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# Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications

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**September 2009**

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# Using PeopleSoft Applications Preface

This preface provides a general overview of the contents of Using PeopleSoft Applications.

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## Using PeopleSoft Applications

This PeopleBook introduces you to the various elements of the PeopleSoft Pure Internet Architecture and explains how to perform basic functions as you navigate through the system using the navigation hierarchy, components, and pages. While your application or implementation may differ in some cases, the topics in this book provide general knowledge of the use of browser-based PeopleSoft applications.

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## PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.



## Chapter 1

# Working With Browser-Based Applications

This chapter provides an overview of browser-based applications and discusses how to:

- Sign in to PeopleSoft applications.
- Use PeopleSoft Pure Internet Architecture navigation.
- Use the universal navigation header.
- Use the pagebar.
- Process components.
- Use buttons and links.
- Use keyboard shortcuts.
- Use accessibility features.

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## Understanding Browser-Based Applications

You use PeopleSoft applications in a purely internet environment, called *PeopleSoft Pure Internet Architecture*. PeopleSoft Pure Internet Architecture is a server-centric architecture that requires only that a web browser be installed on individual user machines.

The PeopleSoft Pure Internet Architecture is your "window" to PeopleSoft applications as well as other web-based applications and content. Within your browser, sign in to the PeopleSoft Pure Internet Architecture as you would when opening a website. The PeopleSoft Pure Internet Architecture uses a dynamic drop down menu for navigation and a *universal navigation header* that includes the following navigational tools: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. This navigation header appears at the top of every page as long as you are logged in.

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

See [Chapter 1, "Working With Browser-Based Applications," Understanding the Universal Navigation Header, page 8.](#)

## ***PeopleSoft Pure Internet Architecture Terminology***

PeopleSoft applications are made up of a navigational structure, components (groups of pages), and pages. Using these elements, you can enter new data or change, delete, and modify the existing data in your application. Using the PeopleSoft Pure Internet Architecture is similar to browsing web pages; it provides a simple, intuitive way of working with your database.

Here are some of the basic elements used in PeopleSoft Pure Internet Architecture:

<b>Main Menu</b>	The PeopleSoft navigation structure, located on the left side of your screen. The main menu contains links to content references, which enable you to access transaction pages, from which you can carry out actions and modify your data. Links display in a hierarchical format, some leading directly to transaction pages and some leading to other links. Menu items can expand or contract, depending on their content.
<b>Content Reference</b>	A link in the menu hierarchy that accesses a transaction page. A content reference is a reference to a uniform resource locator (URL) for the transaction page.
<b>Keys</b>	The display-only fields that uniquely identify your data. To display a page, you perform a search using the key fields, such as Empl ID (employee identification).
<b>Page</b>	The individual display and data-entry screens for each part of your PeopleSoft application. Pages appear in the browser window.

See [Chapter 3, "Using Keys and Search Pages," page 41](#).

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## **Signing In to PeopleSoft Applications**

Signing in to a PeopleSoft application is like opening a secured page on a website.

To sign in to a PeopleSoft application:

1. Open your default browser window.
2. Enter the URL for your application, or select the bookmark for the page where you want to work.

The Sign In page appears.

3. Select the language in which you want your transaction pages to appear.
4. Enter your user ID and password.

Your user ID and password are case sensitive. For security reasons, passwords always appear as asterisks in the display as you enter them.

5. Press Tab and Enter, or click the Sign In button to sign in.

The PeopleSoft online system validates your user ID and password. If either the user ID or password is invalid, the system displays an error message below the Sign In button. You must reenter your user ID and password, or contact your security administrator for assistance.

After you sign in, the mouse pointer turns into a small hourglass, signifying that the online system is initiating your request. Whenever the system accesses data in the database, the hourglass appears on your desktop. If you entered valid sign in information, the system displays the homepage for your PeopleSoft system.

PeopleSoft Pure Internet Architecture structure provides "single signon" access, which allows you to work in multiple PeopleSoft applications and databases without having to sign in to each application. If your site has not implemented single signon, the system prompts you to enter a user ID and password each time that you access a different PeopleSoft application.

For security purposes, your PeopleSoft system logs you out of your application after a period of inactivity determined by your security administrator. Prior to your session timeout, the system might provide a warning that your browser session is about to expire. You can continue with your current session by clicking the OK button in the warning message. If you do not respond within two minutes, the session ends and the expired connection page opens. To return to your application, click the Sign in to PeopleSoft link. The Sign In page appears, and you can once again sign in to your application.

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**Important!** To ensure data security in environments where multiple users have access to the same workstation, users should close the browser after logging out of PeopleSoft.

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## Navigating in PeopleSoft Pure Internet Architecture

PeopleSoft's browser-based interface provides several ways to access data in your database. This section discusses how to:

- Navigate by using the menu pagelet.
- Navigate by using the drop-down menu.
- Navigate by using navigation pages.
- Navigate by using the search field.

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**Note.** Do not use the browser Back button. Use application links and buttons to navigate PeopleSoft applications.

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### Using the Menu Pagelet

The menu pagelet navigation is an intuitive way of updating or viewing data in your database. The menu consists of a hierarchy of cascading folders and content references. Expanding and collapsing these folders, and selecting content references from within them, is one of the primary ways of navigating within PeopleSoft applications.



Menu pagelet

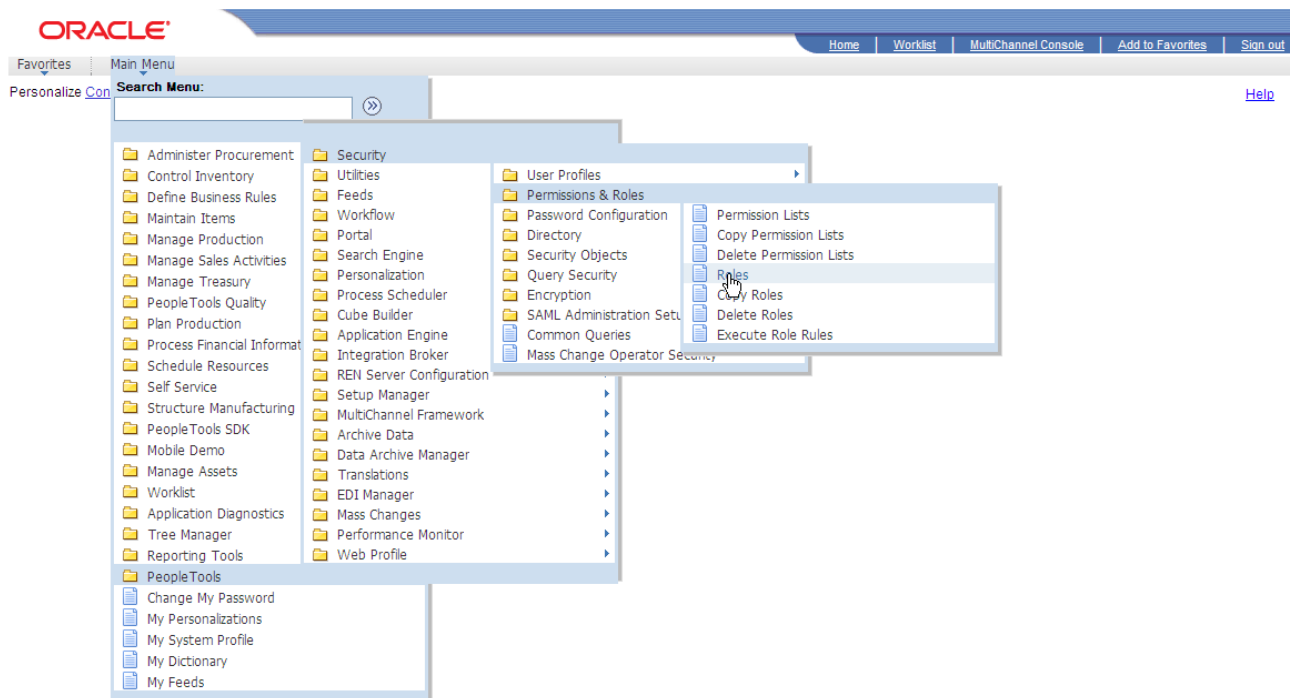
The main menu pagelet contains a list of the general areas to which you have access in the application. From this point you can expand any folder to access additional folders or content references that open transaction pages.

PeopleSoft applications use Asynchronous JavaScript and XML (AJAX) technology. Because of AJAX, when you click folders in the main menu, the system retrieves only the appropriate hierarchy for the selected link or folder, instead of refreshing the entire menu. When you click the folder image next to the folder name, only the specific folder contents are retrieved. When you click the folder link itself, then the entire hierarchy of the root portal registry contents and the folder contents themselves are retrieved and displayed. As you navigate the folders, the levels within the folder hierarchy change color for visual identification.

## Using Drop-Down Navigation

Drop-down navigation is another intuitive way of updating or viewing data in your database. Like the menu pagelet, drop down navigation consists of a hierarchy of cascading folders and content references.

When using drop-down navigation, you begin by clicking Main Menu. The Main Menu is located in the top left section of your page. When you click Main Menu, this causes the list of general areas to which you have access to appear. Hover your mouse over any folder and you will see a cascading menu open to the right. If there is no room to the right, the menu will expand to the left. The menu always opens in the viewable area and if the system cannot show the entire menu, scrollable images will appear as needed on the top and bottom of the menu. You can mouse over one of these images to scroll the menu. Click and hold the arrow to double the scrolling speed. You can also use the mouse wheel while in the menu to scroll. You can continue to hover your mouse through each cascading menu until you find the content reference that you want.



### Drop-down navigation

Although you can navigate directly to the content reference, at any point you can click a folder. This causes the navigation page to appear and creates a set of breadcrumbs to reveal the full navigation to the content. Each folder within the breadcrumbs is an active sub menu. If you click the element in the breadcrumbs, the sub menu appears. You do not have to go back to the Main menu.

You can sort the drop-down menu alphabetically by clicking the sort icon on the Main Menu window. Continue clicking to toggle through an ascending, descending, and portal sequence number sort. As you click the sort icon, the icon changes to indicate the direction of the sort.

---

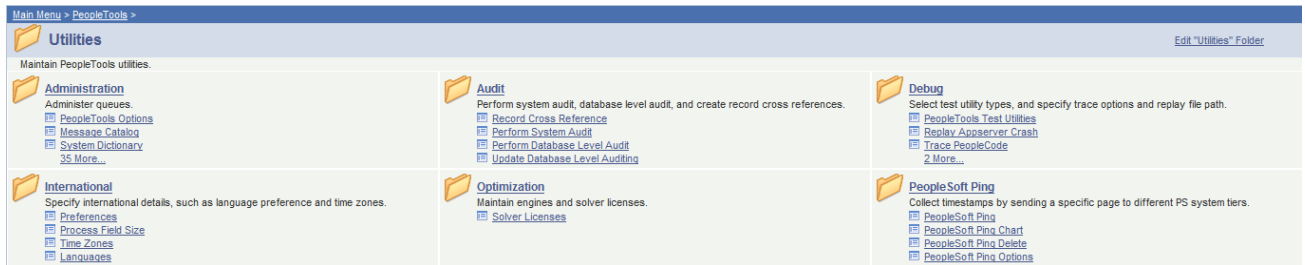
**Note.** The sort icon appears only on the main menu, however, any sort you initiate at the Main Menu level applies to all sub menus.

---

## Using Navigation Pages

PeopleSoft applications may include navigation pages that serve as alternatives to the menu pagelet, providing task-driven pages that offer intuitive access to pages needed to complete your business processes. These navigation pages may incorporate icons to make it even easier for you to navigate your application.

You access navigation pages by clicking a folder in the menu pagelet. Elements embedded in the folder, including content references and other folders, are arranged in a graphical format on a navigation page displayed to the right of the menu pagelet. For example, clicking the PeopleTools, Utilities folder in the menu pagelet displays the Utilities navigation page as shown here:



PeopleTools Utilities standard navigation page

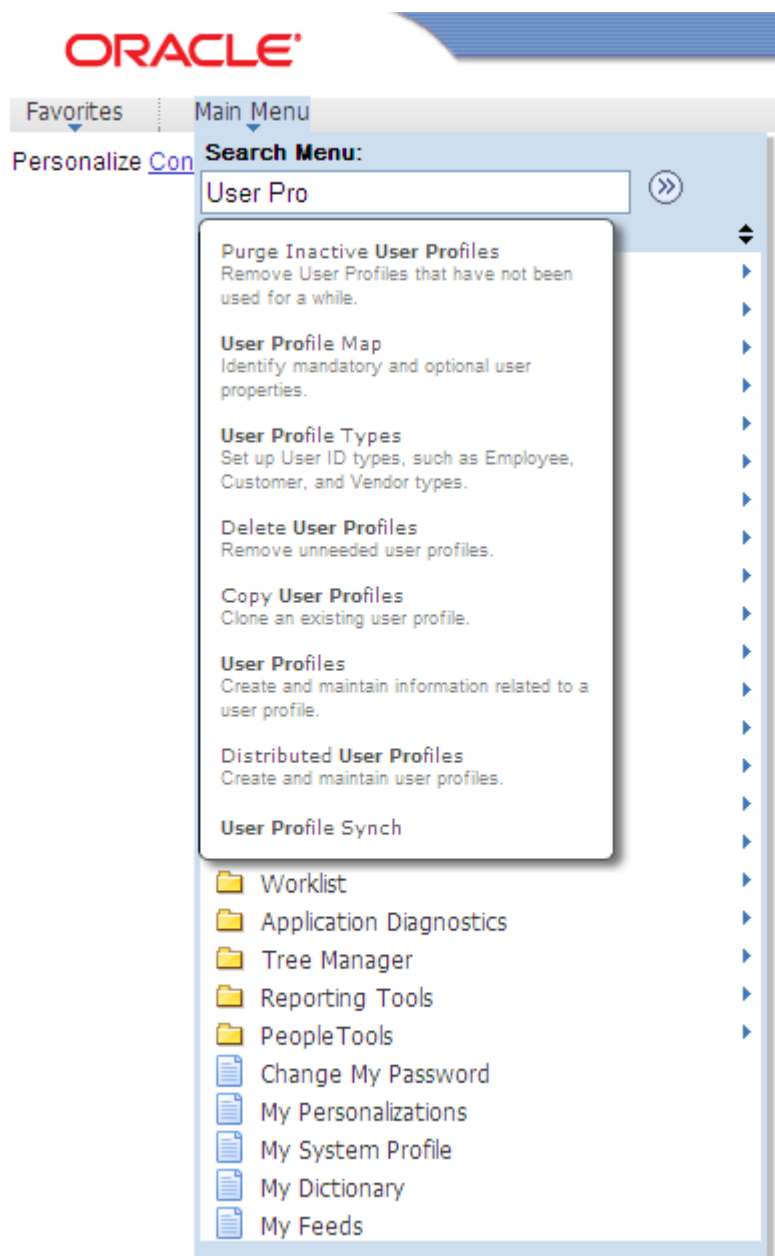
## See Also

*Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technologies*, "Working With Navigation Pages," Understanding Navigation Pages

## Using the Portal Search Field

Use the Search field to search for a registered content reference within the system. Enter the name of the page you want to find and press Enter or click the search button. As you type, you might see suggestions drop down below the search field. These suggestions help you narrow the search. Type ahead uses the text entered and searches for this text from the list of content references available from the portal registry. It returns the list of target content references only (no folders) which the current user is authorized to view. The target content reference label (defined in Portal registry) is checked for the search text entered by the user.





Search menu showing type ahead auto suggest popup window

Select from the list or continue to enter the page name click the search button.

---

**Note.** For the system to display type ahead suggestions and search results, your system administrator must create a search index in PeopleTools. If you consistently do not get any search results, contact your system administrator for more information.

---



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**Note.** The maximum number of automatically suggested entries that appear in the pop up menu when you begin typing is controlled in the general portal settings.

---

When you click the search button, this action opens the Search page displaying the results. If your search produces a large number of results, modify your search criteria, select the Search Within Results option, and then select Find to narrow your search further. Use the Customize Settings link to hide or show summaries of each search result and to control the number of search results that appear on each page.

---

**Note.** You must have full access to this weblib to get the suggestion list:  
`WEBLIB_PORTAL.PORTAL_SEARCH_PB.FieldFormula.ISCRIPT_PortalSearch.`

---

### See Also

*Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technologies, "Administering Portals," Managing General Portal Settings*

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## Using the Universal Navigation Header

This section provides an overview of the universal navigation header and discusses how to:

- Add pages to the Favorites menu.
- Edit the Favorites menu.
- Use the Recently Used menu.

## Understanding the Universal Navigation Header

The universal navigation header is located at the top of your PeopleSoft Pure Internet Architecture page and remains static as you navigate through the pages. The universal navigation header contains these links:

<b>Favorites</b>	Click to add the current page to your favorites list for easy accessibility. The favorites list is like your own list of bookmarks to components and transaction pages that you use frequently. Once you add a favorite, it appears under the Favorites menu. You can return to the page by clicking the Favorites menu and clicking the link for the page that you want to view. You can store favorites with a specific key, for example if you consistently access the ABC department, you can store a favorite that directly accesses the ABC department.
<b>Main Menu</b>	Click to access all folders, sub menus, and content references.
<b>Home</b>	Click to return to your homepage.
<b>Worklist</b>	Click to access the Worklist page, which provides summary information about all items on your personal worklist. This page also provides links enabling you to view additional details about the work, perform the indicated work, and reassign work items.  See <a href="#">Chapter 7, "Using Workflow," Working with Received Notifications, page 122.</a>

**MultiChannel Console** If you are defined as an agent in PeopleSoft MultiChannel Framework, click to access and manage tasks assigned to you. This is an optional setting that your system administrator enables. If you do not have access to this feature, the system displays a warning message to that effect.

*See Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft MultiChannel Framework, "Configuring PeopleSoft MCF Agents."*

*See Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft MultiChannel Framework, "Managing Tasks and Using Chat in PeopleSoft MultiChannel Framework."*

**Performance Trace** Click to monitor the performance of a business process that you typically complete. Because this is an optional setting that your system administrator enables using PeopleTools Security, it may not display to all users.

**Sign out** Click to sign out of the application and return to the Sign In page.

---

**Important!** For security purposes it is important that you sign out when you are finished with your PeopleSoft session rather than simply closing the browser window. Other users could potentially access your cached homepage from another portal if you do not sign out properly.

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**Note.** Guest accounts do not have access to Favorites or Add to Favorites. You must have the appropriate security before you can access favorites.

---

## Adding Pages to the Favorites Menu

To add pages to the Favorites menu:

1. Open the page that you want to designate as a favorite.
2. Click Add to Favorites in the universal navigation header.

The Add to Favorites modal window appears, with the page name as the default in the Description field.

3. Update the description for the favorite, if necessary.
4. Click OK.

The favorite is saved and displayed in the Favorites menu.

---

**Note.** If pages are not registered in the portal registry, you cannot add them to the Favorites menu. See your portal administrator for assistance.

---

## Editing the Favorites Menu

On the Edit Favorites page you can relabel favorites, delete favorites, or modify the sequence in which they appear in the Favorites menu.

To edit favorites:

1. Click the Favorites menu.
2. Click Edit Favorites.

The Edit Favorites page appears, displaying a grid with the favorites that you selected and their sequence numbers. If there are no favorites currently saved, a message indicates this in place of the Favorites grid.

3. Locate the favorite that you want to modify, and make your changes.

To relabel a favorite, type a new name in the text box. To delete a favorite, click the Delete button associated with it. To reorder favorites, type an appropriate number in the Sequence number box.

4. Save your changes.

## Using the Recently Used Menu

When you visit a page, it is automatically added to the Recently Used list under the Favorites menu. This list is limited to the five most recently visited pages.

---

**Note.** The recently visited page data is stored to the list when you leave the template by either clicking on the header or going to a different template.

---

The system does not update the recently used list if:

- The user closes the browser without signing out first.
- If the user session times out.

### *Accessing Pages from the Recently Used Menu*

To access pages from the Recently Used Menu, click the page name. If the component has a search record, the search page appears. Enter search criteria to access the page. If the component has no search record, the page appears without search criteria.


---

## Using the Pagebar

Just below the universal navigation header sits the pagebar—a series of links and buttons that appear when you are on a transaction page. The availability of these options is controlled by the application developer. All options may not be available for each component.

[New Window](#) | [Help](#) | [Customize Page](#) | 

Pagebar

<b>New Window</b>	<p>Opens a new browser window.</p> <p>See <a href="#">Chapter 1, "Working With Browser-Based Applications," Opening New Windows, page 13.</a></p>
<b>Help</b>	<p>Opens the online PeopleBooks help for the displayed transaction page.</p>
<b>Customize Page</b>	<p>Enables you to control the initial page display. Opens the Page Customization page, where you can:</p> <ul style="list-style-type: none"> <li>• Select the initial page in the component to be displayed.</li> <li>• Save the state of the expanded and collapsed sections.</li> <li>• Save the state of the View All settings on the page for grids and scroll areas.</li> <li>• Customize the page field tabbing order. <ul style="list-style-type: none"> <li>• Clear Tabbing Order. Removes the existing tabbing order.</li> <li>• Restore Default. Restores the default tabbing order.</li> <li>• Include In Tabbing Order. Click this option and then click a tabbed item to include it in the tabbing order.</li> <li>• Remove From Order. Click this option and then click a tabbed item to remove it from the tabbing order.</li> <li>• Move Up In Order. Click this option and then click a tabbed item to move it up in the tabbing order.</li> <li>• Move Down In Order. Click this option and then click a tabbed item to move it down in the tabbing order.</li> </ul> </li> </ul> <p>You can also elect to copy and share the settings that you have saved for the customized page.</p> <p>See <a href="#">Chapter 2, "Setting User Preferences," Customizing Pages, page 26.</a></p>
	<p>Copies the current page URL to the clipboard so that it is available for pasting in emails or other applications. The copied URL includes page, action, and search key information to display in the context of the portal, if you are using the portal. If you did not pass through the portal, the system displays the page only without the portal frames.</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technologies</i>, "Administering Portals," Defining Content References.</p>

---

## Processing Components

This section discusses how to:

- Access pages or components.

- Link to related pages.
- Open new windows.
- Save pages.
- Work with dialog boxes.

## Accessing Pages or Components

Components typically consist of several related pages within the same window, however, some components only contain one page. Typically, significant pages such as those containing required fields come early in the page order. As you finish with one page, you can select the folder tab of another page to open it. You can think of this as leafing through several pages of a single form.

In addition to selecting tabs, you can click the links at the bottom of each page in the component to move to other pages within the component. Alternatively, you can press the corresponding access keys.

See [Chapter 1, "Working With Browser-Based Applications," Using Access Keys, page 19.](#)

General	ID	Roles	Workflow	Audit	Links	User ID Queries
---------	----	-------	----------	-------	-------	-----------------

User ID: PTTTOOLS

Description: PeopleTools ☐ Account Locked Out?

**Logon Information**

Symbolic ID: SYSADM

Password:  ☐ Password Expired?

Confirm Password:

User ID Alias:

[Edit Email Addresses](#) [Instant Messaging Information](#)

**General Attributes**

Language Code: English

Currency Code:

Default Mobile Page:

☐ Enable Expert Entry

**Permission Lists**

Navigator Homepage:	QEPAGES	Primary:	QEPAGES
Process Profile:	QEPAGES	Row Security:	QEPAGES

Sample component

To access a component:

1. Select the content reference from the menu hierarchy or navigation page that relates to your page.
2. On the search page, enter search criteria to identify the row of data that you want to retrieve from the database.

### 3. Click Search to perform the search.

If your search returns multiple results, they appear in a grid from which you can select the data you want to view. If your search returns only one result, the system automatically displays that result in a page on the browser.

See [Chapter 3, "Using Keys and Search Pages," Entering and Saving Search Criteria, page 42](#).

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. You will not be prompted to enter new search criteria as you move from page to page in the component.

Likewise, during a save, pages in a component are treated as a single entity. When you click Save, the data on the pages is committed to the database. If you have not completed all required fields, the system prompts you to enter additional data.

## Linking to Related Pages

Some pages, in addition to having links to other pages within the component, have links to related components or pages. The related links appear at the bottom of the transaction area above the toolbar. You can click any of these links to move easily to related transactions for the same key field so you can enter data without going through the search process again.

When you click a component link, the new transaction contains the same component links, enabling you to return to the original transaction. 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 might also see a drop-down list box with "...More," which contains several more related transaction links.

## Opening New Windows

The New Window link in the pagebar opens a new browser window or child window that displays the search page for the current component. From this window, you can view or enter new data. You can open as many child windows as needed by clicking the New Window link. Do *not* select File, New, Window from the browser menu. Doing so copies the current HTML from the parent window, instead of opening a new PeopleSoft-maintained window session.

When entering or viewing data in two different languages, use two separate instances of your browser program and sign in to each PeopleSoft session under the same user ID and password.

---

**Important!** When you open a window from within an application and then log out from there, PeopleSoft must log out from the application for security reasons. To remain logged into the application, you can just close the new window.

---

### See Also

[Chapter 3, "Using Keys and Search Pages," Using Search Pages to Retrieve Data, page 42](#)

## Saving Pages

After modifying the data on a page, you *must* click the Save button to commit your changes to the database. When you click the Save button, a spinning processing sign spins in the upper right corner of the page. When the processing is complete, the Saved icon appears.

If you attempt to leave the page without saving—by clicking another content reference from the menu hierarchy or by clicking a different toolbar button such as Next in List,—a save warning appears. Click OK to return to the page to save your changes. Click Cancel to exit the page without saving.

There are, however, other ways to exit a page. In these cases, the system issues no save warning:

- Clicking the Back button in the browser menu.

In some browsers you can return to the page with your edits intact by clicking the Forward button.

---

**Note.** It is recommended that you do not use the browser Back button.

---

- Closing the browser session.

## Working With Dialog Boxes

When you work with PeopleSoft applications, dialog boxes might appear to provide different types of messages. Dialog boxes might display an error, a warning, or an informational message.

Dialog boxes share certain characteristics; all dialog boxes:

- Are modal, meaning they hover on top of the primary page, which is grayed out.
- Can be dragged by the title bar and relocated.
- Display informational text.
- Display at least one button.

To dismiss the dialog box, you must click one of the buttons on the dialog box or click the close button on the right side of the title bar.

