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PeopleTools 8.53: PeopleSoft Applications User's Guide

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PeopleTools 8.53: PeopleSoft Applications User's Guide
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Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

• Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	Description
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (	).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific

- Europe

- Latin America

- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Access to Oracle Support

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

Documentation Accessibility

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Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.

- PeopleSoft Online Help acessibility.

- Accessing, navigating, and searching the PeopleSoft Online Help.

- Managing a locally installed PeopleSoft Online Help website.

PeopleTools Related Links

Oracle's PeopleSoft PeopleTools 8.53 Documentation Home Page [ID 1494462.1]

PeopleSoft Information Portal on Oracle.com

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Working With PeopleSoft Applications

Understanding PeopleSoft 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 these navigation tools: Home, Worklist, MultiChannel Console, and Sign out.This navigation header appears at the top of every page while you are signed in.

Your PeopleSoft application is delivered 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 product documentation for the various applications frequently refer to the demonstration information to clarify concepts and provide a common frame of reference for examples.

See Understanding the Universal Navigation Header.

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 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 a database.

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

Main Menu	This PeopleSoft navigation structure, located at the top of your page, organizes and provides access to transaction pages from which you can carry out actions and modify data. The Main Menu contains menu items; some lead directly to transaction pages and some lead to submenus in a hierarchical format.
Menu pagelet	This PeopleSoft navigation structure, located to one side of your page, organizes and provides access to transaction pages from which you can carry out actions and modify data. The Menu pagelet contains links, some leading directly to transaction pages and some leading to other links in a hierarchical format.
Content reference	A link in the menu that accesses a transaction page or group of pages. A content reference is a reference to a URL for the transaction page.

Navigation path	The collective set of links that appear as you navigate the menu structure; they indicate the hierarchical path to your current location.
	Sometimes called breadcrumbs, they appear in the drop-down menu header and in the navigation page header.
Keys	The fields, such as EmplID (employee identification), that uniquely identify one row of data in a transaction. Keys appears as fields on search pages and transaction pages. All information on a page is related to a key, which usually appears at the top of the page and is display-only.
Component	The page or group of pages that appear when you perform a search. Multiple pages in a component must share the same high-level key;
Page	The individual display and data-entry screens for each part of your PeopleSoft application. Pages appear in the browser window.

Signing In to PeopleSoft Applications

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

Access your default browser window.

1. Enter the URL for your application or select the bookmark for the page where you want to work.

   The Sign In page appears.

2. Select the language in which you want your transaction pages to appear.

3. 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.

4. Press the Tab and Enter keys 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 signin 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

Chapter 1   Working With PeopleSoft Applications

site has not implemented single signon, the system prompts you to enter a user ID and password each time 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. Before your session times out, 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 sign in to the application again.

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 the PeopleSoft system.
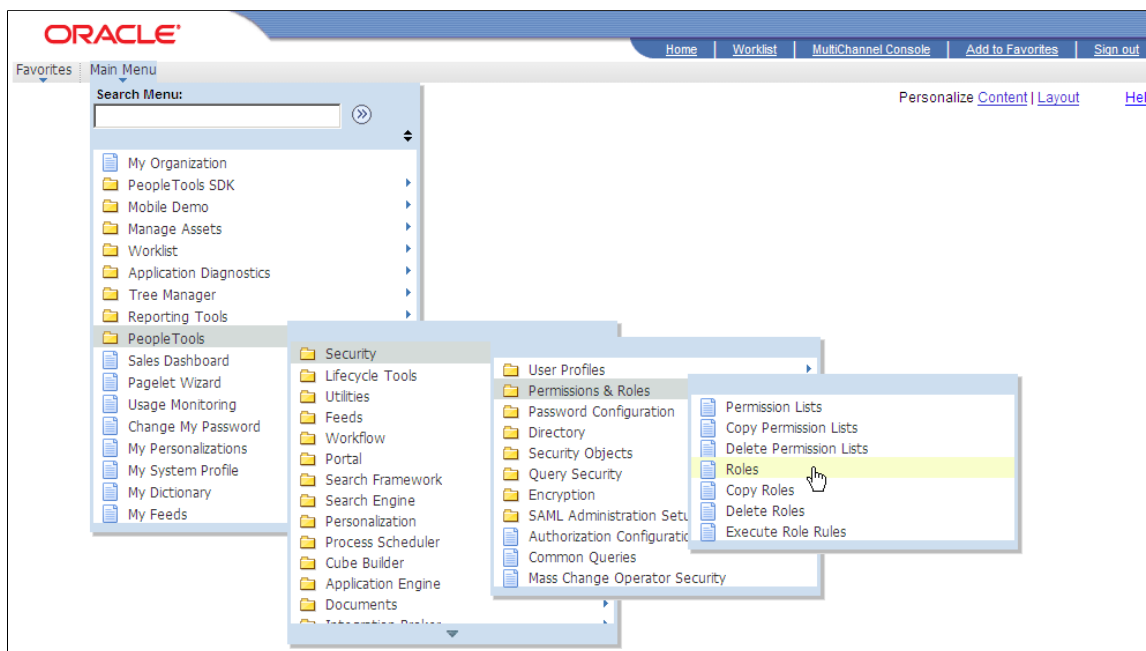
Using Drop-Down Menus

Drop-down menus are an intuitive, nonlinear way to navigate PeopleSoft applications and access your application data. Drop-down menus appear at the top of your browser, above the transaction page or content area, and contain lists of menu items. The menu items are either links that provide direct access to a transaction or detail page, or they are folders that provide access to submenus, which cascade to the side and contain more menu items. Folders typically organize menu items based on business processes or other relationships that exist among transactions.

Image: Drop-down menu navigation showing the Main Menu, folders, and pages

This example shows the Main Menu drop-down navigation.

Access the Main Menu.

Note: The Main Menu and all subsequent menus display only menu items that you are authorized to access.

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1. Click a folder label to open its submenu.

