PeopleSoft 8 Enterprise Portal SP2 PeopleBook

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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Chapter 1

Introducing PeopleSoft Enterprise Portal

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ABOUT THIS PEOPLEBOOK

The book provides you with the information you need to implement and use PeopleSoft Enterprise Portal. You can order the online version by requesting SKU PS8SP2r0, or the hard-copy version by requesting SKU MAEPEr8SP2B 1200.

This section describes information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft Portals Solutions product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

PeopleSoft Portals Application Fundamentals

The *PeopleSoft Enterprise Portal PeopleBook* provides you with implementation and processing information for your PeopleSoft Enterprise Portal system. However, there is additional, essential information describing the setup and design of your system that is contained in a companion volume of documentation called *PeopleSoft Portals Application Fundamentals.*

PeopleSoft Portals Application Fundamentals covers important topics that apply to many or all PeopleSoft applications across the PeopleSoft Portal Solutions product line. Whether you are implementing only the PeopleSoft Enterprise Portal, some combination of products within the product line (for example, PeopleSoft Customer Portal, Supplier Portal, Employee Portal, Campus Portal, and Government Portal), or the entire PeopleSoft Portal Solutions, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as understanding and administering pagelets.

In the *PeopleSoft Portals Application Fundamentals* PeopleBook, we discuss common information pertinent to all applications in the PeopleSoft Portal Solutions product line. This

makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Portals Application Fundamentals* and to other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection web site: http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8 Service Pack 2 Portal Solutions PeopleBooks,* SKU PS8SP2r0.

Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

The CD includes the following PeopleBooks (presented in HTML format) that you can print in whole or in part:

- PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook
- PeopleSoft 8 Campus Portal SP2 PeopleBook
- PeopleSoft 8 Enterprise Portal SP2 PeopleBook

- PeopleSoft 8 Government Portal SP2 PeopleBook
- PeopleSoft 8 Customer Portal SP2 PeopleBook
- PeopleSoft 8 Employee Portal SP2 PeopleBook
- PeopleSoft 8 Supplier Portal SP2 PeopleBook
- PeopleSoft 8 Enterprise Integration SP2 PeopleBook
- PeopleTools 8.12 PeopleBook
- Using PeopleBooks
- Using PeopleSoft Applications PeopleBook

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft internet site: http://www.peoplesoft.com/.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.
Email	Email CPI at callcenter@conpub.com.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates a code example.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).
Cross-references	The phrase "For more information" indicates where you can find additional documentation on the topic at hand. • Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8.00.01 Billing PeopleBook.* • Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see *PeopleSoft 8.00.01 Projects PeopleBook,* "Integrating With PeopleSoft Billing and PeopleSoft Contracts". • Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see "Securing Your PeopleSoft Contracts System". • Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0,* not the letter *O.*
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page, panel, or process.
Object Name	Gives the system name of the page, panel, or process as specified in PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page, panel, or process.
Prerequisites	Specifies which objects must have been defined before you use the page, panel, or process.
Access Requirements	Specifies the keys and other information necessary to access the page or panel. For example, SetID and Calendar ID are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

Introducing PeopleSoft Enterprise Portal

Welcome to PeopleSoft Enterprise Portal, the foundation of PeopleSoft's portal solutions. PeopleSoft Enterprise Portal enables you to establish your own portal based on the PeopleSoft Internet Architecture technology in PeopleTools.

With PeopleSoft Enterprise Portal, you experience in one simple web interface all the applications and information services you need. Moreover, you can add, remove, and rearrange homepage content—such as business intelligence pagelets, real-time indicators, company events and news—to create your own homepage in the same fashion as popular internet portals. As a result, with PeopleSoft Enterprise Portal you get a personalized view of the information and business solutions that you use every day.

Infrastructure

PeopleSoft Enterprise Portal includes the following PeopleTools features. These features support the technical infrastructure of the portal:

- Pure HTML homepage.
- User-based personalization.
- Role-based security.
- Single signon security.
- Integrated Workflow engine.
- Content registry.
- Page assembler.
- Search engine.
- Reporting and query integration.
- Support for multiple languages and currencies.
- XML integration and support.
- LDAP integration.
- Navigation.

- Content distribution.
- Web-based administration.
- Robust development environment.
- Upgrade utilities and reports.

For more information about portal-related PeopleTools features, refer to the *PeopleTools Portal Technology PeopleBook.*

Features

PeopleSoft Enterprise Portal supports the needs of end users and portal administrators. The portal specific features include:

- Company News pagelet.
- Company Events pagelet.
- Integrated Task List pagelet.
- Pagelets that display news feeds from the internet.
- Pagelets that display stock quotes and weather reports.
- Information about the content providers.
- Saved Searches pagelet.
- Third-party email and calendar pagelets.
- Web Magazines pagelet.
- Page layouts and built-in functions for creating web magazines.
- Left-hand navigation.
- Menu items.
- Related links templates.
- Guest user account.
- The portal registry load process.
- Enterprise portal search index.
- Common functions for password data stores.

Before you can use pagelets, you must first add them to your homepage. For more information about how to add pagelets to your homepage, refer to the chapter Working with Homepages in the *PeopleTools Portal Technology PeopleBook*.

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