---

## Using Buttons and Links

This section provides an overview of buttons and links and discusses how to:

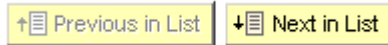
- Use processing buttons.
- Use toolbar buttons.
- Use pop-up menus.



## Understanding Buttons and Links

PeopleSoft Pure Internet Architecture provides buttons and links to help you navigate and process transactions. In general, if the action is related to navigation, it appears as a link. If the action is truly an action, such as *save* or *process*, it appears as a button. Click the button or link to carry out the command.

If a button appears grayed out, that action is currently not available. For example, when working in a transaction for the first dataset from a search list, you might see the following:



Active and inactive buttons

Your only option in this case is to click the Next in List button. Once you click Next in List, however, Previous in List will become available.

Similarly, links at the bottom of the page often enable you to move to another of the component's pages. In the following example, you can use the ID, Roles, and so on links to navigate to other pages. Notice that Workflow is not actually a link—it is not underlined—because it is the current page:

[General](#) | [ID](#) | [Roles](#) | [Workflow](#) | [Audit](#) | [Links](#) | [User ID Queries](#)

Page links in a component

### Tool Tips

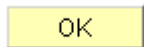
Tool tips are pop-up text messages that appear when your mouse pointer hovers over a button or link. Sometimes called hover text, tool tips display additional information about the action that the button or link performs. Typically, tool tips display what a button or link will do and may list its keyboard hot key, if applicable.

## Using Processing Buttons

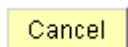
The following buttons process transactions.



Click to apply the data input without returning to the main page, in case you want to perform additional searches. Usually found on a page that you open by clicking a prompt button.



Click to accept the data input made on an auxiliary page and return to the main page.



Click to clear the page and any data that you may have entered or changed without saving. When you click Cancel, the system does not warn you to save changes. Click Cancel if you entered data incorrectly and want to begin again.

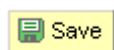
## Using Toolbar Buttons

The toolbar appears at the bottom of most pages. It can include search list navigation buttons, page navigation buttons, and page action buttons; it changes depending on the type of page that is active or the settings that the developer has put into place for a particular transaction. Not all buttons shown in the following table appear on every page. Likewise, some buttons may be unavailable for selection.

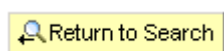
---

**Note.** In some cases, you may see different representations of a button, but the action is the same.

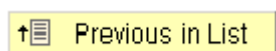
---



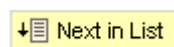
Click to send the information that you have entered on the page to the database. You generally save when you come to the end of a component. The Save button updates the data for all pages in a component. When activated, the system displays the saved message in the upper-right corner of the page.



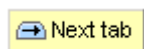
Click to return to the search page.



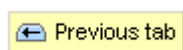
Displays the data for the previous data row in your search results grid. This button is unavailable if you did not select the data row from the search results grid, if there was only one row in the grid, or if the data that appears is the first row in the grid.



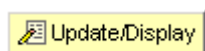
Displays the information for the next data row in your search results grid. This button is unavailable if you did not select the data row from a search results grid, if there was only one row in the grid, or if the data that appears is the last row in the grid.



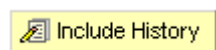
Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.



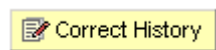
Displays the previous page in the current component. If you are in the first page of the component, this button is unavailable.



Click to access existing rows of data in the database. If data is effective-dated, only current and future rows appear.



Click to display all rows of data: current, future, and history.

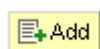


Click to access existing rows of data in the database and display all effective-dated rows. Enables you to update all rows, including history rows.

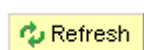
---

**Note.** This button is available only if you have the proper permission.

---



Click to add a row of data to the database for the current transaction.

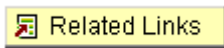


Click to force a trip to the server, validating any data that has been entered and processing any deferred PeopleCode changes.

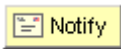
---

**Note.** This button is displayed only for components that are enabled for deferred mode processing.

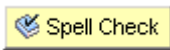
---



Displays when several pages are related to the current page. Click to access a new page containing a list of related page links.



Click to open the Send Notification page, where you can specify names, email addresses, or worklists to which to send notifications.



Click to activate the spell check for all spell check enabled fields on the page. Each field is checked individually. As each field is checked, processing continues to the next field, displaying the spell check page if there are errors. If there are no errors, the *No misspellings found* message appears.

See [Chapter 4, "Working With Pages," Using Spell Check, page 59.](#)

## Using Pop-Up Menus

Pop-up menu buttons appear next to fields on a page.



Click to access a new page to select among the menu items listed.  
Appears if the pop-up menu contains more than one item.



Click to access the new transaction page directly.  
Appears if the pop-up menu contains only one menu item.

---

## Using Keyboard Shortcuts

This section provides an overview of keyboard shortcuts and discusses how to:

- Use hot keys.
- Use access keys.

## Understanding Keyboard Shortcuts

Working in a browser-based environment can often be mouse intensive. However, PeopleSoft offers keyboard navigation alternatives to using the mouse. These shortcuts are classified into two categories: hot keys and access keys.

To view a printable list of these shortcuts while online, press Ctrl+K while on a search or transaction page.

---

**Note.** Certain browsers may treat access keys and hot keys differently. See "Troubleshooting Browser Limitations" on Customer Connection for more specific information on browser differences.

---

## Using Hot Keys

Hot keys perform immediate actions. When you press one, the designated action occurs. Note that several hot keys perform different functions depending on the page that you are on, such as a transaction page or a search page.

---

**Note.** Certain PeopleSoft hot keys do not work as expected on alternate, non-U.S. keyboard layouts. For example, ALT+', ALT+\, and ALT+/ do not produce the expected results on the AZERTY keyboard. This occurs because some keys on non-U.S. keyboards produce different key codes than the same key on a U.S. keyboard (also known as a QWERTY keyboard).

A solution to this problem can be found in the Global Technology PeopleBook.

---

See *Enterprise PeopleTools 8.50 PeopleBook: Global Technology*, "Troubleshooting," PeopleSoft Hot Keys Do Not Function As Expected on a non-U.S. Keyboard.

<b>ALT+1</b>	Saves a page in a transaction. Moves to the Search or Add button on a search or look up page. Moves to the OK button on a secondary page.
<b>ALT+2</b>	Returns to the search page from the transaction page.
<b>ALT+3</b>	View the next row in the list when the button is active.
<b>ALT+4</b>	View the previous row the in list when the button is active.
<b>ALT+5</b>	Accesses the Look Up page. Opens the calendar prompt.
<b>ALT+6</b>	Opens the pop-up window on a page.
<b>ALT+7</b>	Inserts a row in a grid or scroll area.
<b>ALT+8</b>	Deletes a row in a grid or scroll area.
<b>ALT+0</b>	When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.
<b>ALT+ .</b>	View the next set of rows in a grid or scroll area.
<b>ALT+ ,</b>	View a previous set of rows in a grid or scroll area.
<b>ALT+ /</b>	Finds data in a grid or scroll area.
<b>ALT+ '</b>	View all rows of data in a grid, scroll area, or search page results list.
<b>ALT+ \</b>	Toggles between Add a New Value and Find an Existing Value on a search page.

<b>CTRL+ J</b>	Displays the system information page.
<b>CTRL+ K</b>	When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.
<b>CTRL+ Y</b>	Toggles the menu hierarchy between collapse and expand.
<b>CTRL+TAB</b>	Toggles the focus through the frame set.
<b>ENTER</b>	Activates the OK button, where appropriate. On a search page, activates the Search button. On a look up page, activates the lookup button.
<b>ESC</b>	Activates the Cancel button, where appropriate.

## Using Access Keys

Access keys move the focus of your cursor to a particular button on a page, at which point you can press Enter to carry out the command. This is equivalent to clicking the appropriate button.

The following table outlines the shortcuts that you can use in place of clicking the equivalent action button. After pressing the desired key combination, you must press Enter to carry out the action. For example, to save a page press Alt+1 followed by Enter. Note that some access keys have multiple actions assigned to them, and the usage depends on the currently active page.

You can also use access keys for page tabs to help you move between pages in a component. Identify these access keys by noting the underlined letter in the page tab name. To access a page, press Alt plus the underlined letter, and then press Enter.

<b>ALT+9</b>	Accesses the Help line.
<b>ALT+ \</b>	Toggles between Update/Display, Include History, and Correct History action modes on the toolbar on a transaction page.
<b>CTRL+Z</b>	Accesses the menu search box.

### **Main Menu Access Keys**

Navigate between menus by pressing Ctrl+Z, which moves the focus of your cursor to the main menu. From the menu, press Tab (or Shift+Tab for reverse direction) to navigate through the menu.

---

## Using Accessibility Features

This section provides an overview of accessibility features and discusses how to enable accessibility features.

## Understanding Accessibility Features

PeopleSoft applications include several accessibility features to help people with disabilities. These features support the use of assistive technologies, such as screen readers for blind users.

PeopleSoft accessibility features include the following:

- Alternate text for images, group boxes, buttons, navigation buttons for grids and scroll areas, collapsible section icons, hide and expand grid tabs, prompt buttons, and scroll left or right buttons.
- Additional links and anchors that enable screen reader software to bypass navigation content, such as page tabs.
- The removal of icon links within the page and page links from the bottom of pages to reduce redundancy when using screen reader software.
- A feature that presents the elements on the body of a page in a linear format (for blind users operating a screen reader only).

Your system administrator grants access to the Accessibility Features option in PeopleTools. However, you can turn this option on or off in My Personalizations.

---

**Note.** If the Accessibility Features option does not appear on the Personalizations page, contact your system administrator to enable this feature.

---

## Enabling Accessibility Features

To enable accessibility features:

1. Click the My Personalizations content reference in the main menu.

The Personalizations page appears.

2. In Personalization Categories, click the Personalize Option button that is next to the General Options description.

The Option Category: General Options page appears.

3. Select one of the following options from the Accessibility Features the drop-down list box:
  - a. Select *Use accessible layout mode* to alter the display of a page for maximum efficiency.
  - b. Select *Use standard layout mode* to use the standard page layout.
  - c. Select *Accessibility features off* option to disable the accessibility features.

This option is selected by default.

4. Click OK to save your changes.

To verify that your accessibility settings are in place, sign out of the system and sign in again.

## Chapter 2

# Setting User Preferences

You can define several settings to customize your homepage and data entry experience.

This chapter discusses how to:

- Personalize your homepage.
- Customize pages.
- Change your password.
- Set user personalizations.

---

## Personalizing Your Homepage

With the PeopleSoft Portal and other licensed PeopleSoft portals, you can define and store your own portal homepages and specify preferences for their layout and content. The first time that you sign in to a PeopleSoft portal, you see the default homepage for that portal until you define a personal homepage.

This section discusses how to:

- Personalize content
- Personalize layout

### See Also

*Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technologies*, "Administering Portal Homepages and Pagelets," Managing Tabbed Homepages

## Pages Used to Personalize Your Homepage

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personalize Content	PORTAL_HPCOMP	Click the Content link on the homepage.	Personalize content by selecting the pagelets that you want to appear on your homepage.

Page Name	Definition Name	Navigation	Usage
Personalize Layout	PORTAL_HPLAYOUT	Click the Layout link on the homepage.	Personalize and organize the layout of the pagelets on your homepage.

## Personalizing Content

Access the Personalize Content page (from Home click the Personalize Content link).

### Personalize Content

Welcome Message:

**Choose Pagelets:** Simply check the items that you want to appear on your homepage.  
Remember to click "Save" when done.

**Arrange Pagelets:** Go to [Personalize Layout](#)

<b>QE</b> <input type="checkbox"/> <a href="#">Display Cookies</a> <input type="checkbox"/> <a href="#">QE Portal Links</a> <input type="checkbox"/> <a href="#">QE_COMMAINCOOKIE</a> <input type="checkbox"/> <a href="#">QE Counter</a> <input type="checkbox"/> <a href="#">QE Redirect Test</a> <input checked="" type="checkbox"/> <a href="#">Signin</a> <input type="checkbox"/> <a href="#">Test Global Variables</a> <input checked="" type="checkbox"/> <a href="#">Who Am I</a> <input type="checkbox"/> <a href="#">User-based Cache</a> <input type="checkbox"/> <a href="#">Role-based Cache</a> <input type="checkbox"/> <a href="#">Application-based Cache</a>	<b>PeopleSoft Applications</b> <input type="checkbox"/> <a href="#">XML Publisher</a> <input type="checkbox"/> <a href="#">Menu 2.0</a> <input checked="" type="checkbox"/> <a href="#">Menu</a> <input type="checkbox"/> <a href="#">Top Menu Features Description</a> <input checked="" type="checkbox"/> <a href="#">My Reports</a> <input checked="" type="checkbox"/> <a href="#">Main Menu</a>	<b>Miscellaneous</b> <input type="checkbox"/> <a href="#">Bart Schedule</a> <input type="checkbox"/> <a href="#">Calculator</a> <input checked="" type="checkbox"/> <a href="#">Calendar</a> <input type="checkbox"/> <a href="#">Currency Converter</a> <input type="checkbox"/> <a href="#">Dictionary</a>
--	--	---

Personalize Content page (representative example)

To personalize content on your personal homepage:

1. (Optional). Enter a welcome message.

This appears in the header on your homepage when you sign in to the portal.

2. Select the check boxes associated with the pagelets that you want to appear on your personalized homepage.

The portal administrator presets the available selection of pagelets. You can preview each pagelet by clicking the pagelet name, which opens a pagelet preview in a smaller window. If a pagelet is not available to you, text in the pagelet indicates this. Any links in the pagelet are disabled.



- Click the Save button.

---

**Note.** You can click Personalize Layout from here to immediately begin laying out how the pagelets appear on your homepage.

---

## Personalizing Layout

Use either of these two methods to personalize your homepage layout:

- Configure the Personalize Layout page.
- Drag and drop pagelets.

### *Configuring the Personalize Layout Page*

Access the Personalize Layout page (from Home, click the Personalize Layout link).

## Personalize Layout

---

Basic Layout: ☐ 2 columns ☒ 3 columns




Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to [Personalize Content](#)

# = Required - fixed position pagelet

\* = Required - moveable pagelet

Left Column:	Center Column:	Right Column:
Who Am I Calendar Menu My Reports	Signin Main Menu	--No Pagelets Selected--


  
Delete Pagelet

Personalize Layout page (representative example)

**Basic Layout**

Select to display the pagelets in either two or three columns on the homepage.

A two-column layout results in one narrow column on the left side of your homepage and one wider column to the right. A three-column layout results in three narrow columns of equal width. If you place a wide pagelet in a narrow column, the column stretches to accommodate the wider pagelet.

---

**Note.** The system moves required pagelets (indicated by the \* sign) from the third to the second column when you switch from a three-column to a two-column layout.

---

**Columns**

The pagelets selected on the Content page are listed in the column sections.

If the basic layout is two columns, the pagelets are divided into left and right columns. If the basic layout is three columns, the pagelets are divided into left, center, and right columns.

---

**Note.** # indicates a required fixed position pagelet. \* indicates a required moveable pagelet.

For example, #Signon indicates that the Signon pagelet cannot be moved to a different location on the homepage.

You cannot assign required fixed pagelets to the right column in a 3-column layout.

---



Use to position the pagelets. Highlight the desired pagelet, and then click the arrows to move the selected pagelet above a pagelet, below a pagelet, to the next column on the right, or to the next column on the left.

**Delete Pagelet**

Highlight the desired pagelet and then click to delete it from the homepage.

**Return to Home**

Click to view your new choices.

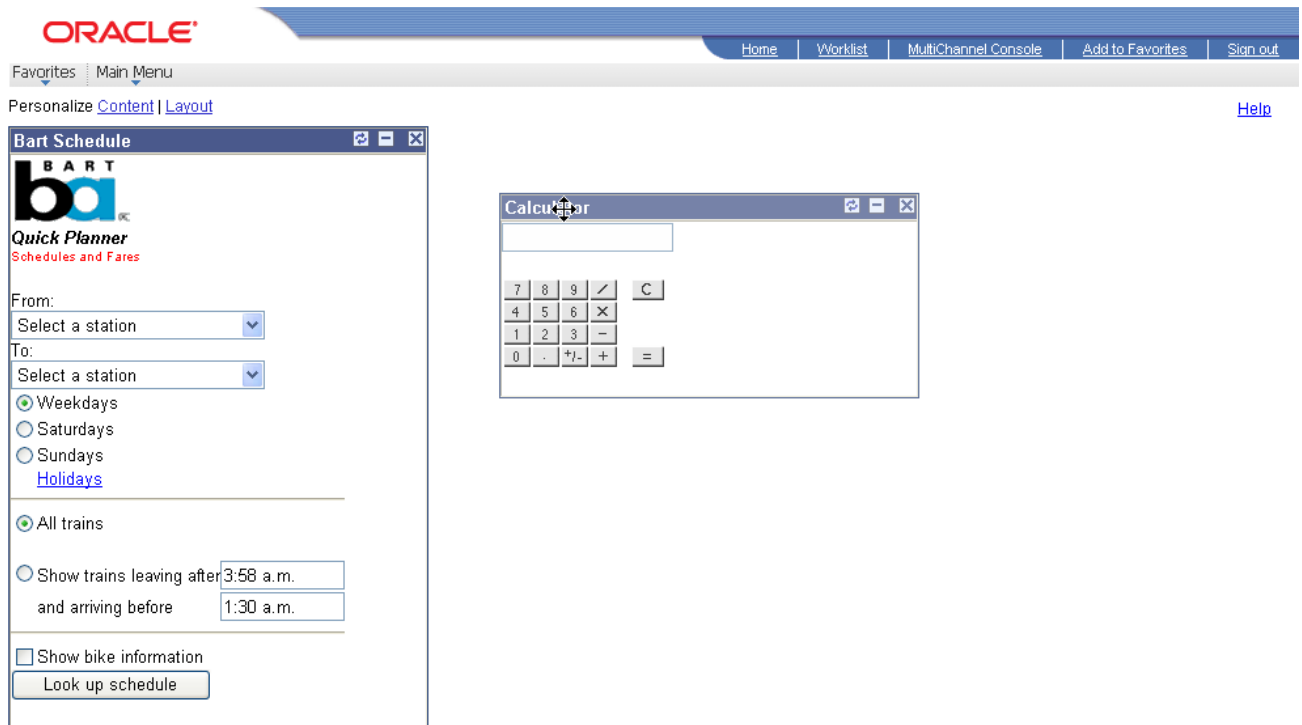
From the homepage you can choose to minimize a pagelet or remove it altogether. Use the minimize and remove buttons in the pagelet header to do so. When you minimize a pagelet, the minimize button is replaced with the restore button. Click the restore button to fully open the pagelet again. Clicking the remove button opens the Removal Confirmation page for that pagelet. Select Yes-Remove or No-Do Not Remove.

To arrange the layout:

1. Select a basic layout option.
2. Select the pagelet name.
3. Click the directional arrow buttons to position the pagelets.
4. Click the Save button.

***Dragging and Dropping Pagelets***

You can rearrange pagelets on your homepage by dragging and dropping them between columns.



Dragging the Calculator pagelet to change the homepage layout

To drag a pagelet, click and drag the pagelet title bar. The cursor changes shape to indicate that you can drag the pagelet. When you are in the new location — signified by the color change — release the mouse.

**Note.** You cannot move pagelets that the portal administrator configures as *required-fixed*. You also cannot move pagelets if you do not have permissions to customize the page.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technologies*, "Administering Portal Homepages and Pagelets," Managing Tabbed Homepages.

## Personalizing Pagelets

You can personalize many of the pagelets on your homepage to show only the information that you want to see. Each pagelet that allows personalization has different personalization options that are based on the type of information displayed in the pagelet. For example, on the Company New pagelet you can use personalization options to show specific news categories from the list of those that are available or limit the pagelet to a specific number of articles. In the Tasks pagelet, you can choose to see all tasks, only personal tasks, only worklist tasks, and so on. These changes will appear in your pagelet only.

**Note.** Not all pagelets allow personalization. Your system administrator can disable the pagelet personalization feature.



Access the Pagelet Personalization page by clicking the Customize button on the pagelet title bar of a pagelet that supports personalization.

## Personalize Company News

Select from the available option(s) to personalize the display of this pagelet.

*Number of Articles to Display:	<input type="text" value="3"/>
*Show Human Resources News:	<input type="text" value="No"/> ▼
*Show Information Technology Ne:	<input type="text" value="No"/> ▼
*Show Events:	<input type="text" value="No"/> ▼

[Reset to Defaults](#)

[Save](#)

[Return to Home](#)

Example of a Personalization page

### See Also

*Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technologies, "Using Pagelet Wizard"*

*PeopleSoft Enterprise Portal Solutions 9 PeopleBook: Enterprise Portal Pagelets*

---

## Customizing Pages

This section provides an overview of page customization and discusses how to:

- Control initial page display.
- Change the tabbing order.
- Copy, share, and delete page customization settings.

## Understanding Page Customization

The page customization feature helps you tailor your transactions to specific business processes and to your personal data entry style. The Customize Page option in the pagebar located just below the navigation header is available for most PeopleSoft pages.

---

**Note.** Page customizations may be superseded if the order of the grids in the underlying page definition is changed in Application Designer.

---

[New Window](#) | [Help](#) | [Customize Page](#) 

Pagebar

Select the Customize Page link to open the Page Customization page for the current page.

OK

Cancel

Copy Settings

### Page Customization

☐ Put this page in front (the current tab) when I come into this component.

☒ Save tabbing order customized below.

To define new tabbing order, select Clear Tabbing Order, then click items to include in desired sequence.  
This new Tab order setting may be overridden by the people code command SetCursorpos().  
To rearrange tabbing order, select Remove from order, Move up in order, or Move down in order, then click appropriate items to rearrange.

Clear Tabbing Order

Restore Default

☐ Include In Tabbing Order

☒ Remove From Order

☐ Move Up In Order

☐ Move Down In Order

New WindowHelp

GeneralIDRolesWorkflowAuditLinksUser ID Queries

User ID: QEDMO

Description: QE User

20

☐ Account Locked Out?

Logon Information

22

Symbolic ID:

24

Password:

25

Confirm Password:

26

User ID Alias:

27

Edit Email Addresses

28

☐ Password Expired?

30

Instant Messaging Information

General Attributes

31

Language Code:

32

Currency Code:

33

Default Mobile Page:

34

☐ Enable Expert Entry

Customizing a page

**Note.** Your system administrator can disable the page customization feature. This may be necessary if there are concerns about database growth.

## Controlling Initial Page Display

The Page Customization page includes four settings that enable you to control how the current page is initially displayed when you open it:

**Put this page in front (the current tab) when I come into this component.**

Defines the current page as the initial default page for the component. Only one page within a component can be set as the "front" page. Search pages and secondary pages cannot be identified as "front" pages.

This option displays only if the current component for the page contains more than one page based on your security profile. This option is cleared by default.

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**Save the state of the expanded/collapsed sections on this page.**

Enables you to personalize the initial display of collapsible sections on the current page. Before selecting Customize Page and then selecting this option, ensure that the collapsible sections on the page display exactly as desired. This option takes a "snapshot" of the current state of the collapsible sections on the page.

You can also preserve the initial display of nested collapsible sections whether or not the parent collapsible section is expanded.

This option is cleared by default. When it is disabled, the application determines the initial display of all collapsible sections, unless this option was defined previously.

This option only displays if the current page contains page elements that you can expand or collapse.

**Save the state of the View All settings on this page.**

Enables you to personalize the initial View All display of scroll areas and grids. This option takes a "snapshot" of the current View All status of the grids and scroll areas on the page.

This option is cleared by default. When it is disabled, the application determines the initial View All display, unless the option was defined previously.

This option only displays if the current page contains a grid or scroll area with a View All setting.

**Save tabbing order customized below.**

Saves the tabbing order that you designate on the current page. You can modify the existing field tabbing order as well as remove page elements from the tabbing order so that the cursor skips those fields as you tab through the page.

## Changing the Tabbing Order

The tabbing order is simply the order in which you move from page element to page element when you press the Tab key. You can change and save a page's default tabbing order from the Page Customization page, which displays an image of the current page with tabbing order numbers in the upper-left corner of each page element that you can change. (Page elements with smaller numbers come before page elements with larger numbers in the tabbing order.) You can modify collapsible section buttons and page elements within collapsed sections, as long as the collapsed section is expanded when you select the Customize Page option.

---

**Note.** This numbering may not begin with "one" and may appear to have gaps for page elements that are not currently visible.

---

**Clear Tabbing Order**

Click this button to define a completely new tabbing order. This clears the current tabbing order, replacing the numbers for each relevant element (any element that you can tab to) with an X. The X indicates that no tab sequence number is applied for that field. You can then assign new tabbing orders to the page elements by using the Include In Tabbing Order, Remove From Order, Move Up In Order, and Move Down In Order buttons described below.

**Restore Default**

Removes all tabbing order customizations defined for the page and restores the original tabbing order.

The radio buttons Include In Tabbing Order, Remove From Order, Move Up In Order, and Move Down In Order enable you to control the tabbing order; you click the appropriate radio button and then click the page element you want to change.

To change the tabbing order:

1. Select the Clear Tabbing Order button to remove all tabbing order settings for the page.

The system replaces each tabbing order number with an X indicating that the page element is no longer included in the tabbing order.

2. Select the Include In Tabbing Order radio button.
3. Select the page elements in the tabbing order you want.

The system numbers each field you select sequentially beginning with one.

4. (Optional) If necessary, select the Move Up In Order or Move Down In Order radio buttons and click on the page elements as needed to adjust the tab order you just set.

These options either promote or demote a page element one step in the tabbing order sequence. The system automatically adjusts all other page element tabbing order numbers accordingly.

To remove specific fields from the current tabbing order:

1. Select the Remove From Order radio button.
2. Click each page element that you want to remove from the tabbing order.

The tabbing order number for each element that you click is replaced with an X. At runtime, the system skips this page element as you tab through the page.

To save the new tabbing order:

1. Make sure the Save tabbing order customized below option is selected.
2. Click the OK button.

The original page displays again with your new tabbing order and other customizations applied.

### ***Tabbing Order Exclusions***

Tabbing order customization applies only to elements within the page, such as edit boxes, grids, drop-down list boxes, push buttons, and so on. You cannot customize the tabbing order for these elements:

- Header icons.
- Browser elements.
- Page and related page links.
- HTML areas.
- Charts.