2. Click a link to open the resource in the content area.

Note: If you click the folder icon instead of the label, the navigation page appears.

See Using Navigation Pages.

Scrolling and Sorting

Submenus always open in the viewable area. If the viewable area is too small to display the full list of items in a submenu, then scroll indicators (up and down arrows) appear at the top and bottom of the submenu to let you know that the list contains more menu items. Hover your mouse over the up or down arrow to make the menu scroll in the direction of the arrow. Click and hold the arrow to double the scrolling speed. You can also use your mouse wheel to scroll through a 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.

Image: Sample drop-down menu navigation showing scroll and menu sort indicators

This example shows the Main Menu drop-down navigation with scroll and menu sort indicators.
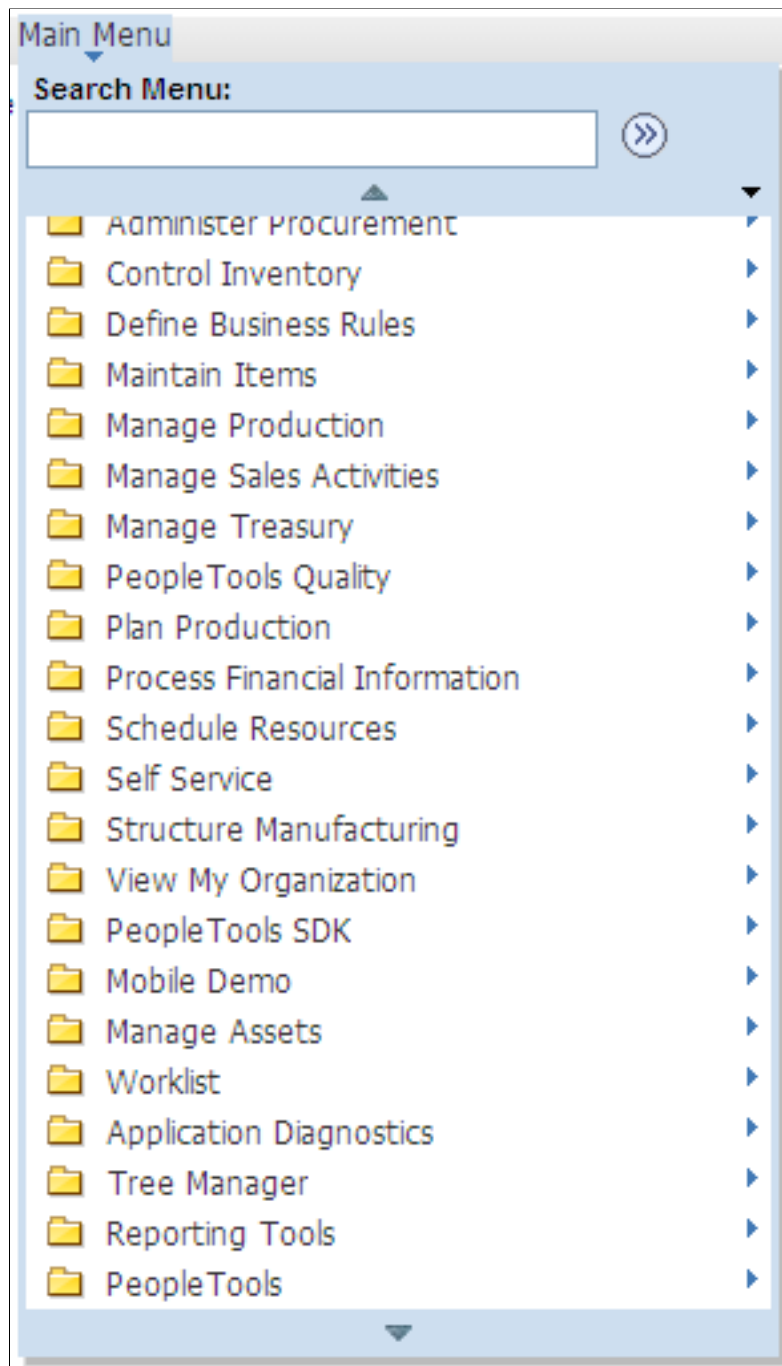
Note: While the sort icon appears only on the Main Menu, any sort you initiate at the Main Menu level applies to all submenus and persists until you change the sort or sign out.

Navigating Breadcrumbs

Breadcrumbs refer to the collective sequence of items that appear above the content area when you navigate to transaction pages or navigation pages using the drop-down menu. The breadcrumbs display the path you took to get to where you are—that is, the component you are on. Each item in the breadcrumb list is either a link to a folder, subfolder, or component, and represents a level in the overall menu hierarchy. When navigating within a WorkCenter or from a dashboard, the breadcrumbs include the WorkCenter or dashboard link. In addition, the breadcrumbs might also include search text, related actions, and the persistent search icon. Click any breadcrumb item to navigate directly to the corresponding item and reveal the subordinate menu items.

Note: Breadcrumbs are updated only when you use drop-down menu navigation; tracking of navigation paths when using menu pagelets is not supported.

All PeopleSoft applications dynamically generate the individual items in the breadcrumb list using the following criteria:

1. The first item in the sequence is always the Main Menu.

2. The intermediate items in the sequence are the names of each item that you click to access the resource; menu items and component names appear in the order that you click them

3. The last item in the sequence is:

    •   The label of the component link when you access a transaction page.

    •   The folder name when you access a navigation page.

    •   The WorkCenter or dashboard name when you access the WorkCenter or dashboard.

    •   The value of the focus node when you access a SmartNavigation page.

Breadcrumbs can reveal both the navigational path to your current location and the hierarchical or parent-child relationships that exist among the items in the breadcrumb sequence.

In certain circumstances, the breadcrumbs will not be updated when you navigate to a new page. These circumstances include:

•   When the new page comes from a content provider system on a release earlier than PeopleTools 8.53

•   If the page, or the folder that contains, it is hidden.

