



PeopleSoft 8 Campus Portal SP2 PeopleBook

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ABOUT THIS PEOPLEBOOK

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 Portal Solutions product line, how to order additional copies of our documentation, and so on.

The book provides you with the information that you need to implement and use PeopleSoft Campus Portal. You can order the online version by requesting SKU PS8SP2r0, or the hardcopy version by requesting SKU MACPEr8SP2B 1200.

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

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 PeopleSoft Campus Portal, some combination of products within the product line, 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 Campus Portal 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
- 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:

<code>monospace font</code>	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.

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 Campus Portal 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 Campus Portal

Welcome to PeopleSoft Campus Portal, the enterprise portal for higher education. PeopleSoft Campus Portal leverages internet architecture and portal technology to provide real-time entry to your PeopleSoft applications, your intranet site, and the World Wide Web. This portal enables members of your campus community to interact with your institution in ways not possible with conventional technologies such as EDI (Electronic Data Interchange) or client/server networks.

With no advertising, e-merchant, or content requirements, you can map content to role-based business processes and create and maintain pages dynamically. Individuals use a standard web browser to interact in your portal environment. With single signon, each student, instructor, advisor, recruiter, alumnus, applicant, and guest can access relevant real-time data to accomplish administrative tasks across your institution and get a personalized view of news and information.

Understanding Portal Technology

This section provides a high-level overview of the internet architecture and portal technologies behind PeopleSoft Campus Portal. Before setting up, configuring, or administering PeopleSoft Campus Portal, implementers and administrators should also familiarize themselves with the details of portal application fundamentals, PeopleTools portal information and installation documents.



For more information about portal architecture and technologies, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, *PeopleTools 8.12 Application Designer PeopleBook*, *PeopleTools 8.12 Internet Architecture Administration PeopleBook*, and PeopleSoft PeopleTools installation doc.

Portal Technology

Portals are sites that provide access to information from different places and pull it all into a single interface. Portals can:

- Classify content into a hierarchical category structure.
- Provide free-form searching across all classified content.
- Function as an initial page where users can add, remove, and arrange content to create a personalized homepage.

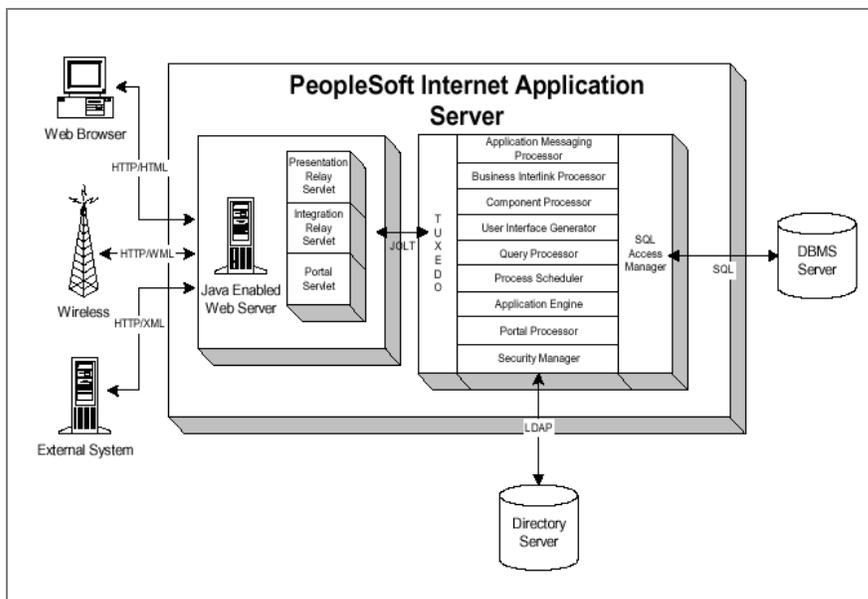
PeopleSoft's technological progress brings these concepts to the higher education world in the form of an enterprise portal. The enterprise portal serves as a gateway to the resources across your institution and beyond through a Web page that is personalized to the needs of each user.



For more information about portal technology, see *PeopleTools 8.12 Portal Technology PeopleBook*.

PeopleSoft Internet Architecture

The internet application server layer is at the center of the PeopleSoft internet architecture. It consists of the web server and application server components.



PeopleSoft Internet Architecture Overview

PeopleSoft Campus Portal uses PeopleTools 8.13 and the PeopleSoft HTML Access tool available in PeopleTools 7.61. The HTML Access tool employs the Message Agent and Active Server Pages (ASP) to transform a PeopleSoft panel into HTML pages. A web-authoring tool provides the ability to easily reformat the pages and deploy them onto the Web. The HTML pages that are generated use native HTML forms for entry and display of PeopleSoft data, and you modify them as any other HTML page. This enables you to present PeopleSoft transactions on the Web through your enterprise portal.