- Grid columns that you have hidden using the grid customization feature.

If you unhide a column after you have set the tabbing order customization, you must customize the page again to include that field in the tabbing order.

### ***Collapsible Sections***

You must expand all collapsible sections on a page before clicking the Customize Page link for page elements in those sections to be available for tab ordering.

You can customize the tabbing order of any allowed page elements within a collapsible area. However, if you then collapse this section, the system skips the page elements contained in the collapsed area. In other words, collapsing an area effectively removes any of its page elements from the tabbing order.

### ***Grids and Scroll Areas***

Page elements within a grid are treated as a group at runtime, even if they are not numbered consecutively. For example, if there are four fields on a page, two of which are in a grid, the tabbing sequence will keep the grid fields together, regardless of the tabbing order you specify. If fields A and B are outside the grid, fields C and D are inside the grid, and you set the tabbing order to be A, C, B, and D, the system will automatically revert to an A, C, D and then B tabbing order to keep the items within the grid (C and D) together.

---

**Note.** If you select View All from the navigation bar when there are multiple levels of scroll areas, the page tabbing order may not behave as you would expect after tabbing through the page for the first time.

---

Grid and scroll area navigation bar elements, such as First, Previous, View All, and so on, are included for tabbing order customization.

## **Copying, Sharing, and Deleting Page Customization Settings**

Access the Page Customization page by clicking the Customize Page link on the page you want to customize. The page customization toolbar at the top and bottom of the Page Customization page enables you to save, cancel, copy, share, and delete your page customization settings. The share and delete options display only after you have customized and saved the page.



Page customization toolbar

### **Copy Settings**

Opens the Copy Settings secondary page, where you can copy the public profiles from other users. A lookup button enables you to search all available public profiles for that page.

Selecting the OK button on the Copy Settings page copies the settings and returns you to the Page Customization page.

---

**Note.** You may need to adjust the tab order numbering if page elements based on your security profile are different from the public profile you are copying.

---



**Share Settings**

Opens the Share Settings secondary page, where you can publicly share the page customization settings you created. You can make your profile Public or Private. The default setting is Private. If you make the customization settings of one page in a component public, all customization settings for all pages in that component will be public.

The Name field is only required if you choose to make your customization settings public, in which case you must have a unique profile name. The profile name you enter is the same for all pages and shared grid customizations across all components. If you modify the profile name, it will be modified for all pages and grid customization settings across all components. Once you save the first profile name, the Name field is prepopulated when you open the Share Settings page for other pages or grids.

The Name field can be of any string of up to 30 characters long—for example OSC\_16AR. Alphabetical characters are automatically converted to uppercase.

**Delete Settings**

Opens the Delete Settings secondary page, where you can delete all page customization settings for the page or component. Click the Delete button to delete the settings for the current page only. Select the Delete Settings for All Pages within Component check box and click Delete to remove all customized settings for the entire component.

---

**Note.** If you make changes to any of these pages, you must also click the Save button on the Page Customization page for your changes to take affect.

---



---

## Changing Your Password

This section discusses how to:

- Change your password.
- Set up forgotten password help.

## Pages Used to Change Your Password

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Change Password	CHANGE_PASSWORD	Change My Password .	Change your current password.
Change Password	USER_CHANGE_PSWD	My System Profile, Change password	Change your current password.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Change or set up forgotten password help	USER_PSWDHINT	Click the My System Profile link in the main menu to open the General Profile Information page. Click the Change or set up forgotten password help link under the Password heading.	Set up password help to enable the system to email you a new password if you forget your original one.

## Changing Your Password

Use 1 to 32 characters to create your password. Your administrator may implement additional password requirements.

To change your password:

1. Access the Change Password page (From Home, select Change My Password).
2. Enter the current password in the Current Password edit box.
3. Enter a new password in the New Password edit box.

Remember that passwords are case sensitive.

4. Enter the new password again in the Confirm Password edit box.
5. Click OK.

## Setting Up Forgotten Password Help

If your system administrator has set up forgotten password help in PeopleTools Security, you can select a predefined question to answer for security purposes. The system then sends a new password to your email address automatically. .

To set up password help:

1. Access the General Profile Information page (From Home, select My System Profile).
2. Select Change or set up forgotten password help.
3. Select a question from the drop-down list box or password hint set by your system administrator.
4. Enter the appropriate response to your question.
5. Click OK to save your entry.

## Setting User Personalizations

This section provides an overview of user personalizations and discusses how to:

- Define your user personalizations.
- Set up your system profile.
- Add words to your personal dictionary.

## Understanding User Personalizations

PeopleSoft enables you to personalize your application based on your daily needs, style of work, language preference, preference for the mouse or the keyboard, and so on. Users of PeopleSoft applications include casual users and power users. Casual users work with PeopleSoft applications only occasionally, because these applications are not an integral part of their daily tasks. For example, casual users might use the PeopleSoft self-service applications only occasionally to maintain their employee information, to enroll in benefits, and so on. Power users, on the other hand, use the PeopleSoft system as a part of their daily job. They do a great deal of data entry—moving quickly from one transaction page to the next, entering data as they go. A power user might be an accounts payable clerk, a human resources benefits manager, a purchasing manager, or an order entry clerk.

## Pages Used to Set User Personalizations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personalizations	PSUSERPRSNLCAT	Select My Personalizations from the main menu.	Personalize your application environment using the personalization options available from this page.
Option Category	PSUSERSELFPRSNL	Click the Personalize Option button on the Personalizations page.	Modify the personalization options for the personalization category you select.
Personalization Explanation	PSUSEROPTNEXPLN	Click the Explain link on the Option Category page.	Displays details for the selected option.
General Profile Information	USER_SELF_SERVICE	Select My System Profile from the main menu.	Change your password, set language preferences, edit your email address, identify an alternate user, and modify workflow attributes.
Spell Check Personal Dictionary	SCPERSONALDICTLANG	Select My Dictionary from the main menu.	Add words or acronyms to your personal dictionary.

## Defining Your User Personalizations

The Personalizations page provides the following option categories for which you can personalize your system. To gain access to these categories, click the appropriate Personalize Option button.

<b>General Options</b>	Offers options for user accessibility features, the length of time the system holds a page in cache, multi language settings, and the spell check dictionary. If you require support for assistive technologies, such as screen readers, you can change the accessibility options. For Multi Language Entry, on pages where multiple language entry is available, you can choose to enter data in the language that you specify in the Data Language drop-down list box. On this page you can also reset your foreign language dictionary to use a different language for your spell checker.  See <a href="#">Chapter 4, "Working With Pages," Using Spell Check, page 59.</a>
<b>Regional Settings</b>	Select to personalize your date, time, and number formats. Select settings for afternoon and morning designators (AM/PM or am/pm), date format (MMDDYY, DDMMYY, or YYMMDD), a local time zone, and so on.
<b>System &amp; Application Messages</b>	Lets you control the display of various system messages. When you are familiar with your application, you can disable these messages. Options include a Save Warning and a Save Confirmation message.
<b>Navigation Personalizations</b>	Allows you to tab over certain unused fields on a page. If you frequently use the tab key to navigate, you can skip page elements that you know you will not need to access. For example, suppose you always prefer to type the date into a date field and then press tab to move quickly to the next field rather than opening the calendar prompt, selecting the date, and then closing the prompt. If you select Tab over Calendar Button, when you navigate with the tab key, your cursor focus never rests on a calendar button.

---

**Note.** You must log off and log back on for changes to Personalization settings to take effect.

---

### ***Personalize Options***

Access the Option Category page for the desired personalization category (From Home, select My Personalizations, and then click the Personalize Option button). , .

## Option Category: Navigation Personalizations

Personalizations			
Personalization Option	Default Value	Override Value	
Drop down Menu Sort Order	None	<input type="text"/>	<a href="#">Explain</a>
Automatic Menu Collapse	No	<input type="text"/>	<a href="#">Explain</a>
Mouse over popup event	Yes	<input type="text"/>	<a href="#">Explain</a>
Tab over Calendar Button	No	<input type="text"/>	<a href="#">Explain</a>
Tab over Grid Tabs	No	<input type="text"/>	<a href="#">Explain</a>
Tab over Header Icons	No	<input type="text"/>	<a href="#">Explain</a>
Tab over Lookup Button	No	<input type="text"/>	<a href="#">Explain</a>
Tab over Navigation Bar	No	<input type="text"/>	<a href="#">Explain</a>
Tab over Browser Elements	No	<input type="text"/>	<a href="#">Explain</a>
Tab over Page Links	No	<input type="text"/>	<a href="#">Explain</a>
Tab over Related Page Links	No	<input type="text"/>	<a href="#">Explain</a>
Tab over Toolbar	No	<input type="text"/>	<a href="#">Explain</a>
Type ahead	Yes	<input type="text"/>	<a href="#">Explain</a>

Find First 1-13 of 13 Last

Restore Category Defaults

OK Cancel

## Sample Navigation Personalizations page

Each of the personalization pages lists the personalization option, the default value for that option, and an Override Value drop-down list box from which you can select a new value to replace the default. Click the Explain link at the end of each row for an explanation of the corresponding option.

**Personalization Explanations**

The Personalization Explanation page offers the details for that particular setting. You can select the override value on this page or restore the option to its default value.

Personalization Explanation

Mouse over popup event

Default Value

Yes

Override Value

▼

Restore Option to Default

Explanation

Mouse over popups are enabled for some fields and will display a popup page with related information on it when you hover the mouse pointer over those fields.

Image:

OK

Cancel

Personalization Explanation page

Setting Up Your System Profile

Access the General Profile Information page (From Home, select My System Profile).

General Profile Information

QE User

Password

[Change password](#)  
[Change or set up forgotten password help](#)

Personalizations

My preferred language for PIA web pages is: English

My preferred language for reports and email is: English

Currency Code:

Default Mobile Page:

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID:

From Date:  (example:12/31/2000)

To Date:  (example:12/31/2000)

Workflow Attributes

☒ Email User ☒ Worklist User

Miscellaneous User Links

Email				
Customize   Find     First 1 of 1 Last				
Primary Email Account	Email Type	Email Address		
<input checked="" type="checkbox"/>	Business	<input type="text"/>		<input type="button" value="+"/> <input type="button" value="-"/>

Instant Messaging Information					
Customize   Find     First 1 of 1 Last					
Protocol	XMPP Domain	UserID	Password	Wkey	
XMPP	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="button" value="+"/> <input type="button" value="-"/>

General Profile Information page

**Password**

Click one of the following links, which are self-service options related to passwords:

- [Change password.](#)
- [Change or set up forgotten password help.](#)

See [Chapter 2, "Setting User Preferences," Changing Your Password, page 32.](#)

**Personalizations**

This area lists your current language preference for web pages, and your preferred language for reports and email. You can change the language setting for your reports and email on this page.

You can also select the currency code for the currency symbol to display on pages when you enter currency values.

---

**Note.** The decimal placement is a property of the currency code; typically, two decimal places is standard.

---

Select the mobile homepage that should appear after you sign on to a mobile device.

PeopleSoft Mobile Agent is a deprecated product. These features exist for backward compatibility only.

---

**Note.** For more personalizations options, open the My Personalizations page.

---

**Alternate User**

If you are going to be on vacation or some other type of temporary leave, you can add the user ID of a colleague who is looking after your tasks in your absence. Select the alternate user ID and enter the dates during which you want the alternate ID to be active. After that time has passed, your tasks are automatically routed back to you.

---

**Note.** When applying an alternate user ID in your workflow settings, make note of the fact that the system only sends workflow routings to the immediate alternate user ID. The system does not send routings down multiple levels of alternate user IDs. For example, assume user A specifies user B as the alternate user ID while user A is out of the office. Also assume that user B happens to be out of the office at a time during user A's absence, and user B specifies user C as an alternate user ID. In this case, the system does not send workflow routings originally intended for user A to user C.

---

**Workflow Attributes**

Select one or more check boxes. (The available options are determined by the workflow setup at your site.) These settings affect how you receive "ad hoc" workflow routings through your workflow system. An email user receives notifications through email while a worklist user receives notifications through worklists.

**Miscellaneous User Links**

Follow this link to view other security links. These links are controlled by your system's security configuration. Contact your system administrator for more information.



**Email**

Use the Email grid to edit your current email address or enter additional email types, such as home or Blackberry. You can enter one address of each Email Type.

**Instant Messaging Information**

Use the Instant Messaging (IM) Information grid to edit your current IM information. You can initiate an outbound chat with a customer using instant messaging networks such as AOL Instant Messenger, IBM/Lotus Sametime, or Yahoo! Messenger. This functionality enables an external user to participate in a business transaction through instant messaging.

PeopleSoft MultiChannel Framework enables instant messaging through public networks (AOL Instant Messenger, GTALK and Yahoo! Messenger), enterprise Lotus Sametime Connect networks, or XMPP instant messaging servers.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft MultiChannel Framework*, "Configuring Instant Messaging in PeopleSoft MultiChannel Framework," Configuring Instant Messaging.

## Adding Words to Your Personal Dictionary

Select My Dictionary from the main menu to access the Spell Check Personal Dictionary page.

### Spell Check Personal Dictionary

Customize   Find   View All     First 1-3 of 3 Last				
	Spell Check Language	Spell Check Word		
1	US and UK	PeopleTools	+	-
2	Spanish	PeopleTools	+	-
3	Session	PeopleSoft	+	-

Spell Check Personal Dictionary page

As you use spell check, you might need to add certain words or acronyms to your personal dictionary so that spell check does not continually attempt to correct them. You can add these words directly from the Spell Check page or you can add several at once by using the Spell Check Personal Dictionary page. This page enables you to add, update, and delete words, as well as add words by language. The words that you enter in your personal dictionary are attached to your user ID, so your personal dictionary is available to you no matter where you access it.

---

**Note.** The maximum number of words in the personal dictionary is 2882.

---

**Spell Check Language** Select the language dictionary to which you want to add the word. To enter the same word in multiple languages, make an entry for each language.

Select *Session* to add a word for your current session's spell check dictionary. After saving this word, the Spell Check Language field refreshes to the current spell check language.

---

**Note.** You must provide a language code for the word and the language code must match the spell check language code specified in My Personalizations for the word to pass the spell check. For example, if you specify *French* as the spell check language code in My Personalizations, then the language code that you select for the word that you enter on the My Dictionary page must be *French*.

---

See [Chapter 2, "Setting User Preferences," Defining Your User Personalizations, page 34.](#)

**Spell Check Word** Enter the word or abbreviation that you want added to your personal dictionary. Entries must be 40 characters or less.

The words that you add to your personal dictionary are case sensitive. The case determines how spell check validates correct spelling. The system applies the following case-sensitive rules:

- If the added word is all lowercase, such as *worklist*, the following are valid:
  - Exact match, all lowercase (*worklist*).
  - All uppercase (*WORKLIST*).
  - Initial capitals (*Worklist*), regardless of the word's position in the sentence.

Mixed case (*WorkList*) is incorrect.
- If the added word is all uppercase, such as *CRM*, only an exact match is valid. Lowercase and mixed case are not valid.
- If the added word is in initial capitals, such as *California*, only an exact match (*California*) and all uppercase (*CALIFORNIA*) are valid.
- If the added word contains an embedded capital letter, such as *PeopleSoft*, only an exact match is valid.

In other words, if case is not relevant to the validity of the word, enter the word into your dictionary in all lowercase.

## Chapter 3

# Using Keys and Search Pages

This chapter provides an overview of keys and search pages and discusses how to use search pages to retrieve data.

---

## Understanding Keys

A field or a combination of fields uniquely identifies every table in your PeopleSoft database. For example, the employee ID field uniquely identifies your employee records. As another example, when employees enroll in training classes, the combination of employee ID, course code, and course start date uniquely identifies enrollment requests.

The fields that uniquely identify your data are called *keys* or *key fields*. To display a page, you enter the keys to search for on the search page, so that the system can retrieve the correct row of data. For example, 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. The search keys are the fields that you are prompted for on a search page. If you run Search by exactly specifying the key fields, the system will always return only one (or no) result. Most transaction pages or components have search records associated with them. If you select other pages that have a common search record, such as pages within a component or an associated link, you are not prompted to enter search criteria again. You are 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: basic search pages and advanced search pages. When you select a content reference, the system often displays a Find an Existing Value tab (or something similar) that enables you to do a basic search and also provides an Advanced Search link

A basic search page enables you to search by just one field at a time, and then only using the "begins with" operator. To designate the search field, if more than one is available, select the desired field from the Search by drop-down list box and then click the Search button to display the results of your search. You can perform a partial search by first entering part of a name or description in the begins with text box. For instance, if you want to find all fields beginning with the letters *PS*, you would type *PS* in the begins with text box before clicking Search.

On the advanced search page, you can narrow your search, both by searching based on more than one field at a time and by using a variety of search operators.

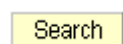
In some cases, search pages may include the Include History and Correct History options. In addition, search pages contain the Case Sensitive check box to enable you to perform case-sensitive searches.

Both the basic and advanced search pages include the Maximum number of rows to return field which enables you to limit the number of items in the search results. This enables you to lower processing time in case your search could yield large numbers of items.

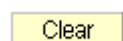
See [Chapter 3, "Using Keys and Search Pages," Entering and Saving Search Criteria, page 42.](#)

### ***Using Search Page Buttons***

The following search-related buttons appear on search pages of all types.



Click to process the search. You can select search by criteria and enter characters in the begins with edit box to limit your search (Alt+1).



(Appears only for advanced searches.) Click to clear entered text from all fields on the page (without saving) so that you can enter new criteria. If the search key is binary, such as Yes or No, the search field may show as a check box. In that case the Clear button unchecks the check box.

---

## **Using Search Pages to Retrieve Data**

This section discusses how to:

- Enter and save search criteria.
- Use wildcards to find information.
- Use type ahead to narrow the search

### **See Also**

[Chapter 4, "Working With Pages," Using Effective Dates, page 50](#)

## **Entering and Saving Search Criteria**



This section discusses how to:

- Enter search criteria.
- Set the maximum number of rows to return.
- Use operators.
- Save search criteria.

## Entering Search Criteria

When specifying search criteria, you can enter a full or partial value for any key field. Based on what you enter, the system uses the search record to present a list of possible matches or, if there is only one match, the page that you requested. Often, however, you do not have all of the information that you need. For example, you may want to find all administrator user profiles. If you enter the word *Administrator* in the Description field, and the search criterion for that field is set to contains, the system narrows the search by displaying all courses that contain *Administrator* in the description. With this information, you may be able to determine which user profiles you want based on the results in the Search Results grid. To access a user profile, click any link in the Search Results grid.

### Search Results

<a href="#">View All</a>	First  1-100 of 154  <a href="#">Last</a>
User ID	Description
<a href="#">BOE_Admin</a>	BOE administrative user
<a href="#">BOE_Viewing</a>	BOE viewing user
<a href="#">PSADMIN</a>	PeopleSoft Administrator
<a href="#">PTCDBADMIN</a>	Dashboard Administrator
<a href="#">PTCDBIMPL</a>	Dashboard Implementer
<a href="#">PTCDBVIEW</a>	Dashboard Report Viewer

Example of a search results list

When browsing through a large number of search results, use the browser scroll bar to view all listings on the current page. If not all results are displayed at once, you can click the Show Next Rows button (the right arrow) above the grid to view the next set of rows, and you can click the Show Previous Rows button (the left arrow) to see previous sets of rows. You can also click the First and Last links to display the first and last sets of rows of search results. In addition, you may be able to click a View All or View x button—to view all records at once or to view a designated number of records. (The value of x will have been set by the application developer.)

When you access a page, notice that the key fields from the search page appear as the display-only fields in the upper-left corner of the page, usually just below the page tab.

## Setting the Maximum Number of Rows to Return

Access the User Profiles search page (PeopleTools, Security, User Profiles, User Profiles).

User Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Maximum number of rows to return (up to 300):

Search by: 

User ID

 begins with

Search

Advanced Search

User Profiles search page-Maximum number field

When you perform a search, you have some control over the number of entries that the search can return. The maximum value and the default value depend on the search settings on the PeopleTools Options page. You can further limit the number of search items, by entering a lower value in the Maximum number of rows to return field on the search page; you can set the number of entries that the search returns to any value less than the maximum. If the search retrieves more than the maximum number of listings, the Search Results grid displays only the number of results requested in the Maximum number of rows return setting. If the search criteria would otherwise retrieve a greater number of results than are displayed, that greater number will also be displayed in a message above the search results. Attempt to narrow your search in another way if you cannot retrieve the data that you need on the first attempt.

**Note.** The default maximum value is set on the PeopleTools Options page.

See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration*, "Using PeopleTools Utilities," PeopleTools Options.

Using Operators

When performing an advanced search, you can use a variety of operators to narrow your searches—hunting for customers by a particular first letter, by values that are less than or greater than a specified amount, and so on. You can use the following operators:

Operator	Field Use
begins with	Character fields.
contains	Character fields.
=	All field types.
not=	All field types.

<b>Operator</b>	<b>Field Use</b>
<	All field types.
<=	All field types.
>	All field types.
>=	All field types.
between	All field types.
in	All field types.

---

**Note.** If you use the IN operator to search for multiple items, separated by commas, and you enter a space after the comma, the search automatically strips out that space. (For example, if you search for *1000, 1001*, the search assumes that you are searching for *1000,1001*. If you actually do want to search for a character string that contains a space, include that string within double quotes, like this: *1000," 1001"*.)

---

You can use an operator for more than one field to make your search even more specific. For example, you could narrow your search for courses with the word *orientation* in the name by selecting the "=" operator for the Internal/External field and selecting *Internal* from the drop-down list box, as shown in the previous example. This search will find only courses that meet both criteria: internal courses that include the word *orientation*.

### ***Saving Search Criteria***

If you are conducting an advanced search, you can click the Save Search Criteria link to name and save the specifics of your search. If you have saved one or more searches, you can use the Use Saved Search drop-down list box to select a saved search. Once you save a search, you can use that specific saved search in other search pages that use the same search record. You can remove any saved searches by clicking the Delete Saved Search link.

---

**Note.** The applications stores saved searches by user ID.

---

## **Using Wildcards to Find Information**

PeopleSoft applications support three wildcard characters to help you search for data in character fields. You can use these wildcards to track down the exact information that you need.

---

**Note.** Wildcards only work with the begins with and contains operators.

---



---

**Note.** Certain applications support wildcards specific only to that application. See your application PeopleBook for details.

---

Here are the supported standard wildcard characters:

Wildcard	Definition
% (percent symbol)	Match one or more characters.
_ (underscore)	Match any single character.
\ (backslash)	Escape character—do not treat the next character as a wildcard.

For example, if you enter *Q%sdmin*, as the User ID, the system returns a list of user IDs that begin with *Q* and contains 'admin' as you can see here.

User Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Maximum number of rows to return (up to 300):

Search by: 

User ID

▼

 begins with

Search

Advanced Search

Search Results

View All		First	1	1-4 of 4	Last
User ID	Description				
<a href="#">QAS_Admin</a>	QAS administrative user				
<a href="#">QEADMIN</a>	QE Administrator				
<a href="#">QE_CEADMIN</a>	CE Administrator role				
<a href="#">QE_DATAADMIN</a>	User for Upgrade Data Admin				

Using wildcard characters on a search page

Using Type Ahead to Narrow the Search

Type ahead suggestions appear on two types of fields:

- Edit fields on search pages.
- Prompt fields



## Edit Fields on Search Pages

When an edit field has type ahead enabled, if you type a letter into a field such as Country, and pause, the type ahead window appears and shows you a list of country codes beginning with the letters you entered. The application returns the maximum number of allowed rows and shows you a subset in the type ahead window. This suggestion list size defaults to 50, but is configurable on the Portal General Settings page.

## Prompt Fields

All prompt fields have type ahead enabled. When you type into a prompt field the type ahead results are slightly different. When using prompt type ahead, the application provides additional columns to assist in choosing the correct value.

Customize   Find   View All   First 1-4 of 4 Last					
Role Name	Description	Dynamic		View Definition	
EOPP_GUEST	Common Portal Guest	<input type="checkbox"/>	Route Control	View Definition	+ -
PAPP_GUEST	Guest User Access	<input type="checkbox"/>	Route Control	View Definition	+ -
PeopleSoft Guest	PeopleSoft Guest	<input type="checkbox"/>	Route Control	View Definition	+ -
B		<input type="checkbox"/>	Route Control	View Definition	+ -
Role Name	Description	PCode Rule	Query Rule	Directory Rule	
BAM Administrator	BAM Administrator	N	N	N	
BOE Admin	BOE admin role	N	N	N	
BOE Viewing	BOE viewing role	N	N	N	

Prompt field showing type ahead

## See Also

*Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technologies*, "Administering Portals," Managing General Portal Settings

*Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Using Page Controls," Using Edit Boxes and Long Edit Boxes



## Chapter 4

# Working With Pages

This chapter provides an overview of pages and discusses how to:

- Use effective dates.
- Work with page elements.
- Use data-entry fields.
- Use spell check.
- Work with HTML trees.
- Work with rich text editor fields.
- Work with field-level prompts and validation.
- Working with mouse over popup windows.
- Work with related content.

---

## Understanding Pages

Pages are the primary graphical interface by which you view and alter data in the PeopleSoft system. In many cases, these pages are representations of rows of data in the database tables. You use pages to view, enter, and update data stored in application tables. Each page also provides buttons or links to help you navigate through the system. As you change or add information to the database, you need to be familiar with effective-dating logic and the various page action options as you work with historic, current, and future data. PeopleSoft applications use many different types of elements to organize information on pages and to enable you to enter data, including data-entry, functional, and data processing elements.

PeopleSoft applications use Asynchronous JavaScript and XML (AJAX) technology to limit server trips and perform partial page refreshes. With a partial page refresh, the browser refreshes the entire page only when the user navigates to a new page. Any server trips triggered by PeopleCode functions such as FieldChange and FieldEdit for related display fields do not redraw the entire page; the refresh updates only the changed fields. Because of AJAX technology, much of the communication with the server happens in the background. You continue to work uninterrupted during the process and notice only the spinning processing icon that lets you know that the system is using AJAX technology to retrieve information.

This list includes the actions supported by partial page refresh:

- Changing a related field.
- Enabling and disabling fields.