•   If the page is part of an unregistered component.

- If the page is part of a component that does not have the Include in Navigation option selected.

Image: Sample drop-down menu navigation showing breadcrumbs, a submenu, and the persistent search icon.

The following example shows a breadcrumb that lists the navigation path that was used to access the User Profiles component. The user has selected the Security item within the breadcrumb, revealing the items subordinate to that menu level.
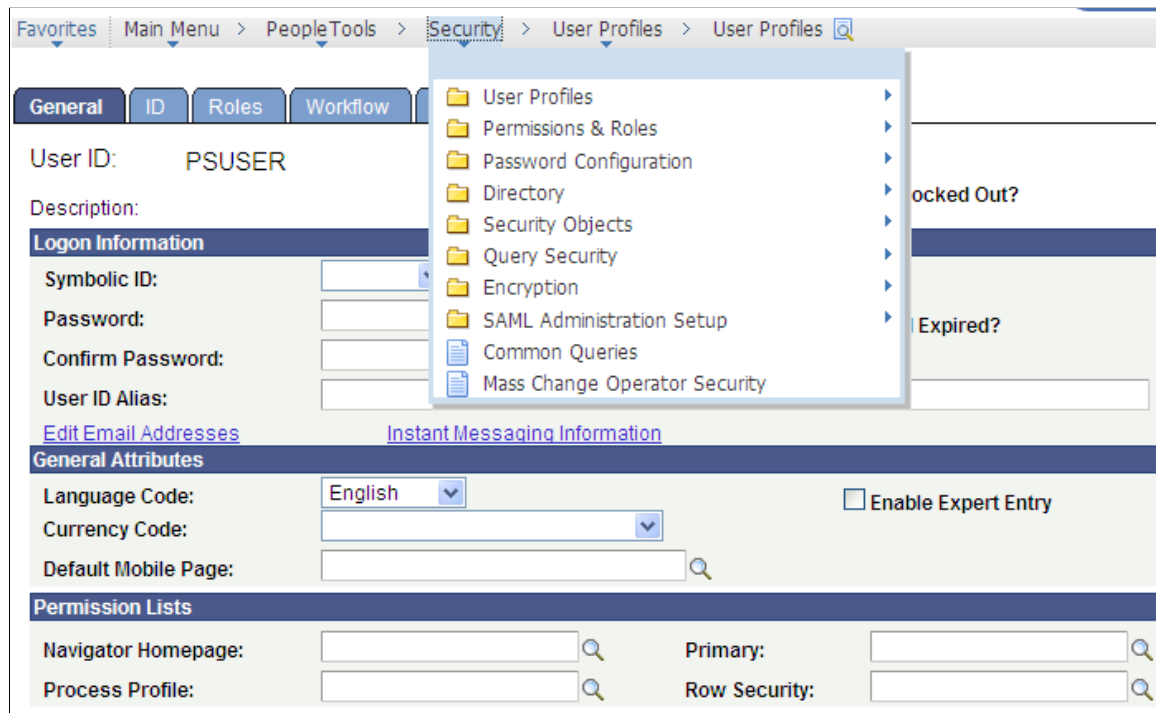
Using SmartNavigation

Most drop-down menus are comprised of menu items that are static and completely independent of your application data and any relationships that exist among your data. You navigate through menu items to access a link that you click to open a search page. You then enter a search value that the system uses to retrieve data, which populates the transaction page

SmartNavigation extends and enhances drop-down menus by incorporating your data into the menu structure itself. Menu items are dynamic and appear in the menu hierarchy based on parent-child relationships. When you use SmartNavigation menus, rather than navigating *to* your data you navigate the data itself.

SmartNavigation menus and menu items represent hierarchically related entities, such as:

- Employees in a department.

- Accounts in a region.

- Students in a class.

Image: Example of SmartNavigation menu

This example illustrates SmartNavigation drop-down menus.
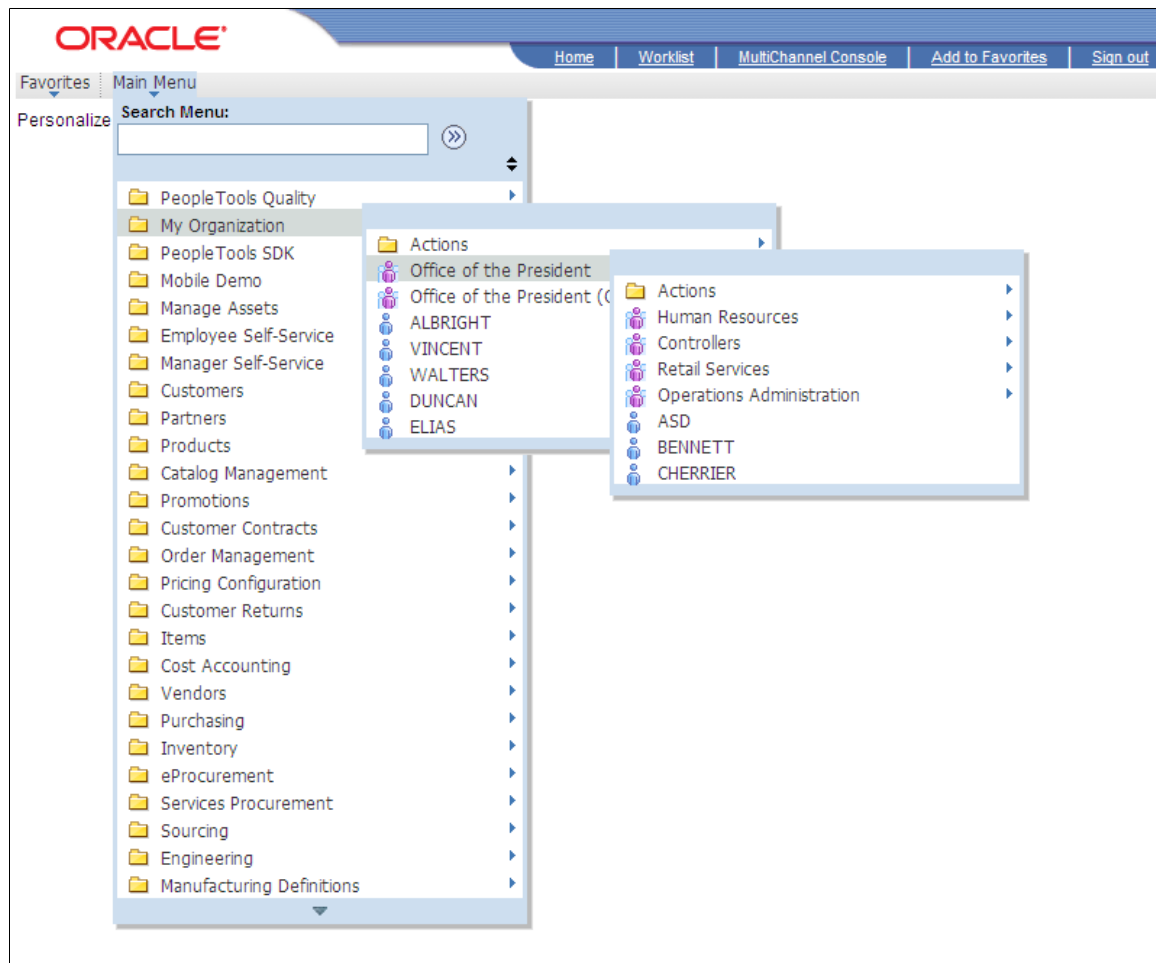
Each menu item is a unique row of data. The menu items are organized based on parent-child relationships. The key field values of the row determine the labels of the menu items. The key field structure of the underlying table determines the position of the menu items in the menu hierarchy.

