



PeopleSoft 8.00.01 Using PeopleSoft Applications PeopleBook

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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Contents

About This PeopleBook

Before You Begin	vii
Related Documentation	vii
Documentation on the Internet.....	vii
Documentation on CD-ROM	viii
Hard-Copy Documentation	viii
Typographical Conventions and Visual Cues.....	viii
Comments and Suggestions	x

Chapter 1

Working With Browser-Based Applications

Learning Internet Architecture Terminology.....	1-1
Logging In to PeopleSoft.....	1-3
Expired Connection.....	1-5
Using Menu Navigation.....	1-5
Processing Components.....	1-7
Components with Related Links	1-9
Opening a Page	1-10
New Window	1-11
Using Internet Architecture Buttons	1-11
Search Page Buttons.....	1-12
Processing Buttons	1-12
Toolbar Buttons.....	1-13
Keyboard Shortcuts	1-14
Using Hot Keys	1-14
Using Access Keys.....	1-15
Folder Tab Access Keys.....	1-15
Menu Navigation Access Keys	1-16

Chapter 2

Using Keys and Search Pages

Understanding Search Pages.....	2-1
Entering Search Criteria	2-2

Using Wildcards.....	2-5
----------------------	-----

Chapter 3

Working With Pages

Understanding Effective Dates	3-1
Page Action Options and Effective Dates	3-2
Update/Display Mode	3-3
Include History Mode	3-3
Correct History Mode	3-4
Aesthetic Elements	3-4
Data-Entry Fields.....	3-4
Edit Boxes	3-6
Prompts	3-6
Formatting in Edit Boxes	3-7
Long Edit Boxes.....	3-7
Radio Buttons.....	3-8
Check Boxes.....	3-8
Drop-Down List Boxes	3-9
Drop-Down Calendars.....	3-9
Grid and Scroll Area Controls	3-10
Navigating Through Data.....	3-10
Adding Rows.....	3-12
Deleting Rows.....	3-12
Finding Data.....	3-12
Grids.....	3-14
Tabbed Grids.....	3-14
Collapsible Grids.....	3-15
Scroll Areas	3-15
Effective-Dated Scroll Areas and Grids.....	3-16
Multiple Scroll Areas and Grids on a Page	3-18
Understanding Field-Level Prompts and Validation	3-19
Field Validation.....	3-21
Deferred Processing	3-21

Chapter 4

Working with Processes and Reports

Requesting Reports in PeopleSoft Applications	4-1
Selecting Reports	4-2
Run Controls	4-2
Run Control IDs	4-2

Submitting a Process Request	4-3
Specifying Where and When to Run Reports	4-4
Monitoring a Process Request	4-5
Viewing Reports in Report Manager	4-6

Chapter 5

Using Workflow

Receiving Workflow Notifications.....	5-1
Using Worklists	5-2
Worklist Page	5-2
Worklist Details Page.....	5-5
Working Items	5-6
Using Timeout Worklists.....	5-6
Triggering Workflow Events.....	5-7

Chapter 6

Using PeopleSoft Navigator

Advantages of PeopleSoft Navigator Advantages.....	6-1
Accessing Navigator.....	6-2
Understanding the Navigator Hierarchy	6-2
Working With Navigator	6-3
Navigating to a Page.....	6-4
Navigating to the Next Page in an Activity	6-5
Understanding How Workflow Fits In	6-5

Index

ABOUT THIS PEOPLEBOOK

In this PeopleBook, we'll introduce you to the various elements of the PeopleSoft Internet Architecture and describe how you use them. Specifically, we'll introduce and review how to perform basic functions as you navigate through the system using menus, components, and pages. We review the various types of fields and how you might go about entering data or finding a specific row of data.

This PeopleBook also contains a number of "quick reference" sections designed to further clarify and describe buttons and menus, as well as provide keyboard shortcuts for specific actions on a page. You may want to print or copy these sections to assist you as you learn to use your PeopleSoft application.

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 menus and pages. You should also be comfortable using the Web and the Microsoft® Windows or Windows NT graphical user interfaces.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of the specific PeopleSoft applications your company uses. You can access additional documentation for this release from PeopleSoft Customer Connection (<http://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 format.



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 PeopleTools release is provided in HTML format on the PeopleTools PeopleBooks CD-ROM. The documentation for the PeopleSoft applications you have purchased appears on a separate PeopleBooks CD for the product line.

Hard-Copy 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 PeopleCode.

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).

We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).

Italic Indicates a PeopleSoft or other book-length publication. We also use italic 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 italic 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.

[Jump links](#) Indicates a jump (also called a link, hyperlink, or hypertext link). Click a jump to move to the jump destination or referenced section.

Cross-references The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by commas (.). Capitalized titles in *italic* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:

For more information, see [Documentation on CD-ROM](#) in *About These PeopleBooks*: Related Documentation.

- **Topic list** Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents window.



Name of
Page or Dialog
Box

Opens a pop-up window that contains the named page or dialog box. Click the icon to display the image. Some screen shots may also appear inline (directly in the text).



Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. Notes preceded by **Important!** are crucial and include 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 outlined in red 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 in our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

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

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

DOC@PEOPLESOFT.COM

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

CHAPTER 1

Working With Browser-Based Applications

In PeopleSoft 8, you'll use your applications in a purely internet environment. We call this new environment PeopleSoft Internet Architecture. PeopleSoft Internet Architecture is a server-centric architecture that requires the installation of only a web browser on individual user machines if one does not already exist. Instead, you access PeopleSoft applications by logging in to a standard Web browser as you would if you wanted to open your favorite Web site.

We deliver your PeopleSoft application with a demonstration database. Sample data in the demonstration database can help you see how the system works. You can also use the demonstration database to experiment with how specific PeopleSoft applications work. The PeopleBooks for the various applications frequently refer to the demonstration information to clarify concepts and provide a common frame of reference for examples.

This chapter describes the basics for accessing and using your PeopleSoft application. We review how terminology is used in PeopleSoft Internet Architecture and how to log into and navigate through your application.

Learning Internet Architecture Terminology

There are some basic terms used in PeopleSoft Internet Architecture you'll need to know to use your application and to understand the online documentation.

PeopleSoft applications are made up of a navigational structure, menus, components (groups of pages), and pages. Using these elements, you'll be able to enter new data or change, delete, and modify the existing data in your application. If you've done any browsing of Web pages, you'll find that PeopleSoft Internet Architecture is a simple, intuitive way of working with your database.

The tables and screen shots below define some of the basic elements to the PeopleSoft Internet Architecture. As you read through this book and work with your system, you will become more familiar with this terminology.

Breadcrumbs

A small horizontal menu of links that is always present across the top of your page. The links show what pages, components, or menu navigation links you used to get to the current page.

Menus

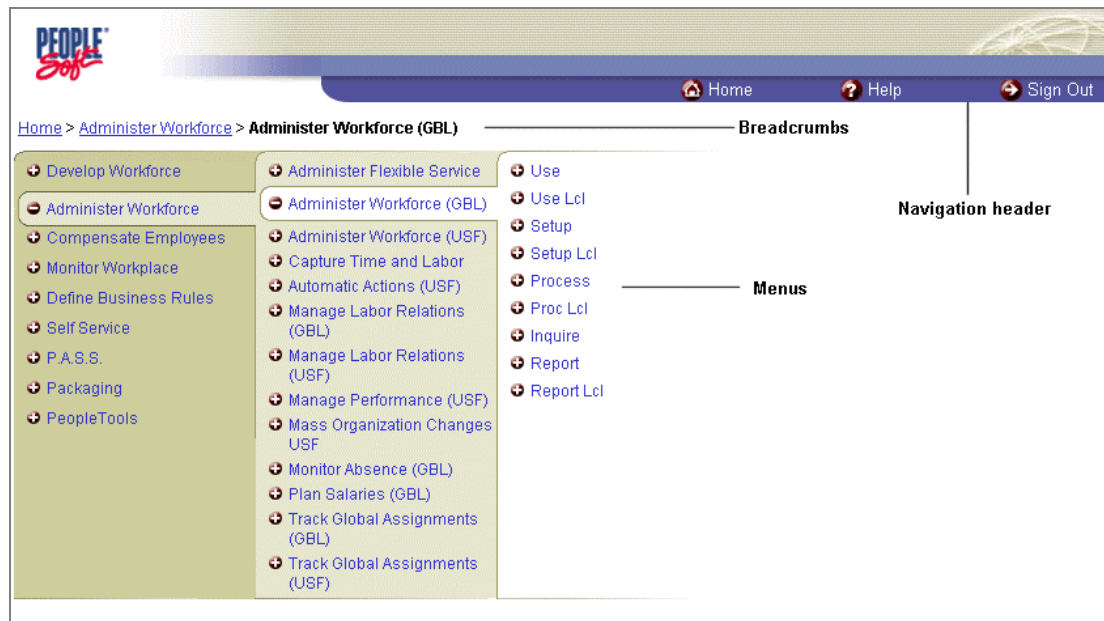
A three-column navigation list that contains menu headings and links you can click to move between the pages of your system.

Application Portal

A Web site that helps you navigate to other Web-based applications and content. This is usually your entry point when you launch your browser; you can customize it to include PeopleSoft application links, external links, and intranet links. (Not shown in the screen shot below)

Navigation header

The header area in PeopleSoft Internet Architecture that remains static as you navigate through your pages. The navigation header contains links back to your homepage and a Signoff button. If you are running the portal, the navigation header also has a Categories, Favorites, and Search feature.



PeopleSoft Internet Architecture

Component

A group of related pages that pertain to a specific task. You access components from the menu. Components contain folder tabs with each tab containing a related page.

Keys

The display-only fields that uniquely identify your data. To display a page, you'll enter the keys so that the system can retrieve the correct row of data. See Using Keys and Search Pages for more information.

Page

The individual display and data-entry screens for each part of your PeopleSoft application. Pages appear in the browser window.

Logging In to PeopleSoft

Logging in to a PeopleSoft application is just like opening a secured page on a Web site. You enter the URL (Uniform Resource Locator) in your browser window's address box to access the Sign In page. You then type your user ID and password to access the secured PeopleSoft application.

To login to a PeopleSoft application:

1. Open your default browser window.
2. Type the URL for your application or select the bookmark for the page in which you would like to work.

The Sign In page appears as shown below.



PeopleSoft8

Language: [English](#) [Español](#) [Français](#)
[Italiano](#) [Deutsch](#) [Français du Canada](#)
[日本語](#) [Português](#) [Nederlands](#)

User ID:

Password:

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CUSTOMERS · EMPLOYEES · SUPPLIERS

People power the internet. **PEOPLE**Soft

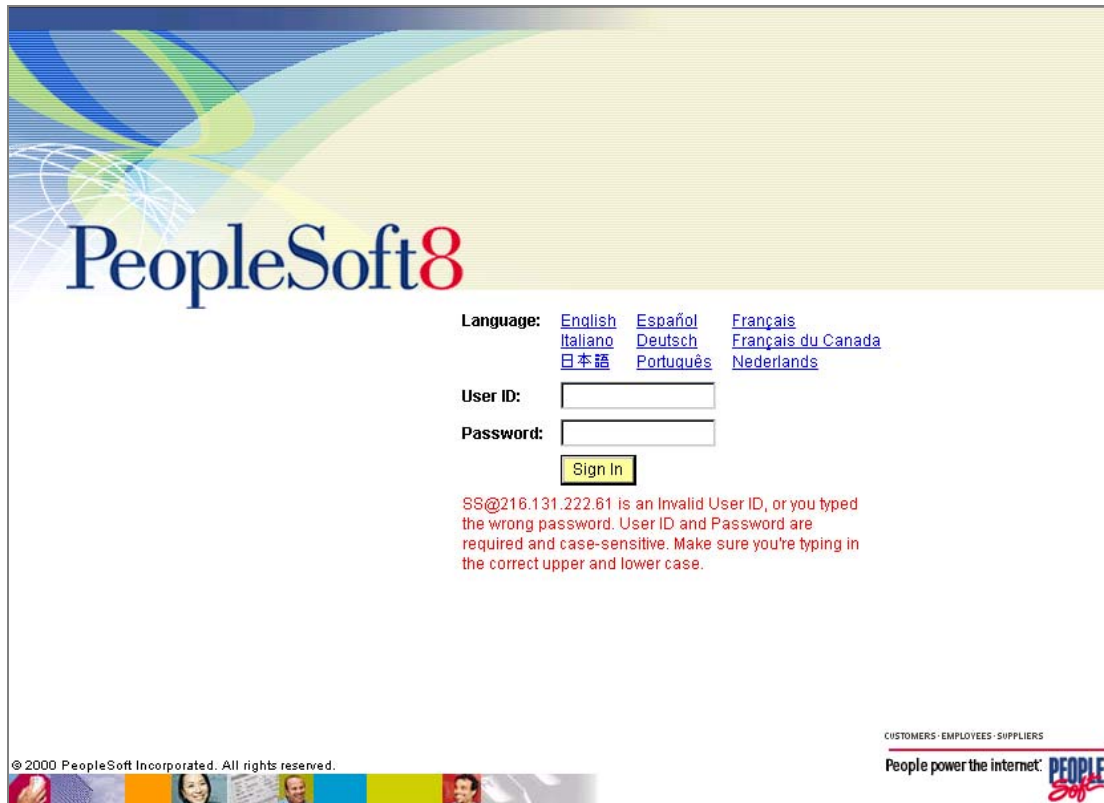
Sign In screen for PeopleSoft Internet Architecture

3. Enter your **User ID** and **Password**.

Your user ID and password are case sensitive. Passwords always appear as asterisks in the display as you type them.

4. Tab to or click the **Sign In** button to login.

The PeopleSoft online system will validate your user ID and password. If either the user ID or password is invalid, the system will display an error message below the **Sign In** button. You'll have to reenter the **User ID** and **Password** or contact your security administrator for assistance.