- Hiding and unhiding fields.
- Expanding and collapsing group boxes.
- Using scroll area and grid navigation links, such as Next, Previous, and so on.
- Inserting and deleting rows in scroll areas and grids.
- Saving a page.

Many PeopleSoft components run in deferred processing mode to reduce interaction with the server thereby providing better performance. This means that, when using some pages in the browser, you can input data with minimal interaction with the server. If deferred processing mode is specified for a component, a page within that component or a field on a page within the component also performs processing in deferred mode.

---

**Note.** Interactive mode is the opposite of deferred mode processing.

---



---

**Note.** AJAX server trips and deferred processing mode work together, but are not the same. Use AJAX *and* deferred processing mode together for best performance regarding server trips.

---

## Using Effective Dates

This section provides an overview of effective dates and discusses page action options and effective dates.

### 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, and significant dates, you can build a job history.

When you enter new information that is related to existing data (in this case about an employee), such as a transfer or pay rate change, you do not want to lose or overwrite the data already stored in the database. To retain history, 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 has happened up to now and plan for the future. The PeopleSoft system categorizes effective-dated rows into the following basic types:

<b>Current</b>	The data row with the date closest to—but not greater than—the system date. Only one row can be the current row.
<b>History</b>	Data rows that have effective dates earlier than the current data row.
<b>Future</b>	Data rows that have effective dates later than the system date.

## Describing Page Action Options and Effective Dates

The types of actions that 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:

**Note.** Not all tables are effective-dated. The Include History and Correct History options only appear on pages that access effective-dated tables.

<i><b>Action</b></i>	<i><b>Rule</b></i>
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 modify 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.  <b>Note.</b> This option is available only to users with the proper permission.

To see how these actions work together, take a look at four possible events in the career of employee Tom Sawyer, listed by effective date. Assume that today is February 1, 2009:

<i><b>Effective Date</b></i>	<i><b>History</b></i>	<i><b>Current</b></i>	<i><b>Future</b></i>
Hired: January 1, 1994	X	—	—
Transferred: January 1, 2000	X	—	—
Promoted: August 1, 2005	—	X	—
Expected termination: December 31, 2009	—	—	X

The action type that you select dictates whether you can access certain fields and what you can do with each type of row:

<b>Action Mode</b>	<b>View</b>	<b>Change</b>	<b>Insert New Rows</b>
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 appear in the toolbar in the lower-right corner of any relevant pages. A shaded button indicates that the page is currently in that mode. For example, the CTI Agent Configuration page is currently in Correct History mode.

**CTI Agent Configuration**
Phone Book
Personalization

User ID: PTPORTAL

**Agent Information** Find | View All First 1 of 1 Last

Effective Date: 05/12/2004

\*Agent ID: PORTAL

Agent Password: \*\*\*\*\*

Queue:

\*Configuration ID: 001 CISCO SYSTEMS

\*Application User Name: CISCO

Application User Password: \*\*\*\*\*

CTI Client Signature:

\*Trace Level: 0 - None

Save Return to Search Notify Add Update/Display Correct History

[CTI Agent Configuration](#) | [Phone Book](#) | [Personalization](#)

Sample page in Correct History mode

### ***Update/Display Mode***

When you select Update/Display, you can access only current and future rows; you cannot access history. Using the example, you can view only the current data, which is effective-dated August 1, 2001, and the future data, which is effective-dated January 1, 2006 (the employee's promotion and then the employee's termination).

You can also:

- Insert new rows with an effective date later than the date on the current row—after August 1, 2001.
- Change the future-dated row, effective-dated January 1, 2006, and change any additional rows that you insert with a date later than today, February 1, 2005 (assumed to be today's date).

If you insert rows with effective dates between August 1, 2001, and February 1, 2005, you cannot change them if you return to the page in Update/Display mode.

### ***Include History Mode***

Select Include History to view any of Tom Sawyer's job data, from his hire date to the day on which he will be fired. However, as with Update/Display, you can update only future-dated rows, effective-dated February 2, 2005, and on. You can also insert new rows with an effective date later than the current row—that is, any date after August 1, 2001.

### ***Correct History Mode***

Select Correct History to access all data rows. This mode enables you to view, change, and insert rows of data, regardless of the effective date. You can view and edit any of Tom Sawyer's job data, from his hire date to the day on which he will be fired. You can also insert new rows with any effective date.

---

**Note.** As you move between the Update/Display, Include History, and Correct History modes, the system prompts you to save your changes if necessary.

---

---

## **Working With Page Elements**

This section provides an overview of PeopleSoft page element types and discusses how to use certain data-entry fields.

### **Understanding PeopleSoft Page Elements**

PeopleSoft applications include three types of page elements: aesthetic, functional, and data-entry fields. Although you should be aware of all page element types, you interact mostly with data-entry fields as you work in your application.

#### ***Aesthetic Page 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:

<b><i>Element</i></b>	<b><i>Definition</i></b>
Frame	Display-only box that groups a set of fields on a page.
Group box	Display-only box, with text labels, that groups and identifies related fields, such as options.
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 another visual element.
Static text	Display-only alphanumeric field that describes a page, field, or group of fields.

### ***Functional Page Elements***

Functional elements are controls, such as buttons and links, that perform a specific function. Aside from the standard toolbar buttons at the bottom of the page, your transaction page may include other buttons and links that are not associated with a grid or scroll area. For example, a button next to a field may perform a calculation based on a value that you just entered. You can activate this button by clicking it or by pressing the Enter key while the element has the focus. You can also activate links by pressing the Enter key.

### ***Data-Entry Fields***

Pages can include several types of data-entry fields, each designed to provide a simple way to enter and update data in your tables. Understanding the various types of data-entry field helps you use the system more efficiently.

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

- Check boxes and Radio buttons**      Selecting a check box or radio button enables an option. Typically, you select one by clicking within it or pressing the space bar when the box is highlighted. Click it again or press the space bar to disable the option.
- Check boxes correspond to fields with only two valid values. You can often select more than one check box in a related set. In contrast, a related set of radio buttons represents a group of mutually exclusive options; typically, you can only select one radio button within a related set.
- Edit boxes**      Enter characters or numbers into edit boxes. The character limit is determined by the length of the database field. Edit boxes for fields with prompt tables have a lookup button to the right. Edit boxes with spell check enabled have a spell check button to the right.
- See [Chapter 4, "Working With Pages," Using Edit Boxes, page 56.](#)



<b>Long edit boxes</b>	Enter longer strings of data, such as comments, into long edit boxes. These boxes store free-form text. If you type more lines than you can see at one time, use the scroll bar on the right to move through text. Long edit boxes with spell check enabled have a spell check button in the upper-right corner.
<b>Drop-down list boxes</b>	Select a value from a predefined list. Drop-down list boxes look like a data-entry field with a prompt button at one end. Click the prompt button to display a list of valid values from which you can select a single option.
<b>Images</b>	Insert photos or other images into your PeopleSoft Application. The format of the image that you insert must match the image format defined for that field by the application developer. Acceptable formats include JPG, BMP, GIF, or DIB. For example, on the Employee Photo page, you can only insert JPG images into the employee photo field. If you try to upload an image of another format, the system displays an error message.
<b>Grids and scroll areas</b>	<p>Serve as containers or organizers for multifield data entry. Grids appear as a minispreadsheet within a page. Scroll areas are like grids except that the fields are arranged in a free form manner. Both contain rows of data that may include Add, Multi-Row Insert, or Delete buttons. Most include a navigation bar or footer with multiple control and configuration options.</p> <p>You can think of all of the fields in each of these controls as belonging to one table in your database. Each time that you add a new row, you are actually adding a new row of data to the database table, each of which shares 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.</p>

### ***Moving Among Fields***

To move among the data-entry fields on a page, press the tab key or click the field once. Pressing tab moves you one field at a time in a sequence determined in the page definition. Pressing tab also rests on prompts to give you the option of viewing the prompt table or calendar. To open a prompt or calendar, you can press enter. Or, to get to the next field, press tab again. Press Shift+Tab to move backward rather than forward in the tabbing order.

---

**Note.** Pressing Tab may yield different results if you have modified page tabbing behavior on the My Personalizations page.

---

### ***Required Fields***

In most applications, required fields are marked with an asterisk. You must enter data into that field to continue on to the next field or save the page. When the developer has set deferred processing mode for the page, you may not be informed that a field is required until you attempt to save or leave the page. If you save the page without entering required data, the field turns red and an error message appears on the page. Click OK within the error message, and then enter the correct data in that field. Required fields are often drop-down list boxes or are accompanied by a prompt button to help you enter the correct data.

---

## Using Data-Entry Fields

This section discusses how to:

- Use edit boxes.
- Use long edit boxes.
- Use drop-down list boxes.
- Work with images.

## Using Edit Boxes

Move to and highlight an edit box by pressing the tab key or by double-clicking and highlighting the text. You can type over existing highlighted text. If the text is not highlighted, you are inserting rather than replacing text.

This example shows an edit box:

**Title:**

Edit box

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. 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 uppercase before writing it to the database.

Other types of formatting include:

- Social security, social insurance, or other government ID numbers.
- Dates.
- ZIP codes or other postal codes.
- International 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 mm/dd/yy (include zeros); the system automatically changes the display to show a four-digit year.

---

**Note.** Number formatting may perform differently for users who have personalized their systems.

---

---

**Note.** PeopleSoft applications are equipped with a spell check feature that you can use on data entered in edit boxes.

---

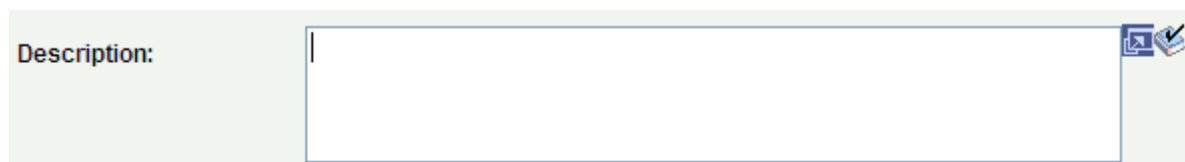
In interactive mode, if you enter a field value incorrectly, the system highlights the field in which an invalid value was added, and a warning message appears with an explanation of the problem.

## Using Long Edit Boxes

You use long edit boxes to enter anecdotal information such as comments or free form informational text.

Move to and highlight a long edit box by pressing the tab key or by double-clicking and highlighting the text. You can type over existing highlighted text. If the text is not highlighted, you are inserting rather than replacing text. If you enter data that extends beyond the visible area of the long edit box, a scroll bar appears for you to navigate through the data.

This example shows a long edit box with the Display in Modal Window and Spell Check buttons:

A screenshot of a software interface showing a long edit box. To the left of the box is the label 'Description:'. The edit box itself is a large rectangle with a blue border. To the right of the box, there are two small icons: one showing a window with a magnifying glass (representing 'Display in Modal Window') and another showing a book with a checkmark (representing 'Spell Check').

Long edit box showing Display in Modal Window and Spell Check buttons

---

**Note.** PeopleSoft applications are equipped with a spell check feature that you can use on data entered in long edit boxes.

---

---

**Note.** You can zoom a long edit box to a modal window if the Display in Modal Window icon is visible to the right of the long edit box.

---

## Using Drop-Down List Boxes

To select a single item from the list, click the down arrow to display the list, scroll through the list until your choice is visible, and then click the desired list item. The list closes and the selected value appears in the list box. You can also type the first letter of an item to select it. If there is more than one choice for a letter, type the letter repeatedly to cycle through the list. In the following example, first click the down arrow, then, if you want to select Greek, type the letter G twice. Alternatively, press the Down Arrow key to select the field entry that you want. Once your choice is highlighted, press Enter.

This example shows a drop-down list box:



Drop-down list box

## Working With Images

You can insert or update images in your PeopleSoft system. For example, the Employee Photo page enables you to store and maintain photos of your employees in your PeopleSoft database.

This section discusses how to:

- Insert an image.
- Delete an image.

### ***Inserting an Image***

You can insert photos into your PeopleSoft database. For example, you may want to store employee photos for company identification badges, or pictures of products for inventory purposes.

To insert an image at runtime:

1. Open the page in which you want to insert the photo.
2. Click the Add button.

A search page appears enabling you to search for the image that you want to insert. You can browse for the image from your desktop, your hard drive, or the network.

3. Click the Browse button to search for and select the image you want to insert.
4. Click the Upload button.

The upload page closes and your newly inserted image appears on the page.

### ***Deleting an Image***

To delete an image at runtime:

1. Open the page from which you want to delete the image.

2. Click the Delete button.

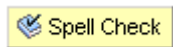
The system automatically deletes the image on the page without posting a warning message prior to deletion. However, if you exit the page without saving, the system does not delete the image from the database, and the image is present when you reopen the page.

## Using Spell Check

PeopleSoft applications are equipped with a spell check feature that you can use on data entered in edit boxes and long edit boxes. Activate spell check by clicking the spell check icon to the right of those fields where spell check is available or by clicking the spell check toolbar button.



Click to activate spell check for the corresponding field. If there are no spelling errors, you see the message "No misspellings found." You can also activate spell check by pressing Alt+5 when the cursor is in the field.



Click to activate spell check for all fields in the component that have been enabled for spell check, regardless of whether those fields have changed. The system checks each field and then proceeds to the next spell check field until all fields in the component have been checked. If there are no errors, the "No misspellings found" message appears.

In the following example, spell check is available for the Description, Message Text, and Explanation fields.

### Message Catalog

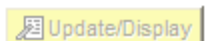
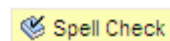
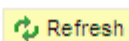
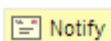
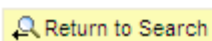
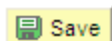
Message Set Number: 4

Description: Help Processor



Short Description: HPR

Messages		Find   View All	First	2 of 5	Last
Last Update Timestamp: 06/13/2001 3:44PM					
*Message Number:	2				
*Severity:	Message				
*Message Text:	Maximum number of records found matching specified key(s) -- others not inc				
Description:	When performing a Lookup, the database returned more rows than can be accommodated in the list box.  Use a Partial Key value or Advanced Search to limit the number of				



Spell check icons and button

The Spell Check button opens the Spell Check page. This page displays the errors in the text and offers a list of alternatives, if applicable. You can choose to ignore the occurrence, ignore all occurrences, change the spelling, change the spelling for all occurrences, or add the word to the current language dictionary.

## Spell Check

Field Label:

Explanation

Spell Check Text:

One of the objects you are trying to lock is already locked by **anothr** user. Do you want to attempt to lock any other objects you've selected?

Change To:

another

Alternatives:

another

anther

Ignore

Ignore All

Change

Change All

Add

OK

Cancel

Spell Check page

Field Label	Displays the field label text of the field currently being checked.
Spell Check Text	Displays all of the text in the field being checked, highlighting the first misspelled word. This field is display-only. This field information is particularly important when multiple fields are being checked simultaneously by using the toolbar action or mandatory spell check.
Change To	<p>Initially displays the first highlighted value in the Alternatives list. You can select a new value from the Alternatives list or enter a new word in the Change To field. The maximum length is based on the maximum field length, which is 40 characters. If you enter a new value, the system spell checks the entry when you click the Change or Change All buttons to verify the correct spelling.</p> <p>If the system does not find any alternative spellings, the Change To field is blank and the Change and Change All buttons are disabled.</p>
Alternatives	Lists other possible spellings. The options listed match the case of the misspelled word.

<b>Ignore</b>	Click to leave the current spelling as is and locate the next misspelled word.
<b>Ignore All</b>	Click to leave the current spelling as is for all text in the field that exactly matches the original text. This action is case-sensitive; only exact matches are ignored.
<b>Change</b>	Click to correct the error to the value that appears in the Change To field. Users can either select one of the proposed alternatives or type in their own value. The system then focuses on the next misspelled word.
<b>Change All</b>	Click to correct all occurrences of the error with the value in the Change To field. You can either select one of the proposed alternatives or type in your own value. The system then focuses on the next misspelled word. Like Ignore All, this action is case-sensitive; only exact matches are changed.
<b>Add</b>	Click to add the highlighted misspelled word (as is) to your personal dictionary. The system then focuses on the next misspelled word. Additions to the dictionary must be 40 characters or less.  <u>See Chapter 2, "Setting User Preferences," Adding Words to Your Personal Dictionary, page 39.</u>

### ***Mandatory Spell Check***

Certain pages, such as those that require an email response, have a mandatory spell check requirement. When you save these pages, the system automatically runs spell check on spell check enabled fields. A field is eligible for automatic spell check if you have changed its contents and you have not already run spell check for that field. If there is more than one spell check field, spell check runs in succession. If there are no errors, the system saves the data without issuing a message.

## **Using Foreign Language Dictionaries**

Spell check supports numerous languages. The default spell check dictionary is based on your current sign in language. For example, if you select French as your sign in language when you sign in to your PeopleSoft application, your spell check dictionary is also in French. You can change your language dictionary on the My Personalizations page.

To change language dictionaries:

1. Select My Personalizations from the navigation menu.
2. Click the Personalize Option button for the General Options personalization category.
3. Enter the language dictionary that you want in the Override Value edit box for Spell Check Dictionary.
4. Click OK.

You can only use one dictionary per sign in session. To change language dictionaries again, make the change in My Personalizations and then sign out of the system before proceeding. To return to having your default spell check dictionary selected automatically based on your current sign in language, remove your override value or set it to *Use Session Language*.

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**Note.** Hyphenation for Hungarian is not currently supported.

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## Working With HTML Trees

When discussing trees, PeopleSoft uses terminology derived from the idea of a family tree. The nodes that report to the root node are called its children; the root node is their parent. Nodes that have the same parent are called siblings.

These terms refer to the relationship between nodes and are not permanent attributes of the nodes themselves. A single node can be a parent, child, and sibling all at the same time. In the following example, Operations Administration is a child of Office of the President and a sibling of Human Resources, Controller, and Retail Banking Admin.




## Tree Manager


SetID:	QEDM1	Last Audit:	Valid Tree
Effective Date:	05/05/1997	Status:	Active
Tree Name:	QE_PERS_DATA	Personal Data Tree	


<a href="#">Save As</a>	<a href="#">Close</a>	<a href="#">Tree Definition</a>	<a href="#">Display Options</a>	<a href="#">Print Format</a>
-------------------------	-----------------------	---------------------------------	---------------------------------	------------------------------


[00001](#) > [10100](#) > [10900](#)


<a href="#">Collapse All</a>	<a href="#">Expand All</a>	<a href="#">Find</a>	First Page	19 of 132	Last Page
------------------------------	----------------------------	----------------------	------------	-----------	-----------


 00001 - Corporate Headquarters


 [8200] - ALBRIGHT


 [8300] - VINCENT


 [8400] - WALTERS


 [8500] - DUNCAN


 [8600] - ELIAS


 10100 - Office of the President


 [8001] - ASD


 [8501] - BENNETT


 [8661] - CHERRIER


 10200 - Human Resources


 10300 - Controllers


 10400 - Retail Services


 **10900 - Operations Administration**










 [8102] - SULLIVAN

 [8409] - WESTLUND

 11000 - Information Systems & Technlgy

 11100 - Item Processing

 20100 - Office of the President (CDN)

Sample HTML tree

Click the yellow folders with + (plus) signs to expand another level. The leaves represent the lowest level of the tree and are not expandable. Click the links beside the nodes to see representations of the data. Clicking a link either opens an entirely new page or displays data for that link to the right of the HTML tree.

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## ***Navigating Within an HTML Tree***

Navigate the tree by using the navigational bar (the horizontal bar at the top of the tree) and the navigation path, as shown in the previous example. You can perform the following actions on the selected tree by using the links and images on the navigation bar.

<b>Collapse All</b>	Click to close all of the visible nodes except for the root node. The root node is always expanded.
<b>Expand All</b>	<p>Click to expand all of the nodes on the tree, so that the entire tree or branch hierarchy is visible.</p> <p>Expands all parent and child relationships, but the tree hierarchy is still presented one page at a time. Use the next and previous page arrows to page forward and backward through the tree.</p>
<b>Find</b>	Click to access the Find Value page and search for nodes and detail values.

As you find your way through your tree, navigation paths appear above the navigation bar. They show you a basic map of your route through the tree; you can also use them to jump back to a previously visited node. These navigation paths represent nodes in the current branch (A type nodes) and the parent branch of the opened branch (B type nodes). In the example, node 00001 is the parent branch of C10100 and C10100 is the parent node of C10900.

The maximum number of navigation paths displayed is seven. When you exceed that number, the system removes the earlier ancestor nodes.

### **See Also**

*Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Tree Manager, "Using PeopleSoft Tree Manager"*

*Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Tree Manager, "Using PeopleSoft Tree Manager," Navigating PeopleSoft Tree Manager*

---

## **Working With Rich Text-Enabled Fields**

This section provides an overview of the rich text editor and discusses how to:

- Use the tool bar
- Enter, format, and modify text.
- Insert and modify images.
- Use spell check.

## Understanding the Rich Text Editor

The rich text editor control extends the capability of a long edit box. It allows for the rich formatting of text content, including common structural treatments such as lists, formatting treatments such as bold and italic text, and drag-and-drop inclusion and sizing of images. The rich text editor tool bar is extensible by using a custom settings configuration file so that application developers can achieve a high degree of customization.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Using Page Controls," Rich Text Long Edit Boxes.

---

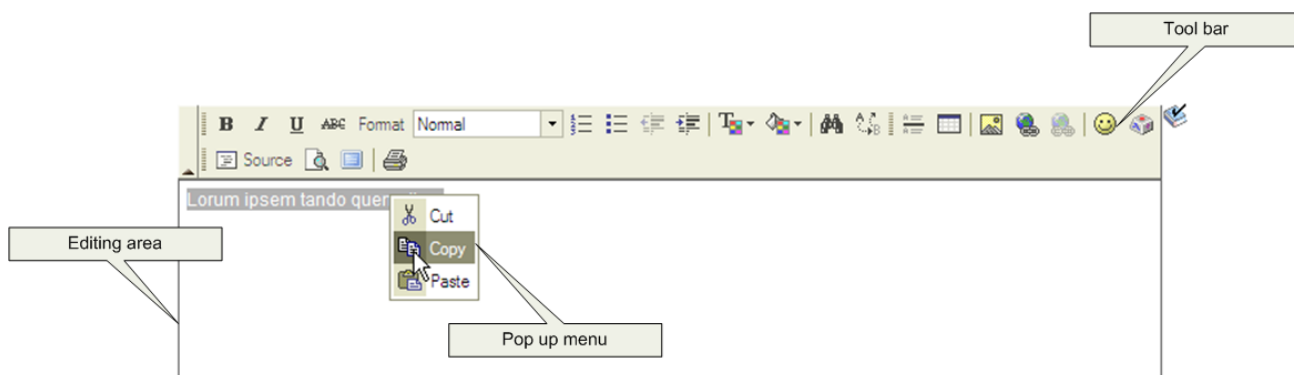
**Note.** All rich text-enabled fields support multi-language entry.

---

The rich text editor provides an easy to use interface which should be familiar to users who worked on common desktop text editors such as Microsoft Word or Open Office. It consists of these three distinct elements:

- Tool bar
- Editing area
- Pop up menu

This is an example of the rich text editor control showing the tool bar, editing area, and pop up menu elements:



Rich text editor elements

### **Tool bar**

The tool bar is the area at the top of the editor, which contains many different buttons that extend and activate a variety of editor functions. The tool bar is highly customizable and can vary from field to field. The tool bar is collapsible. Click the triangle located beside the tool bar to toggle between visible and collapsed.

### **Editing Area**

The editing area is directly below the tool bar. You enter your text in this area.

### ***Pop up Menu***

A pop up menu is a contextual menu that appears when you right-click the mouse inside the editing area. The functions on the menu change based on what element, such as a table or an image, that is under the cursor when you click the mouse.

## **Using the Toolbar**

The toolbar is the area in rich text editor where you can activate most of the editor features. Each button in the toolbar access a different function. There are simple functions such as basic text formatting and more advanced features such as creation of links and tables.

To use the buttons in the toolbar you place the cursor over the button. The button highlights and hover text with the information about the button function appears. Click the button to execute its function. The graphic on the toolbar buttons are standard across many text editors and you will probably find that you know how to use them intuitively. In addition to the toolbar buttons there are also toolbar drop down list boxes, which are white areas with an arrow on its side. You activate drop-down list boxes by clicking the white area or the little arrow. Once you click the menu, it expands so that you can select from one of the available options. To select an option, move your cursor to it and click it.

## **Entering, Formatting, and Modifying Text**

Writing in the rich text editor is similar to writing on desktop word processor text editors, such as Microsoft Word or Open Office. There is an important difference to be considered though. You use desktop word processors primarily to create printed content, limited by physical pages. You use the rich text editor to create text that you publish on PeopleSoft application pages, and that you read by using web browsers.

To enter text, move your cursor to the editing area and enter the data using your keyboard. You can also paste text into the area.

To format text, you click the button before you begin entering text, or highlight text and click the button for the format that you want.

## **Inserting and Modifying Images**

To insert an image into the text, click the Image button. The maximum image size is database dependent. Some database platforms support much larger image sizes while others limit the size to 32000 bytes. Consult your database documentation for more information. Use the Image Properties dialog box to upload an image file or insert a URL link.

To modify images after you have inserted them, right-click the image and then click Image Properties.

### ***Image Properties - Upload Tab***

Access the Image Properties dialog box (Click the Image button).