PeopleSoft HTML Access generates HTML 3.2, which is compatible with most standard web browsers. HTML Access transactions require that the Microsoft Web server (MIIS 4.X -- Microsoft Internet Information Server) be run on a Windows NT server. The PeopleSoft internet architecture requires a web server that supports Java servlet execution. PeopleTools include a specific version of the Apache web server binaries is delivered in the current PeopleTools.



For more information about information architecture, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Understanding Information Architecture”.



For full use of Student Administration HTML Access, your institution must be running the most current version of 7.61 PeopleTools. Refer to Updates and Fixes on Customer Connection for the current version of PeopleTools.

Enterprise Portals and XML

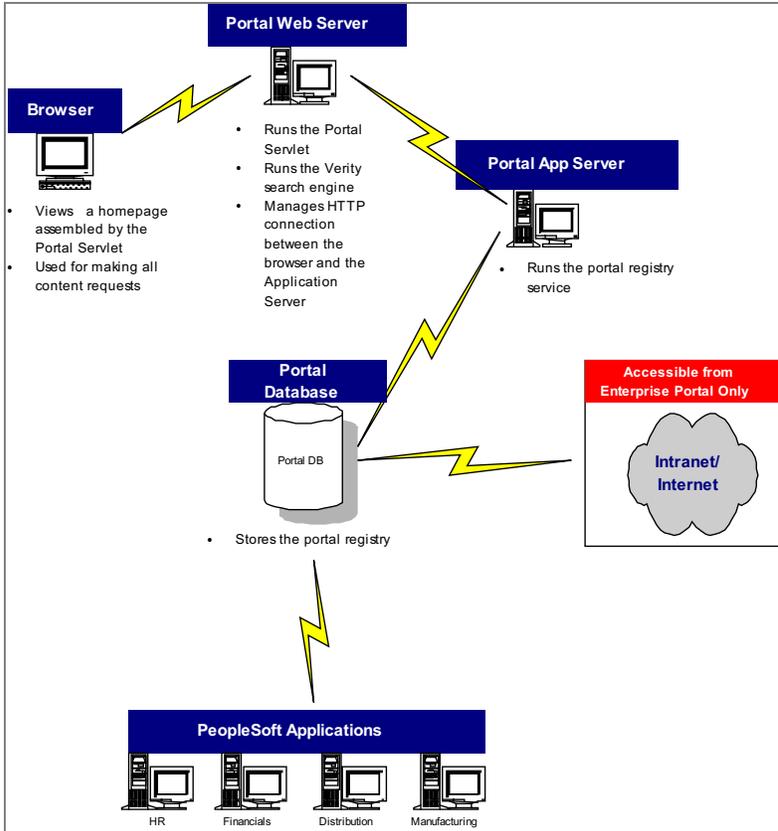
Using an enterprise portal, you can access and integrate structured data as well as unstructured data. Integration is key to providing a single point of access to all this information.

With its potential to simplify information integration, XML (Extensible Markup Language) is a valuable asset for enterprise portals. As a versatile language, XML offers powerful flexibility for defining tags that describe the structure of all types of information. XML acts as a translator that enables disparate business systems to talk with each other and exchange data. As a result, PeopleSoft Campus Portal, an enterprise portal that supports XML, can more easily integrate data from the Internet with unstructured data (word processing documents, content in emails, audio/video files, and graphics) and structured information from databases.

PeopleSoft Enterprise Portal Technology

PeopleSoft enterprise portal technology is based on a collection of technologies that comprise the PeopleSoft enterprise portal tools and architecture. This collection of technologies consists of the portal registry, the page assembler, personalization, the search engine, and navigation. The various parts of the portal architecture are brought together using established pieces of the PeopleSoft Internet architecture. These include a browser (such as Netscape Communicator or Microsoft Explorer) for displaying portal homepages, a web server, an application server, and a PeopleSoft portal database (for storing the portal registry). The portal registry contains the content references to specific pages in PeopleSoft applications. Additionally, non-PeopleSoft sites can be stored in the portal registry, and can be retrieved and formatted by the portal servlet.

The following figure illustrates the relationship among the different pieces of the architecture.



PeopleSoft Portal Architecture

PeopleSoft Enterprise-Wide Information Architecture

PeopleSoft Campus Portal includes the extensible enterprise-wide hierarchy, related information links, rich keyword associations, and sample roles. These elements ease a user’s search for information.



For more information about information architecture, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Understanding Information Architecture”.

The Enterprise-Wide Hierarchy

PeopleSoft Campus Portal features a delivered PeopleSoft enterprise-wide navigational hierarchy. This involves new standards for an aggregated web-based approach to the hierarchy. The following are the high-level approaches and standards that you encounter in Campus Portal:

- All employee self-service content is grouped under a high-level node called “My Information”.