The screenshot shows the PeopleSoft 8 login interface. At the top is the 'PeopleSoft8' logo. Below it, there's a 'Language:' section with links for English, Español, Français, Italiano, Deutsch, Français du Canada, 日本語, Português, and Nederlands. Underneath are input fields for 'User ID:' and 'Password:', followed by a yellow 'Sign In' button. A red error message is displayed below the button: 'SS@216.131.222.61 is an Invalid User ID, or you typed the wrong password. User ID and Password are required and case-sensitive. Make sure you're typing in the correct upper and lower case.' At the bottom left, there's a copyright notice: '© 2000 PeopleSoft Incorporated. All rights reserved.' and a row of small profile pictures. At the bottom right, it says 'CUSTOMERS · EMPLOYEES · SUPPLIERS' and 'People power the internet' with the PeopleSoft logo.

PeopleSoft login error message



For more information about passwords and security, see Understanding PeopleSoft Security.

After you login, the mouse pointer will turn into a small hourglass, signifying that the online system is issuing SQL statements to initiate your request. Whenever the system accesses data in the database, the hourglass appears on your desktop. If the login information you entered is valid, the system will display the Home page for your PeopleSoft system.

PeopleSoft Internet Architecture structure has the ability to have what we call “single signon” access. This means that you can work in multiple PeopleSoft applications and databases without having to log out and sign in again. If your site has not implemented single signon, then the system prompts you to enter a User ID and Password each time you access a different PeopleSoft application.

Expired Connection

For security purposes, your PeopleSoft system automatically logs you off from your application after a certain period of time of inactivity (determined by your security administrator). To return to your application, simply click the Return to PeopleSoft 8 Sign In link. The Sign In page will appear and you can once again login to your application.



Expired connection

Using Menu Navigation

PeopleSoft's browser-based interface provides an intuitive way of updating or viewing data in your database. The menu columns are set up as lists of links that enable you to navigate to the desired component or page. The navigation header remains constant, containing links to Home and to Signoff. If you are running the application portal, the navigation header will have additional features including Categories, My Favorites, and a help feature.

Whether or not you are running the application portal, the three-column menu structure is the primary means of getting around your PeopleSoft application. This menu structure consists of up to three columns that collapse and expand based on your selections. The main column, also known as Home, contains a general list of the areas you can link to in that application. A plus sign (+) before a listing indicates that there are sub-levels to view under that heading. Click the plus sign or the heading name to view the sub-levels. A minus sign (-) before a listing indicates

that the heading is already expanded to show its sub-levels. Click the minus sign or the heading name next to it to collapse the expanded column.


The second column contains the sub-levels to the main category you chose. The third column typically contains menu items that lead you to different components, depending on the type of activity you want to complete. In most applications, the basic activities you can choose are Use, Setup, Process, Inquire, and Report. Each of these activities will present a different type of component. We define these categories in the following manner:

Use	Contains all the transactions in your database where you can update/display, correct, or add past, current, and future data to your system.
Setup	Contains all the base tables for your data from which transactions are built. Use these pages to edit or add data to your base tables.
Process	Contains pages that enable you to schedule or run a process request.
Inquire	Contains pages that will be displayed as read-only pages. You will not be able to edit or update any of the data in these pages.
Report	Contains pages that enable you to produce reports or queries.

You may notice that some of these choices have a number or abbreviation after them, such as a 2 or *Lcl*. The number 2 indicates that the list of components in that category is broken into two lists because it was too long to fit on one page. The abbreviation *Lcl* indicates that the components under that category are for locality-specific contexts (such as for a specific country) rather than for global use.



Menus expanded to third column

After Home, the menus expand to up to three levels. The Home column will collapse to accommodate the fourth column. You can bring the first column back by clicking  or pressing Alt+1+ENTER. The final menu column will be underlined links that, when clicked, will replace the menus with the search page for the component or page you selected.



For more information on menu navigation using keyboard shortcuts, see Menu Navigation Access Keys.

Using Breadcrumbs

You may have noticed that just above the menus are the breadcrumbs, which are underlined links that indicate where you have navigated in the application. Once you have selected a link from the third column to get to a page, the menus disappear from the window. Use the breadcrumbs to return quickly to a particular level of the menu. They also serve as a quick reference to where you are in the system when you are on a page.

Processing Components

Components consist of several pages within the same window. Usually these are pages that are related and need to be completed together. As you finish with one page, click the folder tab of the next page to open it. You can think of this as leafing through several pages of a single form: if you have to enter more information than fits on a single page, you simply move to the next page to complete the process.

In addition to clicking folder tabs, you can also click the links at the bottom of each page in the component to move to the next page. Alternatively, you can press the corresponding access key.

Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data [New Window](#)

Name Address Personal Profile Eligibility/Identity

ID: 8001 Employee

Personal Data View All First 1 of 1 Last

*Effective Date: 01/01/1990

Name

Format Using: USA United States

Name: Schumacher, Simon

Prefix: Mr

First Name: Simon Middle:

Last Name: Schumacher Suffix:

Benefits Information

*Marital Status: Married As of Hire

Canada

USA

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

[Name](#) | [Address](#) | [Personal Profile](#) | [Eligibility/Identity](#)

Personal Data component

You'll encounter components in the following situations:

- If a page is not large enough to accommodate all the fields for the underlying database table.
- If a page is so heavily dependent on information stored in multiple database tables that it would be difficult to keep all the tables and their pages synchronized—if they weren't brought together in a component.

All pages in a group have the same search record so the prompt in the initial search dialog box is the same regardless of which page you access first—and you won't be prompted to enter new search criteria as you move from page to page in the component.

Pages in a group are treated as a single entity when you try to save data. When you click Save data on all the pages is committed to the database. You may be prompted at this time to enter data in required fields, if the system has not prompted you to do so already.



If you click any of the navigation headings in the breadcrumbs, the system will exit the page without prompting you to save any changes you may have made. You can return to the page by hitting the back button on your browser. Your data should still be there and you can then save your work.

To access a page or component:

1. Select the menu items from the menu navigation list that relate to your page.

2. Select the page or component you want to open.
3. Enter the search criteria in the dialog box to identify the row of data you want to retrieve from the database.

See Entering Search Criteria for more information.

4. Click **Search** to perform the search.

If you didn't enter complete key information, you'll be prompted with the search results grid to choose the data you want to view. The page or component you selected will open in your browser.

Components with Related Links

Occasionally you will see pages that, in addition to having links to other pages in the component, have links to related components or pages. The component shown below, for example, contains three related links in the blue box at the bottom of the page. You may click any one of these links to access that page or component for the employee record you currently have open. This convenience allows you to move easily to related transactions to enter data without going through the search process again.

The screenshot displays the 'Work Location' component for employee 'Smith, Mary' (ID: TC015). The page includes tabs for 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Job Information' tab is active, showing fields for 'Employee Status' (Active), 'Effective Date' (07/27/2000), 'Effective Sequence' (0), 'Date Created' (07/27/2000), 'Job Indicator' (Primary Job), 'Action / Reason' (Hire), 'Position Number', 'Position Entry Date', 'Regulatory Region' (USA), 'Company' (ST - Test Company 1), 'Business Unit' (BNGEN), 'Department' (ST - HR Department), 'Location' (001), and 'Supervisor ID'. A blue box at the bottom contains four component links: 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. The 'Employment Data' link is highlighted. Below the links are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Previous tab', 'Next tab', 'Update/Display', 'Include History', and 'Correct History'.

Component links on a page

When you click a component link, you'll notice that the new transaction contains the same component links, enabling you to return to the original transaction if desired. The component or page in which you are working appears in black text and is not underlined. Some applications may identify these related links in another way. For example, you might see the phrase "Go to:"

along with the related links at the bottom of a page. You may also see a drop-down list box with the word "...More," containing several more related transaction links.

When you have finished making changes in your component you will be prompted to save if necessary.

Opening a Page

Select the desired menu items from the list until the final column becomes a list of underlined links. These links, when clicked with your mouse, will eventually either bring you to a single page or open the first of several pages in a component. From the fourth column, select the link to the component you want to access.

For example, if you want to enter personal data for an employee, you would select the Personal Data link. The search page for that component then opens, allowing you to search for the desired employee. The first page in the Personal Data component is the Name page, followed by a series of additional folder tabs, each representing a page, as shown below. Notice how the breadcrumbs at the top of the page leave a trail for you of all the menu stops you made along the way to get to this page.



For more information about search pages see Understanding Search Pages.

Home > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > **Personal Data** [New Window](#)

Name Address Personal Profile Eligibility/Identity

ID: 8001 Employee

Personal Data View All First 1 of 1 Last

*Effective Date: 01/01/1990

Name

Format Using: USA United States

Name: Schumacher, Simon

Prefix: Mr

First Name: Simon Middle:

Last Name: Schumacher Suffix:

Benefits Information

*Marital Status: Married As of Hire

Canada

USA

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

[Name](#) | [Address](#) | [Personal Profile](#) | [Eligibility/Identity](#)


Opening a page

New Window

At the top of all pages you may notice the New Window hyperlink. Clicking this link will open a new browser window, or child window, showing the menu navigation to your current position at level 3. From this point you can open a new transaction to view or enter new data. You may open any number of child windows as necessary.

Tips for Using New Window

There are certain rules of thumb to keep in mind when using PeopleSoft's New Window feature:

1. Before opening a new window, **save any changes** made in the current window. If the session times out while you are working in a new window, you may lose any unsaved changes.
2. After a certain length of inactivity (specified by a system administrator, default time is 20 minutes) in one of your child windows, your new window session will timeout or expire. This does not invalidate your other, current windows but simply means this expired window is no longer useable. Any unsaved changes will be lost. Close this window using the browser's **File, Close** feature or the  (Close Window) button. Do not use the *Return to PeopleSoft 8 Sign In* link on the expired page. Doing so will invalidate the entire session in all open windows.
3. Do *not* use your browser's File, New > Window feature. Doing so merely copies the current HTML from the parent window, rather than opening a new PeopleSoft maintained window session.

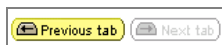


Users entering or viewing data in two different languages should do so using a separate instance of their browser program and sign in under the same user ID and password.

Using Internet Architecture Buttons

PeopleSoft Internet Architecture provides you with a multitude of buttons and links on your page to help you process transactions in your system. In general, if the action to be performed is navigation related, it will be shown as a link, which will bring you to another page. If the action is truly an action, such as Save or Process, it will be displayed as a button on your page. You only need to click the button or link to execute the command.

If a gray button appears on your page, that action is not then available to you. For example, when working on the last page in a component, you might see the following:



Buttons on the last page in a component

The **Next tab** button is gray because you are working on the last page of the component. Your only option is to select the **Previous tab** button.

Likewise, links often appear at the bottom of your page to indicate which of the component's pages you are on. You'll notice that the active page is not actually a link because it is not underlined. For example, if you are on the Compensation page of the Job Data component, the links at the bottom of the page will appear as follows:



[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Page links in a component

Most buttons and links in the system are self-explanatory. You'll find that performing transactions and navigating between pages and components will come easily. Nonetheless, we have included for your reference a few tables that detail the functioning of several PeopleSoft Internet Architecture buttons.




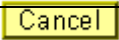
Search Page Buttons

The following search related buttons are located on Search Pages of all types.

Button	Name	Function
	Search	Processes the search once you have entered search criteria in the key fields above the Search button.
	Clear data	Clears entered text from all fields on the page (without saving) so you can enter new criteria.


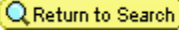

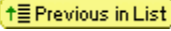

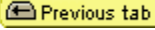
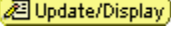
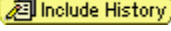


Processing Buttons

The following buttons are used for processing transactions.

Button	Name	Function
	Apply	Usually found on a page that you opened by clicking a prompt button. Enables you to apply the data input without returning you to the main page in case you want to perform additional searches.
	Run	Opens the Process Scheduler Request dialog box where you can set up your process control parameters for the current process.
	Okay	Accepts the data input made on an auxiliary page and returns you to the main page.
	Cancel	Clears the page and any data that you may have entered or changed without saving. When you click Cancel, the system doesn't warn you to save changes. Use Cancel if you entered data incorrectly and want to begin again.

Toolbar Buttons

At the bottom of most pages you'll find the toolbar, which changes depending on the type of page you are in. The toolbar may include search list navigation buttons, page navigation buttons, and page action buttons. The toolbar changes depending on the type of page that's active. So not all buttons shown below will display on every page. Likewise, some buttons may be grayed out, indicating that that action is not available to you at that time.





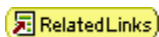

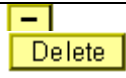
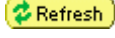


Button	Name	Function
	Save	Sends the information you've entered on the page to the database. You'll generally save when you come to the end of a component. The Save command always updates the data for all pages in a group. Upon save, the system displays the "Saved" message in the upper right corner of the page.
	Return to Search Page	Returns you to the search page.
	Next In List	Displays the data for the next data row in your search results grid. This button appears gray if you didn't select the data row from a search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.
	Previous in List	Displays the data for the previous data row in your search results grid. This button appears gray if you didn't select the data row from the search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.
	Next page in component	Displays the next page in the current component. If you are in the last page of the component, this button is gray.
	Previous page in component	Displays the previous page in the current component. If you're in the first page of the component, this button is gray.
	Update/Display	Accesses existing rows of data on the database. If data is effective-dated, displays only current and future rows.
	Include History	Displays all rows of data: current, future, and history.
	Correction	Accesses existing rows of data in the database and displays all effective-dated rows. Allows you to update all rows, including history rows.
	Refresh page	Appears for expert users only that are in Expert Entry mode. When clicked, validates the data entered in certain fields.



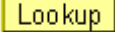
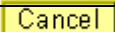
Keyboard Shortcuts

Working in an internet browser-based environment can often be very mouse intensive. PeopleSoft offers many keyboard alternatives to using the mouse in the internet architecture. We call these shortcuts Access Keys and Hot Keys. Once you learn the keystroke combinations below, you'll find working in your PeopleSoft application is a quick and painless process.

Using Hot Keys

Hot keys perform an immediate action. When you press any of the key combinations below, the designated action occurs. You'll notice that several hot keys perform different functions depending on the page you are in, such as a transaction page or a search page.