Similar to standard menu items, SmartNavigation menu items expand when you click the label of a parent menu item. When you click the icon of a child menu item, the transaction or detail page appears.

In addition to your data, SmartNavigation menus also display an Actions folder. The Actions folder contains links to the details component and related actions components.

Note: Side navigation from the Menu pagelet does not support SmartNavigation menus.

SmartNavigation Icons

SmartNavigation menu items do not use the standard folder and content reference icons. SmartNavigation menu items icons are graphically stylized representations of entities. A multi-entity icon appears next to menu items that are parent rows with one or more subordinate menu items that are child rows. A single-entity icon appears next to menu items that are child rows with no subordinate menu items or child rows.

Using Menu Pagelets

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

Image: Menu pagelet

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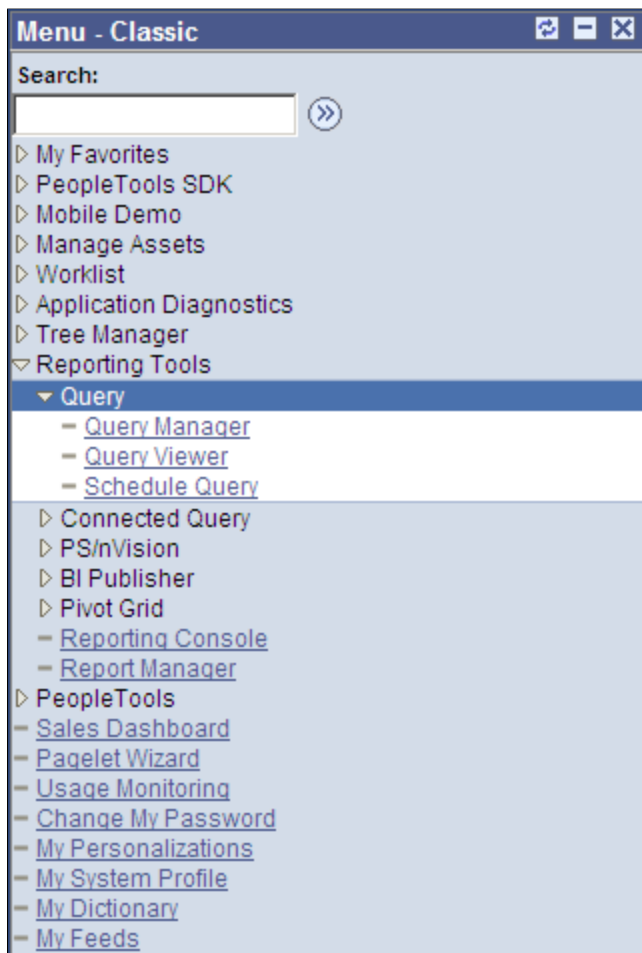
The Menu pagelet contains a list of the general areas to which you have access in the application. From this point you can expand any folder to access additional folders or content references that open transaction pages.

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, the system retrieves and displays the entire hierarchy of the root portal registry contents and the folder contents themselves. As you navigate the folders, the levels within the folder hierarchy change color for visual identification.

Using Navigation Pages

PeopleSoft applications include navigation pages, which are 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 icon in the menu. The two types of navigation pages are:
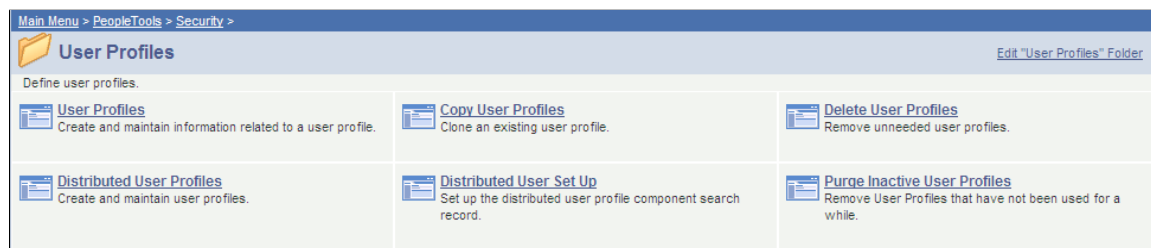
•   Standard navigation pages.

