<b>Detail</b>	Description of the definition.
<b>Type</b>	Object type of the definition.
<b>Object Name</b>	Name of the object.
<b>Multiple Composition</b>	Whether it is multiple composition. A multiple composition is a definition that allows multiple types of data compositions in the base object (e.g component).
<b>Add View Record</b>	This record is used as the prompt view to add new compositions to the definition.
<b>Search View Record</b>	This view is used when searching for compositions in Page Composition registration and Page Composer.
<b>Composition Key Fields</b>	This is the Field Name of the cross reference record and is required only in case of multiple compositions.
<hr/>	
<b>Note:</b> For Approvals, the value is taken from the cross reference table from AWE Transaction Registry.	
<hr/>	
<b>Description</b>	Name of the page.
<b>Edit</b>	Edit the page name.
<b>Display Type</b>	Display Type. Currently only the display type Page is available.
<b>Page Name</b>	Content reference of the page.
<b>Form Factor</b>	The form factor for the page to support different devices. Available form factors are Small, Medium, Large and X-Large. A page needs to be registered for each form factor.
<b>Sequence</b>	Enter the sequence in which this section should be displayed on the Page Composer Composition page.



**Image: Page Composer Registration Reserved Field**

Page Composer Registration Reserved Field.

Employee Self Service

Registration

Home

Search

Menu

Search

Definition

APPROVALS

Object Type

System Source

FDM

Search

Clear

Definition

Fluid Approvals Component

Multiple Compositions

Detail

APPROVALS

Fluid Approvals Component

Edit

Type

Component

Multiple Composition...

Yes

Composition Key Fields

1. EOAWPRCS\_ID

Object Name

EOAWMA\_MAIN\_FL

Add View Record

EOAWPRCS\_VW

Search View Record

EOAWPRCS\_EOOPCVW

Pages and Sections

&General

&Reserved Field

&Labels

&Keys / Source Records / Field Events

Show All

24 rows

Description	Form Factor	Page Reserved Field	Object Name	Long Description		
Requisition Summary	Small	OBJ0000006	EOPCOBJ_L2ROW	Page HTML Field: Level 2 Row	+	-
Requisition Summary	X-Large	OBJ0000006	EOPCOBJ_L2ROW	Page HTML Field: Level 2 Row	+	-
Summary	Small	OBJ0000001	EOPCOBJ_L0	Page HTML Field: Level 0	+	-
More Information	Small	OBJ0000039	EOPCOBJ_L0_A	Page HTML Field: Level 0_A	+	-
Requisition Header Detail - 3	Small	OBJ0000041	EOPCOBJ_L0_B	Page HTML Field: Level 0_B	+	-
Requisition Header Detail - 4	Small	OBJ0000042	EOPCOBJ_L0_C	Page HTML Field: Level 0_C	+	-
Requisition Header Detail - 5	Small	OBJ0000043	EOPCOBJ_L0_D	Page HTML Field: Level 0_D	+	-
Lines	Small	OBJ0000005	EOPCOBJ_L1ROW	Page HTML Field: Level 1 Row	+	-
Summary	X-Large	OBJ0000001	EOPCOBJ_L0	Page HTML Field: Level 0	+	-

## Page Reserved Field

### Object Name

PeopleTools Component name.

## Long Description

## Image: Page Composer Registration Labels

Page Composer Registration Labels.

**Registration**

**Definition**

Fluid Approvals Component FDM

Multiple Compositions

**Detail**

APPROVALS Fluid Approvals Component [Edit](#)

Type	Component	Multiple Composition...	Composition Key Fields
Object Name	EOAWMA_MAIN_FL	Yes	1. EOAWPRCS_ID
Add View Record	EOAWPRCS_VW		
Search View Record	EOAWPRCS_EOPCVW		

**Pages and Sections**

&General &Reserved Field **&Labels** &Keys / Source Records / Field Events Show All

Description	Form Factor	Short Page Description	Long Page Description		
Requisition Summary	Small	Approval Summary	Approval Summary	+	-
Requisition Summary	X-Large	Approval Summary	Approval Summary	+	-
Summary	Small	Header Detail	Header Detail	+	-
More Information	Small	Header Detail	Header Detail	+	-
Requisition Header Detail - 3	Small	Header Detail	Header Detail	+	-
Requisition Header Detail - 4	Small	Header Detail	Header Detail	+	-
Requisition Header Detail - 5	Small	Header Detail	Header Detail	+	-
Lines	Small	Header Detail	Header Detail	+	-
Summary	X-Large	Header Detail	Header Detail	+	-

24 rows

Short Page Description

Short Page Description.

Long Page Description

Long Page Description.

## Image: Page Composer Registration Keys/Source Records/Field Events

Page Composer Registration Keys/Source Records/Field Events.

**Employee Self Service** **Registration** Save

Search

Definition: APPROVALS

Object Type: ▼

System Source: FDM

Search Clear

**Definition**

Fluid Approvals Component FDM

Multiple Compositions

**Detail**

APPROVALS Fluid Approvals Component Edit

Type: Component Multiple Composition: Yes Composition Key Fields: 1. EOAWPRCS\_ID

Object Name: EOAWMA\_MAIN\_FL Add View Record: EOAWPRCS\_VW Search View Record: EOAWPRCS\_EOPCVW

**Pages and Sections** 24 rows

&General &Reserved Field &Labels **&Keys / Source Records / Field Events** Show All

Description	Form Factor	Composition Key Fields	Application Source Records	Field Events
Requisition Summary	Small	Composition Key Fields	Application Source Records	Field Events
Requisition Summary	X-Large	Composition Key Fields	Application Source Records	Field Events
Summary	Small	Composition Key Fields	Application Source Records	Field Events
More Information	Small	Composition Key Fields	Application Source Records	Field Events
Requisition Header Detail - 3	Small	Composition Key Fields	Application Source Records	Field Events
Requisition Header Detail - 4	Small	Composition Key Fields	Application Source Records	Field Events
Requisition Header Detail - 5	Small	Composition Key Fields	Application Source Records	Field Events
Lines	Small	Composition Key Fields	Application Source Records	Field Events
Summary	X-Large	Composition Key Fields	Application Source Records	Field Events

### Composition Key Fields

Enter Composition Key Field.

### Application Source Records

Add an Application Source Record for the Approval page in Page Composer.

### Field Events

Field Events for the desired page section and form factor.

## Application Source Records

Application Source Records are displayed in the left-hand panel on the Page Composer page. The fields defined in these record are the list available to the users to drag and drop to the page.

For Approvals, use the AWE Transaction Registry records to determine the required key structure of the application source records.

## Image: Application Source Records

Application Source Records.

Cancel **Application Source Records** Done

Requisition Summary

**Application Source Record** + -

\*Record PV\_REQ\_SUM\_VW Record Alias hdr2 Buffer Level 2 Message Set Numb... 18036 Message Numb... 14123

**Key Fields** 3 rows

&General &Label Show All

	*Field Name	Key Sequence	App Class Path
1	BUSINESS_UNIT	1	
2	REQ_ID	2	
3	REQ_STATUS	3	

### Record

This record is used to display the drag-from fields in the left-hand panel of the Page Composer page.

### Record Alias

Enter a 1 to 4 character alias name for the record.

### Buffer Level

The Buffer Level of the Page Composer reserved filed base component.

### Message Set Number

Enter the Message Set Number for the Record Label.

### Message Number

Enter the Message Number for the Record Label.

### Field Name

The Field Name in the Record

### Key Sequence

Search Key Field sequence.

### App Class Path

Enter the full path name of the application class method. This is used only for the app class reserved field.

# Security Automation

---

## Understanding Security Automation

The PeopleSoft Security 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

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Usage</i></b>
<u>Manage Permissions Page</u>	EOPM_SUPD_PERM	Set security metadata for new permissions or change the security for existing permissions
<u>Manage Roles Page</u>	EOPM_SUPD_ROLE	Set security metadata for new roles or change the security for existing roles.
<u>Manage Menus Page</u>	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.

PeopleSoft Update Manager  
Manage Permissions

Filter By

Status ☐ is not

Permission List

BUG Number

Filter

Show All Rows

Filter By Update Flag

☐ Selected

☐ Deselected

☒ All Rows

Added or Changed Permission Lists

Personalize | Find | View 100 | First 1-20 of 523 Last

Select for Update	*Permission List	Status	*Permission Type	*Item	Component Name	BUG Number	Set Permissions
<input type="checkbox"/>	HCCPDL3000	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_CMP_AGFL	22581972	Set Permissions
<input type="checkbox"/>	HCCPSS2300	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_CMP_AGFL	22581972	Set Permissions
<input type="checkbox"/>	HCCPDL3000	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_IB_AGFL	22581972	Set Permissions
<input type="checkbox"/>	HCCPSS2300	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_IB_AGFL	22581972	Set Permissions
<input type="checkbox"/>	HCCPDL3000	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_SBM_AGFL	22581972	Set Permissions
<input type="checkbox"/>	HCCPSS2300	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_SBM_AGFL	22581972	Set Permissions
<input type="checkbox"/>	HCCPDL3100	Applied	Page	EL_MANAGER_FL	HR_MSS_CT_VW	22581972	Set Permissions
<input type="checkbox"/>	HCCPGP1	Applied	Page	DEFINE_PAYROLL_RULES_(GBL)	GPSC_ELM_BRW_FL	22246162	Set Permissions
<input type="checkbox"/>	HCCPGP1	Error	Page	DEFINE_PAYROLL_RULES_(GBL)	GPSC_ELM_SRCH_FL	22246162	Set Permissions
<input type="checkbox"/>	EOPM9000INT	Applied	Page	EOPM_MENU	EOPM_SUPD_SCRIPT	50000001	Set Permissions
<input type="checkbox"/>	EOPM9000INT	Applied	Processes	SRALL		50000001	Set Permissions
<input type="checkbox"/>	HCCPSS2311	Applied	Page	EL_EMPLOYEE_FL	HR_DISABILITY_FL	22163019	Set Permissions
<input type="checkbox"/>	HCCPSS2310	Applied	Page	EL_EMPLOYEE_FL	HR_I9_EE_FL	22163019	Set Permissions
<input type="checkbox"/>	HCCPSS2311	Applied	Page	EL_EMPLOYEE_FL	HR_VET_STATUS_FL	22163019	Set Permissions
<input type="checkbox"/>	HCCPSS2300	Applied	Page	EL_MANAGER_FL	HR_MTRX_APPRVL_FL	22384035	Set Permissions
<input type="checkbox"/>	HCCPSC1040	Applied	Page	HRSC_HIDDEN_FL	HR_MGR_SEL_FLU	22390215	Set Permissions
<input type="checkbox"/>	HCCSPCMPINT	Applied	CI	CL_HRMH_MATRIX_SETUP		22383464	Set Permissions
<input type="checkbox"/>	HCCPHR9425	Applied	Page	SETUP_HRMS	HRMH_MTRX_TYPE_DEF	22383464	Set Permissions
<input type="checkbox"/>	HCCPTLS2000	Applied	Page	TL_MANAGER_FL	TL_EMP_PRES_FLU	22349322	Set Permissions
<input type="checkbox"/>	HCCPBN1000	Delivered	CI	CL_ACA_DEP_DATA_SRC		21820815	Set Permissions

Save Notify

Add Update/Display

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
- Component Interfaces
- Query Trees
- Access Group Permission
- Search Groups
- Process Groups and Process Profile Permissions
- 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.

Peoplesoft Update Manager

Manage Roles

Filter By

Status ☐ Is not

Role Name

BUG Number

Filter

Show All Rows

Filter By Update Flag

☐ Selected

☐ Deselected

☒ All Rows

Add or Delete Permission Lists from a Role

Personalize | Find | View All | | First 1-12 of 12 Last

Select for Update	Status	*Role Name	*Permission List	Action	BUG Number	Date Processed	Process Instance	Description	Last Update Date/Time	Updated By User
<input type="checkbox"/>	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
<input type="checkbox"/>	Delivered	Benefits Administrator	HCCPBAC1000	Add	21933382				12/11/2015 12:35:06AM	PPLSOFT
<input type="checkbox"/>	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
<input type="checkbox"/>	Applied	TL Administrator Compensation	HCCPHR4160	Add	20391961	01/22/2015	38479		01/22/2015 1:49:07AM	PPLSOFT
<input type="checkbox"/>	Applied	HR Administrator BRA	HCCPTL10BR	Add	18495676	10/20/2014	32063	New permission list for BRA User	10/20/2014 9:02:05AM	PPLSOFT
<input type="checkbox"/>	Applied	GP Pivot Administrator	HCCPGPAMPPIVOT	Add	17962997	08/28/2014	26623		08/28/2014 2:54:01AM	PPLSOFT
<input type="checkbox"/>	Applied	AM Pivot Administrator	HCCPAMPG01	Add	18179237	08/27/2014	25900	Absence Pivot Grnd Administrator	08/21/2014 2:15:45AM	PPLSOFT
<input type="checkbox"/>	Applied	AM Pivot Administrator	HCCPAMPG03	Add	18179237	08/27/2014	25900	Employee Refresh	08/21/2014 2:15:45AM	PPLSOFT
<input type="checkbox"/>	Applied	AM Pivot User	HCCPAMPG02	Add	18179237	08/27/2014	25900	Absence Pivot Grid User	08/21/2014 2:15:45AM	PPLSOFT
<input type="checkbox"/>	Applied	AM Pivot User Fluid	HCCPAMPG04	Add	18179237	08/27/2014	25900	Absence Pivot Grid User Fluid	08/21/2014 2:15:45AM	PPLSOFT
<input type="checkbox"/>	Applied	HR Administrator SGP	HCCPHR335G	Add	18650387	07/14/2014	20738		07/09/2014 12:04:13AM	PPLSOFT
<input type="checkbox"/>	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 1:52:58AM	PPLSOFT

Save

Notify

Add

Update/Display

- 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.

Peoplesoft Update Manager

**Manage Menus**

Filter By

Status ☐ is not

Menu Name

BUG Number

Filter

Show All Rows

Filter By Update Flag

☐ Selected

☐ Deselected

☒ All Rows

Add or Delete Objects from a Menu

Personalize | Find | View 100 | | First 1-20 of 289 | Last

Select for Update	Status	*Menu Name	*Menu Bar Name	*Item Name	Action	BUG Number	Details	Date Processed	Process Instance	Description	Last Update Date/Time	Updated By User	+/-
<input type="checkbox"/>	Applied	EL_MANAGER_FL	USE	HR_MSS_CT_IB_AGFL	Add	22581972	Details	02/12/2016	72738		02/12/2016 1:03:44AM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_MANAGER_FL	USE	HR_MSS_CT_CMP_AGFL	Add	22581972	Details	02/12/2016	72738		02/12/2016 1:03:44AM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_MANAGER_FL	USE	HR_MSS_CT_SBM_AGFL	Add	22581972	Details	02/12/2016	72738		02/12/2016 1:03:44AM	PPLSOFT	
<input type="checkbox"/>	Applied	DEFINE_PAYROLL_RULES_VGBL	UTILITIES	GPSC_ELM_SRCH_FL	Add	22246162	Details	02/11/2016	72713	New component for Global Payroll Element Browser	02/11/2016 1:14:21AM	PPLSOFT	
<input type="checkbox"/>	Applied	DEFINE_PAYROLL_RULES_VGBL	UTILITIES	GPSC_ELM_BRV_FL	Add	22246162	Details	02/11/2016	72713	New viewer component for Global Payroll Element Browser	02/11/2016 1:14:21AM	PPLSOFT	
<input type="checkbox"/>	Applied	EOPM_MENU	USE	EOPM_SUPD_SCRIPT	Add	50000001	Details	01/11/2016	72149		01/11/2016 6:08:44AM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_EMPLOYEE_FL	USE	HR_VET_STATUS_FL	Add	22163019	Details	12/22/2015	71512		12/22/2015 12:52:51AM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_EMPLOYEE_FL	USE	HR_IR_EE_FL	Add	22163019	Details	12/22/2015	71512		12/22/2015 12:52:51AM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_EMPLOYEE_FL	USE	HR_DISABILITY_FL	Add	22163019	Details	12/22/2015	71512		12/22/2015 12:52:51AM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_MANAGER_FL	USE	HR_MTRX_APPRV_FL	Add	22384035	Details	01/22/2016	72287		12/21/2015 1:35:05AM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_EMPLOYEE_FL	USE	HR_MTRXTILE_FL	Add	22383980	Details	01/29/2016	72427		12/20/2015 11:30:22PM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_EMPLOYEE_FL	USE	HRMH_MTRX_INFO_FL	Add	22383980	Details	01/29/2016	72427		12/20/2015 11:30:22PM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_EMPLOYEE_FL	USE	HRMH_CREAT_TEAM_FL	Add	22383980	Details	01/29/2016	72427		12/20/2015 11:30:22PM	PPLSOFT	
<input type="checkbox"/>	Applied	EL_EMPLOYEE_FL	USE	HRMH_MTRX_TRAN_FL	Add	22383980	Details	01/29/2016	72427		12/20/2015 11:30:22PM	PPLSOFT	
<input type="checkbox"/>	Applied	HRSC_HIDDEN_FL	TASKS	HR_MGR_SEL_FLU	Add	22390215	Details	01/13/2016	72038	New Component for Manager View As feature	12/18/2015 12:34:48PM	PPLSOFT	
<input type="checkbox"/>	Applied	SETUP_HRMS	HRMS_COMMON	HRMH_MTRX_TYPE_DEF	Add	22383464	Details	01/06/2016	72371		12/17/2015 10:34:57AM	PPLSOFT	
<input type="checkbox"/>	Applied	TL_MANAGER_FL	USE	TL_EMP_PRES_FLU	Add	22349322	Details	12/18/2015	71398		12/15/2015 10:28:51PM	PPLSOFT	
<input type="checkbox"/>	Delivered	ACA_MANAGE_ANNUAL_RPTO_1	PROCESS	ACA_CREATE_XML	Add	21933392	Details	12/04/2015			12/11/2015 12:35:05AM	PPLSOFT	
<input type="checkbox"/>	Delivered	ACA_MANAGE_ANNUAL_RPTO_1	SETUP	ACA_XMIT_PARAMS	Add	21933392	Details	12/04/2015			12/11/2015 12:35:05AM	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.