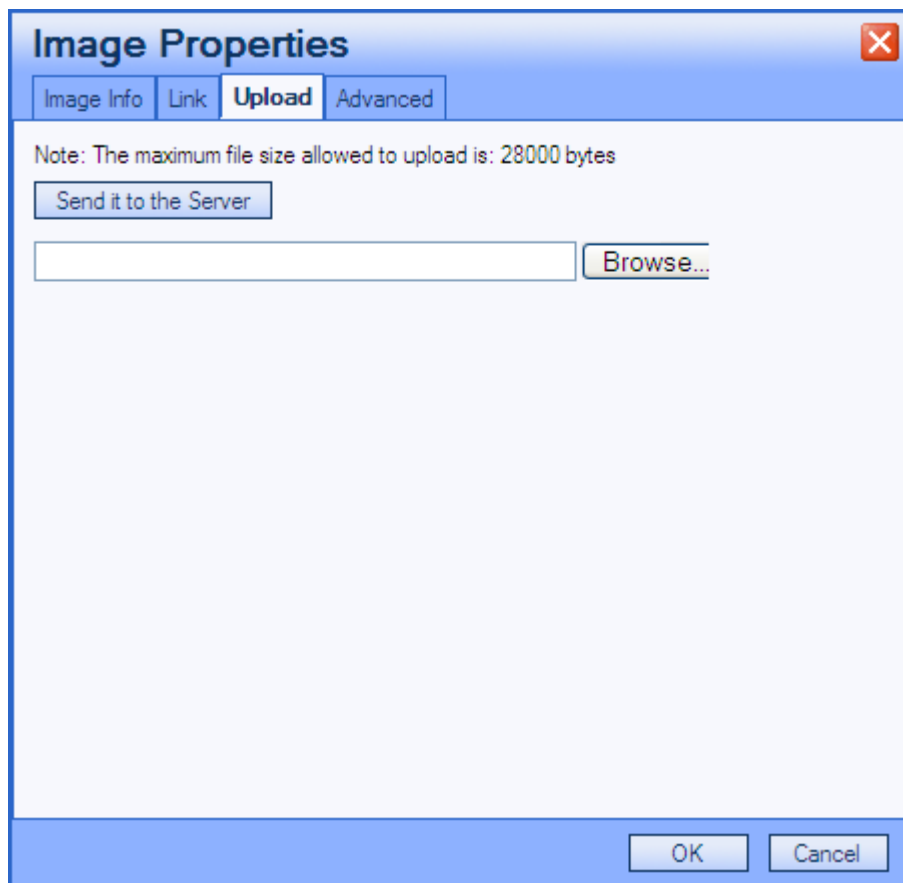


Image Properties: Upload tab

When you click the Image button, the Image Properties dialog box appears with the Upload tab activated. You must upload the image before you can change the other properties.

Click the Browse button to locate the file that you want to insert into the text.

Click the Send it to the Server button to send the image to the database.

### ***Image Properties - Image Info Tab***

Access the Image Info tab.

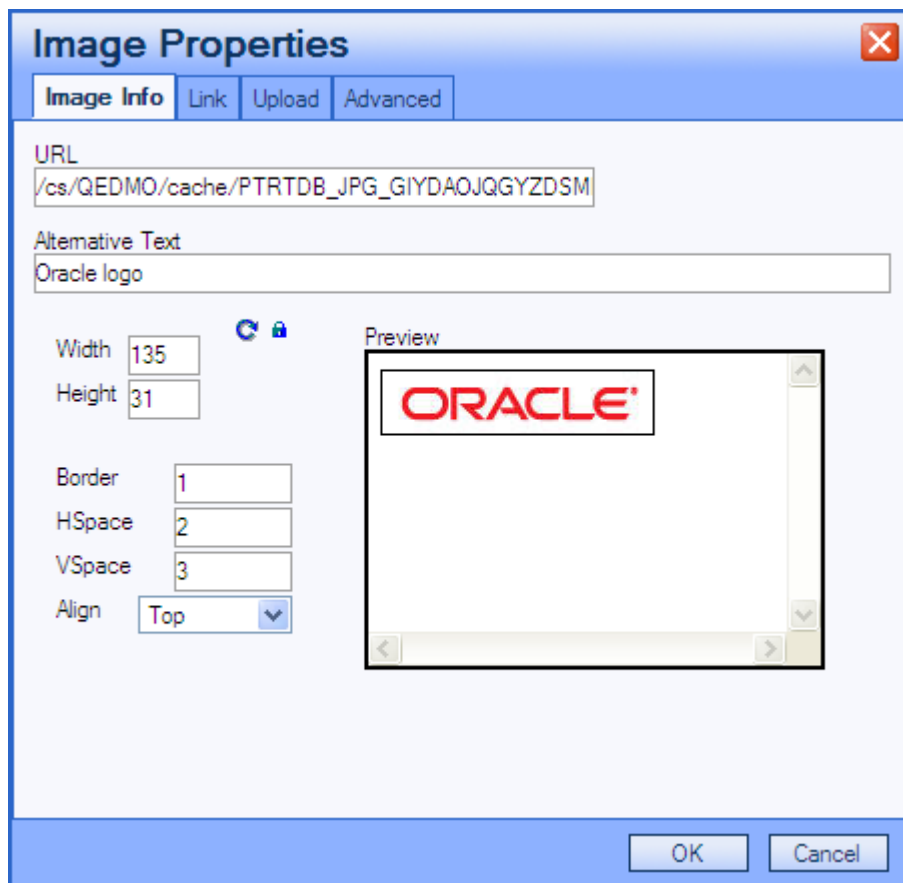


Image Properties: Image Info tab

Use the Image Info tab to set the alternative text, width, height, border, hspace, vspace, and align properties which in turn sets the HTML <img> tag attributes: alt, width, height, border, hspace, vspace, and align, respectively.

- |                   |  |
|-------------------|--|
| <b>URL</b>        | This field is automatically populated when you send the image to the server. This is the URL ID for the image. |
| <b>Reset size</b> | Click to change the image size back to its original size.  |
| <b>Lock ratio</b> | Click to lock the ratio so that the height and width change in conjunction to each other.                      |

### ***Image Properties - Link Tab***

Access the Link tab.

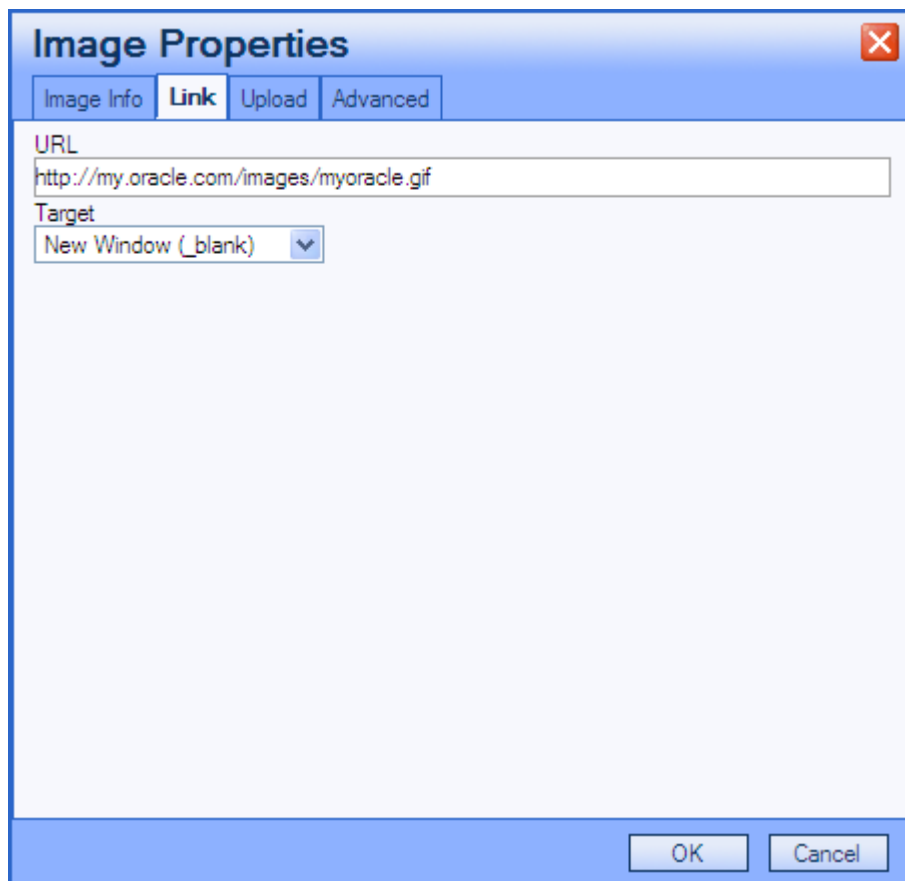


Image Properties: Link tab

Use the Link tab to automatically link an image to another resource. The Image Info tab URL value must be set, then copy it to the Link tab URL field. This results in the editor enclosing the `<img>` tag in an `<anchor>` tag. For example, if you specify `http://my.oracle.com/images/myoracle.gif` as the URL, it results in: `<a href="http://my.oracle.com/images/myoracle.gif"></a>`The Target drop-down list specifies where or how the image link appears. Selecting a target option of *New Window*, *Topmost Window*, *Same Window*, or *Parent Window* results in the editor setting the target attribute to `"_blank"`, `"_top"`, `"_self"` or `"_parent"`, respectively, for example, `<a target= "_top" href="http://my.oracle.com/images/myoracle.gif">`

### **Image Properties - Advanced Tab**

Access the Advanced tab.

Image Properties: Advanced tab

Use the Advanced tab to set the Id, language direction, language code, long description URL, stylesheet classes, advisory title and style fields which in turn sets the HTML img tag attributes: id, dir, lang, longdescr, class, title and style, respectively.

### See Also

FCK Editor User's Guide, [http://docs.fckeditor.net/FCKeditor\\_2.x/Users\\_Guide](http://docs.fckeditor.net/FCKeditor_2.x/Users_Guide)

## Using Spell Check

You can click the Spell Check button that is outside of the rich text editor field to perform spell check on the field content. This invokes the current PeopleTools spell check functionality. The HTML tags are stripped and only the text is taken into consideration for spell check.

While in Spell Check mode, images that you have uploaded do not appear, but you will see a place holder image that contains an 'x' in the upper left corner.



---

## Working With Field-Level Prompts and Validation

This section provides an overview of field-level prompts and validation and discusses how to:

- Use lookup prompts.
- Use calendar prompts.

### Understanding 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. These tables are called prompt or lookup tables because you prompt the system to lookup and present a list of valid field values that reside in the prompt table. Prompt fields are defined so that the system compares the values that you enter to values that are in a prompt table to ensure that your values are valid.

Many fields validate against prompt tables. For example, currency codes and country codes are each stored in their own tables: the CURRENCY\_CD\_TBL and COUNTRY\_TBL tables. Fields prompting against these kinds of prompt tables appear on the page as edit boxes with a lookup button to the right.



Click to open the Look Up page for the current field.



Click to open a small calendar that displays the current month.

---

**Note.** Alternatively, you can press Alt+5 while in a prompt or calendar field to open the lookup page or the calendar, respectively.

---

### Using Lookup Prompts

You can perform a full or a partial search.

To perform a full search, click the lookup button. The Look Up page opens as a stationary modal page on top of the primary page. The primary page is grayed out and inaccessible while the prompt page is active. When the Look Up page opens, the Search Results grid displays all valid values for that field up to the maximum row count. Click the field title in the Search Results grid to change the field values sort direction. To narrow the search results, you can enter partial data and click the Look Up button. Click the Advanced Look Up link to narrow the search, both by searching based on more than one field at a time and by using a variety of search operators. When the field value that you need appears in the Search Results grid, click the value link to populate the prompt field on the primary page with the selection.

---

**Note.** Your system administrator might exclude extremely large tables from automatically prompting, for performance reasons.

---

To perform a partial search, enter the partial value in the prompt field and then click the lookup button. As in the full search, the Look Up page opens as a stationary modal page on top of the primary page. The primary page is grayed out while the prompt page is active. When the Look Up page opens, the system populates the Search Results grid with all the field values that match the partial value that you entered in the prompt field. Click the field title in the Search Results grid to change the field values sort direction. When the field value that you need appears in the Search Results grid, click the value link to populate the prompt field on the primary page with the selection.

This is an example of a Look Up page:

**Look Up**

**Look Up Navigator Homepage**

Search by: **Permission List** begins with

[Advanced Lookup](#)

**Search Results**

View 100 First 1-235 of 235 Last

<u>Permission List</u>	<u>Permission List Description</u>
<a href="#">AEAE1000</a>	Environments Management
<a href="#">ALLPAGES</a>	All pages and weblibs
<a href="#">ALLPORTL</a>	Portal Objects
<a href="#">APPSRV</a>	Can start application server
<a href="#">EOAW1000</a>	Approval Framework Permission
<a href="#">EOBF9000</a>	All BAM Framework Components
<a href="#">EOCF9000</a>	AAF Administrator. (core setup)
<a href="#">EOCF9001</a>	AAF Functional User
<a href="#">EOCF9002</a>	AAF Display RunTime
<a href="#">EOCO9000</a>	PS Common Components
<a href="#">EODI1000</a>	Desktop Integration Pages

Example of a Look Up page

---

**Note.** Application developers can use Application Designer to disable the partial search feature on lookup pages.

---

### ***Look Up Page Properties***

All Look Up pages share certain characteristics. All Look Up pages are modal and appear above the primary page, which is grayed out. In addition, when working with these pages, you can:

- Resize the page.
- Close the page from the title bar close icon.

**Note.**

The New Window, Help, Customize Window, and Copy URL links do not appear on the modal prompt lookup page

Do not use the browser Back button when accessing prompt windows in AJAX mode. Use application links and button to navigate PeopleSoft applications. Clicking the browser Back button in some browsers can cause the spinning processing message to appear. To stop it, press the Back button again, or click the browser Stop button and close the lookup prompt window.

**See Also**

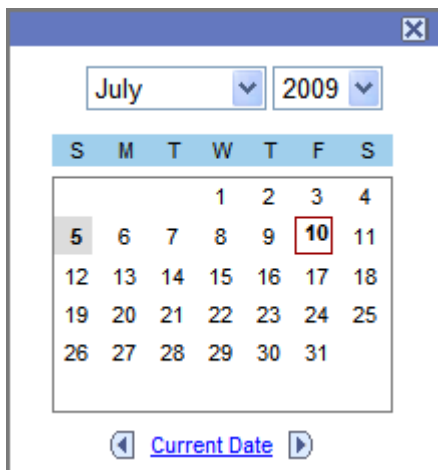
Chapter 3, "Using Keys and Search Pages," Using Search Pages to Retrieve Data, page 42

*Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Creating Record Definitions," Setting Record Field Use Properties

## Using Calendar Prompts

When entering information in a date field, you can select the calendar prompt button to the right of the field to help you choose a date. You can also enter the current day's date by entering *today* in the date field. Press Tab to exit the field; the current date appears. This feature can also use languages specific to the locale.

This example shows the calendar window that displays when you click the calendar prompt button:



Calendar prompt window

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. Press Esc to cancel and close the calendar.

## Working With Mouse Over Popup Pages

Because of AJAX technology, PeopleSoft applications support mouse over popup pages. A mouse over or hover popup page is a small window that is raised or "pops up" when you move your the cursor over a popup-enabled edit box or link on an application page. Popup windows are used to display additional read-only, context sensitive information that would otherwise clutter the main page. Popup pages hover over the main page as long as you leave your mouse over the activating control. When you move your mouse, the popup window disappears.

This is an example of an Employee Information popup page:



Popup page example

## Working with Related Content

In addition to the primary content on a page, some PeopleSoft application pages might have related content. Related content appears at the bottom of the main page in its own frame. Related content can be analytics, other PeopleSoft components, external web sites, discussions, wiki pages, or a variety of other content that you find helpful to performing your task on the primary page. You can work with the related content just as you would any other PeopleSoft page. You can collapse and expand the frame, and refresh the content if those buttons are available. Related content is configured and secured by an administrator.

You can have more than one type of related content associated with the main page at a time. If there is more than one related content page, the related content pages appears as tabs in the related content frame; you access each page by clicking the tab.

## Chapter 5

# Working With Scroll Areas and Grids

This chapter provides an overview of grids and scroll areas and discusses how to:

- Navigate through data.
- View data in scroll areas.
- View data in original grids.
- View data in scrollable grids.
- Use the Customize link to personalize grids.
- Use effective-dated scroll areas and grids.
- Use multiple scroll areas and grids on a page.
- Work with analytic grids.

---

## Understanding Scroll Areas and Grids

Scroll areas and grids serve as containers or organizers for multifield data entry. You can think of all of the fields in each of these controls as belonging to one table in your database. In scroll areas, the fields appear on the page in a freeform manner. In grids, fields appear as columns similar to those on a spreadsheet. Most scroll areas appear with even and odd rows in different colors. This enables you to visually distinguish rows at a glance. Additionally, when you select a row with the mouse, the row changes color to distinguish a selected row from other rows.

Three types of grid layouts appear in PeopleSoft applications:

- Original grids.
- Scrollable grids.
- Analytic grids.

### ***Original Grids***

Original grids are the standard grid layout in releases prior to PeopleTools 8.50. With original grids, you can see navigation headers and footers; insert, multi-row insert, and delete buttons; and grid separator tabs. If the Customize link is enabled by the developer, you can search for data within the grid, sort grid data; and rearrange, freeze, and hide columns to personalize your grids.

See [Chapter 5, "Working With Scroll Areas and Grids," Viewing Data in Original Layout Grids, page 82.](#)

## Scrollable Grids

Unlike original grids, scrollable grids take advantage of AJAX technology, which enables you to change the grid structure and content directly on the grid. You can make changes to scrollable grids directly from the transaction page without using the Customize link. Additionally, scrollable grids can be configured to scroll data within the grid control so as to keep frozen columns or column headers from scrolling out of view and scrollable grids enable you to navigate from cell to cell vertically and horizontally.

See [Chapter 5, "Working With Scroll Areas and Grids," Viewing Data in Scrollable Layout Grids, page 85.](#)

## Analytic Grids

Analytic grids look and function differently than original and scrollable grids. Analytic grids specifically retrieve data from the analytic server and display it in a grid format on a PeopleSoft Pure Internet Architecture page. The analytic grid is the centerpiece for the Analytic Calculation Engine user interface, enabling end users to view, edit, and drag and drop data from an analytic model's cube collection.

See *Enterprise PeopleTools 8.50 PeopleBook: Analytic Calculation Engine*, "Working with Analytic Grids."

---

# Navigating Through Data

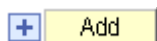
Scroll areas and grids contain similar navigation structures. You can use navigation buttons, links, and grid scroll bars to navigate through data. Buttons and links appear in the navigation header, within the row itself, or to the right of the tabs in a tabbed grid, as appropriate. Certain options, such as embedded horizontal and vertical scroll bars, the Customize link, and the zoom and download to spreadsheet icons, appear only on grids.

This section discusses how to:

- Use navigation buttons and links.
- Add rows.
- Delete rows.
- Select rows.
- Find data.

## Using Navigation Buttons and Links

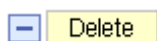
You can view data in grids and scroll area by using navigation buttons and links. The following table describes the buttons and links that might appear on your grid or scroll area.



Click to insert one new row after the current row.



Click to insert multiple rows. Specify the number of rows (1 to 99).



Click to delete the current row of data.



(Show Next Row) Click to display the next row or set of rows of data.

---

**Note.** The Show Next Row and Show Previous Row buttons are disabled if you are viewing all rows of data.

---



(Show Previous Row) Click to display the previous row or set of rows of data.



(Show All Columns) In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.



(Show Tabs) In a tabbed grid only, click to return the expanded grid to its tabbed state.

### Customize

Click to access the customization page for that grid, which enables you to sort by column and reorder, hide, and freeze columns.



(Download) Click to display a new browser window, showing the contents of the grid in a spreadsheet-like format.



(Zoom) Click to display the grid in a modal window.

### View All

Click to display the maximum number of rows available to be viewed at once on a page. When this feature is enabled, the link morphs to read View x so that you can return to the original setting. The value of x can change, and is set by the application developer.

### Find

Click to find a row of data containing a specified search string.

### First

Click to access the first row or set of rows of data.

---

**Note.** The First and Last links are not available if you are viewing all rows at once, in which case you scroll to see your data.

---

### Last

Click to access the last row or set of rows of data.

There are also keyboard shortcuts for all of the above buttons and links.

See [Chapter 1, "Working With Browser-Based Applications," Using Hot Keys, page 18.](#)

In addition to these links and buttons, there is a numbering system for the rows. For example, if a grid or scroll area were set to view only one row at a time, the navigation header might read *1 of 2* or *1 of 20*, depending on how many entries there were. If the grid or scroll area were set to view three rows of data at a time, it might read *1-3 of 20*. Click the arrows to view the next or previous series of rows. In the Messages scroll area, for example, the count indicates that it contains 560 total rows of data, displaying just one row at a time. Select View 100 to see the rows in groups of 100 at a time.

**Messages** Find | View 100 First 1 of 560 Last

**Last Update Timestamp:** 06/04/1999 8:24AM

**\*Message Number:** 1

**\*Severity:** Error

**\*Message Text:** Invalid use of !.

**Explanation:** The exclamation symbol (!) can only be used as a token within PeopleCode as part of a not-equal operator (!=).  
Either make the operator a proper not-equal expression or delete the

Example scroll area

The example shows "View 100" in the example above instead of "View All" because of the personalization (*GRDRWS*) that limits the number of rows to display in "View All" mode. Setting it too high could impact performance; the default setting is 100.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Managing PeopleSoft Personalizations," Understanding Navigation Personalizations.

---

**Note.** Be aware of the differences between the grid or scroll area navigation header, which can appear as a header and a footer in any grid or scroll area control, and the universal navigation header, which appears in the upper-right corner of every page.

---

## Adding Rows

You can click the Add or + button to add an empty row after the current row

In some cases, you can add several rows at once to your grid or scroll area by clicking the +... (multi-row insert) button. When you click this button, the system prompts you to specify the number of rows needed. You can add up to 99 rows at once. This option is not available unless configured by the application developer.

When a grid or scroll area references a table with no data in it, the runtime system presents a *dummy row* to allow the user to access the add row button. This row might have default data in some fields, but has no instantiation on the database unless the user enters data on this row and clicks the Save button. Deleting the dummy row results in a new dummy row being added to the display.

---

**Note.** If you do not insert a new row, any data that you enter overwrites the existing data in the current row. However, the changes that you make do not take effect until you save the page. If you exit the page without saving, the original data remains intact. When working with effective dated tables, you can only make changes to existing data when in Correction mode.

---



## Deleting Rows

You can also delete rows of data from a grid or scroll area. To delete a row of data, click the Delete or – button associated with the row you want to delete. The system confirms the deletion by asking if you want to proceed. 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 the Back button in your browser. You can also retrieve the deleted row by closing the transaction without saving your changes, however, all changes to the entire component since the last save are lost.

## Selecting Rows

For certain grids and scroll areas, you can select a single row or multiple rows in case you need to batch a number of processes. Single-row selection is available when the system displays a radio button to the left of each grid row or in the upper-left corner of a scroll area. Select a row by selecting one of the radio buttons in front of the row. Multiple-row selection is available when the system displays a check box to the left of each grid row and in the upper-left corner of a scroll area. Select as many rows as you need by selecting each check box. This option must be enabled by the application developer.

In this example, the Process List grid shows check boxes, which enable you to select multiple rows for processing.

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	<a href="#">COBOL Multi-process Job</a>	3CBL	PSJob	(None) ▾	(None) ▾	<a href="#">Distribution</a>
<input checked="" type="checkbox"/>	<a href="#">Crystal Multi-process Job</a>	3CRYSTAL	PSJob	(None) ▾	(None) ▾	<a href="#">Distribution</a>
<input type="checkbox"/>	<a href="#">SQR Multi-process Job</a>	3SQR	PSJob	(None) ▾	(None) ▾	<a href="#">Distribution</a>
<input checked="" type="checkbox"/>	<a href="#">6XRFWIN</a>	6SQR	PSJob	(None) ▾	(None) ▾	<a href="#">Distribution</a>
<input type="checkbox"/>	Simple AE test program	AEMINITEST	Application Engine	Web ▾	TXT ▾	<a href="#">Distribution</a>
<input type="checkbox"/>	<a href="#">All Process Types</a>	ALLTYPES	PSJob	(None) ▾	(None) ▾	<a href="#">Distribution</a>
<input type="checkbox"/>	Data Designer/Database Audit	DDDAUDIT	SQR Report	Web ▾	PDF ▾	<a href="#">Distribution</a>

Example selecting rows

## Finding Data

The find feature on grids and scroll areas enables you to locate specific data, which is particularly useful if your table contains hundreds of rows. Note that this feature enables you to search the data within a specific grid or scroll area only. It does not search for any data outside the control. The find feature looks for matches in edit boxes, display-only fields, disabled or shaded fields, dynamic links, and text in long edit boxes. It does not find column headings, field labels, text values on icons, static links, and hidden fields. Find searches from the left-most visible object of the current row down, based on the text that you enter in the search prompt.

The Find link represents the find feature in the navigation bar of your grid or scroll area. Clicking this link displays a dialog box prompting you to enter your search string. The find feature searches through all rows of data in the buffer and brings the first occurrence in your search string to the top of the row list in the grid. If you are in a scroll area that displays only one row of data at a time, the find feature opens that row of data. To find the next occurrence, click the Find link and enter your search string again.

If your search string does not appear in the currently visible rows, the find feature opens a new display of rows so that the row containing the search string appears in the grid.

On tabbed grids, the find feature searches all tabs to locate the search string. If your search string does not appear in the currently active tab, the find feature moves to the tab where the row containing the search string appears in the grid and makes active the tab where the string is found.

Each grid or scroll area control, if it is set up to perform a find, has a separate Find link in the navigation header of that control. When there are nested grids or scroll areas within a scroll area, the find feature searches only the current scroll level; it does not search the nested lower-level data.

---

**Note.** Your browser may also have a find feature. This tool, however, does not search through data in the entire data buffer for the grid or scroll area. It searches the HTML code for what appears on the current open page only. Thus, it searches field headings, read-only text, and headings in grids, group boxes, and scroll areas only.

---

---

## Viewing Data in Scroll Areas

This section provides an overview of displaying data in scroll areas and discusses how to collapse and expand scroll areas.

### Understanding Data in Scroll Areas

In a scroll area each self-contained occurrence represents one row of data in the database. Within a scroll area the fields might be randomly arranged rather than arranged like a spreadsheet. These field groupings, although not necessarily 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 buttons and links in the navigation header. Scroll areas do not contain scroll bars. Instead, you use the buttons and links in the navigation header to scroll through the data rows.

You click the Insert Row (+) and Delete Row (-) buttons to enter data in and remove data from the database tables.

See [Chapter 5, "Working With Scroll Areas and Grids," Navigating Through Data, page 76.](#)

Here you see the Messages scroll area:

Example scroll area

## Collapsing Scroll Areas

Some scroll areas are configured so that you can collapse them so that only the header shows. This capability is indicated by a triangle that displays at the right-most side inside the navigation header. Click the triangle to toggle between the expanded (visible) and collapsed (hidden) views.