•   SmartNavigation pages.

Standard Navigation Pages

Elements embedded in the folder, including content references and other folders, are arranged in a graphical format on a navigation page that appears in the content area. For example, clicking the PeopleTools, Utilities folder in the menu pagelet displays the Utilities navigation page.

Image: PeopleTools Security User Profiles standard navigation page

This example shows the PeopleTools Security User Profiles standard navigation page.

Related Links
Understanding Navigation Pages (PeopleTools 8.53: Portal Technology)

SmartNavigation Pages

SmartNavigation pages are different than standard navigation pages. SmartNavigation pages organize your data into a tree-like chart that displays two or three levels at one time, as you see here:

Image: SmartNavigation page example

This example illustrates a SmartNavigation page.
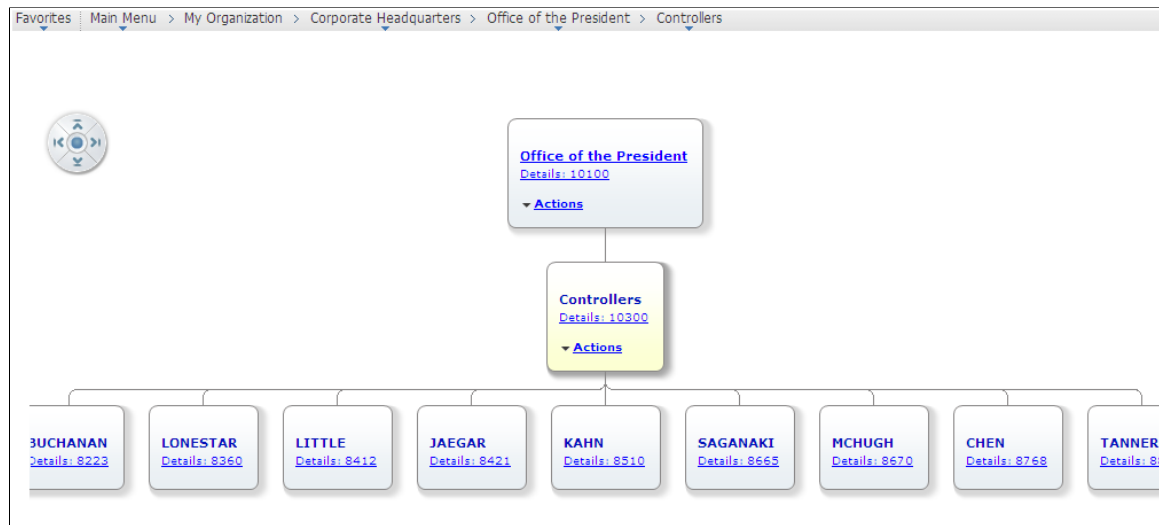
Note: If the focus node does not have a parent or it does not have children, only two levels appear; otherwise, three levels appear.

Note these points about the organization of the chart:

• The chart represents hierarchical data arrayed in levels.

Adjacent levels, joined by connectors, indicate parent-child relationships; nodes at the same level are sibling nodes.

• Each level consists of one or more nodes.

Each node represents a single entity, such as an employee in an organization, and corresponds to one row of data. Other than the top-level node, each node has one parent and zero, one, or more child nodes.

• Each node, which is linked to a detail component, contains values—usually a detail value and a descriptive value.

Note: Some nodes also contain a related Actions drop-down menu. This menu displays links, which you click to access other transactional data that is in some way related to the data on the node where the Actions menu appears.

The descriptive value can appear as either static text or as a link that you use to navigate through the chart. When you click this link, the corresponding node moves to the middle level of the chart, which now displays three levels. The top and bottom levels contain the parent and child nodes, respectively. Click these links until the chart displays the data you want.

The search key or detail value always appears as a link that you use to access a component. When you click a Details link, the system:

- Accesses the component to which the node is linked.

- Passes the detail value to the component search record.

- Retrieves the row of data indicated by the search key value.

- Populates the transaction page with the data and displays it to you.

- Displays node names in the navigation path at the top of the page to show the hierarchical structure of the data.

- SmartNavigation pages have a limited amount of space. If a level contains more nodes than can appear within the allotted space, the SmartNavigation page enables you to reposition the chart by using:

  - The navigator button.

    The button includes directional arrows that you click to move the chart in the direction of the corresponding arrow. Click the arrow until any nodes outside of field of vision come into view or click the center of the button to center the chart horizontally and vertically on the node in the middle level.

  - The cursor.

    Move the cursor inside the chart area. When the cursor changes into a hand, click and drag the chart until any hidden nodes come into view.

The chart, the nodes, and the actions are highly configurable based on security, business processes, and your data.