- Power-user transactions have a structure similar to the application menu structure, enabling users to navigate to the PeopleSoft applications quickly.
- Category titles and descriptions are brief and written with meaningful keywords.
- Content hierarchy is organized by business processes regardless of product or product lines.

Related Information Links

PeopleSoft information architects used the Related Information pagelet and Portal Template to establish cross-reference links based on typical business process requirements. These links enable users to jump quickly from one application to another.

PeopleSoft Campus Portal also provides the Government Resource Directory, which is a menu item providing related links to various government organizations and affiliations.



For more information about related information links, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Understanding Related Links”.

For more information about the Government Resource Directory, see Government Resource Directory.

Rich Keyword Associations

PeopleSoft information architects assigned key functional words for each PeopleSoft web page that is registered within the hierarchy. As a result, users can search for web pages easily, even when they don't know the exact name of the PeopleSoft menu item.

Sample Roles

PeopleSoft Campus Portal includes sample roles based on real business processes. This enables you to implement the portal quickly.

Extensible Hierarchy

With an extensible content hierarchy, you can weave other Hypertext Markup Language (HTML) content from your intranet and the web directly into PeopleSoft Campus Portal. As a result, all appropriate content for your campus community is in one place.

Understanding Campus Portal

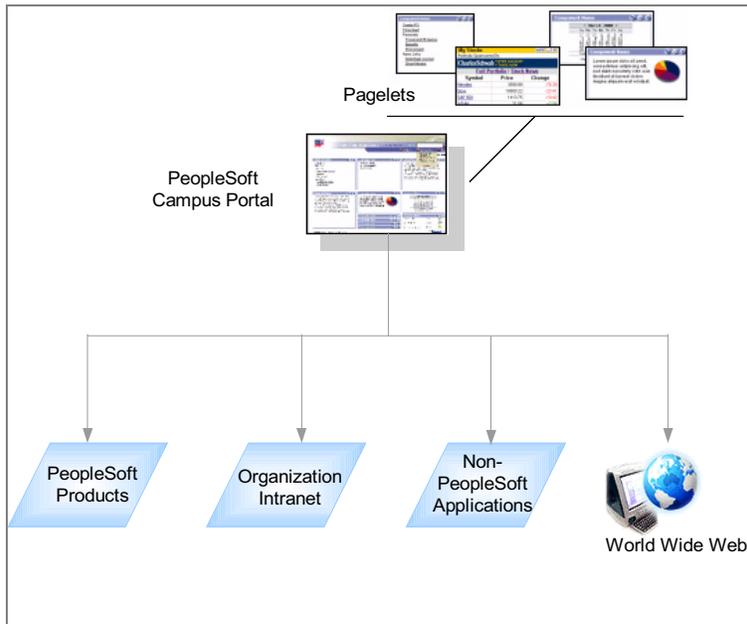
As an enterprise portal, PeopleSoft Campus Portal combines integrated content, security architecture, and standard portal elements to deliver data across the boundaries of your institution to the Web.



For more information **about** PeopleSoft Campus Portal as an enterprise portal, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*.

Integrated Applications

PeopleSoft Campus Portal is a separate enterprise application that functions as a single point of entry to PeopleSoft products and non-PeopleSoft applications including content on intranet sites and the Web.



Single Point-of-Entry for PeopleSoft products, Non-PeopleSoft applications, Intranet and Web content

PeopleSoft Products

PeopleSoft Campus Portal can fully integrate the HTML Access transactions in the following licensed PeopleSoft products. The transactions that deploy in your portal depend on which of these products your institution has purchased.

PeopleSoft Student Administration and Advancement

PeopleSoft Student Administration and Advancement is the backbone of PeopleSoft Campus Portal. To take full advantage of the functionality of Campus Portal, you must purchase and install PeopleSoft Student Administration and Advancement. Student Administration HTML Access provides the foundation for higher education self-service transactions, including the ability to view your course catalog, apply to your institution, add or drop a class, and request a transcript. The underlying tables and functions that support these HTML Access transactions are the same familiar components--Campus Community, Enrollment Services, Student

Financials, Financial Aid, Advisement--from your existing PeopleSoft Student Administration system, making them easy to administer and maintain.

A list of the PeopleSoft Student Administration and Advancement transactions available through PeopleSoft Campus Portal is included in the **Portal Menu** section of this document.



At this time, Student Administration HTML Access 7.6 transactions are available. These deploy easily in Campus Portal 8 but may behave a little differently than transactions from the other PeopleSoft products. For example, when a Student Administration transaction page appears, the Help link is at the top of the transaction page and no longer available in the portal navigation header. Implementers and administrators should familiarize themselves with SA HTML Access 7.6 for Campus Portal.