These examples show both the collapsed and expanded states of the Department Details scroll area.

SetID: QEDM1 Department: 00001

Department Details scroll area in the expanded state

SetID: QEDM1 Department: 00001

Department Details scroll area in the collapsed state

---

**Note.** Application developers set whether the initial state of the grid is collapsed or expanded in Application Designer.

---

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Using Scroll Areas, Scroll Bars, and Grids," Using Scroll Areas and Scroll Bars.

## Viewing Data in Original Layout Grids

Original layout grids offer several functional benefits scroll areas do not. This section discusses how to:

- Work with grid tabs.
- Move, freeze, and resize columns.
- Change column sort order.
- Remove user-specific grid settings.
- Download grid data.
- Collapse grids.
- Display grids in modal windows.

## Working with Grid Tabs






































If the number of columns in a grid precludes you from viewing all of the grid data simultaneously without the page being cluttered, developers might design the grid so as to group and separate columns with tabs. This section discusses: grid tabs and navigating through cells.

- Grid tabs
- Cell navigation

### Grid Tabs

Grid tabs enable you to view groups of data columns simultaneously with little or no scrolling of the entire page to the right.

In this example, you see the Define Personalizations grid and the Definition, Format, and Explanation tabs. Notice the Show All Columns button to the right of the Explanation tab.

Define Personalizations					Customize   Find   View All   		First	1-25 of 46	Last
Definition   Format   Explanation 									
*User Option	Description	*Option Category Group		Option Category		User Option Type		Locale Based	
ACCESS	Accessibility Features	PS Internet Architecture		General Options		System		<input type="checkbox"/>	 
ACEGRDCOLS	Max Col/View All-Analytic Grid	PS Internet Architecture		Navigation Personalizations		System		<input type="checkbox"/>	 
ACEGRDROWS	Max Row/View All-Analytic Grid	PS Internet Architecture		Navigation Personalizations		System		<input type="checkbox"/>	 
ADBTN	Tab over Add/Del Buttons (+/-)	PS Internet Architecture		Navigation Personalizations		System		<input type="checkbox"/>	 
ADES	Afternoon designator (PM, pm)	PS Internet Architecture		Regional Settings		System		<input checked="" type="checkbox"/>	 
AUTOGREGCAL	Auto-recognize Gregorian dates	PS Internet Architecture		Regional Settings		System		<input type="checkbox"/>	 
AUTOJOIN	Enable Auto Join	Query Preferences		Internally Controlled		Functional		<input type="checkbox"/>	 

Define Personalizations grid showing three tabs

To view all columns without tabs:

1. Click the Show All Columns button just below the grid's navigation header

Showing all columns can expand the width of the web page so that a browser scroll bar appears at the bottom of the browser window.

Alternatively, some grids may have an Expand All button to the right of the tabs, which enables you to expand the grid columns to the right so that no tabs appear.

2. You use the browser scroll bar to scroll left and right to view the data columns.

---

**Note.** When in the expanded view, you cannot freeze columns, as the entire grid moves with the page.

---

To restore the grid to its original state, click the Show Tabs button.

### **Cell Navigation**

In original grids, you can navigate through cells in these ways:

- Press Tab to move one field or page element to the right.

Movement continues from row to row and outside the grid.

- Press Shift + Tab to move one field or page element to the left.

Movement continues from row to row, into the column headers, and outside the grid.

## **Moving, Freezing and Resizing Columns**

You can move and freeze columns by using the Customize link only.

Only application developers can resize columns in an original layout grid by accessing the grid properties in Application Designer.

See [Chapter 5, "Working With Scroll Areas and Grids," Customizing Grid Column Appearance, page 97.](#)

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Using Scroll Areas, Scroll Bars, and Grids," Inserting and Resizing Grid Controls.

## **Changing Column Sort Order**

You can change the sort order of a grid column directly on the transaction page. Sorts persist only as long as you are on the page.

You can toggle between ascending and descending order by repeatedly clicking the column header. The last column header that you click becomes the primary sort for the grid. Grids enable you to have primary, secondary, and tertiary sorts. Original layout grids have no visual cue to indicate the sort order.

You can also change the sort order by using the Customize link. This type of sort persists until you change it by using the Customize link again.

See [Chapter 5, "Working With Scroll Areas and Grids," Using the Customize Link to Personalize Grids, page 96.](#)

See [Chapter 5, "Working With Scroll Areas and Grids," Removing User-Specific Grid Settings, page 84.](#)

## Removing User-Specific Grid Settings

You can remove user-specific settings such as sorts and column changes, which restores the default grid settings. To remove user-specific grid settings:

1. Click the Customize link.
2. On the Personalize Column and Sort Order page, click the Delete Settings link.

---

**Note.** If there is no Delete Settings link, click the OK button and the default settings are restored.

---

3. On the Delete Settings page, click the Delete button.
4. On the Personalize Column and Sort Order page, click the OK button and the default settings are restored.

## Downloading Grid Data

Some grids enable you to download grid data to a Microsoft Excel spreadsheet. The download feature extracts all active, unhidden rows, regardless of whether the rows are visible on your screen.

To download grid data:

1. Click the Download button in the grid's navigation bar.

A new browser window opens, showing the data in a spreadsheet-like format.

2. Select File, Save As and save the data as a Microsoft Excel (.xls) file.

---

**Note.** The system downloads all field types (columns) with the exception of images. Hyperlinks and buttons are downloaded as quoted text of the field labels, even though the labels may contain numeric values. If any numeric calculations are to be performed based on hyperlink or button labels, you must convert the text strings to numeric values after downloading.

---

---

**Note.** If you use Microsoft Office 2007, then when performing a download-to-Excel, you might encounter a Microsoft Office Excel warning message suggesting you verify that the file is not corrupted and that it is from a trusted source before opening it. You should click the Yes button in this situation.

---

## Collapsing Grids

You might also encounter grids that you can collapse or expand. Click the right-pointing triangle in front of the grid heading to expand a grid that is hidden from view (collapsed).

These examples show both the collapsed and expanded states of the Component Interfaces grid.

▶ Component Interfaces

The Component Interfaces grid in the collapsed state

▼ Component Interfaces			Customize	Find	First	1-3 of 3	Last
Name	Edit						
CURRENCY_CD_CI	<a href="#">Edit</a>	<a href="#">+</a>	<a href="#">-</a>				
PROCESSREQUEST	<a href="#">Edit</a>	<a href="#">+</a>	<a href="#">-</a>				
QE_MB_COMP_LV0_CI	<a href="#">Edit</a>	<a href="#">+</a>	<a href="#">-</a>				

The Component Interfaces grid in the expanded state

---

**Note.** Application developers set whether the initial state of the grid is collapsed or expanded in Application Designer.

---

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Using Scroll Areas, Scroll Bars, and Grids," Using Scroll Areas and Scroll Bars.

## Displaying Grids in Modal Windows

Some grids enable you to zoom the grid to a modal window. When you click the Zoom icon, the grid and its data appear in a modal window over the main page, which is grayed out.

While in the modal window, you can work with the grid just as you would if the grid were on the primary page, for example, you can insert and delete rows. You must return to the primary page to save any changes to your data.

To return to the primary page, click the Return button that you find at the bottom of the grid in the modal window.

---

**Note.** You can disable the Display in Modal Window functionality for a grid by changing its properties in Application Designer.

---

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Using Scroll Areas, Scroll Bars, and Grids," Display Options.

---

## Viewing Data in Scrollable Layout Grids

Scrollable grids offer several functional benefits that original grids and scroll areas do not. This section discusses how to:

- Work with grid tabs and scroll bars.
- Move, freeze, and resize columns.
- Change column sort order.
- Download grid data.
- Collapse grids.
- Display grids in modal windows.

## Working with Grid Tabs and Grid Scroll Bars

Developers might design the grid so as to group and separate columns with tabs. Developers might also include vertical and horizontal scroll bars in the grid control. Both grid tabs and scroll bars enable you to view all data columns and have some advantages when used together in scrollable grids. This section discusses:

- Grid tabs
- Grid scroll bars
- Cell navigation

### **Grid Tabs**

Grid tabs enable you to view groups of data columns without scrolling to the right. By clicking the Show All Columns button just below the grid's navigation header, you can view all columns in the grid. Showing all columns, if used in conjunction with grid scroll bars, cause a horizontal grid scroll bar to appear.

To view all columns without tabs:

1. Click the Show All Columns button just below the grid's navigation header
2. When the grid expands, use either the horizontal grid scroll bar, if enabled, or the browser scroll bar to scroll left and right to view the data columns.

---

**Note.** If the expanded grid has many frozen columns, the page might expand so that the horizontal browser scroll bar appears and must be used to view all columns.

---

To restore the grid to its original state, click the Show Tabs button.

### **Grid Scroll Bars**

On scrollable grids, developers can configure horizontal and vertical scroll bars to appear within the grid control, which enables you to scroll through data within the grid. Note these points about grid scroll bars:

- An advantage of grid scroll bars is that frozen columns and column headers are stationary.
- Another advantage is that you can scroll data within the grid without having use the browser scroll bar, thus other data on the page stays in view
- Application developers can configure a scrollable grid to display the horizontal and vertical scroll bars independently of one another.
- Grid scroll bars and grid tabs can be configured to work together or separately.

In this example, you see the Define Personalizations grid showing the Definition, Format, and Explanation tabs. Notice the horizontal and vertical scroll bars inside the grid control.



Define Personalizations

Customize | Find | View All | 1-25 of 48 | First | Last

Definition	Format	Explanation	
*User Option	*Option Category Group	Description	Option Category
ACCESS	PS Internet Architecture	Accessibility Features	General Options
ACEGRDCOLS	PS Internet Architecture	Max Col/View All-Analytic Grid	Navigation Personalization
ACEGRDROWS	PS Internet Architecture	Max Row/View All-Analytic Grid	Navigation Personalization
ADBTN	PS Internet Architecture	Tab over Add/Del Buttons (+/-)	Navigation Personalization
ADES	PS Internet Architecture	Afternoon designator (PM, pm)	Regional Settings
ANAVSORT	PS Internet Architecture	Drop down Menu Sort Order	Navigation Personalization
AUTOGREGCAL	PS Internet Architecture	Auto-recognize Gregorian dates	Regional Settings
AUTOJOIN	Query Preferences	Enable Auto Join	Internally Controlled
AUTOMENU	PS Internet Architecture	Automatic Menu Collapse	Navigation Personalization
BADDRESSBAR	PS Internet Architecture	Show browser address location	Navigation Personalization

Define Personalizations grid showing grid scroll bars

**Note.** Be aware that the horizontal and vertical scroll bars for the grid appear at the far right and bottom sides within the grid control; the horizontal and vertical scroll bars for the browser appear at the far right and bottom sides of the browser window.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Using Scroll Areas, Scroll Bars, and Grids," Using Grids.

**Grid Scroll Bar Pop-Up Menus**

If you right-click on the horizontal and vertical grid scroll bars, contextual pop-up menus appear.

In this example, you see the both scroll bar contextual pop-up menus:

**ORACLE**

Home

Favorites Main Menu > PeopleTools > Personalization > Personalization Options

## Define Personalizations

Option Category Level: PeopleTools

Define Personalizations Customize | Find | View All | First 1-25 of 48 Last

*User Option	Description	*Option Category Group	Option Category
ACCESS	Accessibility Features	PS Internet Architecture	General Options
CUSTOMPGSET	Customize Page Settings	PS Internet Architecture	General Options
METEXP	Time page held in cache	PS Internet Architecture	General Options
MLTLNG	Multi Language Entry	PS Internet Architecture	General Options
SCLANG	Spell Check Dictionary	PS Internet Architecture	General Options
AUTOJOIN	Enable Auto Join	Query Preferences	Internally Controlled
DICTIONARY	Display of records	Query Preferences	Internally Controlled
NAMESTYLE	Display of query names	Query Preferences	Internally Controlled
PAGEHDRCACHE	Time header held in cache	Portal Personalizations	Internally Controlled
SORTBY	Ways to sort	Query Preferences	Internally Controlled

Save Return to Search Previous in List Next in List Notify

Scroll Here  
Top  
Bottom  
Page Up  
Page Down  
Scroll Up  
Scroll Down

Scroll Here  
Left Edge  
Right Edge  
Page Left  
Page Right  
Scroll Left  
Scroll Right

Define Personalizations grid showing scroll bar pop-up menus

This table explains the contextual pop-up menu options:

<b>Scroll Here</b>	Select to move the scroll slider so that the center of the slider is located under the cursor.
<b>Left Edge</b>	Select to move the horizontal scroll slider to the far left of the grid.
<b>Right Edge</b>	Select to move the horizontal scroll slicer to the far right of the grid.
<b>Top</b>	Select to move the vertical scroll slider to the top of the grid.
<b>Bottom</b>	Select to move the vertical scroll slider to the bottom of the grid.

<b>Page Up</b>	Select to move the rows up the length of one visible set of rows. For example, if there are 12 rows showing in a grid, selecting this option moves the rows in increments of 12 rows at a time. The bottom row becomes the top row.
<b>Page Down</b>	Select to move the rows down the length of one visible set of rows. For example, if there are 12 rows showing in a grid, selecting this option moves the rows in increments of 12 rows at a time. The top row becomes the bottom row.
<b>Page Left</b>	Select to move the columns to the left the width of one visible set of columns. The far right column row becomes the left-most column in view.
<b>Page Right</b>	Select to move the columns to the right the width of one visible set of columns. The far left column row becomes the right-most column in view.
<b>Scroll Up</b>	Select to move the rows up one row.
<b>Scroll Down</b>	Select to move the rows down one row.
<b>Scroll Left</b>	Select to move the scroll slider five pixels to the left.
<b>Scroll Right</b>	Select to move the scroll slider five pixels to the right.

### ***Cell Navigation***

In scrollable grids, you can navigate through cells in these ways:

- Press Shift + Up Arrow to move up one cell.  
Movement ceases at the top of the column.
- Press Shift + Down Arrow keys to move down one cell.  
Movement ceases at the bottom of the column.
- Press Shift + Right Arrow keys to move right one cell.  
Movement ceases at the end of the row.

---

**Note.** If you do not hold the Shift key, the cursor moves only within the current field.

---

- Press Shift + Left Arrow keys to move left one cell.  
Movement ceases at the beginning of the row.

---

**Note.** If you do not hold the Shift key, the cursor moves only within the current field.

---

- Press Tab to move one field or page element to the right.  
Movement continues from row to row and outside the grid.

- Press Shift + Tab to move one field or page element to the left.

Movement continues from row to row, into the column headers, and outside the grid.

---

**Note.** When using these methods to navigate, the cursor will move to fields within the grid. If grid scroll bars are present, the cursor will cause the grid to scroll as it moves through rows. If grid tabs are present, the cursor will *not* cause the tab to change as it moves through rows.

---

---

**Important!** If the grid navigation header is not present or if the Customize link is not present in the navigation header, cell navigation is identical to that of the original layout grid.

---

## Moving, Freezing, and Resizing Columns

You can change the column order, freeze columns, and resize columns in a scrollable grid directly within the grid control. Moving and freezing columns persist until you change them. Resizing columns persists until you leave the page.

---

**Important!** If the grid navigation header is not present or if the Customize link is not present in the navigation header, you cannot move, freeze, or resize grid columns.

---

### *Moving Grid Columns*

To move columns:

1. Place the cursor on the column header label.

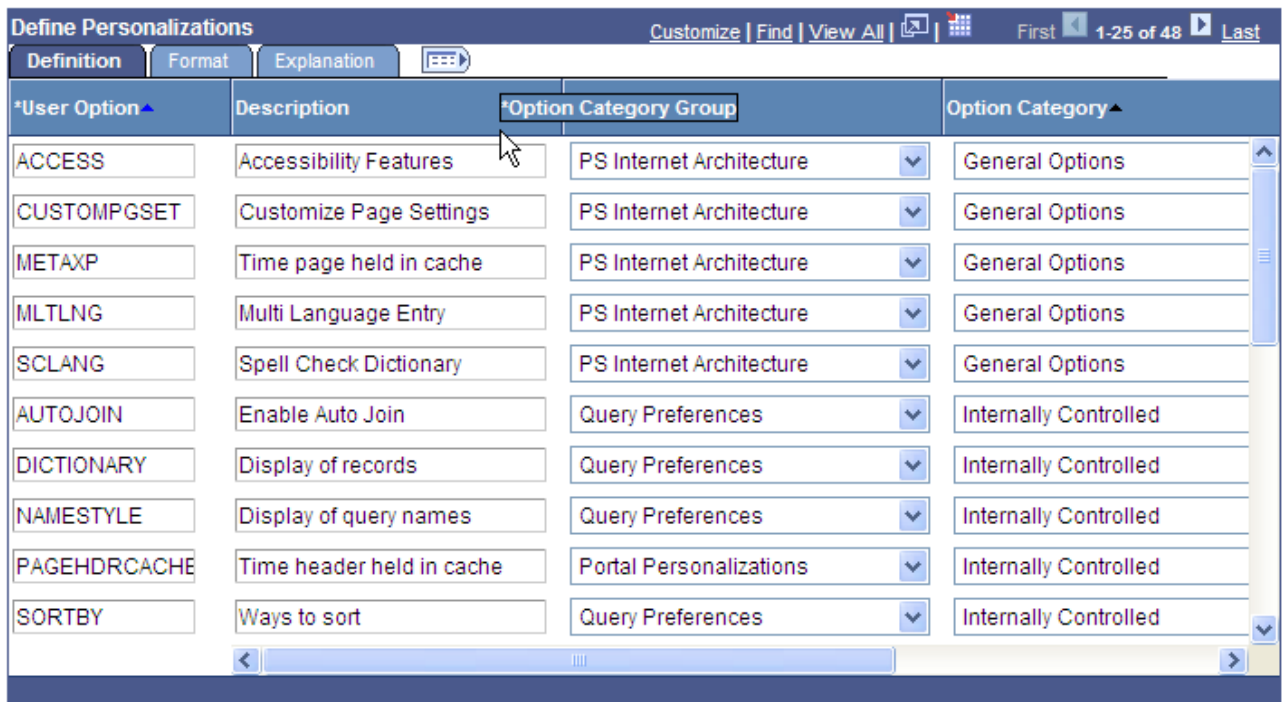
The cursor image becomes a hand.

2. When the cursor changes shape, click the column label and drag the column to its new location.

As you drag the column, a border appears around the column header label, and the label moves with the cursor.

3. When you have the column in the desired location, release the mouse to drop the column.

In this example, the user is moving the Description column.



Dragging the Option Category Group column

You can also change the column order by using the Customize link.

**Note.** Drag and drop is enabled only if the grid can be customized. If you do not see the Customize link in the grid header, you can not drag and drop columns.

### Freezing Grid Columns

A grid can be divided into left and right panes. If the grid is divided, the left pane contains the frozen columns and right pane contains the other columns. If enabled, a horizontal scroll bar appears in the right pane if the columns are wider than that right panel width. If the grid has frozen columns, you can freeze other columns on the transaction page.

1. Place the cursor on the column header label.

The cursor image becomes a hand.

2. When the cursor changes shape, click the column label and drag the column to its new location.

As you drag the column, a border appears around the column header label, and the label moves with the cursor.

3. When you have the column in the frozen column area (to the left of the leading edge of the horizontal scroll bar), release the mouse to drop the column.

You can unfreeze columns by dragging them out of the frozen area.

**Note.** If the grid has only one frozen column, the grid does not allow you to unfreeze that column by dragging it. You must use the [Customize](#) link. Likewise, if you see no frozen columns, you cannot drag a column to freeze it; you must use the [Customize](#) link.

If the grid has multiple tabs, you can drag a column into the frozen area on the first tab only.

**Note.** Drag and drop is enabled only if the grid can be customized. If you do not see the [Customize](#) link in the grid header, you can not drag and drop columns.

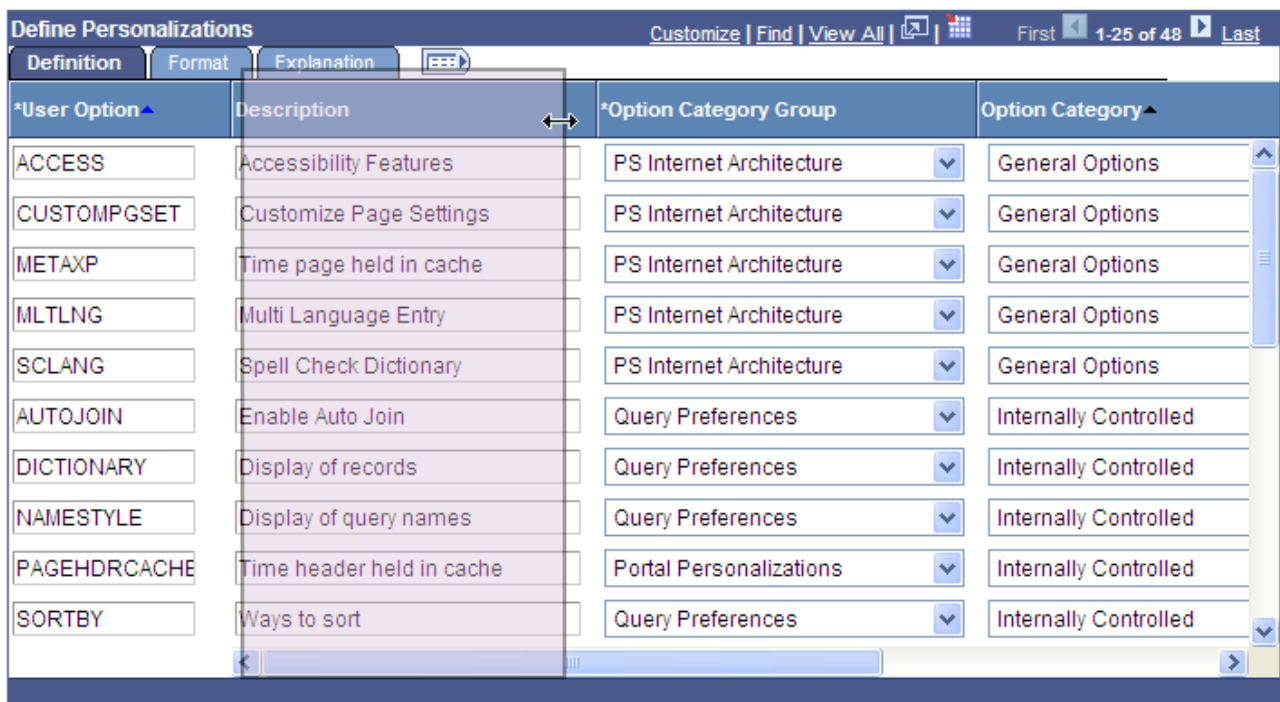
## Resizing Grid Columns

To resize columns on the transaction page.

1. Move the cursor into the column header.
2. When the mouse changes to the hand, click and drag to resize the column.
3. When you have the column at its new size, release the mouse.

**Note.** Columns cannot be resized smaller than the column header width.

In this example, the user is resizing the Description column.



Resizing the Description column

### ***Removing User-Specific Grid Settings***

You can remove user-specific settings, thereby restoring the default grid settings. To remove user-specific grid settings:

1. Click the Customize link.
2. On the Personalize Column and Sort Order page, click the Delete Settings link.
3. On the Delete Settings page, click the Delete button.
4. On the Personalize Column and Sort Order page, click the OK button.

### **See Also**

Chapter 5, "Working With Scroll Areas and Grids," Using the Customize Link to Personalize Grids, page 96

## **Changing Column Sort Order**

You can change the sort order of grid columns without leaving the transaction page. Click a single column header to toggle between ascending and descending order. Click multiple column headers in the reverse order that you want to sort them with the last column header that you click becoming the primary sort for the grid. Grids enable you to have primary, secondary, and tertiary sorts. A dark blue arrow to the right of a column header indicates a primary sort; a light blue arrow indicates a secondary or tertiary sort. Any sort changes that you make to a grid remain in place until you change them.

See Chapter 5, "Working With Scroll Areas and Grids," Removing User-Specific Grid Settings, page 84.

In this example of the Define Personalizations grid, the Description field displays the primary descending sort, the Option Category Group field displays the secondary descending sort, and the Option Category field displays no sort.

Define Personalizations			
Customize   Find   View All   First 1-25 of 48 Last			
Definition	Format	Explanation	
*User Option	Description▲	*Option Category Group	Option Category▲
ACCESS	Accessibility Features	PS Internet Architecture	General Options
ADES	Afternoon designator (PM, pm)	PS Internet Architecture	Regional Settings
AUTOGREGCAL	Auto-recognize Gregorian date	PS Internet Architecture	Regional Settings
AUTOMENU	Automatic Menu Collapse	PS Internet Architecture	Navigation Personalizations
CALENDAR	Calendar	PS Internet Architecture	Regional Settings
CUSTOMPGSET	Customize Page Settings	PS Internet Architecture	General Options
DFRMT	Date Format	PS Internet Architecture	Regional Settings
DTSP	Date Separator	PS Internet Architecture	Regional Settings
DCSP	Decimal Separator	PS Internet Architecture	Regional Settings
EXPERT	Default Expert Entry On	PS Internet Architecture	Navigation Personalizations

Grid showing user-specified sort order

You can also change the sort order by using the Customize link.

### See Also

[Chapter 5, "Working With Scroll Areas and Grids," Using the Customize Link to Personalize Grids, page 96](#)

## Downloading Grid Data

Some grids enable you to download grid data to a Microsoft Excel spreadsheet. The download feature extracts all active, unhidden rows, regardless of whether the rows are visible on your screen.

To download grid data:

1. Click the Download button in the grid's navigation bar.

A new browser window opens, showing the data in a spreadsheet-like format.



2. Select File, Save As and save the data as a Microsoft Excel (.xls) file.

---

**Note.** The system downloads all field types (columns) with the exception of images. Hyperlinks and buttons are downloaded as quoted text of the field labels, even though the labels may contain numeric values. If any numeric calculations are to be performed based on hyperlink or button labels, you must convert the text strings to numeric values after downloading.

---



---

**Note.** If you use Microsoft Office 2007, then when performing a download-to-Excel, you might encounter a Microsoft Office Excel warning message suggesting you verify that the file is not corrupted and that it is from a trusted source before opening it. You should click the Yes button in this situation.