Using the Portal Search Field
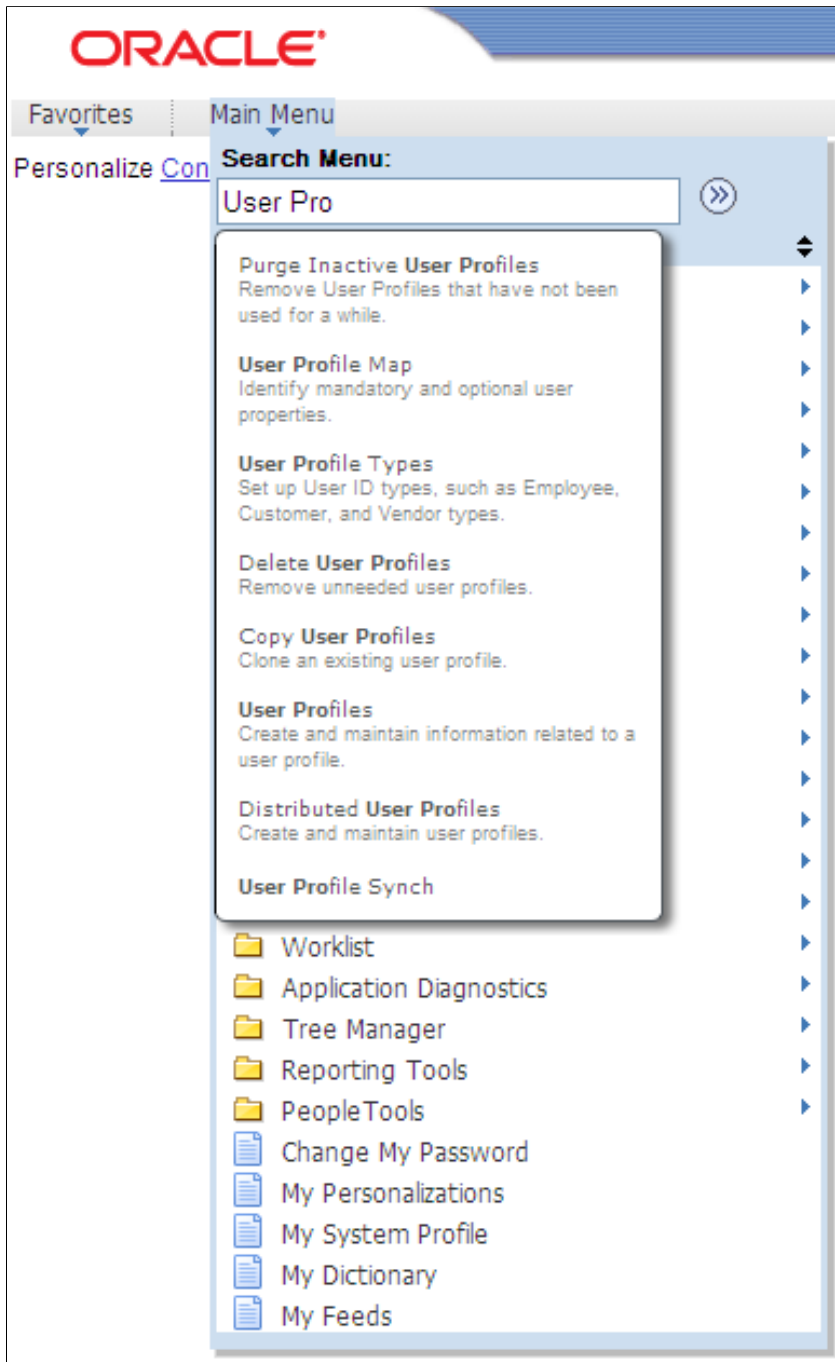
Use the Search field to search for a registered content reference within the system. Enter the name of the page you want to find and press the Enter key or click the search button. As you type, you might see suggestions drop down below the search field. These suggestions help you narrow the search. Autocomplete 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) that 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.

Image: Example of Search Menu showing autocomplete pop-up window

This example shows an autocomplete pop-up window in the Search Menu.

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

Note: For the system to display autocomplete 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.

Note: The maximum number of automatically suggested entries that appears 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 Personalize 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: An administrator must grant you full access to this web library to get the suggestion list: WEBLIB_PORTAL.PORTAL_SEARCH_PB.FieldFormula.ISCRIPT_PortalSearch.

Related Links

Managing General Portal Settings (PeopleTools 8.53: Portal Technology)

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.

Image: Universal Navigation Header

This example shows the universal navigation header.
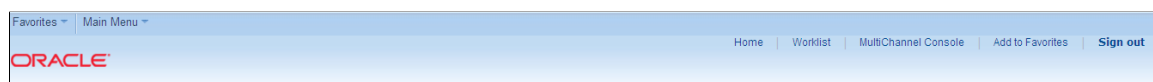
The universal navigation header contains these links:

Favorites	The favorites list is like your own list of bookmarks to components and transaction pages that you use frequently. After you add a favorite, it appears in 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, then you can store a favorite that directly accesses the ABC department.
Main Menu	Click to access all folders, submenus, and content references.
Home	Click to return to your homepage.

Worklist   Click to access the Worklist page, which provides summary information about all items on your personal worklist. This page also provides links that enable you to view additional details about the work, perform the indicated work, and reassign work items.

                                      See Using Worklists to Receive Notifications.

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 the product documentation for PeopleSoft MultiChannel Framework (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 appear to all users.

Add to Favorites   Click to add the current page to your favorites list for easy accessibility.

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

                                      Important! For security purposes, you should 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.

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 appears in the Favorites menu.

5. Click OK to dismiss the dialog box.

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.

Access the Edit Favorites page (Favorites, Edit Favorites).

Image: Edit Favorites page

This example illustrates the fields and controls on the Edit Favorites page.

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

To edit favorites:

1. 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.

2. Save your changes.

Using the Recently Used Menu

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

Note: The recently used data is stored to the list when you leave the component by either clicking on the header or going to a different component.

The system does not update the recently used list if:

• You close the browser without signing out first.

• Your session times out.

Accessing Pages from the Recently Used Menu

To access pages from the Recently Used Menu, click the item 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 is the pagebar—a series of links and buttons that appear when you are on a transaction page.

Image: Pagebar

This example shows the pagebar.

The availability of these options is controlled by the application developer. All options may not be available for each component. The options include:

New Window	Click to open a new browser window.
	See Opening New Windows.
	Note: This option is not available on modal pages.
Help	Click to open the online help for the displayed transaction page.
Personalize Page	Click to control the initial page display. Opens the Page personalization page, where you can:

• Select the initial page in the component to be displayed.

• Save the state of the expanded and collapsed sections.

• Save the state of the View All settings on the page for grids and scroll areas.

• Enable or disable autocomplete for a field, the entire page, or the entire component.

• Personalize the page field tabbing order:

- Clear Tabbing Order. Removes the existing tabbing order.

- Restore Default. Restores the default tabbing order.

- Include In Tabbing Order. Click this option and then click a tabbed item to include it in the tabbing order.