For more information about PeopleSoft Student Administration and Advancement, see the technical document *Student Administration HTML Access 7.6 for Campus Portal 8* posted on Customer Connection.

PeopleSoft Financials for Education and Government

PeopleSoft eBusiness HTML Access applications are available for Accounts Payable, Accounts Receivable, General Ledger, and Purchasing within the PeopleSoft Financial Management for Education and Government product line.

When PeopleSoft Financials is integrated with PeopleSoft Campus Portal, employees, vendors, customers, and sponsors can use a standard web browser to view and modify their own business information at their convenience. Through inquiry panels they can also review invoice, payment, order, and receipt activity as well as view their account balance and the invoices related to that balance.

A list of the PeopleSoft Financials HTML Access transactions available through PeopleSoft Campus Portal is included in the **Portal Menu** section of this document.



For more information about PeopleSoft eBusiness HTML Access Applications, see *PeopleSoft 7.5 Application Fundamentals for Education and Government* and the respective *PeopleSoft Business Processes* PeopleBook for the Accounts Payable, Accounts Receivables, General Ledger, or Purchasing applications.

PeopleSoft Human Resources Management for Education and Government

PeopleSoft HRMS for Education and Government is an innovative and robust human resource management system designed for organizations doing business in the United States and Canada. PeopleSoft HRMS blends traditional human resources standards and practices with contemporary, state of the art technology.

When PeopleSoft HRMS is integrated with PeopleSoft Campus Portal, employees and managers can use a standard web browser to update personal information, view pay check and direct deposit information, view Flexible Spending Account (FSA) plan activity, add and update dependent and beneficiary data, as well as review summary information about their benefit elections.

A list of the PeopleSoft HRMS HTML Access transactions available through PeopleSoft Campus Portal is included in the **Portal Menu** section of this document.



For more information about PeopleSoft HRMS for Education and Government, see your *PeopleSoft HRMS for Education and Government* PeopleBooks.

PeopleSoft Budget Planning for Education and Government

PeopleSoft Budget Planning is designed and built specifically for education and government organizations to enable completion of the budgeting process on the Internet from start to finish. The Budget Planning module enables employees to develop, review, and analyze budget plans at the detailed account, rolled-up by category and budget center levels.

When PeopleSoft Budget Planning is integrated with PeopleSoft Campus Portal, employees can use a standard web browser to manage and organize the business process flow, maintain budget plans, do what-if modeling, and inquire and generate budget reports to complete the budget cycle.

A list of the PeopleSoft Budget Planning transactions available through PeopleSoft Campus Portal is included in the **Portal Menu** section of this document.



For more information about PeopleSoft Budget Planning for Education and Government, see your *PeopleSoft Budget Planning for Education and Government* PeopleBooks.

PeopleSoft eProcurement for Education and Government

Through connections to PeopleSoft Marketplace and Commerce One's own MarketSite, PeopleSoft eProcurement is fully eCommerce-enabled. PeopleSoft eProcurement provides end-to-end support of selected merchants and multiple independent trading exchanges. The integrated links to PeopleSoft Marketplace, Commerce One's MarketSite, independent trading exchanges, and selected merchants mean that PeopleSoft will provide and maintain the eCommerce connectors that enable you to exchange content and transactions directly from the eProcurement application to the targeted merchant or trade exchange. Content can include catalog data, pricing updates, and research data. Supported transactions include requisitions, purchase orders, change orders, price inquiries, inventory availability inquiries, and auctioning.

PeopleSoft eProcurement for Education and Government supports integration with the PeopleSoft Financial Management for Education and Government applications, including budget checking and real-time validation of accounting ChartFields.

A list of the PeopleSoft eProcurement transactions available through PeopleSoft Campus Portal is included in the **Portal Menu** section of this document.



For more information about PeopleSoft eProcurement for Education and Government, see your *PeopleSoft eProcurement* PeopleBooks.

Non-PeopleSoft Applications

Because of its open web architecture, PeopleSoft Campus Portal can aggregate all web content for its users, including the content of other web sites. PeopleSoft has teamed with a systems integration vendor and an enterprise application integration (EAI) vendor to provide a complete portal solution.



For more information about integrating non-PeopleSoft content and external vendors, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*.

Campus Portal Security

Case-sensitive user IDs and their corresponding passwords serve as the main identifiers for accessing PeopleSoft Campus Portal. The security architecture enables you to create a unique ID and password for each user and associate each ID with information pertinent to the user's specific role and task.



For more information about PeopleSoft portal security, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Understanding Information Architecture” and *PeopleTools 8.12 Security PeopleBook*.