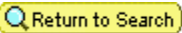
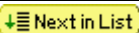
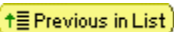
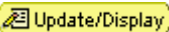


Hot Key	Button or Link	Action
ALT+5	 	Opens lookup page. Opens the calendar prompt.
ALT+6	  	Opens the pop-up window on a page.
ALT+7		Inserts row in a grid or scroll area.
ALT+8		Deletes row in a grid or scroll area.
ALT+0		When in Expert Entry mode, validates data entered in page.
ALT+ .		Next in grid, scroll, or search page results list.
ALT+ ,		Previous in grid, scroll area, or search page results list.
ALT+ \	<u>Add a New Value</u> <u>Find an Existing Value</u>	Toggles between “Add a New Value” and “Find an Existing Value” in a Search page.
ALT+ /	<u>Find</u>	Find data in grid or scroll area.
ALT+ ‘	<u>View All</u>	View all rows of data in grid, scroll area or search page results list.

ENTER	  	<p>Activates the Okay button where appropriate.</p> <p>On a Search page, activates the search button.</p> <p>On a Lookup page, activates Lookup button.</p>
ESC		<p>Activates the cancel button where appropriate.</p>

Using Access Keys

Access keys move the focus of your cursor to a particular push button on your page. Pressing Enter executes the command—the equivalent of clicking the button with your left mouse button.

The table below outlines the shortcuts you may use in place of clicking the equivalent action button with your mouse. After pressing the desired key combination from the list below, you must then press the ENTER key to execute the action. For example, to save a page you would press ALT+1 followed by the ENTER key. Note that some access keys have multiple actions assigned to them, and their usage depends on the currently active page.

Access Key	Button	Action
ALT+1		<p>Save page in a transaction.</p> <p>Move to Search or Add button on a Search or Prompt page.</p> <p>Move to OK button on an auxiliary page.</p>
ALT+2		Return to search page from transaction page.
ALT+3		View next row in list when button is active.
ALT+4		View previous row in list when button is active.
ALT+9	<u>Home</u> >	Toggles between menu items in the breadcrumbs
ALT+ \	  	Toggles between action modes on the toolbar in a transaction page.

Folder Tab Access Keys

You can also use access keys for folder tabs to help you move between pages in a component. Identify these access keys by noting the letter in the folder tab name that is underlined. For example, in the Job Data component, you can see that all the folder tabs contain access keys with which to open them. Open the Job Information page by pressing ALT+J to move your cursor to the page name in the folder tab, and then press ENTER to open the page.

Work Location		Job Information	Job Labor	Payroll	Salary Plan	Compensation
Schumacher, Simon		Employee		ID: 8001		
Work Location		View All		First 1 of 1 Last		
Employee Status: Active		Date Created: 09/16/1996		+ -		
*Effective Date: 09/01/1996		Effective Sequence: 0				
Action / Reason: Data Change		RED		Redesignation		
		Current				
Position Number: 00000001		President & CEO		Position Entry Date: 09/01/1996		
<input type="checkbox"/> Position Data Override		<input type="checkbox"/> Position Management Record				
*Regulatory Region: USA		United States				
*Company: CCB		Continental Commerce&Business				
*Business Unit: USADM		United States Administration				
*Department: 10100		Office of the President		Department Entry Date: 09/01/1996		
Location: 001		Corp HQ				
Supervisor ID:						
Reports To:						
ID:						
Job Data		Employment Data		Earnings Distribution		Benefits Program Participation

Using access keys to open pages

Menu Navigation Access Keys

Navigating between menus can be tiresome when you have to constantly revert to the mouse. By using a combination of the menu access keys (ALT+1, ALT+2, ALT+3 and ALT+4), the tab key, and the Enter key you can reduce your dependence on the mouse.

ALT+1, 2, 3 or 4

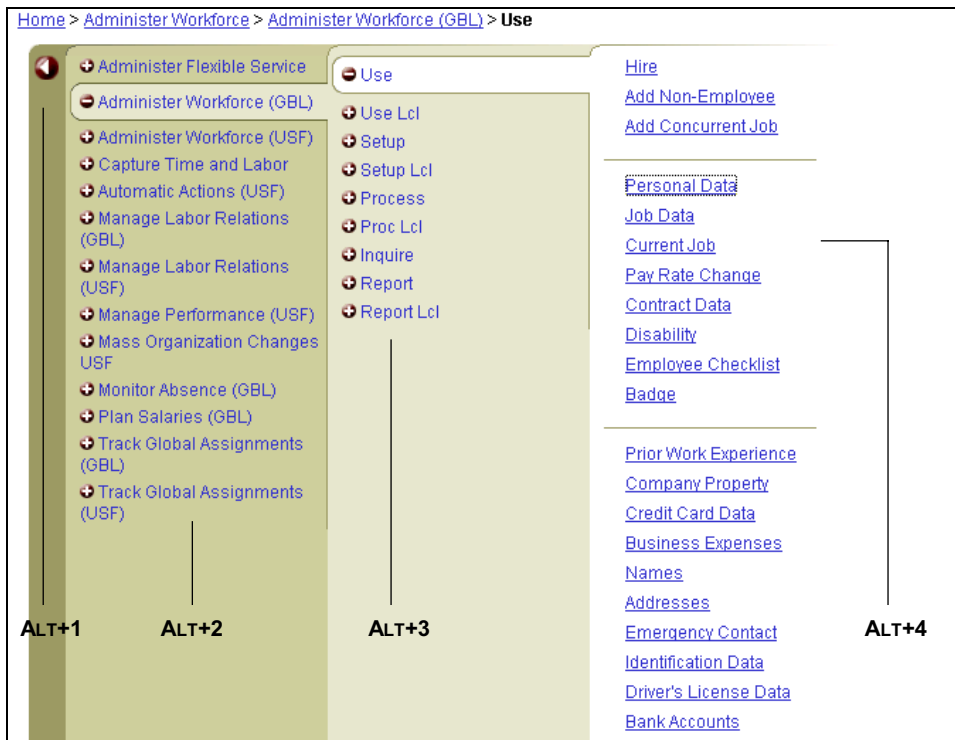
Moves focus across menu levels resting on the uppermost menu item for that column

TAB key

Moves focus to the next menu item in the current column or to the top of the next column if on the last menu item

ENTER key

Opens the next menu level or the search page for the selected component



Access keys for menu navigation

When menu navigation is the active window, you use the access keys to get to the next or previous menu level. For example, suppose you want to choose Capture Time and Labor from the second column above. You can simply press ALT+2 and then the tab key three times to transfer focus to that menu entry. You then press Enter to open the menu item. To view the Home menu again, press ALT+1+ENTER. The collapsed menu section will expand.

CHAPTER 2

Using Keys and Search Pages

Every table in your PeopleSoft database is uniquely identified by a field or a combination of fields. For example, the Employee ID field uniquely identifies your employee records. Or, to take another example, when employees enroll in training classes, the combination of employee ID, course code, and the starting date of the course session uniquely identifies enrollment requests.

The fields that uniquely identify your data are the *keys*. To display a page, you'll enter the keys to search for on the Search page so that the system can retrieve the correct row of data. For instance, if you want to retrieve the Personal Data page for Jim Smith, you must specify the key data in the search record for that employee.

A search record is the list of defined search keys that help you locate data. These are the fields you are prompted for on a search page. Every transaction page or component listed in the menu columns has a search record associated with it. If you select other pages that have a common search record, such as pages within a component or an associated link, you will not be prompted to enter search criteria again. You'll be prompted for new search keys only when you select a new page outside of the component with a different search record.

Understanding Search Pages

There are two types of search pages: the basic search page and the advanced search page. When you select a page to navigate to, the system will often display an advanced search page, such as the Personal Data page shown below. The advanced search page generally offers several keys by which you may search for your record. It allows you to narrow down your search by entering in more than one type of criteria. The Personal Data advanced search page below contains seven fields starting with the EmplID (employee ID) field.


Personal Data


Find an Existing Value

EmpID:

Name:

Last Name:

Department SetID: 

Department: 

Alternate Character Name:

Personnel Status:

☐ Include History ☐ Correct History

[Search](#) [Clear](#) [Basic Search](#)

Advanced Search page

If the search page offers a basic search option, it will appear as a link next to the search action buttons. In general, a basic search page offers just one or two fields by which you may perform your search. However, you may designate which key field you would like to search by from the **Search By** drop-down list box.

Personal Data

Find an Existing Value

Search By:

EmpID:

☐ Include History ☐ Correct History

[Search](#) [Advanced Search](#)

Basic Search page

You'll notice that many search pages, both the advanced and the basic, contain the **Include History** and **Correct History** check boxes as page action options. You can select what type of action you want to perform for your record before retrieving that record by selecting the appropriate check box. Or, if you are unsure, you may leave the check boxes clear. You will again have an opportunity to select the page action once you open the page you are searching for.



For more information on page action options, see Understanding Effective Dates.

Entering Search Criteria

You can enter a full value or a partial value for any key field. Based on what you enter in the dialog box, the system uses the search record to present you with a list of possible matches or, if there is only one match, the page you requested. Often, however, you don't have all the information you need. For example, if you are searching for John Smith, you may find that there is more than one in your company. By entering his full name (without a space) and clicking the Search button, the system may display several John Smiths in the Search Results grid. In our

example below, there are only two. You may be able to determine which employee is the correct one based on the additional information displayed in the Search Results grid. To access the employees data, click any of the underlined hyperlinks in the Search Results grid.

Personal Data

Find an Existing Value

 EmplID:

 Name:

 Last Name:

 Department SetID:

 Department:

 Alternate Character Name:

 Personnel Status:

☐ Include History ☐ Correct History

 [Basic Search](#)

Search Results

[View All](#)
First 1-2 of 2 Last

EmplID	Empl Rcd Nbr	Name	Last Name	Department SetID	Department	Alternate Character Name	Personnel Status
G050	0	Smith, John	SMITH	USA	10200	(blank)	Employee
PA005	0	Smith, John	SMITH	USA	10100	(blank)	Employee

Search Results list



The Search Results for the advanced search will contain a link for each column entry, while the basic search page results will only display the first column as a link.

After you've finished entering in the personal data information for John Smith, let's say you need to enter some leave of absence dates for a different employee, but you're not sure how to spell the employee's last name. You do know, however, that his employee ID begins with a Z. To locate the correct record you would type **Z** as the search criterion in the **EmplID** field (note that this field is not case-sensitive). The system retrieves a list of all employee IDs that begin with **Z** and displays the valid values in the **Search Results** grid below the search buttons.

The search function can retrieve up to 300 entries from the database, displaying a number of results at a time in the Search Results list. Use your browser's scroll bar to view all listings on the current page. If the list is subdivided, click the right-pointing arrow above the grid or press Alt+ . to view the next set of listings.

If your search retrieves more than the maximum 300 listings, as our example below does, the Search Results will indicate this. You should then attempt to narrow your search in another way if you are not able to retrieve the data you need on the first attempt.

General Absence

Find an Existing Value

EmplID:

Empl Rcd Nbr:

Name:

Last Name:

Alternate Character Name:

Personnel Status:

[Basic Search](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#) First

EmplID	Empl Rcd Nbr	Name	Last Name	Alternate Character Name	Personnel Status
Z1000	0	Albion, Charles	ALBION	(blank)	Employee
Z1001	0	Blazer, Donna	BLAZER	(blank)	Employee
Z1002	0	Catoti, Dante	CATOTI	(blank)	Employee
Z1003	0	Dinella, Rita	DINELLA	(blank)	Employee
Z1004	0	Ethel, Donald	ETHEL	(blank)	Employee
Z1005	0	Freeter, Elizabeth	FREETER	(blank)	Employee
Z1006	0	Gallagher, Sean	GALLAGHER	(blank)	Employee
Z1007	0	Himmul, Tina	HIMMUL	(blank)	Employee

Search Results with over 300 listings

From the list, you see the employee you were looking for: employee ID **Z1000** for **Charles Albion**. A single click on any column in that row retrieves the **Absence Data** page, with the latest absence information for that employee. Here you may enter his approaching leave of absence.

Absence Data [Follow-up Action](#) [Comments](#)

Albion, Charles Employee ID: Z1000 Empl Rcd#: 0

Absence Data First [View All](#)

*Start Date/Time: Duration (Days): Hours:

End Date/Time:

*Absence Type:

Absence Code: Regulatory Region: United States

Reason:

☐ Approved Date Approved:

Notification Date: Time: By Whom:

►

►

►

►

First [View All](#)

Retrieving a page

When you access a page, notice that the key fields are the uppermost display-only fields on the page, most often just below the page tabs. In the **Absence Data** page above, **Name**, **Employee ID**, and **Empl Rcd#** are the key fields. The data fields in which you will enter data pertaining to the absence of the employee are below the key fields in the **Absence Data** scroll area.

Using Wildcards

PeopleSoft applications support three wildcard features when searching for data. These wildcards can be helpful in finding the exact information you want to process. The following are the supported standard wildcard features.

% (percent sign)	Match one or more characters.
_ (underscore)	Match any single character.
\ (back slash)	Escape character—don't treat the next character as a wildcard.



Certain applications support wildcards specific to only that application. See your application PeopleBook for specific information on the wildcards available to you.

For example, you can type a number string of possible employee IDs along with the % sign, such as Z%000, and the system returns a list of those employees whose IDs match that criterion.

General Absence

Find an Existing Value

EmplID:

Empl Rcd Nbr:

Name:

Last Name:

Alternate Character Name:

Personnel Status:

[Basic Search](#)

Search Results

[View All](#) First 1-8 of 8 Last

EmplID	Empl Rcd Nbr	Name	Last Name	Alternate Character Name	Personnel Status
Z1000	0	Albion, Charles	ALBION	(blank)	Employee
Z2000	0	Amster, Robert	AMSTER	(blank)	Employee
Z3000	0	Yantali, Ulanda W.	YANTALI	(blank)	Employee
Z4000	0	Ammanini, Allan Joseph	AMMANINI	(blank)	Employee
Z5000	0	Asti, Blaine	ASTI	(blank)	Employee
Z8000	0	Aberdeen, Darla	ABERDEEN	(blank)	Employee
Z9000	0	Ackland, Stephen	ACKLAND	(blank)	Employee
Z9000	1	Ackland, Stephen	ACKLAND	(blank)	Employee


Using wildcards in a search page

CHAPTER 3

Working With Pages

Pages are the primary graphical interface by which you will view and alter data in your PeopleSoft system. You can think of pages as representations of rows of data in your database tables. You'll use them to view, enter, and update data stored in application tables. Each page display also provides features in the form of buttons or links to help you navigate through the system. As you make changes or add to your database, you'll need to be familiar with effective-dating logic and the various page action options as you work with historic, current, and future data.