- Remove From Order. Click this option and then click a tabbed item to remove it from the tabbing order.

- Move Up In Order. Click this option and then click a tabbed item to move it up in the tabbing order.

- Move Down In Order. Click this option and then click a tabbed item to move it down in the tabbing order.

You can also elect to copy and share the settings that you have saved for the personalized page.

See Personalizing Pages.

Note: This option is not available on modal pages.

HTTP

Available only when using Internet Explorer. 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.

See Defining Content References (PeopleTools 8.53: Portal Technology).

Note: This option is not available on modal pages.

Print

Prints the current page. Includes all data in scrollable grids. This option must be enabled. For configuration information, see "Configuring Web Profiles" (PeopleTools 8.53: Portal Technology).

Note: This option is not available on modal pages.

Processing Components

This section discusses how to:

- Access pages and components.

- Link to related pages.

- Open new windows.

- Save pages.

- Work with dialog boxes.

Accessing Pages and Components

Components typically consist of several related pages within the same window; however, some components contain only 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 Using Access Keys.

Image: Sample component

This example illustrates a 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 on a page in the browser.

See Entering and Saving Search Criteria.

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 a component.

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

Linking to Related Pages

In addition to having links to other pages within a component, some pages have links to related components or pages. The related links appear at the bottom of the transaction area and immediately before 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, which enable 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 the word *…More*, which contains additional related transaction links.

Opening New Windows

The New Window link in the pagebar opens a new browser window or child window that displays a 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 using the same user ID and password.

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

Related Links
Using Search Pages to Retrieve Data

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 processing sign spins in the upper right corner of the page. When 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.

You can exit a page in other ways, but the system does not issue a save warning if you exit in one of these ways:

• Click 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: You should not use the browser Back button.

• Close 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.

All dialog boxes share these characteristics:

• They are modal, meaning that they hover on top of a primary page, which is grayed out.

• You can drag and relocate them using the title bar.

• They display informational text.

• They display at least one button.

To dismiss a dialog box, you must click one of the buttons in 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.
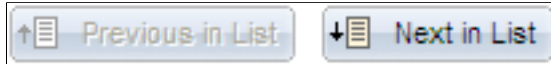
• Use toolbar buttons.

• 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 an action is related to navigating, then it appears as a link. If the action is truly an action, such as *save* or *process*, then it appears as a button. Click a button or link to carry out a command.

If a button appears grayed out, then that action is currently disabled. For example, when working in a transaction for the first dataset from a search list, you might see the following:

Image: Enabled and disabled buttons

This example illustrates enabled and disabled buttons for a search list.

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

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

Image: Page Links in a Component

This example illustrates 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.
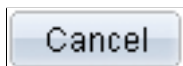
Using Processing Buttons

The following buttons process transactions.
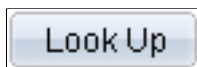
Click to look up the data input without returning to the main page. Useful if you want to perform additional searches. Usually found on a page that you open by clicking a prompt button.
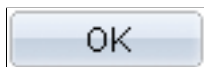
Click to accept the data entered on an auxiliary page and return to the main page.

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.
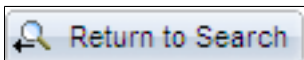
Note: In some cases, you may see different representations of a button, but the action is the same.
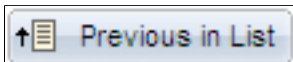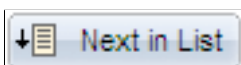
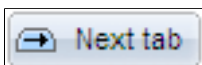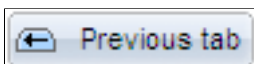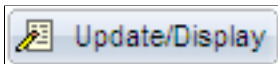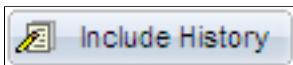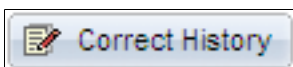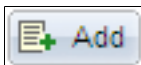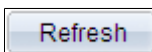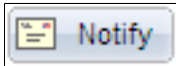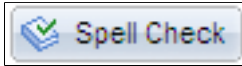|	
Save	Click to send the information that you entered on the page to the database. Generally, you save when you come to the end of a component. The Save button updates the data for all pages in a component. When activated, the system displays the saved message in the upper-right corner of the page.
Return to Search	Click to return to the search page.
Previous in List	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 the grid had only one row, or if the data that appears *is* the first row in the grid.
Next in List	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 the grid had only one row, or if the data that appears *is* the last row in the grid.
Next tab	Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.
Previous tab	Displays the previous page in the current component. If you are in the first page of the component, this button is unavailable.
Update/Display	Click to access existing rows of data in the database. If data is effective-dated, only current and future rows appear.
Include History	Click to display all rows of data: current, future, and history.
Correct History	Click to access existing rows of data in the database and display all effective-dated rows. This button enables you to update all rows, including history rows. **Note:** This button is available only if you have the proper permission.
Add	Click to add a high-level key row of data to the database for the current transaction.
Refresh	Click to force a trip to the server, validating any data that was entered and processing any deferred PeopleCode changes. **Note:** This button iappears only for components that are enabled for deferred mode processing.

Related Links	Appears when several pages are related to the current page. Click to access a new page containing a list of related page links.
Notify	Click to open the Send Notification page, where you can specify names, email addresses, or worklists to which to send notifications.
Spell Check	Click to activate the spell check feature for all spell check-enabled fields on the page. Spelling is checked for each field individually. As spelling is checked for each field, processing continues to the next field, displaying the spell check page if errors occurred. If no errors occur, then the *No misspellings found* message appears.

See Using Spell Check. |

Using Pop-up Menus

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

	Click to access a new page where you can select from 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.

• Navigate drop-down menus using keyboard shortcuts.