**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



# 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:

<b>Supplemental Data Field</b>	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.
<b>Display Group</b>	Grouping of supplemental data fields, for display purpose.
<b>Supplemental Data Page</b>	The page where supplemental data will be displayed or entered in runtime. Also referred to as <i>Page</i> in the context of supplemental data setup.
<b>Supplemental Data Record</b>	Logical data model for supplemental data. Also referred to as <i>Record</i> in the context of supplemental data setup.
<b>Supplemental Data Store</b>	The physical table where supplemental data is stored. Also referred to as <i>Data Store</i> or <i>Data Store Record</i> .
<b>Search Record</b>	Record that saves search criteria for the base record.
<b>Supplemental Search Record</b>	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:

<b><i>Base Record</i></b>	<b><i>Supplemental Data Storage Record</i></b>
WM_WO_HDR	WM_WO_HDR_SD

<b>Base Record</b>	<b>Supplemental Data Storage Record</b>
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.

<b>Component</b>	<b>Page</b>	<b>Base Record</b>
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_SUPPLDATA_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:

<b>Base Record</b>	<b>Storage Record</b>	<b>Base Search Record</b>	<b>Supplemental Data Search Record</b>
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:

<b>Component</b>	<b>Page</b>	<b>Base Record</b>
WM_WOE_TWP	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOE_TWP	WM_WOE_TWP	WM_WO_HDR

<b>Component</b>	<b>Page</b>	<b>Base Record</b>
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

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Usage</b></i>
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.
<u>Define Record - Record Page</u>	SD_RECDEFN	Defines the supplemental data record associated with the base record and identifies where to store this record.
<u>Define Record - Fields Summary Page</u>	SD_RECFLD	Maps fields to the data storage fields.
<u>Define Record - Fields Detail Page</u>	SD_RECFLD_DTL	Defines a field's detail information.
<u>Define Display Group Page</u>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Assign Display Group Page</u>	SD_PAGE_GRP	Assigns one or more display groups to a supplemental data-enabled component and page.
<u>Assign Display Group - Conditions Page</u>	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.

The screenshot shows the 'Define Record - Record' page with three tabs: 'Record', 'Fields Summary', and 'Fields Detail'. The 'Record' tab is active. The page contains the following fields and controls:

- Record:** PS\_HAZARD\_WASTE
- \*Status:** Activated (dropdown menu)
- Base Record:** WM\_WO\_TSK
- Description:** Hazardous Waste (text field with a help icon)
- \*Data Store Record:** WM\_WO\_TSK\_SD (text field with a search icon)
- Recycle Cache:** ☐ (checkbox)

#### 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.

### Recycle Cache

Clears the cache for the Supplemental Data.

## 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.

Record



Fields Summary



Fields Detail

Record PS\_HAZARD\_WASTE

Status Activated

Fields

Personalize | Find | View All |  

First  1-6 of 6  Last

	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.

The screenshot shows the 'Define Record - Fields Detail' page for the record 'PS\_HAZARD\_WASTE'. The page has tabs for 'Record', 'Fields Summary', and 'Fields Detail'. The 'Fields Detail' tab is active. The page displays the following information:

- Record:** PS\_HAZARD\_WASTE
- Status:** Activated
- Field Name:** DATE
- Field Status:** Activated
- Description:** (Empty text box)
- \*Field Label:** Generate Date
- Required:** ☐
- Long Label:** (Empty text box)
- Use Type:** Date
- Field Length:** 10
- Mapped to:** SD\_DATE\_1
- Uppercase:** ☐

#### 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

**Define Display Group**

Display Group: PS\_HAZARD\_WASTE      Base Record: WM\_WO\_TSK

Description:  (100 characters remaining)

Label:       \*Occurs:

**Left Column**      Personalize | Find | View All | |      First 1-3 of 3 Last

*Sequence	*Record	*Field Name	Label		
1	PS_HAZARD_WAS	DATE	<input type="text"/>		
2	PS_HAZARD_WAS	DESCR	<input type="text"/>		
3	PS_HAZARD_WAS	NOTES	<input type="text"/>		

**Right Column**      Personalize | Find | View All | |      First 1-3 of 3 Last

*Sequence	*Record	*Field Name	Label		
1	PS_HAZARD_WAS	QTY	<input type="text"/>		
2	PS_HAZARD_WAS	UOM	<input type="text"/>		
3	PS_HAZARD_WAS	WASTE_CD	<input type="text"/>		

     ☐ Recycle Cache

### 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.

### Reorder

Reorders the group as per the sequence entered by the user in the Sequence column.

### Recycle Cache

Clears the cache for the Supplemental Data.

## 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

Assign Display Group

Component Name WM\_WOMarket Global

Enabled PagesFind | View AllFirst1 of 3Last

Page Name WM\_TSK\_SD\_SECBASE RECORD WM\_WO\_TSK

Display GroupsPersonalize | Find | View All | First1 of 1Last

*Sequence	*Display Group	*Use	User-friendly Text	Edit	Clear		
1	PS_HAZARD_W	Editable	Hazardous Asset is Yes				

Reorder

☐ Recycle Cache

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.

### Reorder

Reorders the group as per the sequence entered by the user in the Sequence column.

### Recycle Cache

Clears the cache for the Supplemental Data.

---

**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

**Assign Display Group**

Component WM\_WO Market Global

Page Name WM\_TSK\_SD\_SEC Display Group PS\_HAZARD\_WASTE

[Switch to Advanced Mode](#)

**Conditions** First 1 of 1 Last

Term	Operator	Value
Hazardous Asset	is	Yes

Done Cancel

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.

<b>Switch to Advanced Mode</b>	Click to activate advanced mode.
<b>Switch to Basic Mode</b>	Click to activate basic mode.
<b>Switch to Search Mode</b>	Click to activate search mode, where you can execute a search for defined terms.
<b>Switch to Browse Mode</b>	Click to activate browse mode, where you can browse defined terms.
<b>Select Term</b>	Click to insert the term into the condition.
<b>Term</b>	Displays the term name used in the condition that is evaluated against the Value.
<b>Operator</b>	Select the operator to use for the condition. The list of available operators depends on the term upon which the condition is based.

<b>Value</b>	Displays the value to which the Term is compared.
<b>Done</b>	Click to create the condition and return to the Assign Display Group page.
<b>Cancel</b>	Click to cancel building the condition.



# Using the Configurable Analysis Framework

---

## Understanding Configurable Analysis Framework

Oracle's PeopleSoft Configurable Analysis Framework (CAF) allows administrators to use a common framework to design end-user pages. These pages are intended to be used to compare or analyze PeopleSoft data. The CAF allows administrators to determine what factors (data) to display for an entity such as customers, suppliers.

There are two display layouts:

- Comparison - Displays multiple entities and factors in a column and row layout.

This option allows users to compare the same factor for multiple entities, side-by-side.

- Analysis - displays multiple factors for one entity in any layout that the user chooses.

This option allows users to focus on one entity at a time and both display layouts can be saved and shared with other users.

High level feature functionality includes:

- It is generic so that it can be used to display data for different types of entities and factors without modifying the framework.
- It is configurable so that the types of the factors and entities can be defined by administrators.
- It is extensible so that application developers can extend it to provide additional functionality that is not available from the framework.
- It supports comparison and analysis modes so that it can be used to compare entities or to focus on one entity at a time.
- It provides an intuitive user interface so that users can easily select the entities and factors to display and arrange them in the way that is most useful for them.
- It allows users to save a set of factors and entities, and recall it later or share it with other users.
- It has access control so that security can be applied to control the entities, factors, and actions that are accessible for the users.

### Third Party Integration

The Configurable Analysis Framework uses the following third party Javascript libraries to implement its user interface. They are included as PeopleTools managed objects and don't reference to external URLs:

- JQuery 1.8.2, which is used to help interact and manipulate the Html DOM objects.

- JQuery UI 1.9.0, which is used to implement the drag-drop and re-size capabilities in the user interface

The Fluid Configuration Analysis Framework does not use JQuery.

## Performance

The Configurable Analysis Framework is a framework that hosts contents. The contents are provided by various factor handlers. It is not expected that there will be large overhead by the framework. However, depending on the types of factors used, potential performance issues may need to be considered.

## Security

Standard PeopleTools security is used to secure the user login and access to the components. In addition, CAF provides access control to control user's access to the factors and related actions.

To control the access to entities, uptake can add OPRID to the entity record to filter the entities by OPRID, extend the built-in entity handler and override its logic to select the entities, or both. Since factor data is retrieved by factor handlers, it is expected that the factor handler will implement the necessary security (such as row-level security) to control the data displayed.

---

# Understanding Technical Elements of Configurable Analysis Framework

Topics discussed in this section:

- Factor Types
- Handler Types
- Related Action Levels
- Security

## Factor Types

Factor types are used in the Configurable Analysis Framework (CAF) when defining factors for an analysis on the [Define Factor Page](#). The factor type is used by the system to display data.

Factor type options are:

### ***Application Class***

Select to indicate that the factor should use an application class to display the data.

### ***Component***

Select to indicate that the factor should use a PeopleSoft Classic component to display the data for classic pages and PeopleSoft Fluid component and pages for Fluid CAF.

### ***Field List***

Select to indicate that the factor should use a pre-formatted two column display that lists each field to display the data.

<b>HTML</b>	Select to indicate that the factor should use HTML to display the data.
<b>PS Query Pagelet</b>	Select to indicate that the factor should use a PS Query Pagelet to display the data.
<b>Pivot Grid Pagelet</b>	Select to indicate that the factor should use a Pivot Grid Pagelet to display the data.
<b>URL</b>	Select to indicate that the factor should use a URL to display the data.

This table lists the factor types that support a value expression in the format of `#{type.value}`. CAF detects these factor types in the configuration and substitutes them with the proper value.

<b>Factor Type</b>	<b>Value</b>	<b>Description</b>	<b>Example</b>
URL	URL Object Name	Returns the text from the specified URL object.	<code>#{URL.HOMEPAGE}</code> : returns the URL for the HOMEPAGE URL object.
IMG	Image Object Name	Returns the URL to the image object.	<code>#{IMG.LOGO}</code> : returns the URL to the LOGO image.
HTML	HTML Object Name	Returns the HTML content or text of the HTML object.	<code>#{HTML.COMMON_HEADER}</code> : returns the HTML for the COMMON_HEADER HTML object.
MSG	MESSAGE_SET, MESSAGE_NBR	Returns the message catalog text. MESSAGE_SET and MESSAGE_NBR specify the message set and number	<code>#{MSG.6550,1}</code> : returns the text for message (6550,1).
MSGE	MESSAGE_SET, MESSAGE_NBR	Similar to MSG but returns the explanation text.	
All others specify record name	Field Name	<p>Returns the values from the specified record field. The value is formatted:</p> <ul style="list-style-type: none"> <li>If it is currency controlled, the amount is formatted as a currency.</li> <li>If it is IMAGE or IMAGEREFERENCE, it returns the URL to the image.</li> </ul>	<p><code>#{CUSTOMER.NAME1}</code> returns the value of the NAME1 field in the CUSTOMER record (customer name).</p> <p><code>#{CUST_DATA.BAL_AMT}</code> returns the BAL_AMT amount formatted since the BAL_AMT field in the CUST_DATA record is currency controlled.</p> <p><code>#{CUSTOMER.CUST_LOGO}</code> returns the URL to the CUST_LOGO image (given that CUST_LOGO is an image field and stores the customer's logo).</p>

## Handler Types

Configurable Analysis Framework (CAF) is an extendable framework using a plug-in architecture. The functionality of CAF can be extended using various types of handlers to override default behavior or provide additional functionality, such as additional type of data to display or related actions.

Handler types are set up using the [Analysis Handler Registry Page](#). The purpose of this registry is to allow application developers to assign a single value to the application class. Therefore, users do not need to know the full path to the application class when specifying it during analysis configuration.

Handler type options are:

### ***Action Handler***

Handles configured related actions. Select to indicate that the handler is used to implement related actions on the [Related Action Configuration Page](#).

The application class must be a subclass of CAF\_API:ActionHandler. The built-in action handlers are in the CAF\_CORE:HANDLER:ActionHandler package.

For Fluid implementations, the application must be a subclass of CAFNUI\_API:ActionHandler or CAFNUI\_CORE:HANDLER:ActionHandler.

### ***Analysis Handler***

The application class for the component that displays the analysis. It is used to provide functionality at the analysis level.

For example, it handles rendering the html for the display, managing the user sessions, and responding to user actions to save/edit the analysis views. It is also the handler that sends notifications. Select to indicate that the handler is used at the analysis level to handle events or override functionality provided by CAF on the [Analysis Configuration Page](#).

The application class must be a subclass of CAF\_API:ComparisonHandler. For most implementations, it should be a subclass of CAF\_CORE:HANDLER:ComparisonHandler so that most of the built-in functionality is used.

For Fluid implementations, the application must be a subclass of CAFNUI\_API:ComparisonHandler or CAFNUI\_CORE:HANDLER:ComparisonHandler.

### ***Entity Handler***

The application class used to implement the functionality of an entity, including selecting/managing the entities, and implementing the entity related actions. Select to indicate that the handler is used at the entity level to handle events or override functionality provided by CAF on the [Entity Configuration Page](#).

The application class must be a subclass of CAF\_API:EntityHandler. For most of implementations, it should be subclass of CAF\_CORE:HANDLER:EntityHandler so that most of the built-in functionality is used.

For Fluid implementations, the application must be a subclass of CAFNUI\_API: EntityHandler or CAFNUI\_CORE:HANDLER: EntityHandler.

### ***Factor Handler***

The application class used to implement the functionality of a factor, including configuring and showing the factor data.

It can also implement factor level related actions. Select to indicate that the handler is used at the factor level to handle events or override functionality provided by CAF on the [Factor Configuration Page](#).

The application class must be a subclass of CAF\_API:FactorHandler.

If the factor handler is extending built-in factor types, it should be a subclass of the corresponding factor handlers in the CAF\_CORE:HANDLER:FactorHandler package.

A CAF method is provided to enable the display of these icons for the factors that support them:

- *Configure Factor*: allows the user to configure the factor display, such as changing filter values.
- *Show Combined*: allows the user to show the data for all selected entities in a single report or chart.

This option is only available for comparison mode and is not available for Fluid CAF.

For Fluid implementations, the application must be a subclass of CAFNUI\_API: FactorHandler or CAFNUI\_CORE:HANDLER: FactorHandler.

For each type of handlers, CAF provides built-in setup to implement the core functionality. The interface definitions of each handler is in the CAF\_API application package. The core setup is in the CAF\_CORE:HANDLER application package. In almost all cases, implementation of handlers should be subclassed from the corresponding application classes in CAF\_CORE:HANDLER.