Roles and Permissions

PeopleSoft Campus Portal assigns appropriate roles at login to provide personalized access and content. Roles keep your application interaction simple and efficient through the progressive disclosure of information and options relevant only to the user and task at hand. For example, enrollment options are not offered to instructor roles, grade book information is not offered to student roles, and degree progress information is not offered to alumni. An individual can hold multiple roles simultaneously.

The following predefined roles are delivered with Campus Portal.

Student Role

Enrollment processing, class search, current class schedule, waitlist information, academic summary, transcript request, financial services information, and user profile.

Alumni Role	Review of gift history, recognition club status, transcripts, course history, financial aid history, and transcript request
Applicant Role	Application status check, open checklist review, transfer credit, financial services information and admission for admitted students.
Instructor Role	Review of class roster and grade roster processing
Academic Advisor	Review of schedule, transfer credit, degree progress, transcript, advisee course/grade history and open checklist items
Recruiter	Access to prospect and applicant data by region, organization or category
Employee	Access to user profile data
Friend	Review of gift history and recognition club status
Guest	Non-authenticated access to the course catalog and generic authentication to class search

Single Signon

PeopleSoft Campus Portal uses single signon so users can easily navigate through all the transactions without having to log in to and out of each of the integrated applications.

PeopleSoft Campus Portal authenticates a user at login, then delivers a web browser cookie containing an authentication token. PeopleSoft security technology uses web browser cookies to store a unique access token for each user after they are initially authenticated. When the user connects to a PeopleSoft application within the PeopleSoft Campus Portal, the application server uses the token in the browser cookie to re-authenticate the user behind the scenes so they do not have to sign on again.

Campus Portal Elements

The PeopleSoft Campus Portal includes the standard elements described in *PeopleSoft Portal Application Fundamentals*. The portal menu enables you to provide quick navigation to the self-service transactions within your PeopleSoft products. Roles and permissions enable you to make relevant information available only to those who need it. Pre-configured pagelets and customizable homepages enable users to configure a personalized view of the internal and external information they need to interact with your institution. However, some of the elements are configured specifically for Campus Portal.



For more information about the general elements of PeopleSoft's enterprise portals, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*.

Navigation Header

The navigation header at the top of every page contains links to the management components and options of PeopleSoft Campus Portal.



Campus Portal navigation header

Search	Searches for key words that you define as attributes for folders or components as you register them.
Home	Transfers users to the PeopleSoft Campus Portal homepage.
Menu	Transfers users to the list of menu items with descriptions. Only the menu items and descriptions available to the user's role appear on this list.
Favorites	Transfers users to the list of links to their favorite pages within the portal.
Add to Favorites	Transfers users to a page where they can add links to their favorite portal pages.
Help	Transfers all users to Campus Portal Help in a separate browser window.

Note. Where a Help link is part of the transaction page, this Help link will not appear in the navigation header.

For more information about configuring help pages, see **Working with Online Help**.

Sign Out	Ends the user session and transfers the user to the sign on page.
-----------------	---

Personalize Content/Layout Links

Users can personalize their own homepages by selecting the content that they want to see and arranging it according to their personal taste. Both customizations are simple and can be accomplished from the Personalize Content/Layout links at the top right of the **Campus Portal homepage**.

Portal Menu

The PeopleSoft Campus Portal menu includes links to the self-service transactions available in your PeopleSoft products. The items that deploy on the menu depend on which PeopleSoft Products your institution purchases and the roles and permissions you define. The following

table lists the menu items available through Campus Portal when all appropriate PeopleSoft products are integrated and no roles or permissions are filtering.

Menu Item	Transactions	Product
My Information	Displays benefits and compensation data enabling the user to view and update and personal information including name, address, telephone, and email address.	PeopleSoft HRMS for E&G and Peoplesoft Student Administration and Advancement
Customer Account Details	Displays customer's account status summary, individual account status, payment status, and address and contact information.	PeopleSoft eProcurement for E&G
Manager Tasks	Provides self-service transactions for managers to create and approve information required to manage their organizations and staff such as asset, budget, procurement, expense, compensation, performance, development, recruiting, and/or time reporting.	PeopleSoft HRMS for E&G
Supplier Order Activity	Displays supplier's invoice, payment, purchase order activity, and account balance.	PeopleSoft eProcurement for E&G
HR Framework	Displays pages for creating and sustaining the structure and workforce composition of the organization; includes position information, organizational structure, required competencies, employee competencies, competency searches, and regulatory requirements.	PeopleSoft HRMS for E&G
Hire Employees	Displays pages related to the recruitment, evaluation, and hiring of employees.	PeopleSoft HRMS for E&G
Employee Information	Displays pages related to employees and their jobs, including absence/vacation, health and safety, labor relations, global assignments, and flexible service.	PeopleSoft HRMS for E&G
Training	Displays pages required for administering training to personnel; includes planning/budgeting, student enrollment, results tracking, and cost calculation.	PeopleSoft HRMS for E&G
Career Planning	Displays pages for creating career plans, evaluating employees, planning successions, and managing faculty events (E&G only).	PeopleSoft HRMS for E&G
Time and Labor	Displays pages required for managing employee time and labor details; includes time reporting, time review, adjustment, audit, approval, submission, and creation of various reports.	PeopleSoft HRMS for E&G