---


## Collapsing Grids

You might also encounter grids that you can collapse or expand. Click the right-pointing triangle in front of the grid heading to expand a grid that is hidden from view (collapsed).

These examples show both the collapsed and expanded states of the Component Interfaces grid.

### ▶ Component Interfaces

The Component Interfaces grid in the collapsed state

▼ Component Interfaces		Customize   Find   	First ◀ 1-3 of 3 ▶ Last
Name	Edit		
CURRENCY_CD_CI	<a href="#">Edit</a>	+	-
PROCESSREQUEST	<a href="#">Edit</a>	+	-
QE_MB_COMP_LVL0_CI	<a href="#">Edit</a>	+	-

The Component Interfaces grid in the expanded state

---

**Note.** Developers set the initial state of the grid in Application Designer.

---

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Using Scroll Areas, Scroll Bars, and Grids," Display Options.

## Displaying Grids in Modal Windows

Some grids enable you to zoom the grid to a modal window. When you click the Zoom icon, the grid and its data appear in a modal window over the main page, which is grayed out.

While in the modal window, you can work with the grid just as you would if the grid were on the primary page, for example, you can insert and delete rows. You must return to the primary page to save any changes to your data.

To return to the primary page, click the Return button that you find at the bottom of the grid in the modal window.

**Note.** You can disable the Display in Modal Window functionality for a grid by changing its properties in Application Designer.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*, "Using Scroll Areas, Scroll Bars, and Grids," Display Options.

## Using the Customize Link to Personalize Grids

This sections presents an overview of customization and discusses how to:

- Customize grid column appearance.
- Manipulate grid column sort order

For most grids, including some analytic grids, you can use the Customize link to change the order of the columns, the sort order, which columns are frozen, and which columns are hidden. You can also share your grid customizations with other users or copy another users' settings. You control these settings on the Personalize Column and Sort Order page, which you open by clicking the Customize link in the grid's navigation header. Any personalizations that you make to a grid remain in place until you change them.

Access the Personalize Column and Sort Order page (Click the Customize link on a grid).

### Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.  
Frozen columns display under every tab.

Column Order

Tab Definition (frozen)

\*User Option (frozen)

Description

\*Option Category Group

Option Category

User Option Type

Locale Based

Tab Format

Field Format

Format Length

Record (Table) Name

Field Name

Option Default Value

Set Option Default Value

Tab Explanation

Message Set Number

Message Number

Image Name

☐ Hidden

☐ Frozen

Sort Order

Description

Option Category

☐ Descending

Personalize Column and Sort Order page

**Note.** If there are grid tabs, they remain active so that you can view all sample data.

Use the following page elements to personalize the grid:

Use the following toolbar buttons to personalize your grid:

<b>OK</b>	Click to save your personalizations and return to the transaction page with the changes in effect.
<b>Cancel</b>	Click to cancel any personalization settings you have and return to the transaction page.
<b>Preview</b>	Click to preview any personalization settings that you make.
<b>Copy Settings</b>	<p>Opens the Copy Settings secondary page, enabling you to copy the public profiles from other users. You can use the lookup button to search all available public profiles for that grid.</p> <p>Selecting the OK button on the Copy Settings page copies the settings for the selected profile and returns you to the Personalize Column and Sort Order page.</p>
<b>Share Settings</b>	<p>Available if you have created and saved grid customizations. Opens the Share Settings secondary page where you can allow public sharing of the grid customization settings you created by making your profile Public. (The default setting is Private.) If you make the customization settings of your grid public, all of your customization settings for all components will be public.</p> <p>The Name field is only required if you make your customization settings public. Each user who shares customization settings must have a unique profile name. The profile name you enter is the same for all pages and shared grid customizations across all components. If you modify the profile name, it is modified for all pages and grid customization settings across all components. Once you save the first profile name, the Name field is prepopulated when you open the Share Settings page for other pages or grids.</p> <p>The Name field can be any string of up to 30 characters long—for example OSC_16AR. Alphabetical characters are automatically converted to uppercase.</p>
<b>Delete Settings</b>	Available if you have created and saved grid customizations. Opens the Delete Settings secondary page where you can delete all grid customization settings for the current grid. Select the Delete button to delete the settings for the current grid only and restore the default grid settings. Select the Cancel button to retain your settings and return to the grid customization page.
<b>Hidden</b>	Select a column and click this check box to hide the column in question.
<b>Frozen</b>	Select a column and click this check box to freeze the column in question. When you freeze a column, the column appears in all tabs within the grid.
<b>Descending</b>	Select a row from the Sort Order list and click this check box to sort the row in descending rather than the default ascending order.

## Customizing Grid Column Appearance

When customizing the grid column appearance, you can:

- Change the column order.
- Hide columns.
- Freeze columns.

### ***Changing the Column Order***

To change the column order:

1. Under Column Order, select the column that you want to move.

To select multiple adjacent columns, press and hold the Shift key as you select additional column names. To select multiple nonadjacent columns, press and hold the Ctrl key as you select additional column names.

If the grid contains tabs, the system displays the tab separators in the Column Order list. You can move the tab separator just as you would a regular column, thus altering the number of columns that the system displays on a particular tab at once.

2. Click the up or down arrow buttons to move the column up or down in the list.

If you move a frozen column below an unfrozen column, the system disables the frozen setting.

3. Repeat steps one and two to move any additional columns.
4. Click OK to save your changes and return to the transaction page.

### ***Hiding Columns***

To hide columns:

1. Under Column Order, select the column that you want to hide.

To select multiple adjacent columns, press and hold the Shift key as you select additional column names. To select multiple nonadjacent columns, press and hold the Ctrl key as you select additional column names.

2. Select the Hidden check box.

---

**Note.** When you use the find feature in the grid, the system will not search any columns that you set as hidden.

---

3. Click OK to save your changes and return to the transaction page.

### ***Freezing Columns***

To freeze columns:

1. Under Column Order, select the column that you want to freeze.

---

**Note.** Any columns that the developer already defined as frozen appear with the Frozen check box selected. You can override this setting by clearing the check box.

---

2. Select the Frozen check box.

The system automatically freezes the selected column and all columns above it. If you move a frozen column after an unfrozen column, the system disables the frozen setting.

3. Click OK to save your changes and return to the transaction page.

Frozen columns appear on all the tabs within the grid.

## Manipulating Grid Column Sort Order

Under Sort Order on the Personalize Column and Sort Order page, you can alter the grid column sort order. Any sort order changes that you save remain in place until you change them again.

To specify a persistent sort order for a grid:

1. Under Column Order, select the column on which you want to sort.

Note that you can sort hidden columns; however, you cannot select the following column types for sorting:

- Tab separators.
- Images.
- Buttons or links.
- HTML areas.

2. Click the right arrow to display that column under Sort Order.

To select multiple adjacent columns, press and hold the Shift key as you select additional column names. To select multiple nonadjacent columns, press and hold the Ctrl key as you select additional column names.

3. If you have moved more than one column to Sort Order, you can select a column and click the up and down arrow button to alter the sort hierarchy.

You can sort multiple columns at once. The system considers the first column in the list the primary sort, the second the secondary sort, and so on.

4. To sort columns in descending order (instead of the default ascending order), select the Descending check box for the highlighted column.

The (*desc*) text appears next to the column name to indicate which columns are sorted in descending sort order.

5. Click OK to save the changes and return to the transaction page.

The system saves your sort settings until you change them again or until you click the Restore Defaults button in the Personalization page.

You can override the sort order of a column in a grid directly in the transaction page without altering the personalization settings. To do so, click the column heading link (not underlined) for the column that you want to sort. This sorts the column in ascending order. You can toggle between ascending and descending order by repeatedly clicking the column heading link. The last column heading link that you click becomes the primary sort for the grid. Note that this type of sorting is only temporary. When you exit the transaction, the system does not save the sort order that you just performed.

---

## Using 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. The active and inactive values enable you to keep a complete history of data for every value that you add. In most cases, you never want to delete a value; you 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. You can also maintain all data on your employees as it changes over time.

For example, when going through the employee review process, it is important to maintain records of past reviews so that you can refer back to see how an employee has improved over time. Then, as employee review time arrives again, you simply add a new row of data to the table by clicking the Add button rather than by typing over the existing row. When you add a new row, the Eff Date (effective date) field automatically populates with the system date, which is usually today's date. You can keep this date or change it to a future date if the information that you are entering does not take effect until later.

Because the system date is at or after the new effective-dated row that you created, the new information becomes the current row and the previous row is now historical information. If you returned to this page and clicked the Update/Display button, which displays only current and future rows, you would see only the last data row that you entered. If you also wanted to see older data rows, you would have to click the Include History button.

To correct incorrect data already in the system, click the Correct History button. (You should take this approach rather than inserting a row with corrected data.)

### **See Also**

[Chapter 4, "Working With Pages," Using Effective Dates, page 50](#)

---

## Using Multiple Scroll Areas and Grids on a Page

Some PeopleSoft applications include pages that contain multiple scroll areas and grids. These scroll areas and grids may be one above the other, side by side, or contained within each other (nested). The fields controlled by one scroll area or grid are associated with only one database table. Pages with multiple scroll areas or grids read from and write to multiple tables.

The Competency Assignment page in the following example contains two grids side by side. With this format, you can transfer data from one grid to the other. In the example, you select a value from the Category and Type drop-down list boxes to populate the Source Competencies grid. To select the descriptions that you want to appear on Tom Green's evaluation, select the appropriate check boxes under the Description field in the Source Competencies grid. Then click the double left arrow button to move those descriptions to the Assigned Competencies grid.

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

Green, Tom
Employee
EmplID: XC3031
[Link to Career Planning](#)

**Competency Assignment**
[Find](#) | [View All](#)
First 1 of 1 Last

Evaluation ID/Type: 01  
[Populate from Job](#)

Assigned Competencies
[Customize](#) | [Find](#) | [View All](#)
First 1-10 of 15 Last

Description	Short Name
PS General Ledger	Skill
PS Accounts Payable	Skill
PS Accounts Receivable	Skill
PS nVision Reporting	Skill
PS Query	Skill
Crystal Reporting	Skill
Payroll Experience	Knowledge
Financial Accounting	Skill
General Accounting	Skill
Financial Analysis	Skill

Search by:
Category: Ability
Type: Communication

Source Competencies
[Customize](#) | [Find](#) | [View All](#)
First 1-4 of 4 Last

Description
<input type="checkbox"/> Debates issues unabrasively
<input type="checkbox"/> Informs Superiors
<input type="checkbox"/> Communication Skills
<input type="checkbox"/> Strong customer service ethic

### Side by side grids

Once you have assigned the competencies to the evaluation, you can evaluate Tom using the Competency Rating page. The Competency Rating page in the following example contains the Assigned Competencies grid nested within the Competency Evaluation scroll area.

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

Green,Tom
Employee
EmplID: XC3031

**Competency Evaluation**
[Find](#) | [View All](#)
First 1 of 1 Last

**Evaluation ID/Type:** 01

**Assigned Competencies**
[Customize](#) | [Find](#) | [View All](#)
First 9-15 of 15 Last

Competency	Effective Date	Proficiency	Interest Level	Detail		
General Accounting	10/17/2002	4-Very Good	2-No Preference	Detail	+	-
Financial Analysis	10/17/2002	3-Good	4-Very desirable	Detail	+	-
Tax Accountant	10/17/2002	4-Very Good	2-No Preference	Detail	+	-
Financial Planning	10/17/2002	5-Expert	4-Very desirable	Detail	+	-
Forecasting	10/17/2002	5-Expert	4-Very desirable	Detail	+	-
Budgeting	10/17/2002	4-Very Good	3-Desirable	Detail	+	-
Auditing	10/17/2002	3-Good	3-Desirable	Detail	+	-

Nested grid in a scroll area

The Evaluation ID/Type fields associated with the outer scroll area refer to the type of evaluation. The fields associated with the Assigned Competencies inner scroll area refer to the specific competencies included in the evaluation.

Another way of looking at nesting is to think of the scroll area and grid as having a parent and 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 uniquely identify individual rows.

## Working with Analytic Grids

This section provides an overview of analytic grids and discusses how to:

- Navigate through analytic grid data.
- Download analytic grid data.
- Pivot data cubes and dimensions.
- Expand and collapse dimension data.
- Slice analytic grid data.
- Saving customized analytic grid layouts.



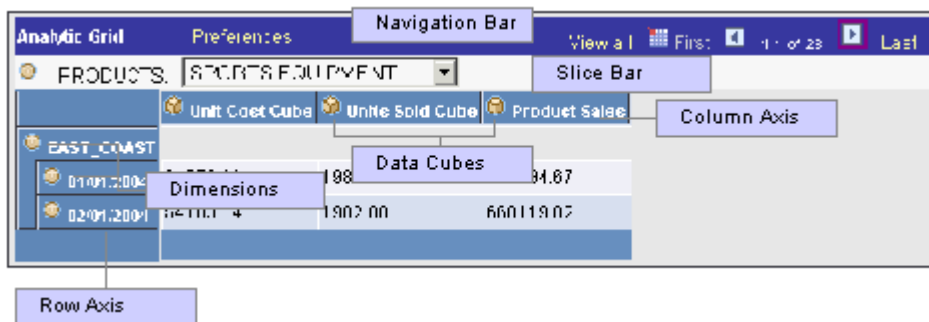
## Understanding Analytic Grids

Analytic grids are specific to PeopleSoft Analytic Calculation Engine, PeopleSoft's multidimensional reporting tool. Within PeopleSoft Analytic Calculation Engine, *analytic models* define the rules for calculating data. These analytic models consist of data cubes and dimensions. *Data cubes* are categories of data; you create one for each kind of information in your analytic model—for example, one for sales, one for rent, and one for salary. *Dimensions* are a list of one kind of data that can span various contexts—for example, months or product codes. You organize data cubes and dimensions into cube collections. Single members of data cubes or dimensions—such as one month—are known as *members*.

When the analytic grid is in Freeze Column mode, you can load into it data that does not come from the Analytic Calculation Engine.

PeopleSoft Pure Internet Architecture pages containing analytic grids display data from cube collections. You can use the analytic grid to edit your data, pivot data cubes and dimensions (move them between the row and column axis of the grid) to gain a different view of your data, and view selected "slices" of your data. Within an analytic grid, you can expand and collapse those dimensions that have a hierarchical structure; you can also drill down into such dimensions. Finally, you can modify preferences within an analytic grid—saving a particular layout that you have created or returning to the default grid layout.

See *Enterprise PeopleTools 8.50 PeopleBook: Analytic Calculation Engine*.



Analytic grid components

## Navigating Through Analytic Grid Data

For the most part, the navigation bar at the top of the analytic grid is much like the one associated with an ordinary grid.

See [Chapter 5, "Working With Scroll Areas and Grids," Navigating Through Data, page 76](#).

In addition, in an analytic grid you can:

- Collapse or expand the slice bar by clicking on the arrow to the right of the analytic grid's name (the name is "Analytic Grid" by default), which appears in the grid's upper-left corner.
- Collapse and expand the entire grid, provided that the application developer has activated this feature (via the Collapsible Data Area check box on the Use tab of the Analytic Grid Properties dialog box). To do so, you use the arrow to the left of the analytic grid title, which is "Analytic Grid" by default.

- Collapse or expand dimensional data by clicking on the expand node or expand all icons.

## Editing Analytic Grid Data

Editing data in an analytic grid is somewhat different from editing data in a standard grid:

- Some cells are editable but some cells may be designated as read only.
- Calculated cells are read only
- In hierarchies (trees), only the lowest level is potentially editable.
- The root and total are not editable.

## Downloading Analytic Grid Data

You can download the contents of an analytic grid to a Microsoft Excel spreadsheet, much as you can download the data from a regular grid.

See [Chapter 5, "Working With Scroll Areas and Grids," Downloading Grid Data, page 84.](#)

See [Chapter 5, "Working With Scroll Areas and Grids," Downloading Grid Data, page 84.](#)

## Dragging and Dropping Data Cubes and Dimensions

This section outlines the ways in which you can drag and drop data within an analytic grid:

<i>Location</i>	<i>Drag and Drop Possibilities</i>
Row axis	You can drag from here to the column axis or the slice bar.
Column axis	You can drag from here to the row axis or the slice bar.
Slice bar	You can drag from here to the row or column axis. You cannot, however, drag to rearrange objects within the slice bar.
Dimensions	You cannot drag to rearrange objects within dimensions, whether they are hierarchical or not.
Data cubes	You cannot reorder data cubes, either on the column or the row axis.

---

**Note.** If an application developer specifies No Drag Drop mode for an analytic grid, you cannot drag or drop any item in an analytic grid. In addition, if Freeze Column Mode is specified, you cannot move frozen columns.

---

## Pivoting Data Cubes and Dimensions

Using drag and drop, you can easily change the orientation of data cubes and dimensions within an analytic grid to get a different perspective on your data. For example, if your analytic grid initially displays the Month dimension across the columns, and the Products data cube down the rows, you could pivot the report to display the Months dimension down the rows and the Products data cube across the columns.

Next to the navigation elements is an icon that provides help text for novice users to perform drag and drop operations successfully. Clicking the icon toggles the display of the help text.

**Analytic Grid** | Preferences | View All | First | 1-2 of 2 | Last | ?

Drag and drop allows you to change the appearance and organization of information in the Analytic Grid by moving an element of the analytic grid (a data cube or dimension member) to a new location in the grid. If an element can be dragged, your cursor will change appearance as it hovers over the icon for that element. Click your mouse button to "grab" the element. Then use the mouse to drag the element to its new location. The appearance of the icon as it is being dragged will indicate when the element is in a valid location for dropping. Release the mouse button to drop the element in its new location. The analytic grid will then re-draw itself in the new configuration.

Month Dimension: 01/01/2004 | Region Dimension: EAST\_COAST

	Unit Cost Cube	Units Sold Cube	Product Sales
SPORTS EQUIPMENT	4270.11	1982.00	681894.67
WATER SPORTS	4270.11	1982.00	681894.67

Analytic grid with help text displayed, before pivot

**Analytic Grid** | Preferences | View All | First | 1-30 of 30 | Last | ?

Region Dimension: EAST\_COAST

	Unit Cost Cube	Units Sold Cube	Product Sales
01/01/2004			
SPORTS EQUIPMENT	4270.11	1982.00	681894.67
WATER SPORTS	4270.11	1982.00	681894.67
02/01/2004			
SPORTS EQUIPMENT	4183.84	1982.00	668119.02
WATER SPORTS	4183.84	1982.00	668119.02
03/01/2004			
SPORTS EQUIPMENT	4173.73	1982.00	666505.18
WATER SPORTS	4173.73	1982.00	666505.18
04/01/2004			
SPORTS EQUIPMENT	3925.05	1982.00	626792.07
WATER SPORTS	3925.05	1982.00	626792.07

Analytic grid after pivot operation

To pivot cubes and dimensions within an analytic grid:

1. Move the mouse pointer over the bullet icon representing a dimension or the cube icon representing a data cube.

The mouse pointer turns into a move cursor (a four-headed arrow), with an associated grabber hand.

2. Drag the bullet or cube icon from a column heading to a row heading or vice versa.

As you drag, the grabber hand will turn into an international no sign (circle with slash) when you are over locations where you cannot drop. You will instead see a bullet icon (for dimensions) or cube icon (for data cubes) when you drag over locations where you can drop the data cube or dimension.

---

**Note.** You can drop data cubes and dimensions onto the row axis, the column axis, and the slicer bar.

---

## Slicing Analytic Grid Data

*Slicing* allows you to view a subset of your data. You can slice your data by choosing from any list—representing data cubes or dimensions—that appears on the slice bar by default. In addition, you can add data cubes or dimensions to the slice bar and use them to view alternate slices of your data. You can place multiple data cubes or dimensions on the slice bar. You can also slice your data further (viewing subsets of subsets) by choosing members from various data cubes and dimensions upon which to slice.

---

**Note.** You can add as many data cubes or dimensions to the slice bar as you like. Three fit per row, so if you add more than three, the fourth and so on are added to a second row on the slice bar. However, note that you can place only a single data cube on the slice bar. When you do so, the analytic grid reflects the data for that data cube only.

---

Analytic Grid   Preferences   View All   First   1-3 of 3   Last				
Month Dimension: 01/01/2004				
	EAST_COAST	HAWAII	MIDWEST	
	SPORTS EQUIPMENT	SPORTS EQUIPMENT	SPORTS EQUIPMENT	
Unit Cost Cube	4270.11	4270.11	4270.11	
Units Sold Cube	1982.00	4015.00	815.00	
Product Sales	681894.67	1354178.92	827281.86	

Slice showing only February data

To slice your data based on a data cube or dimension that already appears on the slice bar:

1. Use the list box on the slice bar to display the values for the relevant data cube or dimension.

As an example, for a Months dimension, it would contain a list of months.

2. Select the desired value from the list box.

The analytic grid changes to show only data related to that value. For instance, if you select the month of March, you will see only data for that particular month.

To add a data cube or dimension to the slice bar and use it to slice your data:

1. Drag the desired data cube or dimension to the slice bar.
2. Select a member.

You will now see data related to that member only.

Dimensions that have filter functions applied will behave differently depending on whether they reside on the column axis/row axis or the slice bar. See the following for details.

See *Enterprise PeopleTools 8.50 PeopleBook: Analytic Calculation Engine*, "Creating Rules, Formulas, and User Functions," Filter User Functions.

## Working with Hierarchical Dimension Data

Some dimension data has a hierarchical structure. When this is the case, you can expand and collapse dimension data within the analytic grid. In addition, you can drill down into the hierarchy to get a closer look at a particular subset of the data.

Analytic Grid			
Month Dimension: 01/01/2004		Region Dimension: EAST_COAST	
	Unit Cost Cube	Units Sold Cube	Product Sales
SPORTS EQUIPMENT	4270.11	1982.00	681894.67

Analytic grid, unexpanded, with multiple nodes to expand

Analytic Grid			
Month Dimension: 01/01/2004		Region Dimension: EAST_COAST	
	Unit Cost Cube		
	Units Sold Cube		
	Product Sales		

Analytic grid, unexpanded

The screenshot shows the 'Analytic Grid' interface. At the top, there are tabs for 'Preferences' and 'View All'. Below the tabs, there are two dropdown menus: 'Month Dimension: 01/01/2004' and 'Region Dimension: EAST\_COAST'. The main grid displays a hierarchy of dimensions: 'SPORTS EQUIPMENT' (expanded), 'WATER SPORTS' (expanded), 'SURFBOARDS' (expanded), 'WAVE RUNNERS' (expanded), and 'JET SKIS' (expanded). The data is presented in a table with three rows: 'Unit Cost Cube', 'Units Sold Cube', and 'Product Sales'. The values are as follows:

	Unit Cost Cube	Units Sold Cube	Product Sales
SPORTS EQUIPMENT	4270.11	1982.00	681894.67
WATER SPORTS	4270.11	1982.00	681894.67
SURFBOARDS	1019.70	430.00	169339.50
WAVE RUNNERS	2115.63	211.00	446397.93
JET SKIS	1119.19	41.00	45886.99

Analytic grid, expanded

To expand or collapse dimension data:

1. Click the plus sign to the left of the dimension name to expand that dimension, showing all subdimensions immediately underneath it.

This approach expands the dimension one level at a time. If you click the multiple plus sign to the left of the single one, all the dimensions are expanded.

2. Click the plus sign to the left of any "subdimensions" to expand them as well.
3. Click the minus sign to the left of any dimension to collapse it.

The screenshot shows the 'Analytic Grid' interface with the 'WATER SPORTS' dimension expanded. The 'EAST\_COAST' dimension is also expanded. The data is presented in a table with three rows: 'Unit Cost Cube', 'Units Sold Cube', and 'Product Sales'. The values are as follows:

	Unit Cost Cube	Units Sold Cube	Product Sales
WATER SPORTS	4270.11	1982.00	681894.67
SURFBOARDS	1019.70	430.00	169339.50
WAVE RUNNERS	2115.63	211.00	446397.93
JET SKIS	1119.19	41.00	45886.99

Drilling in to see just the water sports information

To drill into and out of dimension data:

1. Click any dimension or subdimension that has elements beneath it in the hierarchy. (It is underlined and has a plus or minus sign to its left.)

The plus or minus sign changes into a Drill out this node arrow, and you see only the dimension or subdimension you clicked on, plus any elements directly underneath it in the hierarchy.

2. Click the Drill out this node arrow to drill back out within the hierarchy.

The dimension now shows the node you clicked on plus one level above it.

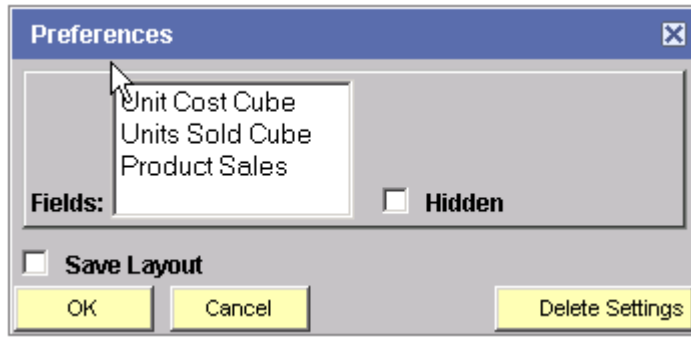
## Saving Customized Analytic Grid Layouts

You have learned how to customize the initial layout of the analytic grid by pivoting data cubes and dimensions, viewing selected slices of your data, and more. In addition, you can save your customizations and return to them later. If you have saved a customized layout, you can also easily return the analytic grid to its original settings.

---

**Note.** The configuration of the Preferences dialog box changes depending upon whether there is a cube in the column header. If there is one, you have the option to hide nondimensional fields. If not, this option isn't available.

---



Preferences dialog box

To save a customized analytic grid layout:

1. Modify the grid's layout as desired.
2. Click the Preferences link.

The Preferences dialog box appears.

3. If applicable, select which nondimensional fields to hide by selecting them and clicking the Hidden check box.

You can hide all nondimensional fields but one. For example, if you have three, you can hide two; if you have four, you can hide three; and so on.

4. Select the Save Layout check box and click OK.

To restore an analytic grid's default settings:

1. Click the Preferences link.

The Preferences dialog box appears.