To add a handler:

1. Create an application class as a subclass of the proper type (handler type) and begin to override the methods as required.
2. Register the application class using the [Analysis Handler Registry Page](#).
3. Use the appropriate handler on each of the Analysis Configuration pages for analysis, entities, factors, and related actions.

## **Related Action Levels**

Configurable Analysis Framework (CAF) is an actionable framework that allows related actions to be attached to many levels of the display so that users can take related/context sensitive actions.

Related action levels are:

<b><i>Common Factor</i></b>	This option is a related action level for a factor, and is applicable to all factors.
<b><i>Analysis</i></b>	This option is a related action level for the whole analysis.
<b><i>Entity</i></b>	This option is a related action level for an entity and is applicable to a single entity.
<b><i>Factor</i></b>	This option is a related action level for a factor and is applicable to a single factor.
<b><i>Factor Data</i></b>	This option is a related action level for a combination of entity and factor and is applicable to the data display.
<b><i>Selected Entities</i></b>	This option is a related action level for an entity and is applicable to a group of entities.

Related actions can be

- Configured, meaning that the related action is configured using the [Analysis Configuration Page](#). Administrators can add or remove related actions using the [Related Action Configuration Page](#) and determine access using the [Analysis Access Control Page](#).
- Dynamic, meaning that the related action is implemented using handlers. Administrators can add or remove handlers dynamically.

## Security

Configurable Analysis Framework (CAF) provides secure access to entities, factors, and related actions using the [Analysis Access Control Page](#). This ensures that proper data security is applied when selecting the data to be displayed.

Entity	If an entity provided has OPRID as a high order key, then when entity data is selected from the database, row-level security (OPRID = %OperatorId) is applied to select only the entities that the user has access to. If this does not provide the required security to select the entities, the entity handler can implement or override the EntityHandler.GetAllEntities() method to select the entities.
Factor	The framework allows an administrator to specify factors that can be used and viewed by users. The access control is by user, role, or both. This can limit access to factors with sensitive data.
Related Action	Similar to factors, administrators can limit the related actions so which a user has access.

## Setting Up Configurable Analysis Framework

### Pages Used to Set Up Configurable Analysis Framework

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#"><u>Analysis Handler Registry Page</u></a>	CAF_HANDLER_TBL	Register application classes used as handlers in Configurable Analysis Framework (CAF).
<a href="#"><u>Analysis Configuration Page</u></a>	CAF_CONFIG_TBL_GEN	Define data analysis.
<a href="#"><u>Entity Configuration Page</u></a>	CAF_CONFIG_TBL_ENT	Define the entity for the analysis.
<a href="#"><u>Factor Configuration Page</u></a>	CAF_CONFIG_TBL_FCT	Define the factors for the analysis.
<a href="#"><u>Define Factor Page</u></a>	CAF_FACTOR_SEC	Add factors to the Factor Analysis page.
<a href="#"><u>Factor List Configuration Page</u></a>	CAF_CONFIG_TBL_FLS	Create a pre-selected list of factors that are available to all users.
<a href="#"><u>Copy Factor Lists Page</u></a>	CAF_CNF_FL_SEL_SEC	Copy a factor list from other users.
<a href="#"><u>Related Action Configuration Page</u></a>	CAF_CONFIG_TBL_ACT	Define configured related actions for different levels of data.
<a href="#"><u>Define Related Action Page</u></a>	CAF_ACTION_SEC	Add a related action to the Related Action Configuration page.
<a href="#"><u>Miscellaneous Page</u></a>	CAF_CONFIG_TBL_MSC	Perform administrative tasks.
<a href="#"><u>Analysis Access Control Page</u></a>	CAF_ACC_CTL_TBL	Set up access control for factors and related actions for an analysis.

### Analysis Handler Registry Page

Use the Analysis Handler Registry page (CAF\_HANDLER\_TBL) to register application classes used as handlers in Configurable Analysis Framework (CAF).

#### Navigation

Enterprise Components, Configurable Analysis, Handler Registry

**Image: Analysis Handler Registry Page (1 of 2)**

This example illustrates the fields and controls on the Analysis Handler Registry page (1 of 2)

**Analysis Handler Registry**

System Defined Personalize | Find | View All | First 1-6 of 6 Last

*Handler ID	*Handler Type	*Description	*Root Package ID
PS_SUPPLIER_ACTION_HANDLER	Action Handler	Supplier Action Handler	SUPPLIER_360_APPCLASS
PS_SUPPLIER_COMPONENT_HANDLER	Factor Handler	Supplier Component Handler	SUPPLIER_360_APPCLASS
PS_SUPPLIER_ENTITY_HANDLER	Entity Handler	Supplier Entity Handler	SUPPLIER_360_APPCLASS
PS_SUPPLIER_PARAM_HANDLER	Factor Handler	Supplier Param Handler	SUPPLIER_360_APPCLASS
PS_SUPPLIER_PIVOTGRID_HANDLER	Factor Handler	Supplier Pivot Grid Handler	SUPPLIER_360_APPCLASS
PS_SUPP_COMPARE_CONFIG_HANDLER	Analysis Handler	Supplier Comparison Configure Handler	SUPPLIER_360_APPCLASS

\* System defined ID should start with "PS\_"

User Defined Personalize | Find | View All | First 1-15 of 19 Last

*Handler ID	*Handler Type	*Description	*Root Package ID	*Qualified Package Name
APCLS_FACTOR_TEST	Factor Handler	Application Class Factor Test Handler	CAF_TEST	HANDLER
APCLS_SUBFACTOR_TEST	Factor Handler	App Class Subfactor Test Handler	CAF_TEST	HANDLER
CUST_ACTION	Action Handler	Customer Action Handler	CAF_TEST	HANDLER
CUST_AGING	Factor Handler	Customer Aging	CAF_TEST	HANDLER
CUST_COMPARISON	Analysis Handler	Customer Comparison Handler	CAF_TEST	HANDLER
CUST_ENTITY_SEL_TEST	Entity Handler	Customer Entity Select Test Handler	CAF_TEST	HANDLER
CUST_ENTITY_TEST	Entity Handler	Customer Entity Test Handler	CAF_TEST	HANDLER
CUST_INFO	Factor Handler	Customer Info	CAF_TEST	HANDLER
LEDGER_SCENARIO_INQ_HANDLER	Factor Handler	Ledger Scenario Inquiry	ANALYSIS_CAF_PKG	
NET_PROFIT_MARGIN	Factor Handler	Financial Analysis Ratio	ANALYSIS_CAF_PKG	
OBIEE_REPORT_TEST	Factor Handler	Obiee Report Handler	ANALYSIS_CAF_PKG	
PG_PAGELET_TEST	Factor Handler	Pivot Grid Pagelet Test Handler	CAF_TEST	HANDLER
RENT_TO_TOTAL_GA	Factor Handler	Rent To Total G&A	ANALYSIS_CAF_PKG	
RTBL_ACTION_HANDLER	Action Handler	Analysis Action Handler	ANALYSIS_CAF_PKG	
RTBL_ENTITY_HANDLER	Entity Handler	RTBL Entity Handler	ANALYSIS_CAF_PKG	

\* User defined ID should start with "PS\_"



## Image: Analysis Handler Registry Page (2 of 2) (scroll to right)

This example illustrates the fields and controls on the Analysis Handler Registry page (2 of 2) after scrolling to the right.

**Analysis Handler Registry**

▼ **System Defined** Personalize | Find | View All | | First 1-6 of 6 Last

*Handler ID	*Qualified Package/Class Path	*Application Class ID	Owner ID
PS_SUPPLIER_ACTION_HANDLER	:	SupplierActionHandler	FAP
PS_SUPPLIER_COMPONENT_HANDLER	:	SupplierComponentHandler	FAP
PS_SUPPLIER_ENTITY_HANDLER	:	SupplierEntityHandler	FAP
PS_SUPPLIER_PARAM_HANDLER	:	SupplierParamHandler	FAP
PS_SUPPLIER_PIVOTGRID_HANDLER	:	SupplierPivotGridParamHandler	FAP
PS_SUPP_COMPARE_CONFIG_HANDLER	:	SupplierCompareConfigHandler	FAP

\* System defined ID should start with "PS\_"

▼ **User Defined** Personalize | Find | View All | | First 1-15 of 19 Last

*Handler ID	*Qualified Package/Class Path	*Application Class ID	Owner ID
APCLS_FACTOR_TEST	HANDLER	AppClass	
APCLS_SUBFACTOR_TEST	HANDLER	SubfactorTest	
CUST_ACTION	HANDLER	ActionHandler	
CUST_AGING	HANDLER	CustAging	
CUST_COMPARISON	HANDLER	CustomerCompareHandler	
CUST_ENTITY_SEL_TEST	HANDLER	CustomerHandlerWithSelect	
CUST_ENTITY_TEST	HANDLER	CustomerHandler	
CUST_INFO	HANDLER	CustInfo	
LEDGER_SCENARIO_INQ_HANDLER	:	LedgerScenarioInquiry	
NET_PROFIT_MARGIN	:	NetProfitMargin	
OBIEE_REPORT_TEST	:	ObieeAnalysis	
PG_PAGELET_TEST	HANDLER	PivotGridPagelet	
RENT_TO_TOTAL_GA	:	RentToTotalGA	
RTBL_ACTION_HANDLER	:	ActionHandler	FRTB
RTBL_ENTITY_HANDLER	:	ScenarioHandler	

\* User defined ID should not start with "PS\_"

Application developers use this page to create user defined handler ID's.

## User Defined

System defined handlers are available for you to use. However, if you need to create your own handlers, use this section to create user defined handlers.

### Handler ID

Enter a unique Id that is used when referencing the application class.

**Note:** System defined handlers should always begin with "PS\_". User defined handlers should NOT begin with "PS\_".

### Handler Type

Select the type of handler that is being registered. Options include:

- *Action Handler*
- *Analysis Handler*
- *Entity Handler*
- *Factor Handler*

For a description of each option and additional information, see [Handler Types](#).

<b>Root Package ID, Qualified Package/Class Path, and Application Class ID</b>	Select the full path to the application class. The system verifies that the application class is a valid subclass of the handler type when you save the page.
<b>Owner</b>	Select a product or owner ID for the handler. This is an optional field.

Analysis Configuration Page

Use the Analysis Configuration page (CAF\_CONFIG\_TBL\_GEN) to define data analysis.

Navigation

Enterprise Components, Configurable Analysis, Analysis Configuration

Image: Analysis Configuration Page

This example illustrates the fields and controls on the Analysis Configuration page.

Analysis ConfigurationEntity ConfigurationFactor ConfigurationFactor List ConfigurationRelated Action ConfigurationMiscellaneous

Analysis ID CUSTOMER\_360Analysis Type SystemFluid ConfigurationActive

Analysis Configuration

\*Analysis TitleComprehensive Customer View

DescriptionComprehensive Customer View227 characters remaining

Display Menu NameCUST360\_SEARCH

Analysis HandlerPS\_CUST\_COMPARE\_CONFIG\_HANDLECustomer Analysis Comparison Handle

Analysis Handler Parameter

Owner ID FARReceivables

Analysis Options

Support Analysis Mode

Support Entity Group Actions

Support Flagged Entity

Analysis Access Control

Set up Access Control

Note: Unsaved changes may not be reflected in the Analysis Access Control page.

Copy Configuration To...Delete Configuration

SaveReturn to SearchPrevious in ListNext in ListNotifyAddUpdate/Display

Use this page to set up general information about the analysis.

<b>Analysis ID and Analysis Type</b>	Displays key fields for the analysis. The analysis type is System Defined or User Defined, which corresponds to the <a href="#">Analysis Handler Registry Page</a> .
<b>Fluid Configuration</b>	Select to indicate if this is a Fluid configuration.
<b>Active</b>	Select to indicate that the analysis can be used.

## Analysis Configuration

### Analysis Title

Enter a title that appears on the Analysis Display page for Classic implementations. For more information about the Analysis Display page, see [Using Configurable Analysis Framework](#).

### Display Menu Name

Select the name of the menu where the Display Analysis page is accessed or the Tile in case of CAF Fluid implementation.

For Classic Implementations:

1. Register the CAF\_DISPLAY component in an existing menu or a new menu.
2. The search record should be *INSTALLATION*

For Fluid Implementations:

1. Register the CAFNUI\_DISPLAY\_FL component in a new menu. Leave the search record as *INSTALLATION*.
2. Create a Content Reference in an existing or new Fluid Page referring to the Menu/Component pair mentioned in the previous step.
3. Specify the menu in this field.

### Analysis Handler and Analysis Handler Parameter

(Optional) Select the handler and enter its parameter.

### Owner ID

(Optional) Select an owner for the analysis. This field is informational only and is not used by the system.

## Analysis Options

### Support Analysis Mode

Select to support analysis mode.

### Support Entity Group Actions

Select to support entity group actions. This is not allowed for Fluid configurations.

### Support Flagged Entity

Select to allow users to flag one or more entities.

## Analysis Access Control

Access control must be set up for the analysis.

### Set up Access Control

Select this button to access the [Analysis Access Control Page](#) in a modal window.

**Note:** The current data for the analysis configuration must be saved before changes are reflected in the Analysis Access Control component. For example, if a new factor is added on the Factor Configuration page, you must save the page before the factor is reflected on the Analysis Access Control component.

Copy Configuration To ...

Select this button to copy this configuration to a new configuration. This button accesses the Copy Configuration window where you can select an analysis type and enter a new analysis ID.

Entity Configuration Page

Use the Entity Configuration page (CAF\_CONFIG\_TBL\_ENT) to define the entity for the analysis.

Navigation

Enterprise Components, Configurable Analysis, Analysis Configuration, Entity Configuration

Image: Entity Configuration Page

This example illustrates the fields and controls on the Entity Configuration page.

Analysis ConfigurationEntity ConfigurationFactor ConfigurationFactor List ConfigurationRelated Action ConfigurationMiscellaneous

Analysis ID RTBL\_ANALYSIS\_1Analysis Type System

Entity Configuration

\*Entity Label Scenario

\*Entity Label (Plural) Scenarios

\*Entity Record Name RTBL\_CAF\_TST\_VWKey Separator

\*Description Field RTBL\_SCENARIO

Entity Handler RTBL\_ENTITY\_HANDLERRTBL Entity Handler

Entity Handler Parameter

Entity Label and Entity Label (Plural)

Enter a singular and plural description for the entity label. The framework requires singular and plural forms so that it can properly create labels. Examples include *Customer* and *Customers* so that CAF can display messages such as “Flag this Customer” and “Select All Customers”.

Entity Record Name

Select a record or view that indicates the structure of the entity and the record from which to retrieve the data.

If the keys of the record or view include OPRID (operator ID), then row-level security is used to select entities that are accessible to the user when CAF selects the data,

For Fluid CAF, when the record has a field of type Image, the image is displayed in Comparison Mode at the Header.

Key Separator

Enter a value that is used to separate key values.

The session tracks the entity keys using a composite key This key is obtained by concatenating the key fields of the entity. The key fields are separated by a key separator. If you leave

the key separator blank, the system uses “~|~” as the default value. However, if you believe that “~|~” can be found in some key values, then you should specify a different value as the key separator.

**Note:** Use caution when changing key separators or entity keys because any saved views or saved sessions will not be valid.

<b>Description Field</b>	Select a field from the entity record that is used to retrieve the title or name for the entity. For example, <i>NAME1</i> for customer name.
<b>Entity Handler and Entity Handler Parameter</b>	Select the handler ID and the parameters if a handler is implemented for the entity.

Factor Configuration Page

Use the Factor Configuration page (CAF\_CONFIG\_TBL\_FCT) to define the factors for the analysis.

Navigation

Common Definitions, Enterprise Components, Analysis Configuration, Factor Configuration

Image: Factor Configuration Page

This example illustrates the fields and controls on the Factor Configuration page.

Analysis ConfigurationEntity ConfigurationFactor ConfigurationFactor List ConfigurationRelated Action ConfigurationMiscellaneous

Analysis ID RTBL\_ANALYSIS\_1Analysis Type System

Factor Configuration

\*Factor Label Metric\*Factor Label (Plural) Metrics

Factors

Define

*Factor ID	*Factor Type	*Factor Name	*Used in Mode	*Status	
LEDGER SCENARIO INQUIRY	Component	Ledger Scenario Inquiry	Both	Active	+ -
NET PROFIT MARGIN	Application Class	Net Profit Margin	Both	Active	+ -
RTBL_ANALYSIS_DEPT	Pivot Grid Pagelet	Expense by Department	Both	Active	+ -
RTBL_ANALYSIS_LED	Pivot Grid Pagelet	Expense by Scenario	Both	Active	+ -
SCENARIO_DETAILS	Field List	Summary Information	Both	Active	+ -
TRIAL BALANCE	Application Class	Trial Balance	Both	Active	+ -

Factor Configuration

<b>Factor Label and Factor Label (Plural)</b>	Enter a singular and plural description for the factor label. The framework requires singular and plural forms so that CAF can properly display messages. Examples include <i>Measure</i> and <i>Measures</i> .
---	---

Factors

Use this section to add factors that are to be used in the analysis.