It will also be helpful if you familiarize yourself with the types of page elements you will encounter on pages and how they work. We use many different types of elements to organize information on pages and to enable you to enter data, including aesthetic elements, data-entry elements, and functional or data processing elements.

If at anytime you have a question while working on a page, press the  Help button in the navigation header. This action will open the PeopleBook that explains the particular page in which you are working.

Understanding Effective Dates

PeopleSoft's effective-dating logic enables you to maintain an accurate history of information in the database. Effective dating allows you to store historical data, see changes in your data over time, and enter future data. For example, you may want to track several events in the career of Tom Sawyer: when he was hired, transferred, and promoted. By inserting rows of data based on his employee ID, you can build a job history.

When you enter new information that is related to existing data, such as a transfer or pay rate change, you don't want to lose or overwrite the data already stored in the database. To retain history, you add a data row identified by the date when the information goes into effect: the *effective date*. You can use the information to look at what's happened up to now and plan for the future. The PeopleSoft system categorizes effective-dated rows into the following basic types:

Current

The data row with the date closest to—but not greater than—the system date. Only one row can be the current row.

History

Data rows that have effective dates earlier than the current data row.

Future Data rows that have effective dates later than the system date.

Page Action Options and Effective Dates

The types of actions you can perform on rows of data depend on the data row type. When you retrieve, modify, or insert rows in a table, the Update/Display, Include History, and Correct History actions apply specific rules based on the effective date:

Update/Display Retrieves only current and future rows. You can change future rows but not current rows. You can also add a new current row.




Include History Retrieves all rows. However, you can make changes to future rows only. You can also add a new current row.

Correct History Retrieves all rows and allows you to change or correct any row and insert new rows regardless of the effective date or sequence number.

To see how these actions work together, let's take a look at four possible events in the job history of Tom Sawyer, listed by effective dates. Assume today is September 1, 2000.

Effective Date	History	Current	Future
Hired 1/1/1994	X		
Transferred 1/1/1996	X		
Promoted 8/1/2000		X	
Expected termination 1/1/2002			X

The action type that you select will dictate whether you can access certain fields and what you can do with each type of row.

Action Mode Button	View	Change	Insert New Rows
 Update/Display	Current, Future	Future only	Effective date greater than or equal to current row
 Include History	History, Current, Future	Future only	Effective date greater than or equal to current row
 Correct History	History, Current, Future	All existing rows	No effective date restrictions

The page action buttons are located in the toolbar at the bottom right of each page on which they are applicable. You can toggle between these buttons by using the Alt+\ access key and then pressing Enter to activate the selected mode. A grayed out button indicates the page is currently

in that mode. For example, Tom Sawyer's Work Location page shown below is currently in the Correct History mode.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Sawyer, Tom Employee ID: TZ173 Empl Rcd#: 0

Work Location View All First 1 of 1 Last

Employee Status: Active Date Created: 12/30/1997

*Effective Date: 05/03/1995 Effective Sequence: 0 *Job Indicator: Primary Job

Action / Reason: Hire

Position Number: Position Entry Date: Position Data Override Position Management Record

*Regulatory Region: USA United States

*Company: TC1 ST - Test Company 1

*Business Unit: TBTC1 Business Unit for Company TC1

*Department: T002 ST - Payroll Department Department Entry Date: 05/03/1995

Location: TCA1 Tst CA

Supervisor ID:

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Action mode buttons

Update/Display Mode

With Update/Display, you can access only current and future rows; you can't access history. In Tom's case, you can view only the current data, effective-dated August 1, 2000, and the future data, effective-dated January 1, 2002 (his promotion and then his termination).

- You can insert new rows with an effective date later than the date on the current row—after August 1, 2000.
- You can change the future-dated row, effective-dated January 1, 2002, and you'll also be able to change any additional rows you insert with a date later than today, September 1, 2000.

If you insert rows with effective dates between August 1, 2000, and September 1, 2000, you won't be able to change them if you return to the page in Update/Display mode.

Include History Mode

Select Include History and you can view any of Tom's job data, dating back to his hire date, and forward to the day we expect he will be fired. But, as with Update/Display, you can update only future-dated rows, effective-dated September 2, 2000, and on. You can also insert new rows with an effective date later than the current row—any date after August 1, 2000.

Correct History Mode

When you choose Correct History, you have access to all data rows. You can view, change, and insert rows of data, regardless of the effective date. You can view and edit any of Tom's job data, dating back to his hire date, and forward to the day we expect he will be fired. You can also insert new rows with an effective date later than the current row—any date after August 1, 2000.



As you move between Update/Display, Include History, or Correct History you will be prompted to save your changes if necessary.

Aesthetic Elements





Aesthetic elements help organize or emphasize different fields or information on the page. These elements are not used to update data in the database; they are purely visual. Aesthetic elements include:

Frame	Display-only box that groups together a set of fields on a page.
Group box	Display-only box with text labels that groups and identifies related fields such as radio buttons.
Horizontal rule	Display-only horizontal line that separates fields or other elements on a page.
Static image	Unchanging graphic, such as your company logo or other visual element.
Static text	Display-only alphanumeric field that describes a page, field, or group of fields.

Data-Entry Fields

On pages, you'll see several types of data-entry fields, each designed to offer different ways to enter and maintain information. The different kinds of data-entry fields serve a common purpose—to provide you with a simple way to enter and update data in your tables. You'll type data directly into some fields, such as edit boxes and long edit boxes. Other data-entry fields (such as radio buttons and drop-down list boxes) present you with a list of choices. Understanding how to use each type of data-entry element will help you use the system more efficiently.

Data-entry elements, which are always associated with specific database fields, include the following:

Check box	Small, square box that enables or disables an option. Typically, you <i>select</i> the check box by clicking within it; this adds a check mark and the option becomes enabled. Click it again to <i>clear</i> the check box and the option is disabled.
Drop-down list box	Rectangular box similar to an edit box with a prompt button within the box. Clicking the prompt button expands the box to display a list of valid values from which you can select a single option.
Edit box	Rectangular box into which you enter data. The size of the edit box—the number of characters you can enter—is determined by the length of the database field. Edit boxes for fields with prompt tables have a prompt button to the right.
Grid	Entry fields arranged like a spreadsheet with a navigation bar or footer and  (Add) and/or  (Delete) buttons for each row.
Long edit box	Long rectangular box into which you enter long text items such as comments.
Radio button	Small round button that represents one option in a group of mutually exclusive options. Only one radio button in a group can be selected at one time (by clicking it).
Scroll area	An area where entry fields are arranged in a framed area with a navigation bar or footer. Each row of data may contain  (Add) and/or  (Delete) buttons.

Tabbing Between Fields

To move among the data-entry fields on a page, press the TAB key or click once on the field. The TAB key moves you one field at a time in a sequence determined in the page definition. Tabbing will also rest on prompts to give you the option of viewing the prompt table or calendar. To open a prompt or calendar you can press the Enter key. Or, to get to the next field press the TAB key again. SHIFT+TAB moves you back rather than forwards.



Tabbing between fields may function differently for power users that have modified page tabbing behavior in the Personalization page of Maintain Security.

Required Fields

In most applications, an asterisk next to a data-entry field on a page indicates a required field. Unless deferred processing has been set for this page, data must be entered in that field if you want to continue on to the next field or to save the page. If you save the page before entering data, the field will turn red and an error message dialog will display on your page. Click OK on

the error message and enter the correct data in that field. Required fields are often drop-down lists or are accompanied by a prompt button to assist you in entering the correct data. Make use of these prompts to help you find the correct data.


Edit Boxes

You highlight an edit box by moving to it with the TAB key or by using your mouse to double-click and highlight the text. You may type over existing highlighted text. If the text is not highlighted, then you are inserting rather than replacing text. Let's use the Bank Account Information page as an example.

Edit boxes on a page

With the exception of the **Type** and **Status** drop-down list boxes, all of the data-entry fields on this page are edit boxes.

Prompts

 The small buttons with a magnifying glass to the right of several of the edit boxes (such as **Country Code**) are **prompt buttons**. Clicking the prompt button, or pressing ALT+5 while in the field containing the prompt, will open a separate page that allows you to search the database for the data you need. After locating the correct data, the system automatically returns you to the original page.



For more information about prompts, see Understanding Field-Level Prompts and Validation.

Formatting in Edit Boxes

Some edit boxes are associated with database fields that have formatting attributes assigned to them. For example, most Name fields are defined with a name format that requires you to enter data in the following way:

```
LastName,FirstName Initial
```

This format is case-sensitive, so capitalization counts. Also, note that there is no space between the comma after the last name and the first name. If a field is not case-sensitive, the system converts what you type to upper-case before writing it to the database.

Other types of formatting include the following:

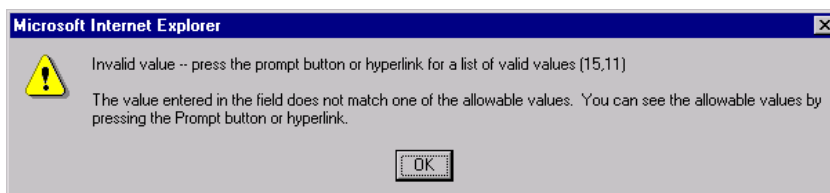
- Social Security, Social Insurance, or other government ID numbers
- Dates
- ZIP or other postal codes
- Multinational phone numbers

For these types of formats, you generally type only the characters; the system inserts the appropriate dashes and slashes for you. For dates, enter the standard six-digit date format, such as MMDDYY (include zeros) and the system will automatically change the display to show a four-digit year.



Number formatting may perform differently for power users that have personalized their system in the Personalization page.

If you enter a field value incorrectly, the system will highlight the field in which an invalid value was added. A warning message will also be displayed by your browser with an explanation of the problem.



Field format warning message

Long Edit Boxes

Long edit boxes store free-form text. If you type more lines than you can see at one time, use the scroll bar to the right of the box to move through text.

General Comments

Almain, Vivian Employee ID: TZ128

General Comments View All First 1 of 1 Last

Comments By: Steven Lee

Comment Date: 06/28/2000

Comment: This is a long edit box. Use the scroll bar to the right if the text in this area is so long that you cannot see the entire string in the available space.

Save Return to Search Next in List Previous in List

Long edit box

Radio Buttons

Radio buttons allow you to choose only *one* valid option from a set of options. Unlike check boxes, only one radio button in a group can be selected at one time. You select radio buttons by clicking in the desired circle or button; this enables the desired option.

Typically, radio buttons are associated with database fields that have valid values stored on the Translate table—a sort of all-purpose table where the system can store a relatively small, static set of values for a field not generally maintained by users. In many cases, radio buttons are grouped together visually in a group box.

Color Vision

☒ Normal

☐ Abnormal

Radio buttons in a group box

Check Boxes

Check boxes correspond to fields with only two valid values, usually enabled (selected) and disabled (clear), and the checkmarks toggle on and off as you click the check boxes. A click in an empty box selects that option. If you select a check box that already has a checkmark, then you have disabled the option. Unlike radio buttons, you can often select more than one check box in a related set.

Drop-Down List Boxes


Drop-down list boxes are edit boxes restricted to values from a predefined list. They look like a data-entry field with a prompt button at one end. Click the button with the arrow on it and a list of valid values drops down. You can choose only one item from the list.

To select a single item from the list, click the arrows until your choice is visible and then click the item itself. The value you choose displays in the box when the list retracts again. You can also type the first letter of the item in the box to select it. If there is more than one choice for a letter, typing the letter more than once toggles through the list. For example, in the Relationship to Employee field shown below you would type the “S” three times to select *Spouse*. Alternatively, you may use the down arrow key on your keyboard to select the desired field entry. Once your choice is highlighted, press ENTER.

Drop-down list box

Radio buttons and drop-down list boxes are used in similar situations—when the list of valid values is static and relatively limited. Typically, you’ll see radio buttons where there are fewer than six valid values, and you’ll see drop-down list boxes where there are more values or when page space is too limited to display several radio buttons.

Drop-Down Calendars

 When entering information in a date field, you can select the date prompt button to the right of the field to help you choose a date. Clicking the button opens a small calendar that displays the current month. Alternatively, you can press ALT+5 while in the field containing the calendar prompt to open the calendar.

The screenshot shows the 'Elections' tab in the 'Dependents' section of a PeopleSoft application. The user is 'Sawyer, Tom' with ID 'TZ173' and 'Empl Rcd#': '0'. The 'Plan Type' is 'Medical'. The 'Coverage' section is active, showing a 'Coverage Election' of 'Elect'. A calendar pop-up is displayed, showing the month of 'June' for the year '2000'. The calendar grid shows days from 4 to 30, with the 27th highlighted. The 'Deduction Begin Date' is set to '06/27/2000'. Other fields include 'Benefit Plan', 'Coverage Code', 'Health Provider ID', 'Employee Status' (Active), and 'Currency' (USD). Navigation buttons like 'Save', 'Return to Search', 'Update/Display', 'Include History', and 'Correct History' are visible at the bottom.

Drop-down calendar

To change the calendar month, select the drop-down list box arrow for the month. To change the year, select the drop-down list box arrow for the year. Click the correct day of the month to select the day. Pressing the Escape key, cancels and closes the calendar.







Grid and Scroll Area Controls

On some pages, you may want some of the fields to repeat so that you can enter multiple rows or occurrences of data. For this purpose, we use grids and scroll areas on a page. With these two control types, you have the ability to add, edit, and view multiple occurrences of data for a group of fields on one page. You can think of all the fields in each of these controls belonging to one table in your database. Each time you add a new row, you are actually adding a new row of data to the database table.