Menu Item	Transactions	Product
Plan Salaries	Displays pages for maintaining the levels of compensation provided to employees; includes preparation of evaluations and salary plans, creation of budgets, award increase details, compensation analysis, and salary administration reports.	PeopleSoft HRMS for E&G
Award Variable Compensation	Displays variable compensation data, eligible recipients, goal attainments, variable compensation (VC) plan funding, and awards calculation and approval.	PeopleSoft HRMS for E&G
Report Total Compensation	Displays pages related to total compensation; including determining the compensation, reviewing calculations, and obtaining total compensation reports.	PeopleSoft HRMS for E&G
Payroll Interface	Displays interface tables, confirms pay period deductions, exchanges payroll information, reviews interface results, and updates payroll information.	PeopleSoft HRMS for E&G
Compensate Employees	Displays pages related to compensating/paying employees for work performed; includes taxes, deductions, garnishments, calculations, confirmations, balances, paychecks, and payroll reporting.	PeopleSoft HRMS for E&G
Benefits	Displays pages for providing benefits to employees; includes benefit plan selection, company car and FMLA tracking, leave accrual and annuity calculation, primary job maintenance, NDT, FSA details, auto enrollment, COBRA, and merchant administration.	PeopleSoft HRMS for E&G
Benefits Billing	Displays pages for creating billing information and statements, calculation and review of charges, adjustments to billings, application of payments, and posting of billings and payments.	PeopleSoft HRMS for E&G
Retroactive Payroll	Displays pages for retroactive payroll processes including creation and review of pay requests, calculation of retroactive pay, adjustments, and review of retroactive pay data.	PeopleSoft HRMS for E&G
Pension Plans	Displays pages required for administering pension plans; includes creation of payee information, periodic updates, pension calculations, preparation and creation of pension payments, trustee details, domestic relations order information, and basic plan details.	PeopleSoft HRMS for E&G
Stock Administration	Displays pages for tracking stock option and ESPP transactions; includes stock participation, maintaining stock details, creating grants, identifying dispositions, re-pricing options, purchasing stocks, and determining refunds.	PeopleSoft HRMS for E&G

Menu Item	Transactions	Product
Budgets	Creates the hierarchy for the budget structure including user profiles for budget review approvals, enabling import of information and budget adjustments, and defining budget cube dimensions for budget preparation and control.	PeopleSoft Financials for E&G
Grants	Creates and submits grant proposals and budgets, and displays proposal, award and project forecasts and variances information.	PeopleSoft Financials for E&G
Procurement	Displays pages for approving requisitions, converting requisitions to purchase orders, creating and approving purchase orders, making changes to purchase orders, managing procurement cards and workflow, and maintaining vendors and items.	PeopleSoft Procurement
Define Business Rules HRM	Displays pages for standard setup information required for managing all human resources processes; includes identification of standard data, initial settings, business rules, and other required data.	PeopleSoft HRMS for E&G
Involvement	Displays gift, pledge, and recognition club details.	PeopleSoft Student Administration and Advancement
Admissions	Displays pages for checking the status of admissions applications, review transfer credits, and accept or decline admission.	PeopleSoft Student Administration and Advancement
Enrollment	Displays pages with enrollment appointment, add/drop capabilities, class schedules, and exam information.	PeopleSoft Student Administration and Advancement
Advise Students	Displays pages with advisee information such as class schedules, course history, transfer credits, and unofficial transcripts.	PeopleSoft Student Administration and Advancement
Academic Records	Displays pages with academic information and transcript requests.	PeopleSoft Student Administration and Advancement