<b>Define</b>	Click this button to access the <a href="#">Define Factor Page</a> .
---------------	--

## Define Factor Page

Use the Define Factor page (CAF\_FACTOR\_SEC) to add factors to the Factor Comparison page.

### Navigation

Set Up Financials/Supply Chain, Common Definitions, Configurable Analysis, Analysis Configuration, Factor Configuration. Click the Define button in the Factors section of the page.

### Image: Define Factor Page

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

The screenshot shows the 'Define Factor' page within the 'Analysis Configuration' window. The page is titled 'Define Factor' and contains the following fields and sections:

- \*Factor ID:** LEDGER SCENARIO INQUIRY
- \*Factor Type:** Component (dropdown menu)
- \*Factor Name:** Ledger Scenario Inquiry
- Description:** (text area with a character count of 254 characters remaining)
- \*Active:** (checked checkbox)
- Factor Options:**
  - \*Used in Mode:** Both (dropdown menu)
  - Width:** 650
  - Height:** 500
  - Factor Handler:** LEDGER\_SCENARIO\_INQ\_HANDLER (with a search icon and the text 'Ledger Scenario Inquiry')
  - Handler Parameter:** (text field)
  - Entity Key Map:** (text field)
- Component Options:**
  - \*Menu Name:** RTBL\_UI (with a search icon)
  - \*Component Name:** RTBL\_CAF\_LSI (with a search icon)
  - \*Page Name:** RTBL\_CAF\_LSI (with a search icon)
  - \*Menu Action:** U (with a search icon)

#### Factor ID

Enter an ID that identifies the factor.

#### Factor Type

Select the type of factor you want to use to display the data.. Depending on the option selected, additional fields are displayed to define the factor details.

Options include:

- *Application Class*
- *Component*
- *Field List*
- *HTML*
- *PS Query Pagelet*
- *Pivot Grid Pagelet*
- *URL*

When an option other than *Application Class* is selected, a new section with additional fields appears lower on the page.

For a description of each option and additional information, see [Factor Types](#).

### Factor Name

Enter a name for the factor, which is used when displaying it to the user.

## Factor Options

### Used In Mode

Select a mode for which this factor can be used. Options include:

- *Analysis*: Select to indicate that the factor can only be use in Analysis Mode.
- *Comparison*: Select to indicate that the factor can only be used in Comparison Mode.
- *Both*: Select to indicate that the factor can be use in Analysis and Comparison Mode.

### Width and Height

Enter a value that represents the size of the factor. The system defaults the size to *400* (width) and *300* (height).

---

**Note:** For fixed size factor types, such as Component, Chart, and pagelets, the size should be large enough to accommodate the content and avoid scroll bars that the user would need to view the data.

---

### Factor Handler and Handler Parameter

Select the factor handler and specify its parameters.

This is a required field when the Factor Type is *Application Class*.

When the Factor Type is anything other than application class, then factor handler is already determined. However, if you need to extend, or override, the built-in handler, then you can specify a customized handler and its parameters. The custom handler should extend or subclass from the built-in handler class.

### Entity Key Map

Enter a value that is used to map the key values when a the record specified uses different key fields.

For example, the entity record for Customer can be CUSTOMER, which is keyed by SETID and CUST\_ID. If the data is retrieved from a view or record that is keyed by BILL\_TO\_SETID and BILL\_TO\_CUST\_ID, then the Entity Key Map that can be used to specify the mapping could be *BILL\_TO\_SETID=SETID,BILL\_TO\_CUST\_ID=CUST\_ID*

For some factor types, CAF automatically passes the selected entity keys to retrieve the data for display. For example, with

the HTML factor type, an administrator can use the expression `#{RECORD.FIELD}` to specify the record and the field to retrieve the data. In most cases, the record specified should be keyed at the entity level and use the same key fields. However, it is possible that the record specified uses different key fields.

## Component Options

Data is displayed by entity and the search record for the component should be keyed by entity. CAF automatically passes the entity keys to the component to bypass the search dialog. The Entity Key Map field can be used if the key fields are different. However, this create a transaction to display the data. Therefore, it may be more efficient to use other factor types such as PS Query, Field List, and so on.

**Menu Name, Component Name, Page Name, and Menu Action** Enter the values for the target component.

## Field List Options

When this option is selected the left column is intended to display field labels and right justified. The right column is intended to display the field values and is left justified.

**Label Column Width and Value Column Width**

Enter the column width for field labels and field values.

The preferred method is to enter one column a percentage so that the data display can automatically adjust based on the cell size of the data. Then, enter the other column using “\*”, which indicates that it will use the remaining width.

**Seq (sequence)**

Enter the sequence of each row. The rows are ordered in this sequence when viewed by a user.

## HTML Options

If the HTML generated for each entity is the same except for the data, then this factor type can be used. The HTML can be coded to format the data and the value expressions can be used to substitute the data in the HTML.

**HTML**

Enter the HTML code. Value expressions should be used to substitute the data that is specific to each entity. You may provide formatting for this data.

## PS Query Pagelet Options

When this option is selected, you must perform theses steps:

1. Create a PS Query.
2. Use the Pagelet Wizard to create the Pagelet for the PS Query.
3. Create a factor that uses PS Query Pagelet as the factor type and complete the PS Query Pagelet Options.



The data that is generated for this option is a static HTML, image, or both, and the factor is not interactive. However, this options provides the best performance when displaying the data. Therefore, if you want a simple chart, grid, or both, this option should be used instead of the Component option.

**Maximum Rows**

Enter the maximum number of rows to display. This field overrides the MAXROWS parameter in the pagelet.

**Pagelet Width and Pagelet Height**

Enter the size of the container that holds the pagelet. This value should be slightly larger than the size of the pagelet specified in the Pagelet Wizard, and smaller than the size entered in the Factor Options. This provides clean margins and reduces scrolling.

**Pagelet ID**

Select the ID of the Pagelet that you created in the Pagelet Wizard.

## Pivot Grid Pagelet Options

When this option is selected, you must perform theses steps:

1. Create a PS Query.
2. Use the Pivot Wizard to create the Pivot Grid.
3. Use the Pagelet Wizard to create the Pagelet for the Pivot Grid.
4. Create a factor that uses Pivot Grid Pagelet as the factor type and complete the Pivot Grid Pagelet Options.
5. For Fluid, use Publish as a Grouplet found at the last page of the Pivot Grid Wizard to create the grouplet. The new Pivot Grid Content Reference should have exactly the same name of the Pagelet.

The data that is generated for this option uses iframe and is interactive. Therefore a user can make changes to the Pivot Grid view. Changes are independent for each view, therefore to apply changes to all views, you must use the Configure Factor related action for the factor.

**Pagelet Width and Pagelet Height**

Enter the size of the pagelet. these values override the values in the Pagelet Wizard. These values should be slightly smaller than the size entered in the Factor Options. This provides clean margins and reduces scrolling.

**Pagelet ID**

Select the ID of the Pivot Grid pagelet that you created in the Pagelet Wizard.

## URL Options

**URL**

Enter the URL for the factor. The URL should be based on the entity, the installed system, or both.

---

**Note:** Due to security limitations, not all URLs are supported.

---

Pivot Grid Pagelet Options for Fluid

The Fluid Configurable Analysis Framework allows users to setup how each prompt field of their Pivot Grids should be populated. Handlers are not needed in most cases. Use the Pivot Grid Prompt Fields to populate the prompt fields.

Image: Pivot Grid Prompt Fields for Fluid CAF (1 of 2).

Pivot Grid Prompt Fields for Fluid CAF.

Factor Options

\*Used in Mode

Comparison

Width

350

Height

330

Factor Handler

Handler Parameter

Entity Key Map

VENDOR\_SETID=SETID

Pivot Grid Pagelet Options

Pagelet Width

350

Pagelet Height

250

\*Pagelet ID

EP\_DISCOUNTS\_LOSTTAKEN\_FL

Discounts Lost/Taken (Fluid)

Pivot Grid prompt fields

Personalize | Find |

First 1-6 of 6 Last

	Unique Prompt Name	Query Prompt Name	*ValueType	Record (Table) Name	Field Name
1	BIND3	Display Currency	My Personalizat	S360_USER_PREF	DISPLAY_CURR
2	BIND4	Rate Type	My Personalizat	S360_USER_PREF	RT_TYPE
3	BIND5	From Year	Global Date		Year of
4	BIND6	From Month	Global Date		Month of
5	BIND7	To Year	Global Date		Year of
6	BIND8	To Month	Global Date		Month of

OK Cancel

Image: Pivot Grid Prompt Fields for Fluid CAF (2 of 2).

Pivot Grid Prompt Fields for Fluid CAF (2 of 2).

Personalize   Find					First	1-6 of 6	Last	First	1-6 of 6	Last
*ValueType	Field Name	Global Date Operation		Constant						
My Personalizat	LAY_CURR	Not Applicable						+	-	
My Personalizat	YPE	Not Applicable						+	-	
Global Date		Year of Global Date From						+	-	
Global Date		Month of Global Date From						+	-	
Global Date		Year of Global Date To						+	-	
Global Date		Month of Global Date To						+	-	

Unique Prompt Name The Pivot Grid prompt fields defined in Pivot Grid Wizard.

<b>Value Type</b>	<p>The options users can use to populate the prompt fields. Available options are:</p> <ul style="list-style-type: none"> <li>• Constant</li> <li>• Global Date</li> <li>• My Personalization</li> </ul>
<b>Record (Table) Name</b>	<p>This field is enabled only when the Value Type is My Personalization. The personalization can be changed dynamically if the Action Level is set to Analysis. For more details, see <a href="#">Related Action Configuration Page</a></p>
<b>Field Name</b>	<p>This field is enabled only when the Value Type is My Personalization. Specify a field of the My Personalization record.</p>
<b>Global Date Operation</b>	<p>This field is enabled only when the Value Type is Global Date. The options available are:</p> <ul style="list-style-type: none"> <li>• Global Date from</li> <li>• Global Date to</li> <li>• Day of Global Date from</li> <li>• Day of Global Date to</li> <li>• Month of Global Date from</li> <li>• Month of Global Date to</li> <li>• Year of Global Date from</li> <li>• Year of Global Date to</li> <li>• Day Difference</li> <li>• Month Difference</li> <li>• Year Difference</li> </ul>
<b>Constant</b>	<p>This field is enabled only when the Value Type is Constant. Specify a constant value for this field.</p>

## Factor List Configuration Page

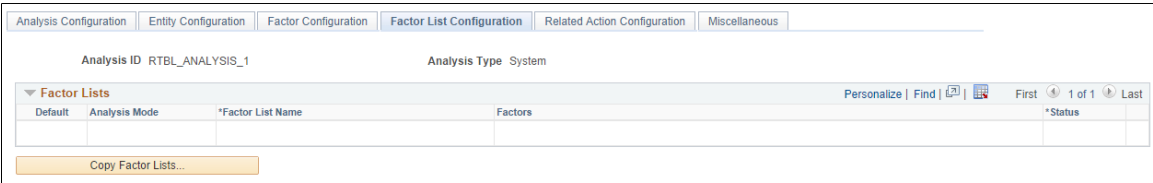
Use the Factor List Configuration Page (CAF\_CONFIG\_TBL\_FLS) to create a pre-selected list of factors that are available to all users.

### Navigation

Common Definitions, Enterprise Components, Factor List Configuration.

Image: Factor List Configuration Page

This example illustrates the fields and controls on the Factor List Configuration page..



Depending on the needs of your users, this page allows them to switch between different sets of factors without having to select individual factors, or without having to create their own factor lists. The list includes the position and size of the factor for the administrator to create the list using the CAF Display page (for the classic CAF implementations) or the Fluid CAF for Fluid implementation as opposed to entering the data in this page. Therefore, to set up a factor list, create it using the CAF Display page or the Fluid CAF page and then use this page to copy the factor lists as part of your configuration. Alternatively, the administrator can copy public factor lists from other users and make them part of the configuration.

Factor Lists

This section displays all the factor lists that have been configured for the analysis. Each row represents one factor list.

Default

Select to indicate that this row is the default factor list for each display mode. Therefore, only one row can be selected for an Analysis mode row and a second row can be selected as long as it is for a Comparison mode row.

The select factor list is used the first time a user accesses the analysis without specifying any factors.

Analysis Mode

Displays the mode to which the factor list belongs.

Factor List Name

Displays the name of the factor list. This value is copied from the source factor list and can be changed.

Factors

Displays the list of factors of the factor list.

Status

Select *Active* or *Inactive*. Active factor lists are available to users.

Copy Factor Lists

Click this button to access the Copy Factor Lists page where you can copy factor lists from users.

Copy Factor Lists Page

Use the Copy Factor Lists page (CAF\_CNF\_FL\_SEL\_SEC) to copy a factor list from other users.

Navigation

Enterprise Components, Configurable Analysis, Analysis Configuration, Factor List Configuration. Click the Copy Factor Lists button.

### Image: Copy Factor Lists Page

This example illustrates the fields and controls on the Copy Factor Lists page.

Follow these steps to search for and copy a factor list into the Factor List Configuration page:

1. Enter or select a user ID.
2. (Optional) Select the analysis mode.
3. Click the Search button.
4. Select the check box next to the factor list that you want to copy.

You can select more than one if you want to copy multiple factor lists.

5. Click the OK button to copy the factor list and return to the Factor List Configuration page.

## Related Action Configuration Page

Use the Related Action Configuration page (CAF\_CONFIG\_TBL\_ACT) to define configured related actions for different levels of data.

### Navigation

Enterprise Components, Configurable Analysis, Related Action Configuration.

### Image: Related Action Configuration Page

This example illustrates the fields and controls on the Related Action Configuration page.

Field definitions are available below the Define Related Action page.

### Define

Click this button to access the [Define Related Action Page](#).

## Define Related Action Page

Use the Define Related Action page (CAF\_ACTION\_SEC) to add a related action to the Related Action Configuration page.

## Navigation

Enterprise Components, Configurable Analysis, Related Action Configuration. Click the Define button.

### Image: Define Related Action Page

This example illustrates the fields and controls on the Define Related Action page.

The screenshot shows a web form titled 'Define Related Action' within an 'Analysis Configuration' window. The form includes the following fields and controls:

- \*Action ID:** A text input field containing 'AC1'.
- \*Action Name:** A text input field containing 'My Personalization'.
- \*Action Level:** A dropdown menu with 'Analysis' selected.
- \*Action Type:** A dropdown menu with 'App Class' selected.
- \*Action Handler:** A text input field containing 'RTBL\_ACTION\_HANDLER'. To its right is a magnifying glass icon and the text 'Analysis Action Handler'.
- Handler Parameter:** An empty text input field.
- Active:** A checked checkbox.

#### Action ID and Action Name

Enter a unique action ID and a name for the related action. The name appears for users.

#### Active

Select the check box to indicate that the action is active. Only active related actions are displayed to users.

#### Action Level

Select the level to which the related action is associated. Options are:

- Analysis
- Common Factor
- Entity
- Factor
- Factor Data
- Selected Entities

#### Factor ID

Select the factor to which this action is associated. Or, you can leave this field blank and it will be applicable to all factors in the analysis.

This option is only available when the action level is Factor and Factor Data.

#### Configure Action

Select to indicate that this is the configuration action for the factor. It is the action that is associated with the Configuration Factor button for the factor. Only one related action can have the this check box selected and it overrides any dynamic configure action from the faction handler.

This check box is only available when the action level is Factor.

#### Action Type

Select the type of related action. Options include:

- *App Class* (application class): the related action is handled through an application class.
- *Component*: the related action is intended to open a component.

### Action Handler and Handler Parameter

Select the action handler for the related action. This field is required for the application class action type, and is optional for the component action type.

When the action handler is selected, it overrides the built-in handler and you can enter the parameter of the handler.