Rows of data in both grids and scroll areas always share the same high-level key. For example, for employee records, you may have more than one emergency contact listed for each employee. If you have two emergency contacts listed for an employee, each of those contacts has that employee's ID number as a key field. If you insert a new row, the system automatically copies the shared key data into the new row.

Navigating Through Data

Grids and scroll areas contain the same type of navigation structure. Instead of a traditional scroll bar to scroll through the rows of data, we use navigation buttons and links. The table below shows the action options and their function. You will find these buttons or links in the navigation header, within the row itself, or to the right of the tabs in a tabbed grid as appropriate.

Button or Link	Function
 Add	Inserts a new row
 Delete	Deletes the current row of data
	Displays the next row of data
	Displays the previous row
	In tabbed grid only, expands grid columns to the right so tabs are no longer needed.
	In tabbed grid only, expanded grid is returned to tabbed state.
<u>View All</u>	Displays all rows of data on a page. When this feature is enabled, the link morphs to read View 1 so that you can return to the original setting.
<u>Find</u>	Enables you to find a specific row of data.
<u>First</u>	Takes you to the first row of data
<u>Last</u>	Takes you to the last row of data

For keyboard shortcuts of the above buttons and links see Using Hot Keys.

In addition to these links and buttons, you will notice a numbering system for the rows. If a grid with five rows is set to view only one row at a time, the navigation header will read "1 of 5." If a grid is set to view three rows of data at a time, it will read "1-3 of 5." Click the arrows to view the next series of rows. Using the Work Location page as an example, we see that the Work Location scroll area contains two rows of data.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Smith, Mary Employee ID: TC015 Empl Rcd#: 0

Work Location View All First 1 of 2 Last

Employee Status: Active Date Created: 07/27/2000

*Effective Date: 07/27/2000 Effective Sequence: 0 *Job Indicator: Primary Job

Action / Reason: Hire

Position Number: 001 Position Entry Date: 02/01/1990

Position Data Override Position Management Record

*Regulatory Region: USA United States

*Company: RCB ST - Test Company 1

*Business Unit: BNGEN Benefit Administration

*Department: T001 ST - HR Department Department Entry Date: 02/01/1990

Location: 001 Corp HQ

Supervisor ID:

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Next in List Previous in List Previous tab Next tab Update/Display Include History Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Sample scroll area

Adding Rows

With the **Work Location** scroll area in the screen shot above as an example, you'll notice that if you click the **+** button, the navigation header will show that there are three rows of data in the table rather than just two. Because this table is effective-dated, the **Effective Date** field will contain the current date.

If you do not insert a new row, any data you enter will overwrite the existing data in that row. The system does not prompt you to insert a row; it assumes that you want to type over existing information. However, the changes you make will not take effect until you save the page. If you exit the page without saving, the data you typed over will remain intact.

Deleting Rows

You can also delete rows of data from a SQL table. Select the row you want to delete by using the navigation header or by clicking a field in the row. Click the **-** button. The system gives you a confirmation message asking if you want to proceed with the deletion. It also reminds you that the row will not be deleted from the database until you save the transaction; however, the row is automatically removed from the grid or scroll area. To retrieve the row, click Back button in your browser or close the transaction without saving your changes. Any other changes you made to the page will also not be saved.

Finding Data

The Find feature on a grid or scroll area enables you to locate specific data. This is particularly useful if your table contains hundreds of rows. Note that this feature allows you to search the

data within the grid or scroll area only. It does not search for any data outside the control. Find will look for matches in edit boxes, display-only fields, disabled or gray fields, dynamic links, and text in long edit boxes. It will not find column headings, field labels, text values in icons, static links, and hidden fields. Find will search from the left-most visible object of the current row down, based on the text you enter in the search prompt.

The Find feature is represented by a link, Find, in the navigation bar of your grid or scroll area. When you click the Find link, a dialog box appears prompting you to enter your search string. Then click OK. The Find feature will search through all rows of data in the buffer and bring the first occurrence in which your search string appears to the top of the row list in the grid. If you are in a scroll area that shows only one row of data at a time, the Find command will open that row of data. To find the next occurrence, click the Find link and enter your search string again.

In the example below, we want to find out how much was spent on lodging for this business trip. Since lodging does not appear in the rows currently visible, Find will open a new display of rows so that the first row containing the word *“lodging”* appears as the first row in the grid. Note that on tabbed grids, Find searches only the active tab.

The screenshot shows the 'Employee Business Expense Time' application for Employee Smith, Betty (ID: S9MULTJOB10). The 'Expense Period End Date' is 08/03/2000, and the 'Expense Period Total' is 831.00 USD. The 'Business Expense Details' grid shows two rows: 'Meals' for 55.00 USD (dinner with client) and 'Telephone' for 23.00 USD (calls to the office). An 'Explorer User Prompt' dialog box is open, asking for a search string. The search string 'lodging' is entered in the text field. The dialog has 'OK' and 'Cancel' buttons. At the bottom of the application window, there are buttons for 'Save', 'Return to Search', and 'Next in L'.

Using the Find feature in a grid


Find searches only the current scroll level. If the **Employee Business Expense Time** scroll area above contained the Find link, activating it would search the data in that scroll area only. It would not search the grid data as well. Each control, if it is set up to perform Find, will have a separate Find link in the navigation header of that control.

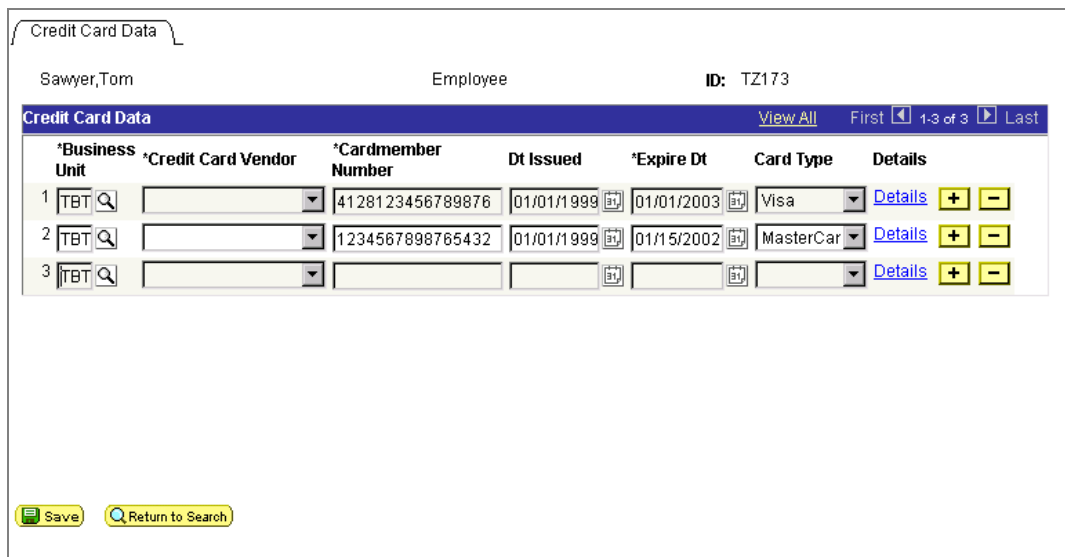


Your browser may also contain a Find feature. This Find tool, however, will not search through data in your PeopleSoft database. It will search the html code only for what appears on the current open page. Thus, it will search through only field headings, read-only text, and headings in grids, group boxes, and scroll areas.

Grids

Grid controls resemble and behave like an embedded spreadsheet with column headings, rows, and cells. The cells are generally equivalent to regular edit boxes and allow you to enter data as if you were in a spreadsheet program. Or, you might see a grid that contains a drop-down list box, check box, image, link, or button, in addition to edit boxes. Also, the cells may sometimes contain display-only information.

To navigate through the data in the grid, use buttons and links in the navigation header. When you add a new row, it is placed below the row in which you are clicking .





Credit Card Data							View All	First	1-3 of 3	Last
*Business Unit	*Credit Card Vendor	*Cardmember Number	Dt Issued	*Expire Dt	Card Type	Details				
1 TBT		4128123456789876	01/01/1999	01/01/2003	Visa	Details	+	-		
2 TBT		1234567898765432	01/01/1999	01/15/2002	MasterCar	Details	+	-		
3 TBT						Details	+	-		

Save Return to Search

Grid displayed on a page

Grid fields may also contain look-up prompts and drop-down calendar buttons, like those shown in the **Credit Card Data** grid above. These prompt buttons behave in the same manner as they would if not in a grid. See Prompts and Drop-Down Calendars for more information.

Tabbed Grids

Tabbed grids provide a means of viewing multiple columns of information without having to scroll to the right to view them. By clicking the tabs just below the grid navigation bar, you can view the remaining columns of data for your grid. Alternatively, some grids may have an Expand All button  to the right of the tabs that enables you to expand the grid columns to the right such that no tabs are showing. You may then move between all the columns by pressing the TAB key or using your browser's horizontal scroll bar. To return the grid to its tabbed state, click the  button.

Defined Personalizations					
Personalization Options		Explanation Setup		First 1-25 of 25 Last	
User Option	Description	Field Format	Format Length	Record (Table) Name	Field Name
ADBTN	Tab over Add/Del Buttons (+/-)			XLATTABLE	PSYESNO
ADES	Afternoon designator (PM, pm)	Uppercase	5		
CALBTN	Tab over Calendar Button			XLATTABLE	PSYESNO
CSYM	Currency Symbol	Mixedcase	1		
CSYMP	Currency Symbol Position			XLATTABLE	CUR_SYMBOL_POS
DCSP	Decimal Separator	Mixedcase	1		
DFRMT	Date Format			XLATTABLE	PT_DATE_FORMAT

Tabbed grid with expand all button

Collapsible Grids

You may also encounter grids that can be collapsed or expanded. By clicking the right-pointing triangle in front of the grid heading, you can expand a grid that is hidden from view or collapsed. Below are the collapsed and expanded states of the National ID grid from the Eligibility/Identity page in the Personal Data component.



Collapsed grid

 A screenshot of an expanded grid. The header bar is blue with "National ID" and a left-pointing triangle icon. Below the header is a table with five columns: "Country", "National ID Type", "Description", "National ID", and "Primary ID". The first row contains the following data: "USA" (with a magnifying glass icon), "PR" (with a magnifying glass icon), "Social Security Number", "987-54-9876", and a checked checkbox (with "+" and "-" icons).

Expanded grid

Scroll Areas

A scroll area behaves like a grid, in that each occurrence represents one row of data in the database. You'll notice, however, that within a scroll area the fields are randomly arranged rather than setup like a spreadsheet. These field groupings, although not physically displayed in a row, should still be considered as rows of data in the database.

A scroll area looks like a group box with navigation tools in the navigation header. It does not actually contain a scroll bar that you would use to scroll up and down between the various rows. Instead, you use the buttons and links in the navigation header to help you "scroll" through the data rows. See Navigating Through Data for descriptions of these buttons and links.

The example below shows a simple scroll area on the **Work Location** page. Like the grid, a scroll area can contain a number of different field types as well as prompt buttons and drop-down calendar prompts.

The screenshot displays the 'Work Location' page for employee Mary Smith (ID: TC015). The page is divided into several sections:

- Employee Information:** Smith, Mary; Employee ID: TC015; Empl Rcd#: 0.
- Work Location Header:** Includes 'View All', 'First', '1 of 2', and 'Last' navigation links.
- Employee Status:** Active; Date Created: 07/27/2000.
- Effective Date/Sequence:** *Effective Date: 07/27/2000; Effective Sequence: 0.
- Action / Reason:** Hire.
- Job Indicator:** Primary Job.
- Position Information:** Position Number, Position Entry Date, Position Data Override, and Position Management Record.
- Regulatory Region:** USA (United States).
- Company:** RCB (ST - Test Company 1).
- Business Unit:** BNGEN (Benefit Administration).
- Department:** T001 (ST - HR Department); Department Entry Date: 02/01/1990.
- Location:** 001 (Corp HQ).
- Supervisor ID:** (Empty field).
- Data Entry Tabs:** Job Data, Employment Data, Earnings Distribution, Benefits Program Participation.
- Navigation Buttons:** Save, Return to Search, Next in List, Previous in List, Previous tab, Next tab, Update/Display, Include History, Correct History.
- Page Navigation:** Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation.

Sample scroll area

If you access the next row of data for Mary Smith on the **Work Location** page, you'll see that her second work location is in France. To add another location, you must insert a new row into the scroll area. In doing so, you are also inserting a new row into the database table.

Effective-Dated Scroll Areas and Grids

Many scroll areas and grids are controlled by an effective date and an effective-dated status. These scrolls can have two values: active and inactive. This enables you to keep a complete history of data for every value that you add. In most cases, you will never want to delete a value; you will only make it inactive. Thus, you can retain a complete history of all your data and table values—whether you changed them two years ago or want them to go into effect in two months—for trend analysis and other historical reports.

With all this information at your fingertips, you can “roll back” your system to a particular point from which you can perform analyses or projections for your company.

Union Address | Contact | Partner/Steward | Union Agreement | Earnings Codes

Bargaining Unit: 1234 Federal Employees Union

Union Code: 11

Scroll Area View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active + -

Union Scope: Local

Union Affiliate:

LMR Hours: 0 Fax Number:

*Description:

Short Description:

[Country](#) [Union Contact / Contract Info](#)

Save Return to Search Previous tab Next tab Add Update/Display Include History Correct History

[Union Address](#) | [Contact](#) | [Partner/Steward](#) | [Union Agreement](#) | [Earnings Codes](#)

Scroll through effective dates

For example, the Federal Employees Union recently changed its **Union Scope** from *Local*, as shown above, to *National*. Rather than writing over the existing entry, dated *01/01/1980*, which you need to retain for the records, you should add a row.

All the information is copied into a new row that is identified by the system date—usually today's date. All you have to do is enter the date on which you want this change to go into effect. In the new row, you can change the **Union Scope** to *National*. You should then save your changes.