Menu Item	Transactions	Product
Financial Resources	Displays pages related to tuition and fee payments and financial aid.	PeopleSoft Student Administration and Advancement
Instructor Resources	Displays pages for reviewing class rosters, processing grade rosters, and reviewing instructor schedules.	PeopleSoft Student Administration and Advancement
Recruit Students	Displays pages for reviewing prospects and applicants.	PeopleSoft Student Administration and Advancement
Government Resource Directory	Contains links to various government web sites.	PeopleSoft Government Portal
Submit Portal Content	Displays pages for submitting portal content for approval and posting to this web site. User can submit menu items, campus news articles, and information about campus events.	PeopleSoft Campus Portal
Portal Administration	For the portal administrator only. Enables them to manage pagelet content and options, manage menu items submitted by users, import data from a pre-configured file, and manage the registry load utility.	PeopleSoft Campus Portal
PeopleTools	Displays the PeopleTools menu, including application engine, maintain security, process schedule, and so on.	PeopleSoft PeopleTools
Worklist	Displays the user's worklist items (from your personal to do items) enabling him or her to view or update items.	PeopleSoft PeopleTools
Course Catalog	Displays a list of courses offered by the institution.	PeopleSoft Student Administration and Advancement
Schedule of Classes	Displays class schedules for classes meeting the specified criteria (institution, term, subject, and so on).	PeopleSoft Student Administration and Advancement

Menu Item	Transactions	Product
Request Information	Displays a list of information that can be requested (Schedule of Classes, Admissions packet, alumni bulletins, and so on).	PeopleSoft Student Administration and Advancement
Customer Help	Displays help topics on accounts, payments and contact information.	PeopleSoft Financials for E&G
Supplier Help	Displays help topics on invoices, payment, purchase orders, and balances.	PeopleSoft Financials for E&G
Employee Help	Displays help topics on Requisitions, Budgets, and Grants.	PeopleSoft Financials for E&G
User Profile	Displays pages enabling the user to modify or view his or her User Profile. Users can change their passwords, change or set up a password clue, and set personalized defaults such as language and currency code. They can also enter a default email address or specify beginning and ending dates for an alternate user to receive their routings.	PeopleSoft Campus Portal

Pagelets

In addition to the navigational menu items, PeopleSoft Campus Portal consists of data-dependent pagelets that appear on the portal homepage as box-like objects. These pagelets contain internal or external content relevant to the user's role within your institution. You can make any or all of the pagelets available to your users to incorporate in their homepages. Your institution can also design its own pagelets.

This section describes the pre-configured enterprise portal pagelets delivered with PeopleSoft Campus Portal.



The Campus News and Campus Events pagelets are the same as the Company News and Company Events enterprise pagelets.



For more information about designing your own pagelets, see *PeopleTools 8.12 Portal Technology PeopleBook*, “Developing Pagelets”.

Campus News

The Campus News pagelet enables your institution to publish specific news articles and display them. The articles that individuals can access are role sensitive.



For more information about the Campus News pagelet, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Using the Company News Pagelet”.

Campus Events

The Campus Events pagelet enables your institution to post event information. The events that individuals see are role-sensitive.



For more information about the Company Events pagelet, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Using the Company Events Pagelet”.

Integrated Task List

The Integrated Task List pagelet enables users to build their own worklists and “to do” items and view the them within the pagelet’s display.



For more information about integrated task lists, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Understanding the Integrated Task List Pagelet”.

External Content

PeopleSoft Campus Portal offers both internal and external content. The external content is based on information you encounter through popular internet portals—headline news, stocks, sports, and weather, to name a few. Specifically, Campus Portal accesses web sites that have syndicated content. The process is based on Rich Site Summary (RSS) and Open Content Syndication (OCS), two XML-based content standards that enable content providers to syndicate their content.

In addition, PeopleSoft Campus Portal offers external content from various content syndication partners. PeopleSoft’s content syndication partners include iSyndicate and Moreover.com.



For more information about external content, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Using Content From the Internet”.

Email and Calendar Integration

Individuals can use email integration to view their latest email messages without leaving the PeopleSoft portal. They can also check their email whether or not they’re at their own computer, even if the email package is a Windows client implementation. The portal can

integrate with Lotus Notes, Microsoft Outlook, or any Pop-enabled mail software. In addition, if the email package is web enabled, they can launch their email directly from the portal.

Calendar integration enables users to check their appointments for the current day without leaving the portal. Moreover, they can view their schedules whether their using their own machine or not, even if the calendar package is a Windows client implementation. The portal can integrate with Lotus Notes and Microsoft Outlook.



For more information about email and calendar integration, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Using Third-Party Email and Calendar Events”.

Web Publishing

With web publishing, your institution can create a striking online magazine. The publication technology pulls together disparate pieces of content (such as articles) and displays them in an organized layout. Multiple publications are supported, and individual issues can be effective-dated to keep information current. From the homepage, individuals can access various publication issues based on their roles.



For more information about web publishing, see *PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, “Creating Web Magazines”.

Homepage

User interaction with the PeopleSoft Campus Portal takes place within a personalized homepage. Users can select from the list of registered pagelets under the Personalize Content link (top right of the homepage) to add or remove content. They can also select the Personalize Layout link to rearrange the blocks of content to create and personalize their own homepages. By personalizing their homepages, users can display information that is specifically relevant or of interest to them.