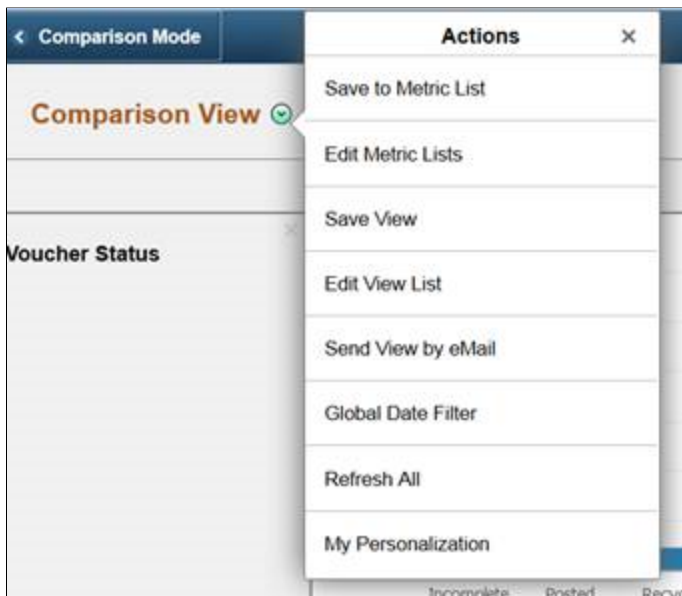
To create an Analysis Related Action My Personalization:

1. Create an action with Action Level = Analysis, and Action Type: App Class.
2. Create a handler to display a page where the user can maintain the fields for My Personalization record.
3. Enter Handler Parameter = *refreshall=y*.

A value is changed by doing this action every time. The Pivot Grids using Value Type = My Personalization will be automatically refreshed to reflect this change.

### Image: My Personalization in Related Actions for an analysis

My Personalization in Related Actions for an analysis



### Component Options

This section appears when *Component* is selected as the action type.

#### Key Map

Enter the map, which is similar to the entity key map.

This option maps the key differences between the data from CAF and the data in the search record of the target component. The key fields and values that are passed from CAF when opening the component are defined in record CAF\_XFRSRCH\_WRK.

### Navigation Type

Select to indicate how the component is to be opened. Options include:

- *Modal*: indicates that the component is opened as a modal page.
- *New Page*: indicates that the component is opened in a new browser page or tab.
- *Replace Page*: indicates that the component is opened in place of the current page, which would be the CAF DISPLAY page.

**Menu Name, Bar Name, Item Name, Panel Name, and Menu Action** Select the path and action of the component.

## Miscellaneous Page

Use the Miscellaneous page (CAF\_CONFIG\_TBL\_MSC) to perform administrative tasks.

### Navigation

Enterprise Components, Configurable Analysis, Miscellaneous.

### Image: Miscellaneous Page

This example illustrates the fields and controls on the Miscellaneous page.

Analysis ID RTBL\_ANALYSIS\_1      Analysis Type System

**Reset Last Session**

If there are errors from factors or entities that prevent user's last session to be automatically loaded, this can be used to reset user's last session so it won't automatically be loaded. Leave User Id blank to reset last session for all users.

User ID

Use this page to reset the last session for a specific user or for all users.

Every time a user accesses the CAF\_DISPLAY page (for Classic CAF implementations) or the Fluid CAF, a new session is created. When a user makes changes on the page, such as adding, deleting, or rearranging the entities, factors, or both the session data is saved. When the user comes back to the CAF\_DISPLAY page for the same analysis, the last session that the user accessed is loaded, unless a specific session is entered by the user. If there is problem with the factors, entities, or both from the last session, during configuration or factor development, the session may not load and the page may not be displayed properly. The Reset Last Session button is provided for an administrator or developer to reset the last session, which loads a blank session instead of the last session that had the issue.



- User Id

Select a user ID to reset the last session for a specific user.  
Leave this field blank to reset the last session for all users.
- Reset Last Session

Click to reset the last session to a blank session for the specified user, or for all users, if a User ID is not specified in the User Id field.

Analysis Access Control Page

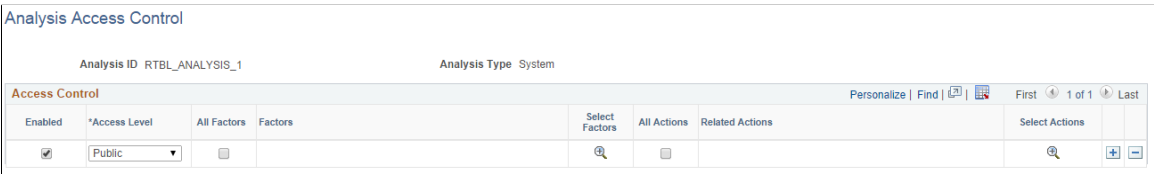
Use the Analysis Access Control page (CAF\_ACC\_CTL\_TBL) to set up access control for factors and related actions for an analysis.

Navigation

- Enterprise Components, Configurable Analysis, Analysis Access Control.
- Enterprise Components, Analysis Configuration. Click the Set Up Access Control button on the Analysis Configuration page.

Image: Analysis Access Control Page

This example illustrates the fields and controls on the Analysis Access Control page. This setup page is used by both Classic CAF and Fluid CAF



Use this page to grant access to each analysis.

- Enabled

Select to allow access control.
- Access Level

Select the level of access. Options include:
  - Public*: Select to indicate that access is available for all users.  
  
When this option is selected, the Access Level Value field is not available for entry.
  - Role*: Select to indicate that access is defined by role.  
  
When this options is selected, indicate the role in the Access Level Value field.
  - User*: Select to indicate that access is defined by User ID.  
  
When this option is selected, indicate the user ID in the Access Level Value field.
- All Factors

Select to indicate that access is granted to all factors. When this option is selected, Factors and Select Factors are not displayed.

<b>Select Factors</b>	Select to access the Select Factors page, where you can select which factors of the analysis are available for the access level. This option is available when the All Factors check box is not selected.
<b>All Actions</b>	Select to indicate that access is granted to all related actions. When this option is selected, Related Actions and Select Actions are not displayed.
<b>Select Actions</b>	Select to access the Select Related Actions page where you can select which related actions are available for the access level. This option is available when the All Actions check box is not selected.

---

## Using Configurable Analysis Framework

### Pages Used to Utilize Configurable Analysis Framework

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Analysis Display Page (Comparison Mode)</u>	CAF_DISPLAY	Compare data for multiple entities in a tabular or grid format.
<u>Analysis Display Page (Analysis Mode)</u>	CAF_DISPLAY	Analyze data for one entity.
<u>Fluid Analysis Display Page (Comparison Mode)</u>	CAFNUI_DISPLAY_FL	Compare data for multiple entities in Fluid.
<u>Fluid Analysis Display Page (Analysis Mode)</u>	CAFNUI_360_FL	Analyze data for one entity in Fluid.

### Understanding Configurable Analysis Framework

The CAF\_DISPLAY page is the page that is used to view and interact with comparison and analysis data. This page supports two modes: comparison mode and analysis mode. Each mode has some similarities and some differences.

When a PeopleSoft application uses CAF, component CAF\_DISPLAY should be registered under its own menu. For example, a customer analysis might be accessed from the Customers menu. It is registered under the Analysis menu as Display Analysis, and Display Analysis Test for an administrator to test the configuration only.

The default search record for Component.CAF\_DISPLAY is *INSTALLATION*. This bypasses the search dialog and displays the default comparison associated with the menu. However, the search record can be overridden for a menu to provide the search dialog to allow users to select from multiple comparisons, if desirable.

The CAF\_DISPLAY page is automatically re-sized when the size of the browser window changes. Users can add, remove, and rearrange entities and factors. There is no built-in limitation on the number of entities and factors that a user can selected at the same time.

---

**Warning!** Depending on your implementation, there may be performance issues if a user selects too many entities, factors, or both.

---

## Common Elements on the Display Analysis Page

The Display Analysis page is displayed in two modes. Each mode has similarities and differences. This section discusses the similarities.

### Select Analysis View

Select previously saved views that are available for a user. Saved views are created by the user who is signed on or by other users.

### Analysis View

Displays the last analysis view selected from the drop down list box. This can be used as a reference if the factors, entities, or both have been modified since the analysis view was selected and the current display does not reflect that analysis view.



(Save As)

Click the Save icon so that the current view can be accessed in the future. The user must enter text in the Name of Analysis View to Save field, and click the OK button. The saved view includes the list of entities and factors, including the layout information such as order and size. The system also saves the data for both modes.

If the name entered in the Name of Analysis View to Save field exists, the view is replaced.



(Edit)

Click the Edit icon to access the Edit Analysis View page and perform these tasks:

- Select the Public check box to make the view available to other users.

The system adds the owners user ID to the end of the view name for other users to identify the modified view and who modified it.

- Select the Delete check box to delete the view.



(Notify)

Click the Notify icon to access the Email Notification page and send an e-mail to other users. The field The e-mail includes a link to the current view.

- To: select the e-mail addresses icon if the analysis handler includes a list of e-mail addresses to choose from.
- BCC: is automatically populated with the user's e-mail address so they have a copy of the message and can re-send it if necessary.
- Subject: The system automatically populates this field with the analysis title.

- Message: The system automatically populates this field with the entities and factors selected.

In addition, a link is provided for the e-mail recipients to open the current view.



(Refresh)

Click the Refresh icon to refresh the data that is displayed on the page.



(Analyze this Entity)

Click the Analyze this <entity> icon to access the Comparison Analysis page in analysis mode.

This icon acts like a toggle between comparison mode and analysis mode.

This option is only available if the Support Analysis Mode check box is selected on the [Analysis Configuration Page](#).

(Analysis related actions)

Click the Analysis related actions icon to perform related actions. This icon is only available if related actions are available for the analysis.

## Analysis Display Page (Comparison Mode)

Use the Analysis Display page (Comparison Mode) (CAF\_DISPLAY) to compare data for multiple entities in a tabular or grid format.

### Image: Analysis Display Page (Comparison Mode) (1 of 2)

This example illustrates the fields and controls on the Analysis Display Page (Comparison Mode) (1 of 2).

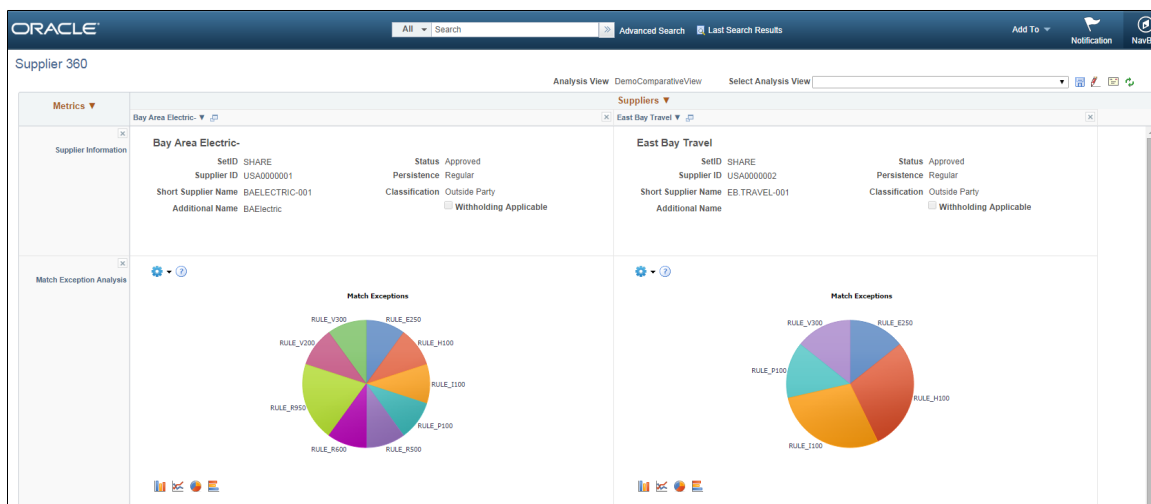
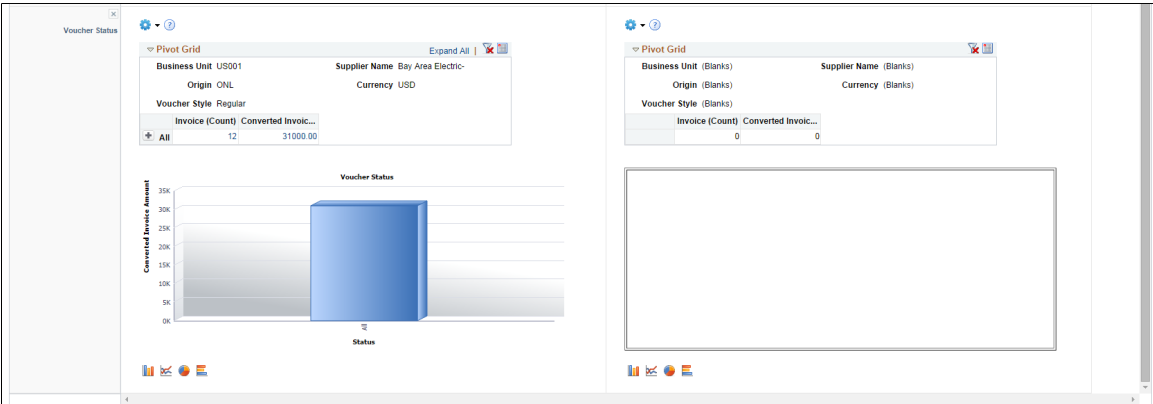


Image: Analysis Display Page (Comparison Mode) (2 of 2)

This example illustrates the fields and controls on the Analysis Display Page (Comparison Mode) (2 of 2).



The comparison mode has three primary areas:

- The Entity Header area is shown across the top of the page.  
It shows entity column headings and actions related to the entities.
- The Factor Header area is shown on the left pane.  
It show factor row headings and actions related to factors.
- The Factor Data area is shown in the largest part of the page.  
It shows the data and actions related to the associated entity and factor.

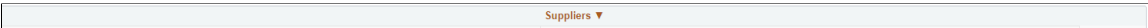
If a user makes a change to one area, the system synchronizes the other two areas. For example, if a user rearranges the entities using drag-n-drop or the Choose Displayed <Entities> option, the corresponding columns in the Factor Data areas are rearranged

Entity Header Area (comparison mode)

The entity header is located across the top of the Analysis Display page (CAF\_DISPLAY), when in comparison mode. The first row of the entity header displays the entity selected on the [Entity Configuration Page](#).

Image: Entity Header (Comparison Mode - row 1)

This example illustrates the Entity Header (Comparison Mode - row 1).



Users can click the drop down arrow next to the entity to select these options:

- Choose Displayed <Entities>**

Select to access a popup (or window) that enables the user to select the entities to display in the view.
- Select All <Entities>**

Select this option to add a check mark in each check box that is next to the individual entity.
- Deselect All <Entities>**

Select this option to remove all check marks in each check box that is next to each entity.

The second row of the entity header displays each entity selected for the view. These tasks can be performed:

### Image: Entity Header (Comparison Mode - row 2)

This example illustrates the Entity Header (Comparison Mode - row 2).



(check box)

Select the entity for the Selected Entities action options.

This option is only available if the Support Entity Group Actions check box is selected on the [Analysis Configuration Page](#).



(Selected)

This icon indicates that the entity is selected.

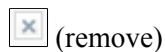
(entity name)

Click the entity name to open related actions.

- *Flag this <Entity>* and *Clear Flag for this <Entity>*: These option add or remove a check mark from the check box next to the entity name.

This option is only available if the Support Flagged Entity check box is selected on the [Analysis Configuration Page](#).

- Other actions: The actions that are displayed are dynamic, from the handler, or configured at the entity action level on the [Related Action Configuration Page](#).



(remove)

Click the Remove icon to remove the entity from the view.

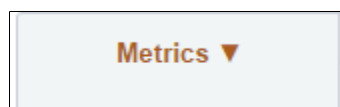
Users can re-position the entity name columns by using the Entity Chooser option or by dragging the column to the new position.

### Factor Header Area (comparison mode)

The factor header is located on the left pane of the Comparison Analysis page (CAF\_DISPLAY), when in comparison mode.

### Image: Factor Header (comparison mode)

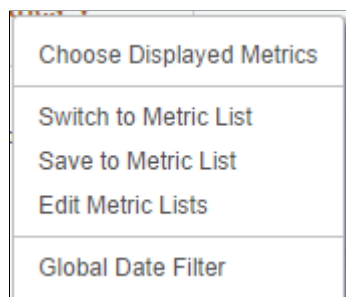
This example illustrates the Factor Header when in Comparison mode.



The top of the factor header displays the factor labels that are defined on the [Factor Configuration Page](#). Users can select the label to access the related actions that are associated with each factor. This section also provides the dynamic and configured related actions for each factor.