Just as soon as you finish saving this new data, the employees of your company decide to change unions, as of today's date: August 2, 2000. You use the **Status** field, along with the **Effective Date** field, to maintain an accurate history of this.

Click to insert a new row.

- Enter the date the union becomes inactive in the **Effective Date** field.
- Change the status to *Inactive*.
- Save your changes.

By inserting a new row, you maintain the fact that the Federal Employees Union was an active code for a certain period of time—the duration controlled by the *Active* effective date and the *Inactive* effective date. If you simply make the code *Inactive* without inserting a new row, or if you delete the code altogether, you retain no history of this ever having been an active code on the database.

Because the system date is at or after the new effective-dated row you've created, the new information becomes the current row. That means the row you saw before you added a new row is now historical information. If you were to return to this page and click **Update/Display**, which displays only current and future rows, you would see only the last data row you entered. If you wanted to see the other data rows, you would have to click **Include History**.


To make a correction to incorrect data already in the system, you'll use the  **Correct History** button. You don't need to perform a row insert, because the row of data already exists and you don't need to maintain incorrect information.



For more information about effective-dated status, see Understanding Effective Dates.

Multiple Scroll Areas and Grids on a Page

As you work with PeopleSoft applications, you will encounter pages that contain multiple scroll areas and grids. They may be one on top of the other or side by side, or they may be contained within each other (nesting). The fields controlled by one scroll area or grid are associated with only one database table. Those pages with multiple scroll areas or grids contain fields that write to multiple tables.

The page below, Competency Assignment, contains two grids side by side. With this format you can transfer data from one grid to the other. In this example, you select the Category and Type from the drop-down list boxes to populate the Source Competencies grid on the right. You can then select which Descriptions you would like to appear on John Smith's evaluation by selecting the check boxes next to the Description and then clicking . This will populate the Assigned Competencies grid.

Grids side by side

Once you have assigned the competencies to the evaluation, you can evaluate John on the Competency Rating page. The Competency Rating page below contains the Assigned Competencies grid nested within the Competency Evaluation scroll area.

Competency Evaluation Competency Assignment Competency Rating Competency Verification

Smith, John Employee ID: FG7025

Competency Evaluation View All First 1 of 1 Last

Evaluation ID/Type: 01 Customer

Assigned Competencies View All First 1-5 of 5 Last

Competency	Effective Date	Proficiency	Interest Level		
Ability to listen & respond	08/02/2000	4-Very Good	2-No Preference	+	-
Set & achieve goals	08/02/2000	3-Good	2-No Preference	+	-
Debates issues unabrasively	08/02/2000	1-Little	2-No Preference	+	-
Conceptual thinking	08/02/2000	4-Very Good	2-No Preference	+	-
Abstract thinking	08/02/2000	2-Fair	2-No Preference	+	-

Save
 Return to Search
 Next in List
 Previous in List
 Update/Display
 Include History
 Correct History

[Competency Evaluation](#) |
 [Competency Assignment](#) |
 [Competency Rating](#) |
 [Competency Verification](#)

Nested grid in a scroll area

The **Evaluation ID/Type** fields associated with the outer scroll area refer to the type of evaluation, while those associated with the inner scroll area, **Assigned Competencies**, are associated with the specific competencies included in the evaluation. So during his first evaluation (by the customer), John was evaluated on his ability to listen and respond among other criteria. For his second evaluation (by his employer), he might be evaluated on his knowledge of financial planning and banking procedures.

Another way of looking at nesting is to think of the scroll area and grid as having a parent/child relationship. The table that stores information about individual competencies is a child of the table that stores information about particular evaluations. Child tables share the same key structure as the parent tables, plus one or more additional keys to identify individual rows uniquely. If you insert new rows in the parent table, the fields on that table as well as the child table are cleared because these tables are not effective-dated.

Understanding Field-Level Prompts and Validation

Some edit box fields are linked to database prompt tables, which store values for information shared across your organization, such as department IDs, country codes, and state codes. They're called prompt tables because you can prompt the system to give you a list of values from which you can select the correct value. In many cases, fields are defined so that the system edits or validates the values you enter against a prompt table and ensures that the values are valid.

Many of these values have individual prompt tables of their own. For example, company codes and department IDs are each stored in their own respective tables: COMPANY_TBL and DEPARTMENT_TBL. Fields prompting against this kind of prompt table appear as edit boxes on your screen with a prompt button to the right.



When you click the prompt button (or select Alt+5), a lookup page opens, allowing you to search for the value you need. For example, to determine the department ID for an employee,

on the Work Location page, press the prompt button next to the Department ID field. The Lookup Department page then opens.


Job Data


Lookup Department


SetID: TBGEN

Department:

Description:

Company: 

Location SetID: 

Location Code: 

Budget with Department:

[Lookup](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Lookup Department page for Job Data

You can click the **Lookup** button or press ENTER to see a list of all valid departments. Or, you can type in the full or partial department name in the **Description** field to find the value you need.


Job Data


Lookup Department


SetID: TBGEN

Department:

Description:

Company: 



Location SetID: 

Location Code: 

Budget with Department:

[Lookup](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View All First  1-28 of 28  Last

Department	Description	Company	Location SetID	Location Code
S10100	Office of the President	(blank)	TBGEN	(blank)
S10200	Human Resources	(blank)	TBGEN	(blank)
S10300	Controller	SCA	TBGEN	001
S10400	Retail Banking Administration	SCA	TBGEN	001
S10500	Business Services	(blank)	TBGEN	(blank)
S10600	Branch Office Administration	SCA	TBGEN	001

Lookup Department page with Search Results

When you find the department you need, click the link in the **Department** or **Description** columns and the system automatically opens the **Work Location** page again and places that value in the **Department** field.

Alternatively, if you know a partial value of the department ID you can type that into the main page and then click the prompt button. The **Search Results** in the **Lookup Department** page are already populated with all the choices available to you based on the partial value you entered.

Field Validation

When you associate a field with a prompt table, you can also enforce the validation of keys. For example, on the State Names table we include Country Code as a high-level key. In other words, each state or province is associated with a country: California with USA, New Brunswick with Canada. So not only must you enter a state/province value that is a valid value on the State Names table, but it must also be a state within the country you enter in the Country field. The State value is not validated until you enter a Country value.

For example, if you change the Country field to Canada (CAN) and then try to change the State field to another state (not Province) value, you'll get an error message. To resolve the error, you must clear the data in the State field, change the Country back to USA, then enter the State value again—or enter a Canadian province as the State value.

Deferred Processing

As you work with different pages in your application, you may notice that certain pages process data differently. For example, you may find that when you enter a date such as *1/1/01* into a field and press TAB to get to the next field, the date you enter is validated against the database and returns a full date of *01/01/2001*. And yet on another page with a date field, this type of validation does not occur. This simply means that the programmers have set what is called Deferred Processing on the fields and page so that the system does not validate the data for each field as you TAB through a page.

Deferred processing speeds up the data-entry process. You can enter in all the data for your page without unnecessary trips to the server for data validation. The system will validate the data only when you click the Save button or navigate to another page in the component. If there are any errors in your data, you will be notified at this time. Error messages will indicate the field in which the data is invalid.

Some expert users may be able to control processing for their page by using the Refresh button in their toolbar. Note that access to this feature is controlled by your security administrator.

CHAPTER 4

Working with Processes and Reports

Although much of your interaction with the PeopleSoft system involves working with the online pages of a PeopleSoft application, you'll also execute off-line, or batch, processes that run in the background while you're still using the application or even after you've left the office.

A batch process is a predefined process or program that runs independent of any end user intervention. Some typical, off-line processes are payroll, journal posting, complex mathematical calculations, or generating reports that you share with colleagues.

You run off-line (batch) processes in the PeopleSoft system using Process Scheduler Manager. Process Scheduler Manager allows your organization to define processes, submit requests for processes, and set up an "agent" that scans for submitted processes and runs them.

As an end user you'll only need to be concerned with successfully submitting process requests, monitoring their progress, and viewing their output in Report Manager. You can safely leave Process Definitions and configuring the Process Scheduler Server Agent for the technical staff at your site.

The following sections briefly introduce you to the fundamentals of submitting and monitoring a process request.

Requesting Reports in PeopleSoft Applications

The process of printing a report has four major steps:

1. Select the report you want to print.
2. Enter the parameters for the report.
3. Specify where and when you want the report to run.
4. Choose the report output type and the report distribution method.

This section discusses these steps. Using these general steps, you can produce many different types of reports.



For more information on types of reports, see Introduction to PeopleSoft Reporting.

Selecting Reports

To run a report, select it from the appropriate menu in your PeopleSoft application. Many applications have a Reports menu that lists the available reports.

When you select a report menu item, you frequently have the choice of two actions: Add or Update/Display. Of course, you might want to print a predefined report, not update it, or add a new one. Both options enable you to print a predefined report. What you're adding or updating is not the reports themselves, but run controls.

Run Controls

When you want to run a report, you need to tell the system when and where you want it to print. For example, you might tell it to print the report on the database server at midnight, or on a Windows server every Sunday afternoon, or you'd like to see it in your browser right away. For most reports, you also need to set parameters that determine the content of the report, such as the business unit or time period on which to report.

A run control is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create (and save) a run control with those settings. The next time you run the report, you select the run control, and the system fills in the settings.

Run Control IDs

Each run control you create receives a unique run control ID. When you select a report from a menu, a search dialog box appears, asking for a run control ID. If you're in Add mode, enter a new ID for the run control you're about to define. If you're in Update/Display mode, enter an existing run control ID or press Enter and select from the list of available run control IDs.



If you're running a number of reports from the same menu in a row, you only have to enter the Run Control ID for the first report. When you select a second report from the menu, the application remembers which run control you're using.

Submitting a Process Request

You execute off-line processes from pages in your PeopleSoft application. There are a variety of ways to execute an off-line process. It really depends on the application. Navigate to the page from which you want to run your process. After you enter your run control ID, a page appears that allows you to enter specific parameters for that process. Here's an example of the Report page for the General Ledger Activity report.

General Ledger Activity

Run Control ID: MONTHLY [Report Manager](#) [Process Monitor](#) [Run](#)

Language: [English](#)

Report Request Parameters

Unit: [US001](#) Ledger: [LOCAL](#) View All First 1 of 1 Last

Fiscal Year: From: To: Adjustment Period

Currency: [USD](#) ☐ Include Adjustment Period(s) 1 + -

☐ Show Only Ledger vs. Journal Discrepancies ☐ Show Journal Detail ☐ Display Full Numeric Field

Chartfield selection Find First 1 of 1 Last

*Sequence ChartField Select Summarize Detail Value

☐ ☐ ☐ ☐ -

+ +Add Update/Display

General Ledger Activity page

You can change any of these settings. Keep in mind, though, that your changes are saved to the run control when you save or run the report.

To run your report, click **Run** and the Process Scheduler Request page appears.

Specifying Where and When to Run Reports

You submit a process request from the Process Request Dialog page in your browser. This page shows you the options that you have selected for a particular process request and what processes are available for you to submit.

Process Scheduler Request					
User ID: VP1		Run Control ID: MONTHLY			
Server Name: PSNT		Run Date: 08/02/2000			
Recurrence:		Run Time: 3:46:24PM			
Time Zone:		Reset to Current Date/Time			
Process List					
Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	General Ledger Activity Report	GLS7002	SQR Report	Web	PDF
OK Cancel					

Process Scheduler Request page

The options available to you on this page are determined by your security profile. For instance, each end-user has a User Profile, which is linked to one or more *Roles*. A *role* is a group of end-users with a specific identity, and each role has one or more Permission Lists that control what a user can and can't access. You can only run processes that are associated with your Permission List. If you are in the HR department, you most likely belong to an HR role and therefore can only run HR processes. The number of processes that appear in the list on the Process Scheduler Request page are directly associated with your security profile.

Select the run options that you want to use in running your process. Depending on your security, you can select the server, and run date and time variables for your process. Next, select the checkbox in the Process List for each process that you want to run.



For more information about options for running your process, see [Scheduling a Process Request](#).

PeopleSoft 8 gives you the option to create new output types (including email and Web) and to create distribution lists for email and Web viewing.

The Distribution Detail page allows you to choose the recipients of your process output. To set up distribution for your process output, click

If the process that you are running allows output that can be emailed (for example, Crystal can create Adobe Acrobat (.pdf) files), you can enter an email subject and message and send the output to a group of email addresses.



For more information about setting up report distribution lists, see Setting Report Distribution.

Clicking OK will queue your process request.

Monitoring a Process Request

When you click OK from the Process Scheduler Request page, you are returned to your Application page. To check the status of your report, select the link to Process Monitor or select PeopleTools, Process Monitor, Inquire, Process Requests.

When you run a report from a PeopleSoft application, the system automatically starts Process Monitor. Process Monitor is a tool designed to track the status of all completed and pending Process Scheduler requests.

Depending on how much data you ask the system to retrieve, and depending on the system's current processing load, your report might take only a few moments or considerably longer to run.

Process List

Server List

View Process Request For

User: VP1

Type:

Last: 30 Minutes

Refresh

Server:

Run Status:

Instance:

☐ View Job Items

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
1004	SQR Report	GLS7002	VP1	08/02/2000 3:46:24PM PDT	Success	Details
1003	Application Engine	GL_JRNL_ARCH	VP1	08/02/2000 3:45:59PM PDT	Success	Details
1001	Application Engine	GL_JRNL_ARCH	VP1	08/02/2000 3:29:53PM PDT	Success	Details
1000	Application Engine	GL_JRNL_ARCH	VP1	08/02/2000 3:29:53PM PDT	No Success	Details
998	COBOL SQL	GLPJEDIT	VP1	08/02/2000 3:19:32PM PDT	Success	Details

Save

Previous tab

Next tab

[Process List](#) | [Server List](#)

Checking Process Status with Process Monitor

Your user ID appears in the **User** list box. If the list of processes is too long, you can use the navigation arrows on the screen to scroll through the list. Use the **Server**, **Type**, **Run Status**, **Last**, and **Instance** list boxes to limit the processes that Process Monitor displays.