The screenshot shows a personalized PeopleSoft Campus Portal homepage for a user named Sandra. The page is organized into several sections:

- Navigation Menu:** A list of links including My Information, Involvement, Admissions, Enrollment, Advise Students, Academic Records, Financial Resources, Instructor Resources, Recruit Students, Submit Portal Content, PeopleTools, Course Catalog, Schedule of Classes, Campus Information, Request Information, and Holds & To Dos.
- My Course Information:** A section with links for My Class Schedule, Add a Class to my Schedule, My class sites, Online Course Information, and Buy Your Books!
- My Learning Services:** A section with links for Unofficial Transcript, Search the Library, and Financial Aid Award.
- Tasks:** A section titled "All sorted by Due Date:" with tasks listed by date:
 - 02/16/2001: Call Ms. Drake
 - 02/21/2001: Create Quiz for NEED CLASS
 - 03/30/2001: Register for my classes
 There is also a "Show All/Enhanced..." link and an "Add Task" button.
- Campus News:** A section featuring a logo for "The PeopleSoft Higher Education User Group (HEUG)" and a "Headline News" section with links to articles such as "The President of State U to visit alumni and parents in Latin America", "Strong growth in State U's endowment allows major increases in support for graduate students", and "Ready to retire, Williams reflects on faith". There is also a "Top News Story" link.
- Campus Events:** A table listing events:

Event	Date
The Anniversary Campaign for State U	01/02/2001
Art deco exhibition opens at State University Library	01/22/2001
President Bush to speak at State U	02/12/2001
- Favorite Pagelets:** A section with links for My Yahoo and My Benefits.

Example of a personalized PeopleSoft Campus Portal homepage



For more information on how users can personalize content and layout, see *PeopleTools 8.12 Portal Technology PeopleBook*, “Working with Homepages”.

Administering Campus Portal

You can tailor and administer Campus Portal to your institution's needs. The Portal Administration menu item enables you to manage pagelets and objects in the portal registry. Registry objects include folders, content references, templates, and content providers. Common administrative tasks include adding, deleting, and renaming portal objects. There are many properties associated with each portal object, and all of these properties can be accessed and modified by an appointed portal administrator who has been given appropriate permissions through PeopleSoft Security.



For more information about administering Campus Portal, see *PeopleTools 8.12 Portal Technology PeopleBook*.

Configuring Campus Portal

You can configure PeopleSoft Campus Portal to reflect the look and feel of your institution. Configurable objects include styles, colors, and image sites.

Styles and Colors

You can change styles and colors through Application Designer and the style sheet object. Campus Portal uses the style sheet PSSTYLEDEF which is under PeopleTools, Utilities, Options.

Site Images

Images in the header, navigation, and footer regions of Campus Portal are stored as PeopleTools objects in the database. You can use any image-editing tool to modify these images. Use Application Designer to obtain the objects and upload them after editing, back into the database.

The style sheet and image map for each PeopleSoft product can include other configurable styles, colors, and images.



Important! You must have an in-depth knowledge of PeopleTools and Application Designer to configure Campus Portal.



For more information about using style sheets, see *PeopleTools 8.12 Application Designer PeopleBook*, “Creating Style Sheet Definitions”.



For more information about configuring images, see *PeopleTools 8.12 Application Designer PeopleBook*, “Creating Image Definitions”.

Working with Online Help

PeopleSoft Campus Portal provides HTML-based online help pages. These pages are context-sensitive. When a customer clicks the Help button, a relevant help page opens.

Online help appears in a separate window from the main Campus Portal window. The help window is usually smaller than the main window, so users can view both windows at the same time. The standard browser navigation buttons are suppressed in the online help window.



When the main and help windows are both open and you click within the main window, most browsers automatically minimize the help window. Look at the status bar at the bottom of your browser window to find and maximize the help window again, if necessary.

Some end-user help pages have been created specifically for and embedded in their relevant PeopleSoft products. For example, Student Administration transactions include end-user help written specifically for the Student Administration HTML Access pages. When a Student Administration transaction page appears, the Help button is embedded and appears at the top of the transaction page instead of in the Campus Portal homepage navigation header.

In cases where end-user help has not been created, the Help button remains available from the homepage navigation header. Clicking the Help button in the navigation header takes you to the relevant section of the appropriate Peoplebook.

You can modify the end-user help pages using any HTML editor or text editor. You might consider modifying the text references, logo images, and formatting elements such as colors and fonts to match those of your institution's intranet site. You can also create your own end-user online help where needed.



For more information about modifying or creating end-user help, see the appropriate PeopleSoft product PeopleBook for the transaction. For Student Administration and Advancement transactions see the technical document *Student Administration HTML Access 7.6 for Campus Portal 8* posted on Customer Connection.

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