### Image: Factor Header Options (comparison mode)

This example illustrates the Factor Header Options when in comparison mode. The factor label *Metric* is defined so that it appears wherever <Factor> is referenced.



Users can click the drop down arrow next to the factor to select these options:

#### Choose Displayed <Factor>

Select to open the Factor Chooser where users can select, remove, and rearrange the factors in the view.

#### Switch to <Factor> List

Select to open the factor list where users can switch to a pre-defined list of factors. The factor lists are defined by the user, by other users, and by an administrator using the [Factor List Configuration Page](#).

#### Save to <Factor> List

Select to open a window where the user can enter a list name and save the factor list. If the name entered in the List Name field already exists, the factor list is replaced with the current factors.

#### Edit <Factor> Lists

Select to access the Edit <Factor Lists page that shows the factor lists that have been saved by the user. The user can make the factor lists public, change the status to Active or Inactive, or delete a factor list.

### Factor Data Area (comparison mode)

The factor data is located on the center of the Analysis Display page (CAF\_DISPLAY), when in comparison mode. The factor data is displayed in a cell, which combines the entity in the Entity Header and the factor in the Factor Header.

(More drop down)

Click the More drop down to select related actions. Each factor data cell can have factor related actions, which are determined from the factor handler or the [Related Action Configuration Page](#).

(Action button)

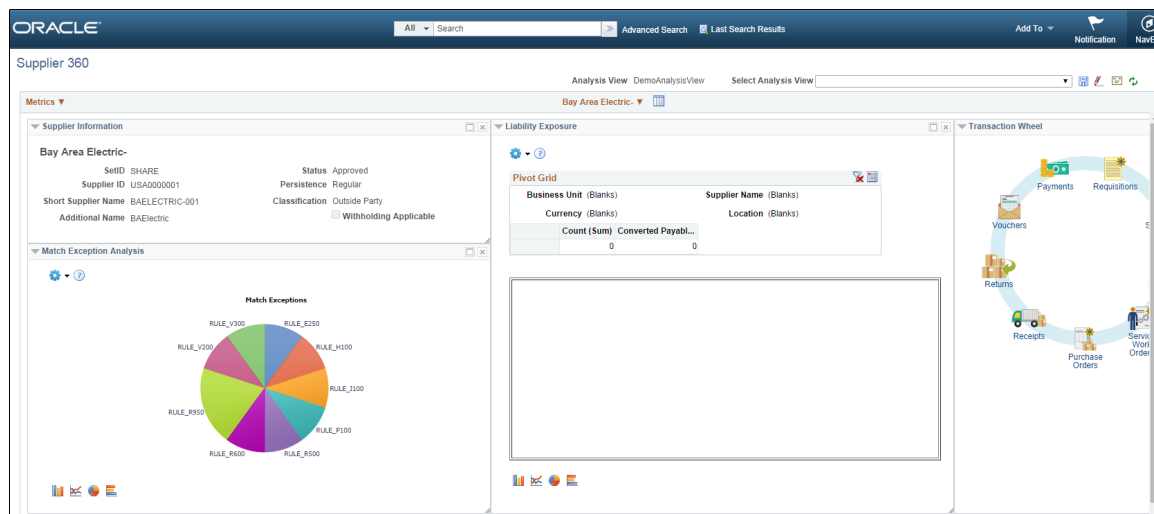
Click the Action button to access embedded related actions for the factor data.

### Analysis Display Page (Analysis Mode)

Use the Analysis Display page (Analysis Mode) (CAF\_DISPLAY) to analyze data for one entity.

## Image: Analysis Display Page (Analysis Mode)

This example illustrates the fields and controls on the Analysis Display page (Analysis Mode).



The analysis mode has two primary areas:

- The Entity Header area is shown across the top of the page.

It shows the entity and related actions.

- The Factor Data area is shown in the largest part of the page.

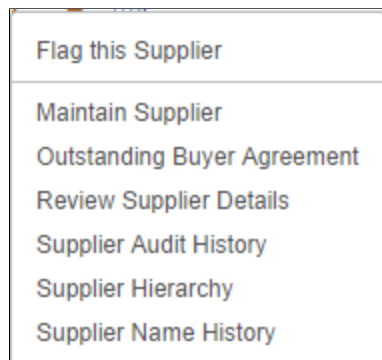
It shows the factor data for the entity. Factors can be added, removed, resized, repositioned, minimized, and maximized by the user.

## Entity Header Area (analysis mode)

The Entity Header area displays entity information and actions that allow the user to access the factor related actions.

### Image: Entity Header Options (analysis mode)

This example illustrates the Entity Header Options when in analysis mode.



Choose Displayed <Factors>

Select to display a factor popup window that shows the available factors for the user. You can drag selected factors from the list to any location in the Factor Data area. The system



shows a frame for the size of the factor. When you drop the factor, the factor data is retrieved and displayed.

(switch to Comparison Mode)

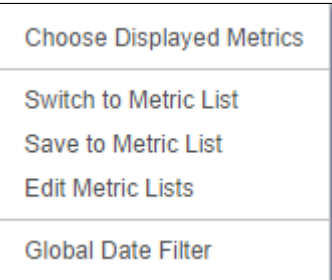
Click this icon to switch to comparison mode.

**Factor Data Area (analysis mode)**



The Factor Data area appears in the largest part of the page and shows the factors in a free-form format. Each factor is displayed in its own frame, with a header.

**Image: Factor Header Options (analysis mode)**

This example illustrates the Factor Header Options when in analysis mode.



The Factor Data area size is not limited to the size of your display. You can move the factor frame outside of the current Factor Data area and the area is re-sized to accommodate it. Use the scroll bars at the right and bottom of the Factor Data area to scroll through all factors


 and  (Collapse and expand icons)

Use the collapse and expand icons to collapse and expand each frame. When you collapse a frame, only the factor header is shown.

You can also double-click on the factor header to maximize and consolidate the factor frame.

(factor name)

Click on a factor name to access the related actions for the factor. These actions are the same as those in comparison mode with the exception of Show Combined and Configure.

 (remove icon)

Click the remove icon to remove the factor frame from the Factor Data Area.

**Understanding Configurable Analysis Framework for Fluid Implementations**

Use the CAFNUI\_DISPLAY\_FL page to view and interact with comparison and analysis data in Fluid implementations. This page supports only Comparison Mode. Comparison mode and analysis mode has some similarities and some differences.

The following steps need to be followed while implementing Fluid Configurable Analysis Framework:

1. Register the CAFNUI\_DISPLAY\_FL component in a new menu. Leave the search record as Installation.

2. Create a Content Reference in an existing or new Fluid Page referring to the Menu/Component pair mentioned in the previous step.
3. Specify the menu in this field.

The Fluid Analysis Display is resized automatically when the browser window size is changed. User can add/remove/rearrange entities and factors in any way they desire. Please note that there might be potential performance issue if user selects too many entities and/or factors.

## Common Elements for Comparison and Analysis Modes in Fluid Implementations

These are the common elements that are available in both modes:

<b>View</b>	This drop-down allows user to switch between saved views.
<b>Choose Factors</b>	Allows adding and removing of factors for comparison or analysis.
<b>Choose Metrics</b>	<p>The selector Individual Factor/Factor Group switches between:</p> <ul style="list-style-type: none"> <li>• Individual Factor(select/remove factorindividually.</li> <li>• Factor Group (replace all factors with a set of factor or a factor list.</li> </ul>
<b>Related Actions (In Entity)</b>	<p>Lists all the actions defined in the Analysis configuration with Action level = Entity. It also lists:</p> <ul style="list-style-type: none"> <li>• Flag this Entity. This is listed only when Support Flagged Entity is flagged at Analysis Configuration and the entity is not flagged.</li> <li>• Clear Flag. This is listed only when only when Support Flagged Entity is flagged at Analysis Configuration, and the entity is already flagged. It then clears the flag.</li> </ul>
<b>Related Actions (in Analysis)</b>	<p>Lists all the actions defined in the Analysis configuration with Action level = Analysis. It also lists:</p> <ul style="list-style-type: none"> <li>• Save to &lt;Factor&gt; List. This creates a new Factor List with all the metric currently displayed at the page. This factor list is accessible only to the user that created it.</li> <li>• Edit &lt;Factor&gt; List. It allows to activate/inactivate, make public, delete or edit the user created Metric Lists</li> <li>• Save View.</li> <li>• Edit View List. Allows to make public or delete the created Views.</li> <li>• Global Date Filter. allows users to change the Global Date range and refresh all factors.</li> </ul>

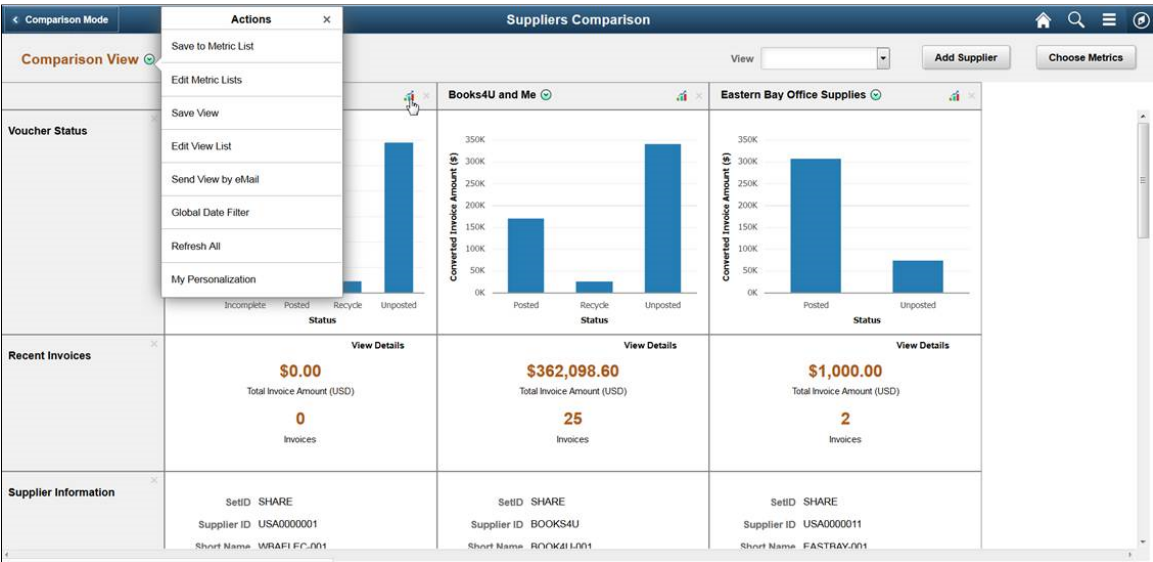
- Send View by eMail. Allows users to send an eMail to other users including the link to the current view display.

Fluid Analysis Display Page (Comparison Mode)

Use the Analysis Display Page (CAFNUI\_DISPLAY\_FL) in Fluid implementations to compare different entities.

Image: Fluid Analysis Display Page (Comparison Mode)

Fluid Analysis Display Page (Comparison Mode)



The items specific to Comparison mode are:

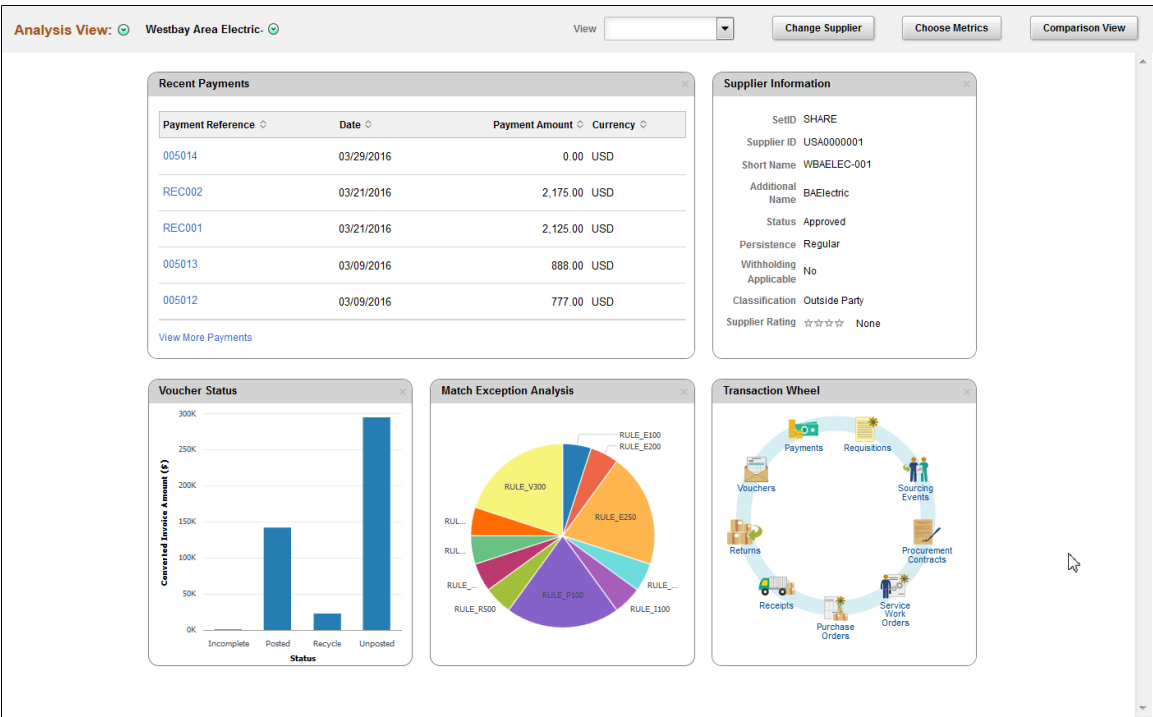
Comparison Title	Name of the comparison.
Add Entity	Allows adding and removing entities to the comparison.
Analysis Mode	Transfer to the Analysis mode, and the entity will be analyzed in Analysis mode.
Remove Factor	Allows removing the entire row of a factor or the entire column.
Flagged Entity Indicator	If the entity has been flagged, this flag is placed before this entity. If the user clicks at Analysis Mode icon for this Entity, this entity will show up as flagged in Analysis Mode. If the user unflags this entity in Analysis Mode, and navigates to Comparison Mode, it will show up unflagged in Comparison Mode.

Fluid Analysis Display Page (Analysis Mode)

Use the Analysis Display Page (CAFNUI\_360\_FL) in Fluid implementations to Analyze an entity.

Image: Fluid Analysis Display Page (Analysis Mode)

Fluid Analysis Display Page (Analysis Mode)



The Analysis Mode allows user to concentrate on one entity by displaying factors for only one selected entity. It is displayed in the Entity Header area. The Factor Data area displays factor data for the entity. The factors can be added, removed or moved, by the user

The items specific to Analysis mode are:

- Analysis Title
- Name of the analysis.
- Change Entity
- Allows changing the entity spotted in Analysis Mode.
- Remove factor
- Allows removing a factor from the Analysis Mode page.
- Comparison View
- Transfer to the Comparison mode. The Entity currently displayed in Analysis Mode is not automatically added to Comparison mode.
- Flagged Entity Indicator
- If the entity has been flagged, this flag is placed before this entity. If the user clicks on Comparison View and this entity was already placed at Comparison Mode, this will show up as flagged in Comparison Mode. If the user unflags this entity in Comparison Mode and navigates back to Analysis Mode, it will show up unflagged in Analysis Mode.
- Remove Entity
- Allows removing an entity from the Analysis mode page.

## Chapter 14

# Fluid Discussion Service

---

## Understanding Fluid Discussion Service

Fluid Discussion Service is a simple and easy to use discussion tool that enables you to link Context Specific Discussions to PeopleSoft pages.

Discussion Service enables you to:

- Initiate discussion from a page with the context of current transaction
- Send/Receive messages and attachments
- Easily identify when and who posted what to discussion
- Search within discussions
- Edit Subject, Add/Remove participants
- Close/Reopen Discussions

## Security Access

To access discussion components, users need to be assigned with the below roles:

- EOFD\_DSCN\_USER: Discussions User, this role is required for accessing Discussions that the user is a participant of.
- EOFD\_DSCN\_ADMIN: Discussion Service Administrator, user with this role will have access to configure new Discussion Types and Discussion Groups.
- EOFD\_DSCN\_SUPER\_ADMIN: Discussion Service Super Administrator, user with this role will have full access to all the Discussions in the system.

---

**Note:** In a cluster environment it is important that you assign the EOFD\_DSCN\_USER role to the users in all the nodes.