Click **Refresh** to update this page with the latest system activity. If the **Run Status** column says **Initiated** or **Processing**, the report is still running. When it says **Success**, the system has finished running the report.



For more information about options for viewing your process, see Using Process Monitor.

Viewing Reports in Report Manager

Report Manager is like your own personal “in box” of reports and processes that you have access to. It provides a secured means to view report content, check the status of a job, and see content detail messages. Select PeopleTools, Report Manager, Inquire, Report List to view your list of reports.

You can also link to Application Engine and COBOL log and trace files by selecting the **Details** link on the page.

Report List Archived Reports

View Reports For

User: VP1

Process Type:

Status:

Last: 1 Hours

Refresh

Report List

View All

First 1-7 of 7 Last

Select	Report ID	Prce Instance	Report Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	315	1004	General Ledger Activity Report	08/02/2000 3:47:42PM	Acrobat (*.pdf)	Posted	Details View
<input type="checkbox"/>	310	995	Copy Journal SQR	08/02/2000 3:16:20PM	Acrobat (*.pdf)	Posted	Details View
<input type="checkbox"/>	309	994	Batch Journal Import	08/02/2000 3:13:10PM	Acrobat (*.pdf)	Posted	Details View
<input type="checkbox"/>	308	993	Batch Journal Import	08/02/2000 3:12:49PM	Acrobat (*.pdf)	Posted	Details View
<input type="checkbox"/>	307	992	Batch Journal Import	08/02/2000 3:06:03PM	Acrobat (*.pdf)	Posted	Details View
<input type="checkbox"/>	306	989	General Ledger Activity Report	08/02/2000 2:58:04PM	Acrobat (*.pdf)	Posted	Details View
<input type="checkbox"/>	303	985	Batch Journal Import	08/02/2000 2:50:52PM	Acrobat (*.pdf)	Posted	Details View

Delete

Click the delete button to delete the selected report(s)

Save


Previous tab

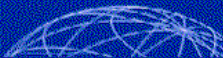
Next tab

[Report List](#) | [Archived Reports](#)

Report List page

To view your report output, select Detail and the Report/Log Viewer page appears in another browser window.



Report/Log Viewer


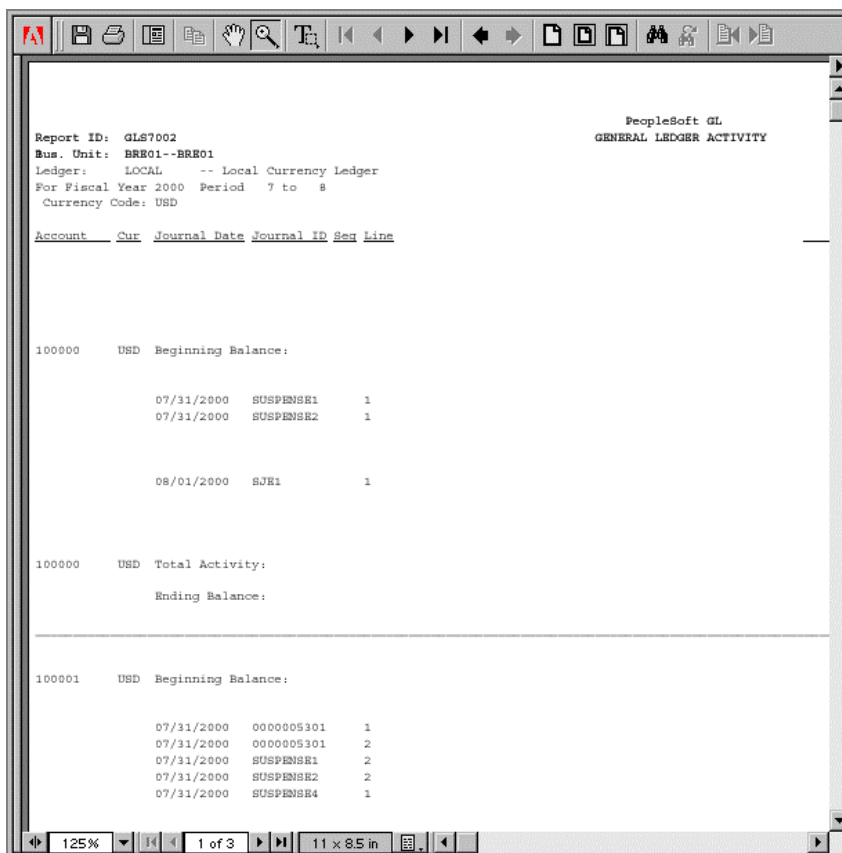
Instance:	1004	Type:	SQR Report
Name:	GLS7002	Run Cntl ID:	ACCTG
Status:	Success	Submitted By:	VP1
Server:	PSNT	Recurrence:	

General Ledger Activity Report

Name	Size	Creation Date
Trace File	95 bytes	Wed Aug 02 08:24:50 2000
GLS7002_880.PDF	4870 bytes	Wed Aug 02 08:25:04 2000
Message Log	1203 bytes	Wed Aug 02 08:24:50 2000

Report/Log Viewer page

Click the link to the report or the associated file that you want to view. In this example, the General Ledger Activity report appears in Adobe Acrobat format.



PeopleSoft GL
GENERAL LEDGER ACTIVITY

Report ID: GLS7002
 Bus. Unit: BR01--BR01
 Ledger: LOCAL -- Local Currency Ledger
 For Fiscal Year 2000 Period 7 to 8
 Currency Code: USD

Account	Cur	Journal Date	Journal ID	Seq	Line
100000	USD	Beginning Balance:			
		07/31/2000	SUSPENSE1		1
		07/31/2000	SUSPENSE2		1
		08/01/2000	SJE1		1
100000	USD	Total Activity:			
		Ending Balance:			
100001	USD	Beginning Balance:			
		07/31/2000	0000005301		1
		07/31/2000	0000005301		2
		07/31/2000	SUSPENSE1		2
		07/31/2000	SUSPENSE2		2
		07/31/2000	SUSPENSE4		1

125% 1 of 3 11 x 8.5 in

Report in Adobe Acrobat

CHAPTER 5

Using Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve several steps and several people working together. For example, when you enter an invoice, you are really initiating an approval and payment process: someone else reviews and approves it, and a third person submits payment to the vendor. The term workflow refers to this larger process.

To facilitate this type of multi-user process, PeopleSoft can automatically trigger workflow routings—notifications to inform other people of the work awaiting them. So when you enter that invoice, PeopleSoft can automatically notify the appropriate approver that the invoice has been submitted and is awaiting review.

This topic explains what you see when you trigger or receive a workflow routing.



For more information about setting up PeopleSoft workflow, see PeopleSoft Workflow.

Receiving Workflow Notifications

PeopleSoft offers three types of workflow notifications: worklist, email, and Lotus Notes forms. Although this discussion is focused on worklists, be aware that you may also receive workflow notifications through email or as a Lotus Notes form.

When you receive a non-worklist notification, the notification includes a link that you can follow to access the PeopleSoft system and do the necessary work.

Using Worklists

When you're using a workflow-enabled application, the most obvious change in your day-to-day operations is the use of worklists.

A worklist is an organized list of the work items awaiting your attention. You select items to work on from a worklist, and selecting an item automatically brings up the pages you need in order to work on it. You bypass any other navigational structure and work directly from the worklist.

Worklist Page

The Worklist page provides summary information about all items on your personal Worklist. This page also provides links enabling you to view additional details about the work, to perform the indicated work, and to reassign work items.

To view your Worklist, select **PeopleTools, Worklist, Use, Worklist**.

Worklist for PTDMO: Unger,Annette				
From	Date From	Work Item	Link	
Unger,Annette	07/20/2000	Activity Guide Demo	ACTIVITY GUIDE DEMO	Mark Worked Reassign
Duncan,Joanne	03/24/1998	Project Assignments	UPGTEST, Upgrade Test	Mark Worked Reassign

First 1-2 of 2 Last

Work List: Refresh Detail View

Worklist page

By default, you see all work items assigned to you in order from the oldest to the newest. Click any of the column headings to sort work items according to the data in that column.

The **From** column shows who triggered the work item.

The **Date From** indicates when the work item was triggered.

The **Work Item** is the type of activity you need to carry out. You can have multiple entries all with the same work item. For example, if you approve expense reports, you may have several entries with *Expense Approval* in the Work Item column. Each of these entries represents a different expense report that requires your attention. To view only entries with a specific Work Item, select that Work Item from the **Work List** field.

The **Link** takes you to the page where you work the item. This is the target page. The target page is specific to the type of work you're doing. For example, the link for an expense approval item takes you to the page where you can review and approve expense reports.

Mark Worked enables you to remove an item from your worklist without actually going to the target panel. You shouldn't use this option unless the item is a simple notification and there is no additional work required.

Reassign enables you to forward the item to another user. This also removes the item from your list.



For more information, see To reassign a worklist item to another user.

As items are added to and removed from your Worklist, click **Refresh** to update the page to show the most recent changes.

Detail View transfers you to the Worklist Details Page, where you can see additional information about each item.

To work an item in its target page:

1. Click the **Link** for the item you want to work.

You are transferred to the page where you can perform the required task. Once you work the item, it automatically disappears from your worklist.

To manually mark an item as worked:

1. Click Mark Worked.

The item disappears from your Worklist.

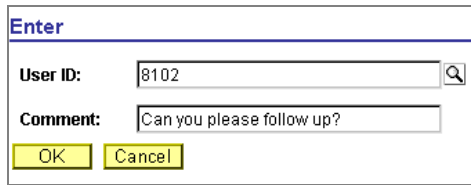


Marking an item worked without actually working it can be dangerous because there is no guarantee that the work has actually been performed. This option is appropriate when the entry is a simple notification with no follow up necessary.

To reassign a worklist item to another user:

1. Click Reassign.

The Reassign page appears




Reassign page



Your organization can choose to prevent particular types of items from being reassigned.

2. Enter the **User ID** for the person to whom you are reassigning the item.

Click the  Search button for help finding the appropriate User ID.

3. (Optional) Enter a **Comment**.

The comment becomes part of the worklist item when it appears in the assignee's Worklist.

4. Click **OK**.

Worklist Details Page

The Worklist Details page provides additional information about items on your Worklist. All the information from the Worklist page is repeated here, along with the additional details.

To view Worklist Details, select **PeopleSoft, Worklist, Use, Worklist Details**.

Worklist for PTDMO: Unger,Annette						
From	Date From	Work Item	Link			
Timed Out Dttm	Previous User	Selected Dttm	Comment	Timed Out	Instance	Transaction
PTDMO	07/20/2000 12:35:23PM	Activity Guide Demo	ACTIVITY_GUIDE_DEMO	Mark Worked Reassign		
07/20/2000 12:35:23PM					2	2
PT75	03/24/1998 11:14:50AM	Project Assignments	UPGTEST, Upgrade Test	Mark Worked Reassign		
03/24/1998 11:14:50AM		07/20/2000 11:50:09AM			1	1

First 1-2 of 2 Last

Work List: Refresh At a Glance

Worklist Details page

In addition to the fields and buttons that are on the Worklist Page (accessible using the **At a Glance** button), this page includes additional details about each item.

Timed Out Dttm	The date and time when the item will time out if it isn't already worked.
Originating User	The user whose action triggered this item.
Selected Dttm	The date and time when you first selected this item (in order to work the item)
Comment	If the item was forwarded from another user, the comment (if any) entered by that other user.
Timed Out	Indicates if the item has timed out.
Instance	A unique identifier for each item of the same type.
Transaction	A unique identifier for each item in the worklist.
At a Glance	Transfers you to the Worklist Page.

Working Items

Depending on how the worklist item has been defined, there are different requirements for what actions are sufficient before the item is considered worked and removed from your worklist.

You cannot tell which type of worklist item you have just by looking at it, but understanding the different types that exist will help you understand why different items respond to different actions.




<i>Worklist Type</i>	<i>Description</i>
User Specified	A work item is marked as worked when you click the Mark Worked button. This option is typically used in situations where you may need to return to the same work item several times or wait for supporting information.
Saved	A work item is marked as worked when you save your work on the page assigned to the worklist. This option is typically used in situations where you can complete the item in one visit to the target panel.
Selected	A work item is marked as worked as soon as you select it from the worklist. This option is typically used when the work items serve primarily as a notification—just seeing the item is sufficient.
Programmatic	A work item is marked as worked by behind-the-scenes processing attached to the page. This option is typically used when the data on the page must be evaluated to determine whether the item can be considered worked.

Using Timeout Worklists

Items on your worklist have built-in timeout parameters. Depending on how your organization has chosen to handle timeout processing, you may receive an email or another worklist entry if you haven't worked an item by the time it times out.

When you open a timeout notification in your worklist, you are transferred to the **Timeout Worklist Data** page. You can also access this page by selecting **PeopleTools, Workflow Administrator, Use, Worklist Timeout Data**.

In this page, you can view information about the timed out work item, enter a comment on the item, or reassign the item to another user.

Timeout Worklist Data	
Business Process:	Approve Inventory Items
Activity:	Inventory Item Approval
Event:	Inventory Item Approval
Worklist:	Inventory Item Approval
Instance:	1
Timeout Worklist Information	
User ID:	MGR1 
Comment:	<input type="text"/>
Instance Available Date/Time:	03/09/97 2:04:37PM
Instance Selected Date/Time:	03/11/97 4:30:09PM
Late After:	03/09/97 2:04:37PM
 Save  Return to Search	

Timeout Worklist Data page

Triggering Workflow Events

When you enter a transaction that triggers a workflow notification, you may not even realize you've triggered anything. If the notification is going to another user's Worklist, the entire process happens behind the scenes.

However, if the notification is sent via email or as a Lotus Notes form, you need to be logged on to your email system. When you enter the transaction that triggers the email or form routing, the PeopleSoft system checks to see whether it has already logged on to the appropriate third-party software. If it hasn't, it asks you for your logon name and password and logs on. The person who receives the routing sees your name in the From field. PeopleSoft remains logged on to the third-party software for the remainder of the session.