2. Click Delete Settings.

---

**Note.** Delete Settings restores the analytic grid's default layout, and also "unhides" hidden nondimensional fields.

---





## Chapter 6

# Working With Processes and Reports

This chapter provides an overview of PeopleSoft processes and reports and discusses how to:

- Request reports in PeopleSoft applications.
- Check the status of reports.
- View reports in Report Manager.

---

**Note.** The procedure described in this chapter applies to most standard reports, but not all of them. Some PeopleSoft applications include reports that you run from outside the system, using PS/nVision or a third-party application. The documentation for your PeopleSoft application tells you which third-party application to use.

---

---

## Understanding PeopleSoft Processes and Reports

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

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

You run batch processes in the PeopleSoft system using the PeopleSoft Process Scheduler, which enables your organization to define processes, submit requests for processes, and set up an "agent" that scans for and runs submitted processes.

As an end user, you need only 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 to the technical staff at your site. This chapter covers the general procedure for running the standard reports that come with your PeopleSoft applications. If you, or someone in your organization, have added custom reports to the system, the procedure should be similar.

---

## Requesting Reports in PeopleSoft Applications

This section discusses how to:

- Select reports.

- Specify report parameters.
- Specify where and when to run reports.
- Select output formats and set report distribution.

## Selecting Reports

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

### ***Run Controls***

When you want to run a report, you must tell the system when and where you want it to run. For example, you might tell the system to run the report on the database server at midnight, or on a Windows server every Sunday afternoon, or make it available immediately in your browser. For most reports, you also must 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 that you run a report, you create (and save) a run control with those settings. The next time that you run the report, you select the run control, and the system fills in the settings.

### ***Run Control IDs***

Each run control that you create receives a unique run control ID. These IDs are product-specific. Refer to your PeopleSoft product documentation for details on the run control IDs that you will be using. When you select a report to run, the system prompts you for a run control ID. If you are in Add mode, enter a new ID for the run control that you are about to define. If you are in Update/Display mode, enter an existing run control ID, or click the Search button and select from the list of available run control IDs.

---

**Note.** If you are running a number of reports in a row from the same menu, you must enter only the run control ID for the first report. When you select a second report from the menu, the application remembers which run control you are using.

---

To select a report:

1. Select the required PeopleSoft application menu item—for example, Process Financial Information, Maintain Ledgers.
2. Select Report, and then click the required report name.

When you select a report name, you can choose from these two actions:

- Add a new run control ID.
- Select an existing run control ID.

## Specifying Report Parameters

You can run off-line processes from pages in your PeopleSoft application in a variety of ways. The way in which you use the processes depends on the application. Access the page from which you want to run your process. For many reports, you need to enter values for parameters that specify what data the report includes, such as from and to dates or business units. The parameters page appears after you enter the run control ID. The following is an example of the General Ledger Activity report.

GL Activity

Report Request Parameters

Run Control ID: testEnglish

[Report Manager](#) [Process Monitor](#)

Run

Language: English

Unit: US001

Ledger: LOCAL

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

Adjustment Period

1

+ -

Fiscal Year:

Currency: USD

From Period:

To Period:

☐ Show Discrepancies Only

☐ Show Journal Detail

☐ Display Full Numeric Field

Refresh

ChartField Selection

[Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Sequence	Field Long Name	Select	Subtotal	Value	ChartField TO Value
		<input type="checkbox"/>	<input type="checkbox"/>		

General Ledger Activity page

**Note.** The pages you use to submit report parameters in your applications may appear differently.

If you selected an existing run control ID, the values in this page reflect the settings from the selected run control; if you added a new value, or if you're using an HCM application, they are the default values.

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

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

## Specifying Where and When to Run Reports

You submit a process request from the Process Scheduler Request page. This page displays the options that you have selected for a particular process request and which processes are available for you to submit. Select the options that you want to use in running your process, and select the check box for each process that you want to run. Click OK to queue your process request.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests."


The options available to you on this page are determined by your security profile. For example, each end user has a user profile, which is linked to one or more *roles*. Roles define groups or types of end users, such as payroll clerks, sales staff, or managers. Each role has one or more permission lists that control what a user can access. You can run only those processes that are associated with your permission list. For example, if you are in the human resources department, you probably belong to a human resources role and therefore can run only human resources processes. The number of processes that appear in the list on the Process Scheduler Request page is 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. In the Process List group box, select the check box for each process that you want to run.


### Process Scheduler Request









User ID: VP1 Run Control ID: testEnglish

---

Server Name:  Run Date: 11/10/2003 

Recurrence:  Run Time: 1:34:46PM  Reset to Current Date/Time

Time Zone:  

Select	Description	Process Name	Process Type	*Type	*Format	File Dependency
<input type="checkbox"/>	<a href="#">COBOL Multi-process Job</a>	3CBL	PSJob	(None)	(None)	 
<input type="checkbox"/>	<a href="#">Crystal Multi-process Job</a>	3CRYSTAL	PSJob	(None)	(None)	 
<input type="checkbox"/>	<a href="#">SQR Multi-process Job</a>	3SQR	PSJob	(None)	(None)	 
<input type="checkbox"/>	<a href="#">6XRFWIN</a>	6SQR	PSJob	(None)	(None)	 

Process Scheduler Request page

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests."

## Selecting Output Formats and Setting Report Distribution

You can choose several kinds of output formats for your process. The following table shows a list of output formats listed by process type and output type:

Process Type	Output Type	Output Format	Default
AppEngine	FILE	PDF, XLS, TXT, HTM	TXT
AppEngine	WEB	PDF, XLS, TXT, HTM	TXT
AppEngine	WINDOW	PDF, XLS, TXT, HTM	TXT
COBOL	NONE	NONE	NONE
COBOL	WEB	TXT	TXT

<b><i>Process Type</i></b>	<b><i>Output Type</i></b>	<b><i>Output Format</i></b>	<b><i>Default</i></b>
COBOL	WINDOW	TXT	TXT
Crystal	EMAIL	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM
Crystal	FILE	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM
Crystal	PRINTER	RPT	RPT
Crystal	WEB	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM
Crystal	WINDOW	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM
Cube	NONE	NONE	NONE
nVision	EMAIL	HTM, XLS	XLS
nVision	FILE	HTM, XLS	XLS
nVision	PRINTER	HTM, XLS	XLS
nVision	WEB	HTM, XLS	XLS
nVision	WINDOW	HTM, XLS	XLS
nVision	DEFAULT	DEFAULT	DEFAULT
SQR	EMAIL	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
SQR	FILE	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
SQR	PRINTER	HP, LP, PS, WP	PS

<b>Process Type</b>	<b>Output Type</b>	<b>Output Format</b>	<b>Default</b>
SQR	WEB	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
SQR	WINDOW	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
WinWord	WEB	DOC	DOC
WinWord	WINDOW	DOC	DOC
Data Mover	FILE	TXT	TXT
Data Mover	WEB	TXT	TXT
Data Mover	WINDOW	TXT	TXT
OTHER	NONE	NONE	NONE

---

**Note.** You must have Adobe Acrobat Reader installed on your workstation to be able to read Acrobat (.pdf) files.

---

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests," Selecting Output Types and Formats.

### **Report Distribution**

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

If your process 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.

You can add users or roles to the distribution list by adding a row and entering the pertinent information. You can also use this page to add someone who would not normally have the proper security to view this output.

---

**Note.** If you are entering a list of email addresses, insert a semicolon between each address.

---

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests," Setting Report Distribution.

## Checking the Status of Reports

When you click OK on the Process Scheduler Request page, the system returns you to your application page. Use the Process Monitor to view the status of your submitted processes. Process Monitor is a tool designed to track the status of all running, pending and completed Process Scheduler requests.

**Note.** The time it takes for a process request to complete varies. The complexity of the process and the current load on the system are examples of the factors that can lengthen the duration of a process request. For example, a large, complicated report extracting large volumes of data will take longer to run than a simpler report. Keep this in mind when monitoring the status of your process requests.

Process List
Server List

View Process Request For

User ID:  Type:  Last:  Days

Server:  Name:  Instance:  to

Run Status:  Distribution Status:  ☒ Save On Refresh

Process List										Customize	Find	View All	First	1-9 of 9	Last
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details						
<input type="checkbox"/>	9999932		PSJob	<a href="#">3CBL</a>	QEDMO	03/24/2004 9:53:29AM PST	Queued	N/A	<a href="#">Details</a>						
<input type="checkbox"/>	9999931		SQR Report	XRFWIN2	QEDMO	03/24/2004 5:00:00PM PST	Queued	N/A	<a href="#">Details</a>						
<input type="checkbox"/>	9999927		PSJob	<a href="#">3SQR</a>	QEDMO	03/24/2004 9:45:13AM PST	Queued	N/A	<a href="#">Details</a>						
<input type="checkbox"/>	9999926		SQR Report	XRFWIN2	QEDMO	03/24/2004 9:42:05AM PST	Queued	N/A	<a href="#">Details</a>						
<input type="checkbox"/>	9999925		Crystal	XRFWIN	QEDMO	03/24/2004 9:42:05AM PST	Queued	N/A	<a href="#">Details</a>						

### Checking process status with Process Monitor

To check the status of your report:

1. Click the link to Process Monitor, or select PeopleTools, Process Scheduler, Process Monitor.  
Your user ID appears in the User ID list box. If the list of processes is too long, you can use the navigation arrows on the screen to scroll through the list.
2. Use the Server, Type, Run Status, Last, and Instance list boxes to limit the processes that Process Monitor displays.
3. Click Refresh to update this page with the latest system activity.

If the run status is *Initiated* or *Processing*, the report is still running. If the run status is *Success*, the system has finished running the report.

Depending on the status of your report, you can cancel it or put it on hold. If the system is done processing a report, you can delete the report's information from Process Monitor. Click Details to display the options for canceling or holding a request.

**See Also**

*Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler, "Using Process Monitor"*

---

## Viewing Reports in Report Manager

Report Manager is like your own personal "in box" of reports and processes to which you have access. It provides a secured means to view report content, check the status of a job, and see content detail messages.

To view your list of reports:

1. Select Reporting Tools, Report Manager.
2. Select View to view your report output.

The Report/Log Viewer page appears in another browser window.

3. Click the link to the report or any associated files that you want to view.

The report appears in Adobe Acrobat (.pdf) format.

**See Also**

*Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler, "Using Report Manager"*



## Chapter 7

# Using Workflow

This chapter provides an overview of workflow and discusses how to:

- Send and receive notifications.
- Work items.
- Use timeout worklists.

---

## Understanding Workflow

Many of the tasks that you perform throughout the day are part of larger tasks of an entire business process that involve several steps and several people working together. For example, when you enter a vendor invoice into the system, you are also initiating an approval and payment process: someone else reviews and approves the invoice, and a third person submits payment to the vendor. The term *workflow* refers to the way in which work flows through the steps of the larger, business process.

To facilitate this type of multiuser process, PeopleSoft automatically triggers workflow *routing*s—notifications to inform other people of the work awaiting them. So when you enter an invoice, PeopleSoft automatically notifies the appropriate individual that the invoice has been submitted and is awaiting review.

### See Also

*Enterprise PeopleTools 8.50 PeopleBook: Workflow Technology*, "Understanding PeopleSoft Workflow"

---

## Sending and Receiving Notifications

This section discusses how to:

- Send notifications.
- Use worklists to receive notifications.

## Page Used for Sending and Receiving Notifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Send Notification	PT_WF_NOTIFY	Click the Notify button in the toolbar at the bottom of any transaction page.	Use to enter a personal message and send an email or worklist notification to an individual or group when a relevant event has occurred.
Worklist	WORKLIST	Select Worklist, Worklist from the main menu or select Worklist from the universal navigation header.	Use to view and work from an organized list of the work items awaiting your attention.
Worklist Details	WORKLIST_DETAILS	Select Worklist, Worklist Details from the main menu.	Use to view additional information about items on your worklist.

## Sending Notifications

The system sends notifications automatically as part of the standard workflow routings. You can also send notifications from most PeopleSoft components by using the Notify toolbar button. This button picks up any available notification templates for that component.

In both cases, you can send notifications by way of worklist or by email.

Access the Send Notification page (Click the Notify button at the bottom of any page).

## Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.  
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details

[Lookup Recipient](#)[Delivery Options](#)

To:

CC:

BCC:

Priority:

Subject:

<Enter Subject here>

Template Text:

Workflow Notification  
Priority: %NotificationPriority  
Date Sent: 2004-03-24

Message:

OK

Cancel

Apply

Send Notification page

<b>To</b>	Enter the user names or email addresses of those who need to take action. This field can contain one or more email addresses or user names separated by a semicolon.
<b>CC (carbon copy)</b>	Enter the names or email addresses of CC recipients, who are made publicly aware of the notification.
<b>BCC (blind carbon copy)</b>	Enter the names or email addresses of BCC recipients, who are made aware of this notification privately.
<b>Priority</b>	Select a priority level for the notification: low, medium, or high. This priority is reflected in the notification only if the %NotificationPriority variable is in the template text.
<b>Subject</b>	Enter the topic or a brief description of the notification. The subject value may appear by default from a template, but you can edit it.
<b>Template Text</b>	Displays the template text, which is based on a predefined notification template. The text in this field is sent in the language of the recipient. However, the notification template has to be defined with template text for each language.

<b>Message</b>	Enter your own comments. The message text is sent in the language of the sender.
<b>Lookup Recipient</b>	Click to access the Lookup Address page. Enter the first characters of a recipient and click Search to receive a list of people who match your search. To use someone as a recipient, select the check box for the type of recipient (To ,cc, bcc) and click Add to Recipient List.
<b>Delivery Options</b>	The check boxes are populated based on the delivery options that are defined in the recipient's user profile. The Worklist check box is unavailable for external email addresses.

### **See Also**

*Enterprise PeopleTools 8.50 PeopleBook: Workflow Technology*, "Administering PeopleSoft Workflow," Setting Notification Options

## **Working with Received Notifications**

PeopleSoft offers two types of workflow notifications:

- email
- worklists

### ***Working with Email Notifications***

While many workflow-enabled applications use worklists to assign work, you may receive workflow notifications through email. When you receive an email notification, the notification typically includes a link to the PeopleSoft page where you will perform the necessary work. Depending on your business processes, you may need to notify a colleague or supervisor that you've completed the work.

See [Chapter 7, "Using Workflow," Sending and Receiving Notifications, page 119.](#)

### ***Viewing a Worklist***

When you are using a workflow-enabled application, changes in your day-to-day tasks are reflected in a worklist. A worklist is an organized list of the work items awaiting your attention. Selecting items to work on from a worklist automatically returns the pages that you need. This enables you to bypass any other navigational structure and work directly from the worklist.

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.
- Perform the indicated work.
- Reassign work items.

Access the Worklist page (Click the Worklist link in the Universal Navigation Header).

As with other grids, you can customize the sorting and columns within Worklist grid.

Worklist for VP1: Kenneth Schumacher

[Detail View](#) Work List Filters:

From	Date From	Work Item	Worked By Activity	Priority	Link		
Theresa Monroe	04/13/2001	Supplier Schedule	PO_SUPPLIER_SCHEDULE	<input type="text"/>	<a href="#">SHARE_SCM0000004_US008_FR7002_2001-04-13-09.16.02.000000</a>	Mark Worked	Reassign
Theresa Monroe	01/25/2002	Recommendation Made	RS_MYRECS_CHANGE	<input type="text"/>	<a href="#">KU0015_US004.0000000017.1</a>	Mark Worked	Reassign
Theresa Monroe	08/16/2000	Routing Notification	Maintain Routing	<input type="text"/>	<a href="#">SAMPLE.2000-08-16-14.03.41.0000000_US008.MT2000.RW.1.PR</a>	Mark Worked	Reassign

## Worklist page

### Work List Filters

Enables you to select a worklist to view. You can only view worklists to which you are assigned. The system maintains the filter you have selected until you sign out of the PeopleSoft system.

---

**Note.** If you complete all of your work items in a worklist and mark them as "worked" during your current PeopleSoft session, the system displays Invalid Value. This is because the worklist is empty; it contains no more work items.

---

### From

Displays who triggered the work item.

### Date From

Displays when the work item was triggered.

### Work Item

Displays the work items, which are the types of activities that 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.

### Worked By Activity

Displays the activity that needs to be worked by the worklist item.

### Priority

Rank the worklist entry by importance. Priority values include: *1* for high, *2* for medium, and *3* for low.

### Link

Click a link to access the target page—the page where you work the item. The target page is specific to the type of work that you are doing. For example, the link for an expense approval item accesses the page where you can review and approve expense reports.

---

**Note.** You cannot sort on this column. In addition Find won't work on it and Download to Excel won't download this information.

---

### Mark Worked

Click to remove an item from your worklist without actually accessing the target page. You should not use this option unless the item is a simple notification and no additional work is required.

<b>Reassign</b>	Click to forward the item to another user and remove it from your list.
<b>Refresh</b>	As items are added to and removed from your worklist, click this button to update the page with the most recent changes.

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

### ***Performing Work***

To work an item on its target page, click the link on the Worklist page for the item that you want to work. The system transfers you to the page where you can perform the required task. When you have worked the item, it automatically disappears from your worklist.

If you need to mark an item as worked manually—such as when an entry is a simple notification with no necessary followup—select the Mark Worked button. The item disappears from your worklist.

### ***Reassigning a Worklist***

You can also reassign a worklist item to another user. Your organization can choose to prevent particular types of items from being reassigned.

To reassign a worklist item to another user:

1. Click the Reassign button.

The Reassign page appears.

2. Enter the user ID of the person to whom you are reassigning the item.

Click the Search button if you need 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.

### ***Viewing Worklist Details***

Access the Worklist Details page (Click the Detail View link from the Worklist page).

The Worklist Details page provides additional information about items on your worklist; it includes all of the information from the Worklist page, along with the additional details described here.

<b>Timed Out Dttm</b> (timed out date and time)	Displays the date and time when the item will time out if it is not already worked.
<b>Previous User</b>	Displays the user whose action triggered this item.
<b>Selected Dttm</b> (selected date and time)	Displays the date and time when you first selected this item (to work the item).

<b>Comment</b>	Displays the comment (if any) entered by the user if the item was forwarded from another user.
<b>Timed Out</b>	Indicates whether the item has timed out.
<b>Instance</b>	Displays a unique identifier for each item of the same type.
<b>Transaction</b>	Displays a unique identifier for each item in the worklist.

---

## 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.

Although you cannot differentiate between the different types of worklist items just by looking at them, understanding these different types will clarify why different items respond to different actions:

<b><i>Worklist Type</i></b>	<b><i>Description</i></b>
User Specified	A work item is not marked as "worked" until you click Mark Worked. This option is typically used when 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 when you can complete the item in one visit to the target page.
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.
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 in your worklist contain built-in timeout parameters. Depending on how your organization handles timeout processing, you may receive an email or another worklist entry if you have not worked an item by the time it times out.

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

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



## Chapter 8

# Using PeopleSoft Navigator

This chapter provides an overview of PeopleSoft Navigator and discusses how to:

- Access PeopleSoft Navigator.
- Work with PeopleSoft Navigator.

---

## Understanding PeopleSoft Navigator

PeopleSoft offers multiple navigation methods for accessing application pages. 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 section discusses:

- Advantages of PeopleSoft Navigator.
- The PeopleSoft Navigator hierarchy.
- Workflow processing.

## Advantages of PeopleSoft Navigator

PeopleSoft Navigator maps are organized by procedure. For example, the delivered navigation hierarchy for PeopleSoft Enterprise Human Resources Management is organized functionally: payroll-related pages appear under a different hierarchy than benefits-related pages. Using PeopleSoft Navigator's process-oriented organization, on the other hand, you might have a hire activity that includes both payroll-related and benefits-related steps.

PeopleSoft Navigator's process orientation also provides an high-level view of the process, helping you to understand the overall flow of work in your organization. Unlike text and menu-based navigation, PeopleSoft Navigator displays graphical maps. These maps clarify relationships among the steps in a process and ease your navigation through sequential tasks.

Navigator maps can also show you any workflow notifications that are triggered by changes that you make on a page. Without PeopleSoft Navigator, you would not necessarily know when you trigger a workflow notification. A PeopleSoft Navigator map can clarify when a notification is sent.

## See Also

*Enterprise PeopleTools 8.50 PeopleBook: Workflow Technology, "Understanding PeopleSoft Workflow"*

*Enterprise PeopleTools 8.50 PeopleBook: Workflow Technology, "Building Workflow Maps"*

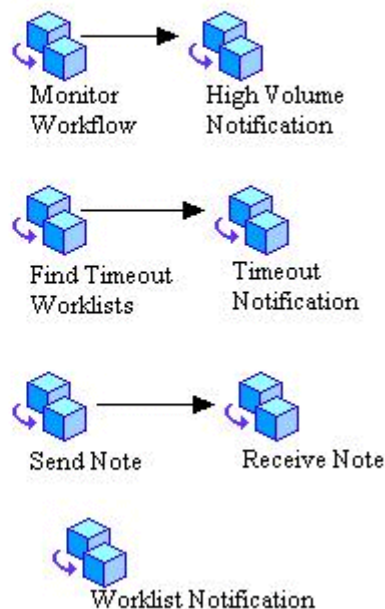
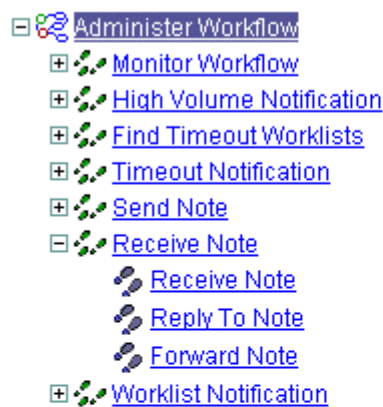
## The PeopleSoft Navigator Hierarchy

PeopleSoft Navigator maps are organized hierarchically, enabling you to navigate from processes to subprocesses to the lowest level page where an individual transaction occurs. Workflow uses three hierarchical levels. The first two levels, business processes and activities, are both maps: graphical representations of the relationships between the component objects (other maps or steps).

The third level, steps, does not contain maps. Steps are elements within activities and represent the level at which the user interacts directly with application pages.

This example shows the PeopleSoft Navigator hierarchy:

### NAVIGATOR



PeopleSoft Navigator hierarchy

## See Also

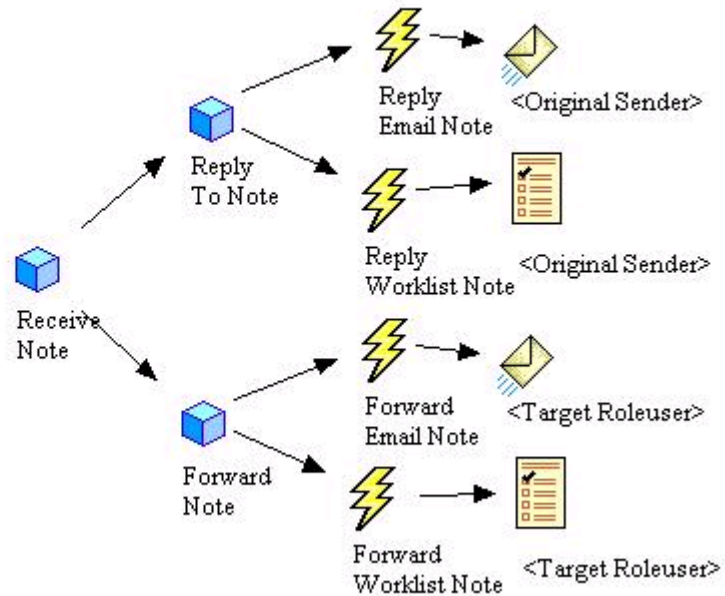
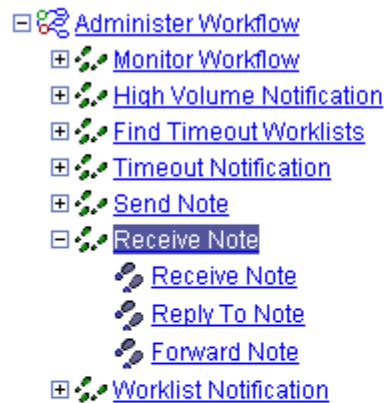
*Enterprise PeopleTools 8.50 PeopleBook: Workflow Technology, "Building Workflow Maps," Understanding Map Hierarchies*

## Workflow Processing

Some PeopleSoft Navigator maps incorporate a visual representation of associated workflow processing. The icons associated with workflow processing appear only in the maps, not in the PeopleSoft Navigator tree. These icons merely provide information.

This diagram shows some of the icons associated with workflow processing:

### NAVIGATOR



Map with workflow icons

Some of the icons that you are likely to see include:



*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 her or his worklist.

### See Also

*Enterprise PeopleTools 8.50 PeopleBook: Workflow Technology, "Building Workflow Maps," Understanding Workflow Maps*

---

## Working With PeopleSoft Navigator

This section discusses how to:

- Navigate the map hierarchy.
- Navigate to a page.
- Navigate to the next page in an activity.

### Pages Used to Work with PeopleSoft Navigator

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Navigator	NAVIGATOR	Worklist, Navigator	<p>The Navigator page displays a tree with nodes that represent various processes; the right displays the map that corresponds to the highest level of the tree. The specific tree and map that appear depend on how your user profile is defined through PeopleSoft Security.</p> <p><b>Note.</b> From PeopleSoft Navigator, you can return to the main menu at any time by clicking Home in the universal navigation header.</p>

### Navigating the Map Hierarchy

You can navigate through the PeopleSoft Navigator hierarchy by opening nodes in the tree or by clicking icons in the map. Either way, both the tree and the map always show the currently selected item. Navigate the map hierarchy by using the following actions:

- To select a tree node and simultaneously expand it, click either the node or the plus sign that appears next to the node.
- To collapse a tree node, click the minus sign that appears 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 otherwise appears. A page that you access through PeopleSoft Navigator has the same access requirements as a page that you access through the standard application navigation. You therefore may need to go through a search page before accessing the transaction.

All of the standard page operations, including the Save and Return to Search buttons, are available. The PeopleSoft 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, PeopleSoft Navigator offers two ways to move through the sequence:

- Continue using the tree by clicking the next step in the activity.
- Click the navigation links that appear in the upper-right corner of any page that appears in PeopleSoft Navigator.

Depending on where the page falls in the sequence of pages, links for the Prev (previous) page and Next page appear. When you move from page to page, key fields are remembered so that you do not have to go through the search page unless you are moving to a page with different high-level keys.



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