---

## Fluid Discussion Service Implementation Options

The fluid discussion service implementation options are listed in the below table.

<b>Sl. No:</b>	<b>Implementation Option</b>	<b>Description</b>	<b>Steps</b>	<b>Result</b>
1	Assign Default Discussion Service at component level	The simplest way to implement Fluid Discussions is to assign the Default Discussion Service as a Related Content Tile or a Related Action	<p>Assign the Default Discussion Service: EOFD_DEFAULT_DSCN to the component using Related Content framework.</p> <p>For details, see <a href="#">Assigning Default Discussion as a Related Content Tile</a>.</p>	<p>Users with access to component can:</p> <p>Add a new topic, add participants and start discussion.</p> <p>View all discussions that they have been added to as participants.</p> <p>The discussion list will only show discussions created for the current component</p>
2	Assign Default Discussion Service with context	Discussions can be made context specific by adding the context parameters to the service	<p>Clone Default Service: EOFD_DEFAULT_DSCN and add context fields to the Service.</p> <p>Assign the cloned Service to the component as a Related Action or Related Content tile and map the page fields to the context fields so that values are passed at run time.</p> <p>For details, see <a href="#">Assigning Default Discussion as a Related Action with Context</a>.</p>	<p>Users with access to component can:</p> <p>Add a new topic, add participants and start discussion.</p> <p>View all discussions that they have been added to as participants.</p> <p>The discussion list will only show discussions created for the current context. ( example: current Class, Current Employee, etc.).</p>
3	Implement Discussion Service with additional rules to auto-add dynamic participants and assign privileges.		<p>Create Discussion Type and Discussion User Groups.</p> <p>Clone Default Service: EOFD_DEFAULT_DSCN and add context fields and discussion type field.</p> <p>Assign the cloned Service to the relevant Components and map the page fields to the context fields so that values are sent at run time. Specify the new Discussion type value for the Discussion type parameter.</p> <p>For details, see <a href="#">Implementing Discussion Service with a New Discussion Type</a>.</p>	Dynamic users are automatically added to relevant discussions with appropriate access based on the Discussion Type and Discussion User Group configurations.

## Understanding Default Discussion Type

Oracle delivers a default Discussion Service definition that has predefined rules configured in the DEFAULT discussion type. In most cases, you will be able to use this Default service for enabling Discussions on a component. Next few sections describe detailed steps for implementing the default discussion.

**Note:** DO NOT update the Default Discussion Configuration and Service.

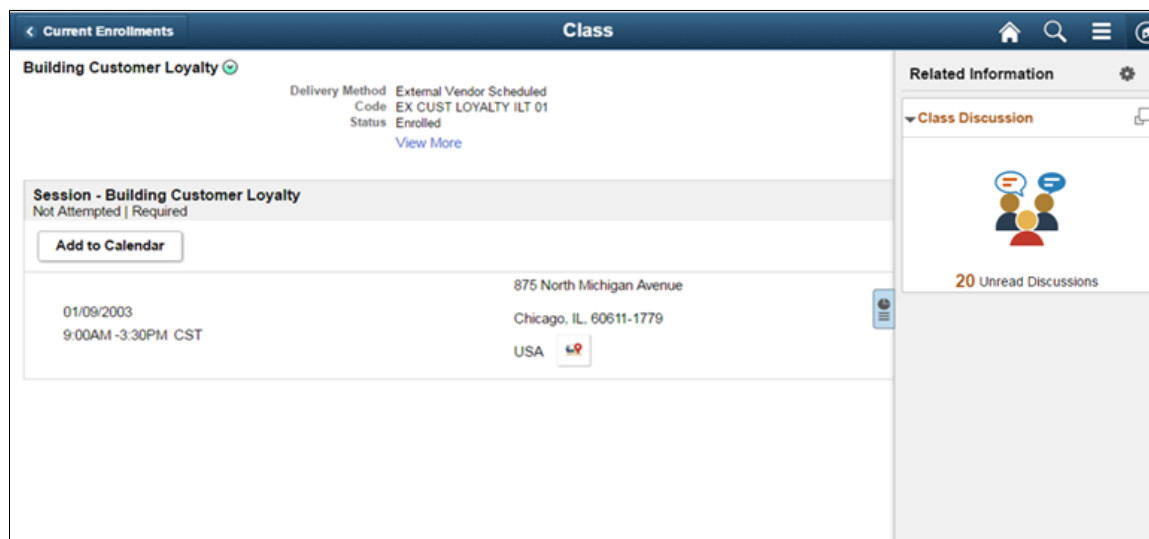
## Assigning Default Discussion as a Related Content Tile

To assign default discussion as a RC tile, perform the following:

1. Navigate to PeopleTools, Portal, Related Content, Manage Related Content.
2. Select the Cref to which you need to assign the discussion service.
3. Assign the Service ID: EOFD\_DEFAULT\_DSCN under Component Level Related Content.
4. Update the Service label.
5. Click on Configure button to configure the service. For parameters EOFD\_COMPONENT & EOFD\_MARKET, choose mapping type as System Variable and mapping data as %Component and %Market respectively.
6. Select Security options as Related Content Provider Security.
7. Click Ok. Save the configuration details.

### Image: Class Page

This example illustrates the fields and controls on the Class page.



## Assigning Default Discussion as a Related Action with Context

To assign default discussion as a related action with context, perform the following:

1. Navigate to PeopleTools, Portal, Related Content, Maintain Related Content.
2. Clone the Service: EOFD\_DEFAULT\_DSCN.
3. Add the context fields to the new service. Add below additional parameters to the service definition:
  - EOFD\_<Context Key Field 1>
  - EOFD\_<Context Key Field 2>

You can add as many key fields as per your requirement. These parameters will be used to determine the context. If you want to use the same discussion type on multiple components then you can remove the Component parameter from the list. Save your changes.

4. Navigate to PeopleTools, Portal, Related Content, Manage Related Content.
5. Select the Cref to which you need to assign the default service.
6. Under Page-level Related Content, select the page in which Discussion Service link should be opened.
7. Select the new cloned service ID created in step 2.
8. Update the Service label.

### Image: Assign Related Actions Page

#### Assign Related Actions Page

**Assign Related Actions**

Configure Related Content | **Configure Related Actions** | Configure Layout

**Assign Related Actions**

Assign services to be used as Related Actions. Select the service target to determine where the service will be displayed. Use the Configure link to define the parameter mappings and options for the service.

Portal Name: EMPLOYEE  
Content Reference: [My Expense Reports](#)

**Component Level Related Actions**

Assign Component Level Related Actions to be added to the Drop-down menu and Search Actions menu.

Personalize | Find | View All | 1 of 1 | First | Last

Enable	Service Type	Select	Service ID	Service Label	*Service Target	Bulk Action	Configure
<input checked="" type="checkbox"/>	Service				Target Content		Configure

**Page Level Related Actions**

Assign Page Level Related Actions to be added to a field level contextual menu.

Personalize | Find | View All | 1-4 of 4 | First | Last

Enable	Page	Service Type	Select	Service ID	Service Label	Service Target	Bulk Action	Page Field Menu	Configure
<input checked="" type="checkbox"/>	EX_EXP_LIST_FL	Service		EOFD_EXPENSE_REPORTS	Discuss	Replace Window		Action	Configure
<input checked="" type="checkbox"/>	EX_EXP_LIST_FL	Service		EX_EMAIL_NOTIFY_FL	Send Notification	User Defined		Action	Configure
<input checked="" type="checkbox"/>	EX_EXP_LIST_FL	Service		EX_EXP_LIST_COPY	Copy To New Report	User Defined		Action	Configure
<input checked="" type="checkbox"/>	EX_EXP_LIST_FL	Service		EX_EXP_LIST_DEL	Delete Report	User Defined		Action	Configure

Return to Manage Related Content Configuration page

[Save](#) [Notify](#)

9. Click on Configure button to configure the service to pick the System variables.



- a. For parameters EOFD\_COMPONENT & EOFD\_MARKET, choose Mapping Type as System Variable and Mapping data as %Component and %Market respectively.
  - b. Assign fields from the page as values for the context field parameters.
10. Suppose the page in selected component reference is designed to have a Push button/Hyperlink for opening Discussion Service. Under Menu Options, select that field as Page Field Menu.

### Image: Configure Service Modal Window

Configure Service Modal Window

**Configure Service**

Page Name: EX\_EXP\_LIST\_FL  
Service ID: EOFD\_EXPENSE\_REPORTS  
Service Label: Expense Reports

**Map Parameters**

Parameter Name	Parameter Label	Required Flag	Mapping Type	Select	Mapping Data	Mapping Details	Display in field menu
1 EOFD_COMPONENT	Component	<input type="checkbox"/>	System Variable	<input type="checkbox"/>	%Component		<input type="checkbox"/>
2 EOFD_MARKET	Market	<input type="checkbox"/>	System Variable	<input type="checkbox"/>	%Market		<input type="checkbox"/>
3 EOFD_DSCN_TYPE	Discussion Type	<input type="checkbox"/>	Fixed Value	<input type="checkbox"/>	EXPENSE_REPORT		<input type="checkbox"/>
4 EOFD_EXPENSE_REPORT_ID	Expense Report ID	<input type="checkbox"/>	Page Field	<input type="checkbox"/>	Report ID		<input type="checkbox"/>

**Menu Options**

Page Field Menu Action  
Select

**Service Filter**

Package  Path  Class ID

**Select Security Options**

☒ Public Access  
☐ Related Content Provider Security

OK Cancel

11. Select Security Options and Click Ok.
12. Save the details configured in Assign Related Actions page. After performing all the above mentioned steps, the default discussion services appear as a related action in the Discussion list.

## Image: My Expense Reports Page

### My Expense Reports Page



Clicking Discuss opens the Discussion list page.

## Implementing Discussion Service with a New Discussion Type

Creating new Discussion type and Discussion User group enables you to implement additional rules to auto-add dynamic participants and assign privileges to specific roles.

### Configuring Discussion Service

This topic provides an overview of discussion service configuration and describes how to:

- Define Discussion User Group •
- Define Discussion Type

### Pages Used to Configure Discussion Service

Page Name	Definition Name	Usage
Discussion User Group Page	EOFD_DSCN_GROUP	To create a new discussion user group.
Discussion Type Page	EOFD_DSCN_TYPE	To create a new discussion type that can be assigned to components.

### Discussion User Group Page

Use the Discussion User Group page (EOFD\_DSCN\_GROUP) to define discussion groups which enable you to create dynamic list of participants for a discussion based on the context. For example all participants and the instructor of a course class can be added to a discussion attached to the Course class page with a context of the course class id.

#### Navigation

Enterprise Components, Discussion Service, Discussion User Group

## Image: Discussion User Group page

Discussion User Group page

Discussion User Group

Discussion Group ID Training

\*Description

\*Group Source

Save Notify Add Update/Display

## Defining Discussion User Group

To create a new discussion user group:

1. Login as an administrator.
2. Enter the required discussion group ID.
3. Click Add.
4. Type a meaningful description in the Description field.
5. Select an appropriate value from the Group Source field. On selecting a value, corresponding field is displayed as shown:

### Image: Discussion User Group Query Page

This example illustrates the fields and controls on the Discussion User Group Query Page

Discussion User Group

Discussion Group ID Training

\*Description Training Group

\*Group Source Query

Query

Save Notify Add Update/Display

## Discussion Type Page

Use the Discussion Type page (EOFD\_DSCN\_TYPE) to define new discussion types. You can post attachments to the discussion, add default list of participant, define permissions for adding/removing participants, updating subject, and close or reopen discussion.

Enterprise Components, Discussion Service, Discussion Type

## Image: Discussion Type Page

This example illustrates the fields and controls on the Discussion Type page.

## Defining Discussion Type

To create a new discussion type:

1. Login as an administrator.
2. Enter the discussion type and a meaningful description as per requirement.
3. To allow attachments, select the Allow Attachments check-box.

To configure the permissions for each type of user:

1. Select the Roles tab. The Discussion Type – Roles page appears as shown:

### Image: Discussion Type — Roles page

This example illustrates the fields and controls on the Discussion Type — Roles page.

Role ID	Role Description	Close / Reopen Discussion	Edit Subject	Add / Remove Participants	Assign Role	Personalize
1 C	Creator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2 A	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3 P	Participant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

2. Select the Allow Create check-box, so that the user can create new discussions.

**Note:** When ‘Allow Create’ is turned off, Creator role is removed and the users will not be allowed to add new discussions. Add Discussion(+) Button on the Discussion List page will be hidden for users.

### Add Custom Roles

Click this button to add new roles.

To automatically add users while creating discussions:

1. Click the Participants tab. The Participants tab is displayed only when you saved the Roles page details.

### Image: Discussion Type – Participants Page

This example illustrates the fields and controls on the Discussion Type – Participants Page:

Discussion Type CLASS  
Description Class / Course Discussions

Participants added to this grid will be automatically added to any new Discussion of this type.

Default Participants

	Participant Type	User / Group ID	User/Group *Role
1			(Invalid Value)

Save Notify Add Update/Display

Discussion Type | Roles | Participants

2. Include User/Group in Participants tab to automatically add users when discussion is created. Assign Participant/Administrators role to user/group using this tab as shown.

### Image: Default Participants page

Default Participants page

Discussion Type CLASS  
Description Class / Course Discussions

Participants added to this grid will be automatically added to any new Discussion of this type.

Default Participants

	Participant Type	User / Group ID	User/Group	*Role
1	User	PS	PS	Administrator
2	User	VP1	Kenneth Schumacher	Participant
3	Group	MANAGER	Manager	Administrator

Save Return to Search Previous in List Next in List Notify Add Update/Display

Discussion Type | Roles | Participants

## Assigning New Discussion Type as a Related Action with Context

To assign a new discussion type as a related action with context, perform the following:

1. Navigate to PeopleTools, Portal, Related Content, Maintain Related Content.
2. Clone the Service: EOFD\_DEFAULT\_DSCN.
3. Add the context fields to the new service. Add below additional parameters to the service definition:

- a. EOFD\_DSCN\_TYPE\_ID
- b. EOFD\_<Context Key Field 1>
- c. EOFD\_<Context Key Field 2>

You can add as many key fields as per your requirement. These parameters will be used to determine the context. If you want to use the same discussion type on multiple components then you can remove the Component parameter from the list. Save your changes.

4. Navigate to PeopleTools, Portal, Related Content, Manage Related Content.
5. Select the Cref to which you need to assign the default service.
6. Under Page-level Related Content, select the page in which Discussion Service link should be opened.
7. Select the new cloned service ID created in step 2.
8. Update the Service label.

### Image: Assign Related Actions Page

#### Assign Related Actions Page

**Assign Related Actions**

Configure Related Content | **Configure Related Actions** | Configure Layout

Assign services to be used as Related Actions. Select the service target to determine where the service will be displayed. Use the Configure link to define the parameter mappings and options for the service.

Portal Name: EMPLOYEE  
Content Reference: [My Expense Reports](#)

**Component Level Related Actions**

Assign Component Level Related Actions to be added to the Drop-down menu and Search Actions menu.

Personalize | Find | View All | 1 of 1 | First | Last

General | Instance Information | [...](#)

Enable	Service Type	Select	Service ID	Service Label	*Service Target	Bulk Action	Configure
<input checked="" type="checkbox"/>	Service				Target Content		Configure

**Page Level Related Actions**

Assign Page Level Related Actions to be added to a field level contextual menu.

Personalize | Find | View All | 1-4 of 4 | First | Last

General | Instance Information | [...](#)

Enable	Page	Service Type	Select	Service ID	Service Label	Service Target	Bulk Action	Page Field Menu	Configure
<input checked="" type="checkbox"/>	EX_EXP_LIST_FL	Service		EOFD_EXPENSE_REPORTS	Discuss	Replace Window		Action	Configure
<input checked="" type="checkbox"/>	EX_EXP_LIST_FL	Service		EX_EMAIL_NOTIFY_FL	Send Notification	User Defined		Action	Configure
<input checked="" type="checkbox"/>	EX_EXP_LIST_FL	Service		EX_EXP_LIST_COPY	Copy To New Report	User Defined		Action	Configure
<input checked="" type="checkbox"/>	EX_EXP_LIST_FL	Service		EX_EXP_LIST_DEL	Delete Report	User Defined		Action	Configure

[Return to Manage Related Content Configuration page](#)

[Save](#) [Notify](#)

9. Click on Configure button to configure the service to pick the System variables.
  - a. For parameters EOFD\_COMPONENT & EOFD\_MARKET, choose Mapping Type as System Variable and Mapping data as %Component and %Market respectively.
  - b. Assign fields from the page as values for the context fields.
  - c. Specify the new Discussion Type ID as fixed value for the parameter: EOFD\_DSCN\_TYPE\_ID.