CHAPTER 6

Using PeopleSoft Navigator

PeopleSoft offers multiple navigation methods for accessing application pages. The Using Menu Navigation section in this PeopleBook describes standard application menus. PeopleSoft Navigator is an alternative navigational structure that uses a process-oriented organization to show you how individual steps fit together into a single activity or process.

This chapter describes how to access and use PeopleSoft Navigator.



For more information about how to create Navigator maps, see Building Workflow Maps.

Advantages of PeopleSoft Navigator Advantages

Whereas menus are organized around areas of functionality, Navigator maps are organized procedurally. For example, the delivered menus for PeopleSoft HRMS are organized functionally: payroll-related pages appear under a different menu than benefits-related pages. Using Navigator's process-oriented organization, on the other hand, you might have a *Hire* activity that includes both payroll-related and benefits-related steps.

Navigator's process orientation also provides a big picture of the process, helping you to understand the overall flow of work in your organization.

Unlike menus, which provide text-only navigation, Navigator displays graphical maps. These maps can clarify relationships among the steps in a process and make your navigation through sequential tasks easier.

Navigator maps can also show you any workflow notifications that are triggered by changes you make in a page. Without Navigator, you wouldn't necessarily know when you trigger a workflow notification. A Navigator map can clarify when a notification is sent.



For more information about how Navigator maps illustrate workflow, see Understanding How Workflow Fits In.

Accessing Navigator

To access Navigator, select **PeopleTools, Navigator** from the standard application menu. Navigator appears as a two-part screen. On the left, you see a tree with nodes that represent various processes; on the right, you see the map that corresponds to the highest level of the tree.

The specific tree and map displayed depend on how your user profile is defined through PeopleSoft security.



Navigator homepage

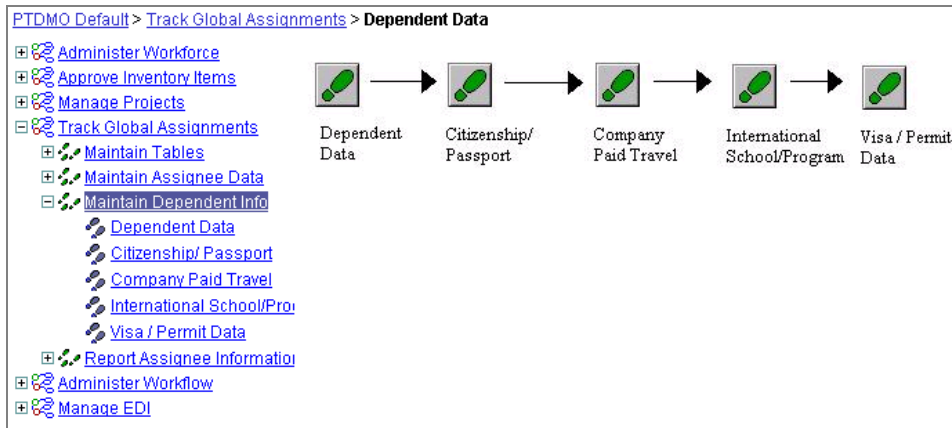
You can return to the standard application menus at any time by clicking **Home** in the page header.



Returning to the standard menus

Understanding the Navigator Hierarchy

Navigator maps are organized hierarchically, enabling you to drill down from processes to subprocesses to the lowest level page where an individual transaction occurs.



Navigator hierarchy

Icons seen in both the tree and in the maps represent the various levels in Navigator:

<i>Tree Icon</i>	<i>Map Icon</i>	<i>Name</i>	<i>Description</i>
		Business Process	A complete business task, consisting of one or more activities or of other business processes. A business process might include work that is done by multiple users and work that occurs over time in several stages.
		Activity	A subprocess of the business task, consisting of one or more steps. Normally, activities are made up of steps that are all completed by a single user in a relatively short time.
		Step	A discrete step in the activity corresponding to a single transaction executed on an application page or through an external program.

Working With Navigator

You can drill down through the Navigator hierarchy by opening nodes in the tree or by clicking icons in the map. Regardless of your method, both the tree and the map always show the currently selected item.

To select a tree node and simultaneously expand it, click either the node or the + (plus) button next to the node.

To collapse a tree node, click the – (minus) button to the left of the node.

To return to a higher-level map, click the appropriate tree node; you cannot use the map to move to a higher level.

Navigating to a Page

When you click a step—the map element corresponding to a single page—the corresponding page appears on the right side of the screen where the map is otherwise displayed. A page accessed through Navigator has the same access requirements as a page accessed through the standard application menus

For example, if you click the Dependent Data step in the Maintain Dependent Info map, you'll first see the Dependent Data search page. Only after you enter search criteria does the Dependent Data page appear.

PTDMO Default > [Track Global Assignments](#) > [Maintain Dependent Info](#) > **Dependent Data**

Dependent Data

Find an Existing Value

Search By:

EmplID:

[Advanced Search](#)

Navigator Tree:

- Administer Workforce
- Approve Inventory Items
- Manage Projects
- Track Global Assignments
 - Maintain Tables
 - Maintain Assignee Data
 - Maintain Dependent Info
 - Dependent Data**
 - Citizenship/ Passport
 - Company Paid Travel
 - International School/Pro
 - Visa / Permit Data
 - Report Assignee Information
- Administer Workflow
- Manage EDI

Search page in Navigator

PTDMO Default > [Track Global Assignments](#) > [Maintain Dependent Info](#) > **Dependent Data** [Next](#)

Dependent Data 1 | **Dependent Data 2**

Schumacher, Simon ID: 8001

*Dependent/Beneficiary ID: *Type:

*Dependent/Beneficiary Name:

Home Address and Telephone

☐ Same Address Phone As Employee

Address 1:

Address 2:

Address 3:

City:

County:

State: Zip:

Country:

Phone:

Application page in Navigator

All the standard page operations, including the **Save** and **Return to Search** buttons, are available. The Navigator tree also remains available, and you can use it to move to maps or to other pages

Navigating to the Next Page in an Activity

When an activity contains sequential steps, Navigator offers two ways to move through the sequence. To continue using the tree, click the next step in the activity. Alternatively, you can click the navigation links that appear at the top right of any page that is displayed in Navigator. Depending on where the page falls in the sequence of pages, links for the Prev (Previous) page and Next page appear.

PTDMO Default > Track Global Assignments > Maintain Dependent Info > **Citizenship/Passport** [Prev](#) [Next](#)

Dependent Citizen/Passport

Schumacher, Simon ID: 8001

Schumacher, Karen Dependent ID: 01

*Citizenship Country:

*Passport Number:

Issue Date: Expiration Date:

Issued By

Country:

State:

City:

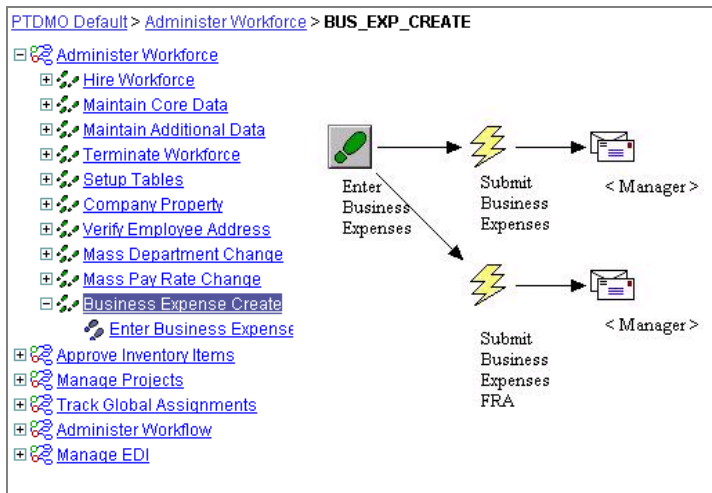
Comment:

Next and Previous links in a Navigator page

When you move from page to page, key fields are remembered so that you don't have to go through the search page unless you're moving to a page with different high-level keys.




Understanding How Workflow Fits In

Some Navigator maps incorporate a visual representation of associated workflow processing. The icons associated with workflow processing appear only in the maps, not in the Navigator tree. These icons do not do anything when you click them; they merely provide information.



Map with workflow icons

Some of the icons you are likely to see include:

<i>Icon</i>	<i>Name</i>	<i>Description</i>
	Event	A condition that triggers a workflow notification.
	Email Routing	A workflow notification that is delivered to the user by email.
	Worklist Routing	A workflow notification that is delivered to the user through that user's Worklist.



For more information about workflow and worklists, see Using Workflow.

Index

A

- access keys 1-15
 - menu navigation 1-16
- access keys, folder tabs 1-15
- action options defined 3-2
- Adobe Acrobat 4-7
- advanced search page 2-1
- application portal 1-2
- applications, browser-based 1-1

B

- basic search page 2-1
- breadcrumbs 1-1
- browser
 - find feature 3-13
 - navigation 1-5
 - terms 1-1, 1-2
- browser-based applications 1-1
- browsers
 - opening a new window 1-11
- buttons
 - calendar prompt 3-9
 - page navigation 1-13
 - page processing 1-12
 - search list navigation 1-13
 - search page 1-12
 - using 1-11

C

- calendar prompts 3-9
- CD-ROM, ordering ii
- check boxes
 - defined 3-5
 - using 3-8
- collapsible grids 3-15
- components
 - definition 1-2
 - folder tabs 1-7
 - opening 1-8
 - processing 1-7
 - related links 1-9
- connection, expired 1-5
- controls
 - grids 3-10
 - scroll areas 3-10

- correct history
 - defined 3-2
 - search page 2-2
 - when to use 3-4
- current data rows 3-1
- Customer Connection link i

D

- data-entry fields 3-4
 - deferred processing 3-21
 - entering names 3-7
- deferred processing 3-21
- demonstration database 1-1
- drop-down list boxes
 - defined 3-5
 - using 3-9

E

- edit boxes
 - calendar prompts 3-9
 - defined 3-5
 - formatting in 3-7
 - prompt buttons 3-6, 3-19
 - using 3-6
 - validation 3-19
- effective dates
 - row types 3-1
 - understanding 3-1
- effective-dated grids 3-16
- effective-dated scroll areas 3-16
- errors, password 1-4
- expand all button 3-14
- expired connection 1-5

F

- fields
 - entering data 3-7
 - format warnings 3-7
 - required 3-5
 - tabbing between 3-5
 - validation 3-19, 3-21
- find link
 - defined 3-11
 - using 3-12
- finding data 3-12
- folder tab access keys 1-15

folder tabs 1-7
future data rows 3-2

G

General Ledger Activity page 4-3
grids 3-10
 adding rows 3-12
 collapsing and expanding 3-15
 defined 3-5
 deleting rows 3-12
 effective-dated 3-16
 finding data 3-12
 multiple 3-18
 navigation buttons and links 3-10
 side by side 3-18
 tabbed 3-14
 using 3-14

H

historic data rows 3-1
home 1-5
hot keys 1-14

I

include history
 defined 3-2
 search page 2-2
 when to use 3-3

K

keyboard shortcuts 1-14
keys
 definition 1-2
 using 2-1

L

links 1-12
logging in 1-3
long edit boxes
 defined 3-5
 using 3-7

M

menu navigation access keys 1-16
menus
 definition 1-2
 navigation 1-5

N

navigation
 home 1-5
 three-column 1-5
navigation header 1-5
navigation header defined 1-2
Navigator
 leaving Navigator 6-2
nesting 3-18
new window 1-11
 language issues and 1-11
 tips for using feature 1-11

P

page
 definition 1-2
 processing buttons 1-12
 sign in 1-3
page activities
 defined 1-6
 Lcl 1-6
page navigation buttons 1-13
pages
 action options defined 3-2
 aesthetic elements 3-4
 database tables and 3-1
 effective dated 3-2
 General Ledger Activity 4-3
 opening 1-8, 1-10
 Process Scheduler Request 4-4
 Report List 4-6
 Report/Log Viewer 4-6
 saving 1-8
 search 2-1
 Timeout Worklist Data 5-6
 working with 3-1
password errors 1-4
PeopleBooks
 CD-ROM, ordering ii
 printed, ordering ii
PeopleSoft Customer Connection link i
PeopleSoft Internet Architecture
 buttons 1-11
 navigation 1-5
 terms 1-1
Peoplesoft sign in 1-3
Process Monitor 4-5
process request 4-3
 monitoring 4-5
 scheduling 4-4
Process Scheduler Request page 4-4
processing
 buttons 1-12
 components 1-7

- deferred 3-21
- prompt buttons 3-6
- prompt tables 3-19

R

- radio buttons
 - defined 3-5
 - using 3-8
- Report List page 4-6
- Report Manager 4-6
- Report/Log Viewer page 4-6
- reports
 - requesting 4-1
 - running 4-4
 - selecting 4-2
 - viewing 4-6
- requesting reports 4-1
- required fields 3-5
- run control IDs 4-2
- run controls 4-2

S

- scheduling process request 4-4
- scroll areas 3-10
 - adding rows 3-12
 - defined 3-5
 - deleteing rows 3-12
 - effective-dated 3-16
 - finding data 3-12
 - multiple 3-18
 - navigation buttons and links 3-10
 - using 3-15
- search criteria 2-2
- search pages
 - action options 2-2
 - advanced 2-1
 - basic 2-1
 - buttons 1-12
 - entering criteria 2-2

- understanding 2-1
- using wildcards 2-5
- search results 2-3
- shortcut keys 1-15
- signing in 1-3
- starting PeopleSoft 1-3

T

- tabbed grids 3-14
 - expand all button 3-14
- tabbing 3-5
- tables, effective-dated 3-1
- Timeout Worklist Data page 5-6
- transactions
 - accessing 1-8
 - opening related 1-9
 - processing 1-7

U

- update/display
 - defined 3-2
 - when to use 3-3

W

- warnings, field format 3-7
- wildcards 2-5
- workflow
 - notifications 5-1
 - triggering events 5-7
 - using 5-1
- Worklist Details page 5-5
- Worklist page 5-2
- worklists
 - reassigning 5-3
 - types 5-6
 - using 5-1