- Suppose the page in selected component reference is designed to have a Push button/Hyperlink for opening Discussion Service. Under Menu Options, select that field as Page Field Menu.

### Image: Configure Service Modal Window

Configure Service Modal Window

**Configure Service**

Page Name: EX\_EXP\_LIST\_FL  
 Service ID: EOFD\_EXPENSE\_REPORTS  
 Service Label: Expense Reports

**Map Parameters** ? Personalize | Find | View All | First 1-4 of 4 Last

	Parameter Name	Parameter Label	Required Flag	Mapping Type	Select	Mapping Data	Mapping Details	Display in field menu
1	EOFD_COMPONENT	Component	<input type="checkbox"/>	System Variable	<input type="checkbox"/>	%Component		<input type="checkbox"/>
2	EOFD_MARKET	Market	<input type="checkbox"/>	System Variable	<input type="checkbox"/>	%Market		<input type="checkbox"/>
3	EOFD_DSCN_TYPE	Discussion Type	<input type="checkbox"/>	Fixed Value	<input type="checkbox"/>	EXPENSE_REPORT		<input type="checkbox"/>
4	EOFD_EXPENSE_REPORT_ID	Expense Report ID	<input type="checkbox"/>	Page Field	<input checked="" type="checkbox"/>	Report ID		<input type="checkbox"/>

**Menu Options** ?

Page Field Menu: Action

**Service Filter** ?

Package:  Path:  Class ID:

**Select Security Options**

☒ Public Access  
☐ Related Content Provider Security

- Select Security Options and Click Ok.
- Save the details configured in Assign Related Actions page.

## Scheduling Notifications

Certain actions in Fluid Discussion Service send users both an email message and a notification that appears on the RC tile or Discussion List page. On the RC tile, you can view unread messages and active discussions.

Notifications are triggered when the user initiate the following actions:

- User is added to a new/existing conversation.
- New message is posted in a conversation.
- When the subject is changed
- When discussion is closed/reopened

## Pages Used to Schedule Notifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Discussion Notification Page	EOFD_EML_RUN	To run discussion notifications.

## Discussion Notification Page

Use the Discussion Notification page (EOFD\_EML\_RUN) to schedule notifications.

### Navigation

Enterprise Components, Discussion Service, Run Discussion Notifications

### Image: Discussion Notification Page

This example illustrates the fields and controls on the Discussion Notification Page.

The screenshot shows the 'Discussion Notification Page' interface. At the top, there is a tab labeled 'Notifications'. Below the tab, the text 'Run Control ID: 12' is displayed. To the right of this text are two links, 'Report Manager' and 'Process Monitor', and a yellow 'Run' button. Below these elements is a dropdown menu with the label '\*Notification type'. At the bottom of the page, there are four buttons: 'Save', 'Notify', 'Add', and 'Update/Display'.

To schedule discussion notifications, perform the following:

1. Login as an administrator.
2. Access Discussion Notification page.
3. Enter the Run Control ID.
4. Click Add. This displays the Discussion Notifications page.
5. Select an appropriate value from the Notification Type field.
6. Click Run to process the notification request. This displays the Process Scheduler Request modal window as shown.



**Image: Process Scheduler Request modal window**

Process Scheduler Request modal window

**Note:** It is recommended to set different frequencies for email and push notifications. For instance, push notifications could be as frequent as every hour or every 5 minutes. Email notifications would be less frequent, say once a day or week.

## Viewing All Discussions

This section details the pages used to view discussions.

### Pages Used to View Discussions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Discussions Tile	EOFD_DSCN_LIST_FL_GBL	To view all discussions.
Discussions Page	EOFD_DSCN_LIST_FL	To access a list of discussion types which are having active discussions.

### Discussions Tile

Use the Discussion tile (EOFD\_DSCN\_LIST\_FL\_GBL) to view all the discussions.

#### Navigation

Select Fluid Home under the main menu. On the page that appears, select Employee Self Service. The Discussions tile is available on the Employee Self Service landing page.

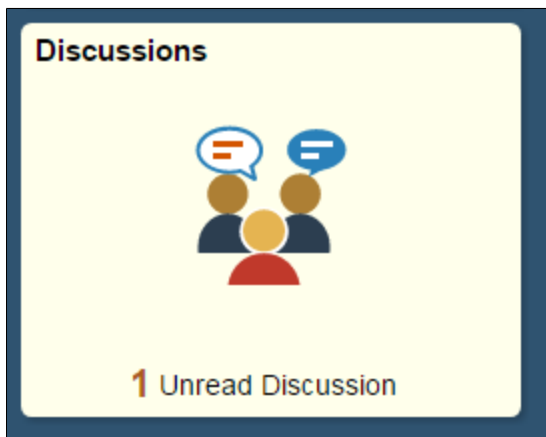
---

**Note:** Discussion Tile is not available on the homepage by default. It can be added using Personalize Homepage option.

---

### Image: Discussions Tile

Discussions Tile



The tile displays the cumulative count of Unread and Active discussions from all the nodes.

Click the tile to access the aggregated discussion list.

## Discussions Page

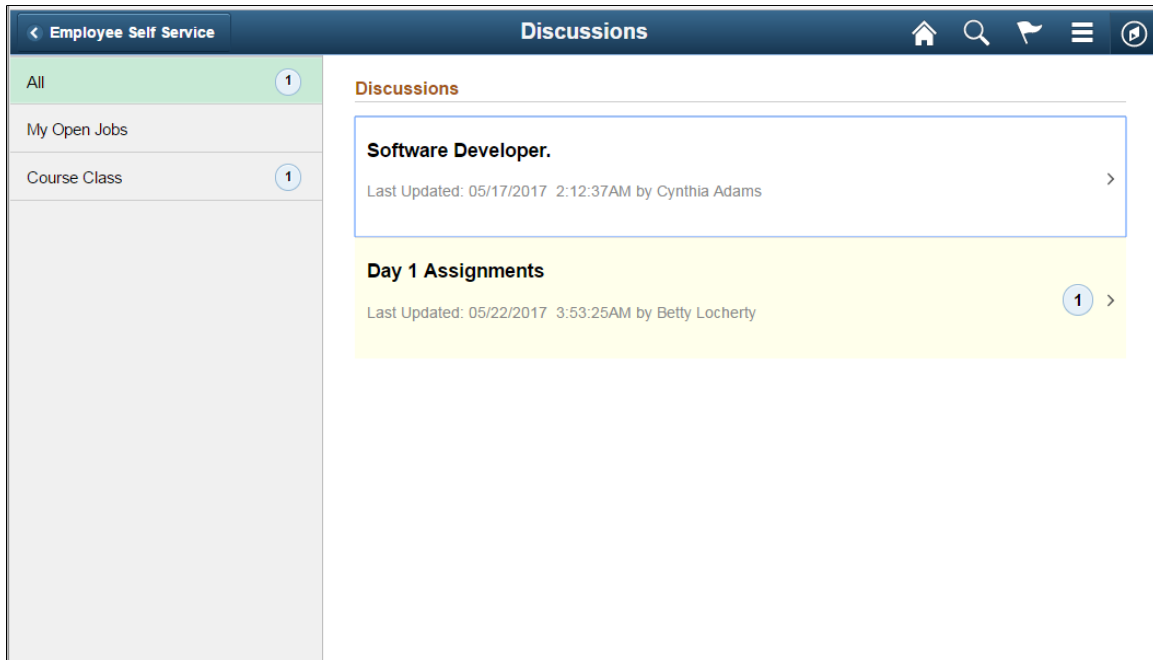
Use the Discussion page (EOFD\_MAIN\_LIST\_FL) to access a list of discussion types which are having active discussions.

### Navigation

Click the Discussion tile on the Employee Self Service homepage.

## Image: Discussions page

This example illustrates the fields and controls on the Discussions page.



Only top fifty discussions are displayed on selection of any discussion type. To view all the discussions, click the View More link.

---

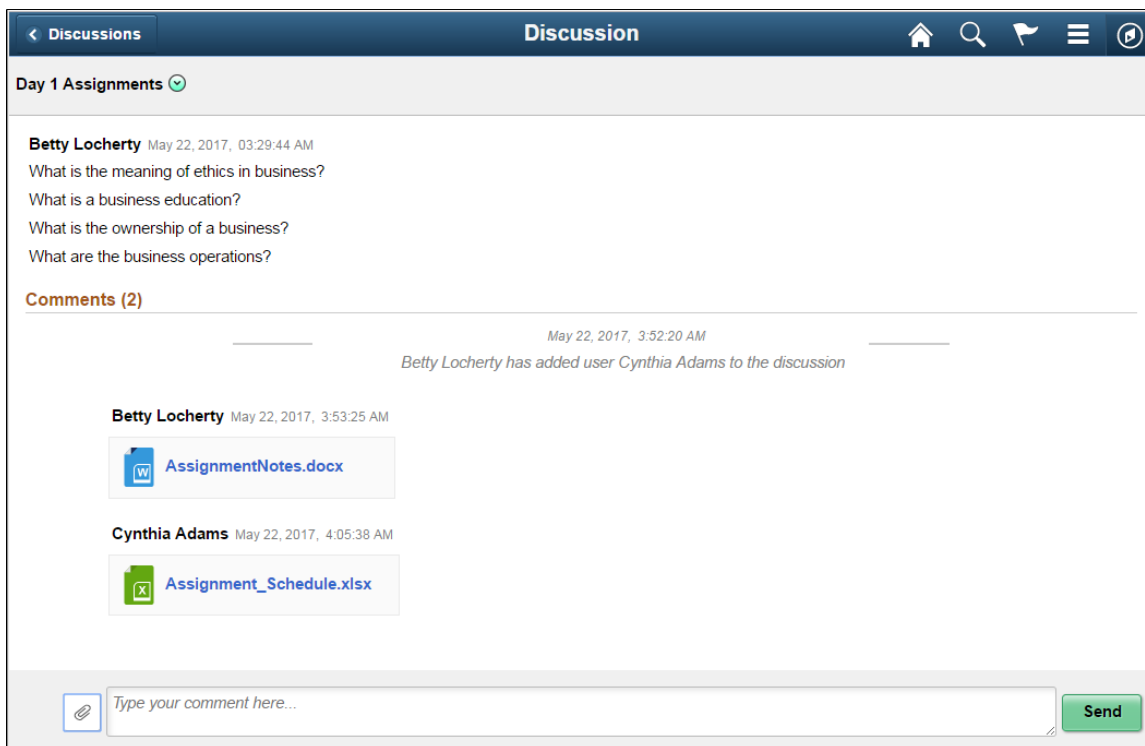
**Note:** By Default, 'All' is selected and the list of all discussions, of all discussion types, from all the nodes is displayed. Discussion Type description is followed by Unread Messages count.

---

Click on a discussion to open up the conversation window corresponding to the selected discussion.

## Image: Discussion Conversation page

### Discussion Conversation page



You can enter your comments and attach supporting documents in this page.

Click Send to add your comments.

## Actions on Discussions Page

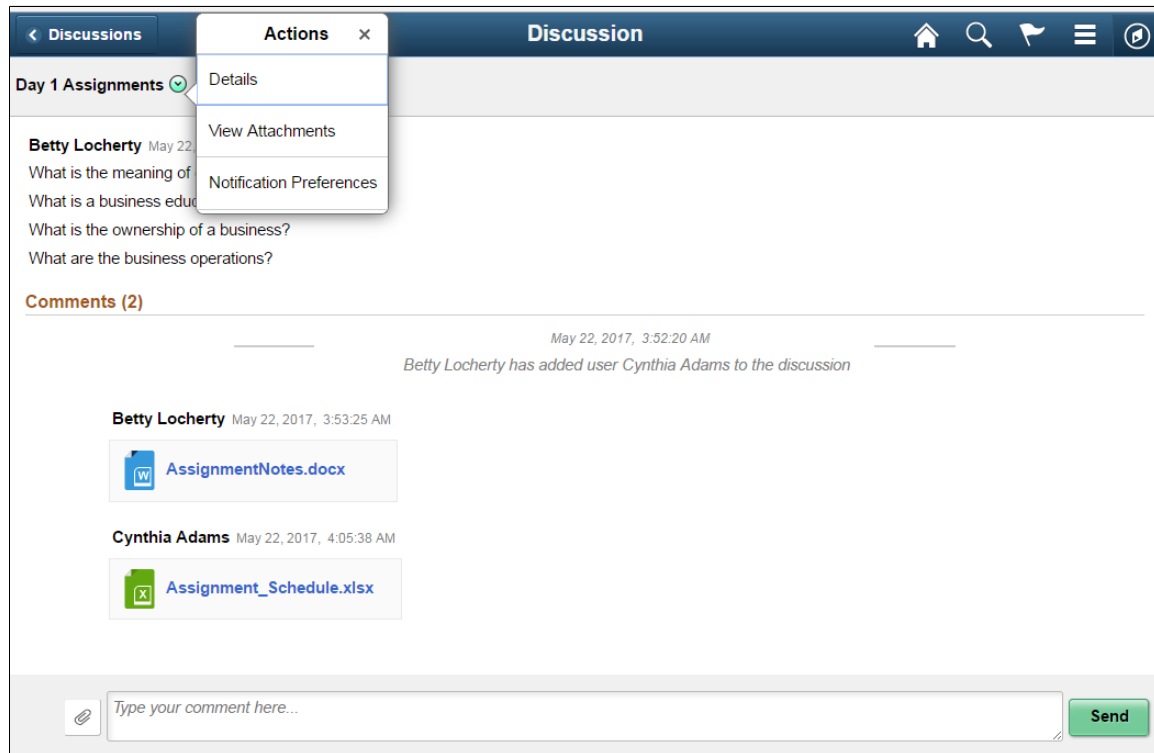
In Discussions page, you can perform three actions on any discussions.

- Details
- View Attachments
- Notification Preferences

Click on the Related Action item. You can view the actions on Discussions page as shown.

## Image: Discussions – Actions Page

### Discussions – Actions Page



### Details Option

Use this option to access Discussion Details page which is used to update the discussion details and add or remove participants. Default Discussion grants full access to the creator of the discussion.

## Image: Discussion Details Page

### Discussion Details Page

Cancel

Discussion Details

Done

\*Subject

Day 1 Assignments

Description

What is the meaning of ethics in business?  
 What is a business education?  
 What is the ownership of a business?  
 What are the business operations?

Status

Open

▼ Participants

2 rows

+

Select All

Select	Participant Type	User/Group	Role Description
<input type="checkbox"/>	User	Cynthia Adams	Participant
<input type="checkbox"/>	User	Betty Locherty	Creator

## View Attachments Option

Use this action to access Discussion Attachments page which can be used to view all the attachments posted in the Discussion Conversation.

## Image: Discussion Attachments Page

### Discussion Attachments Page

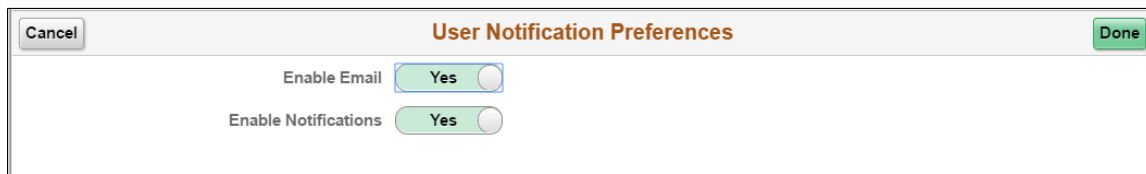
Discussion Attachments		
Cancel		Done
Attachments 2 rows		
User Description	Uploaded Date-Time	Attachments
1 Cynthia Adams	05/22/2017 4:05:38AM	<a href="#">Assignment_Schedule.xlsx</a>
2 Betty Locherty	05/22/2017 3:53:25AM	<a href="#">AssignmentNotes.docx</a>

## Notification Preferences Page

Use this action to access User Notification Preferences page which can be used to enable or disable notifications for the current discussion.

**Image: User Notification Preferences Page**

User Notification Preferences Page



The image shows a dialog box titled "User Notification Preferences". It has a "Cancel" button on the top left and a "Done" button on the top right. Inside the dialog, there are two settings:

- Enable Email**: A toggle switch currently set to "Yes".
- Enable Notifications**: A toggle switch currently set to "Yes".