Understanding Keyboard Shortcuts

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

To view a printable list of these shortcuts while online, press Shift+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 <u>My Oracle Support</u> for specific information about 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).
You can find a solution to this problem in the product documentation for *PeopleTools: Global Technology*. See PeopleSoft Hot Keys Do Not Function As Expected on a non-U.S. Keyboard (PeopleTools 8.53: Global Technology)

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

CTRL+ J	Displays the system information page if configured by an administrator to appear.
CTRL+ K	On a search or transaction page, displays a list of keyboard navigation hot keys and access keys.
CTRL+ Y	Toggles the Main Menu drop-down menu between expand and collapse.
	Toggles the Menu pagelet between minimize and maximize.
CTRL+TAB	Moves the focus through the frame set.
ENTER	Activates the OK button, where appropriate.
	On a search page, activates the Search button.
	On a look up page, activates the Lookup button.
ESC	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 action is equivalent to clicking the appropriate button.

The following table outlines the shortcuts that you can use instead 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 their 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.

ALT+9	Accesses page bar elements, such as Help..
**ALT+ **	Toggles between Update/Display, Include History, and Correct History action modes on the toolbar on a transaction page.
CTRL+Z	Accesses the menu search field if it is enabled.

Menu Pagelet Access Keys

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

Navigating Drop-Down Menus Using Keyboard Shortcuts

This table lists the key or key combinations used to navigate the drop-down menu structure and describes the result:

Key or Key Combination	*Result*
Ctrl + Y	Expands the Main Menu.
Ctrl + Z	If the search field is configured to appear in the Main Menu, expands the Main Menu and moves the cursor to a search field.
Up Arrow	Varies based on context: • In an expanded menu, moves one item upward through the list of folders and content references. • When moving through the navigation path, collapses the drop-down menu item.
Down Arrow	Varies based on context: • In an expanded menu, moves one item downward through the list of folders and content references. • When moving through the navigation path, expands the drop-down menu item.
Right Arrow **Note:** This functionality applies only to left-to-right languages.	Varies based on context: • In an expanded menu, opens a folder to the right so that subfolders or content references appear. • When moving through the navigation path, accesses the next menu item to the right.
Right Arrow **Note:** This functionality applies only to right-to-left languages.	Varies based on context: • In an expanded menu, closes the current folder and sets focus on its parent folder. • When moving through the navigation path, accesses the next menu item to the right.
Left Arrow **Note:** *Left-to-right languages only.*	Varies based on context: • In an expanded menu, closes the current folder and sets focus on its parent folder. • When moving through the navigation path, accesses the next menu item to the left.
Left Arrow **Note:** *Right-to-left languages only.*	Varies based on context: • In an expanded menu, opens a folder to the right so that subfolders or content references appear. • When moving through the navigation path, accesses the next menu item to the left.
Esc	Closes all open menu items. Collapses all expanded menus.

Important! The drop-down menu is the default navigation type in both standard and Accessible modes.

Enabling 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; lookup 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 a page, and page links from the bottom of pages to reduce redundancy when using screen reader software.

- The presentation of the elements in the body of a page in a linear format (only for blind users operating a screen reader).

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 it.

Enabling Accessibility Features

Access the Personalizations page (Main Menu, My Personalizations.)

Image: Personalizations page

This example illustrates the fields and controls on the Personalizations page.
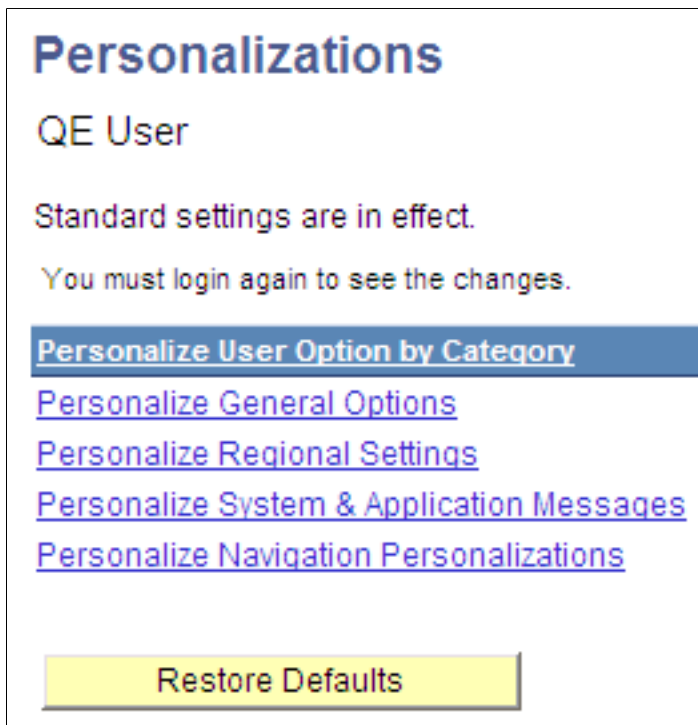
1. Click the Personalize General Options link.

2. Select one of the following options from the Accessibility Features drop-down list box:

    *   Select *Use accessible layout mode* to alter the appearance of a page for maximum efficiency.

    *   Select *Use standard layout mode* to use the standard page layout.

    *   Select *Accessibility features off* to disable accessibility features.

        This option is selected by default.

3. 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

Personalizing Your Homepage

You can define and store your own homepages and specify your preferences for their layout and content. The first time that you sign in to a PeopleSoft system, you see the default homepage until you define a personal homepage.

This section discusses how to:

- Personalize content.

- Personalize layout.

Related Links

"Managing Homepages" (PeopleTools 8.53: Portal Technology)

Personalizing Content

Access the Personalize Content page (on your Homepage, click the Personalize Content link).

Image: Example of a Personalize Content page

This example illustrates the fields and controls of a sample Personalize Content page.

1. (Optional). Enter a tab name and welcome message.

   This message appears in the header of your homepage when you sign in.

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, you will receive a message in the pagelet. Any links in the pagelet are disabled.

3. Click the Save button.

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

Personalizing Layout

Use either of these two methods to personalize your homepage layout:
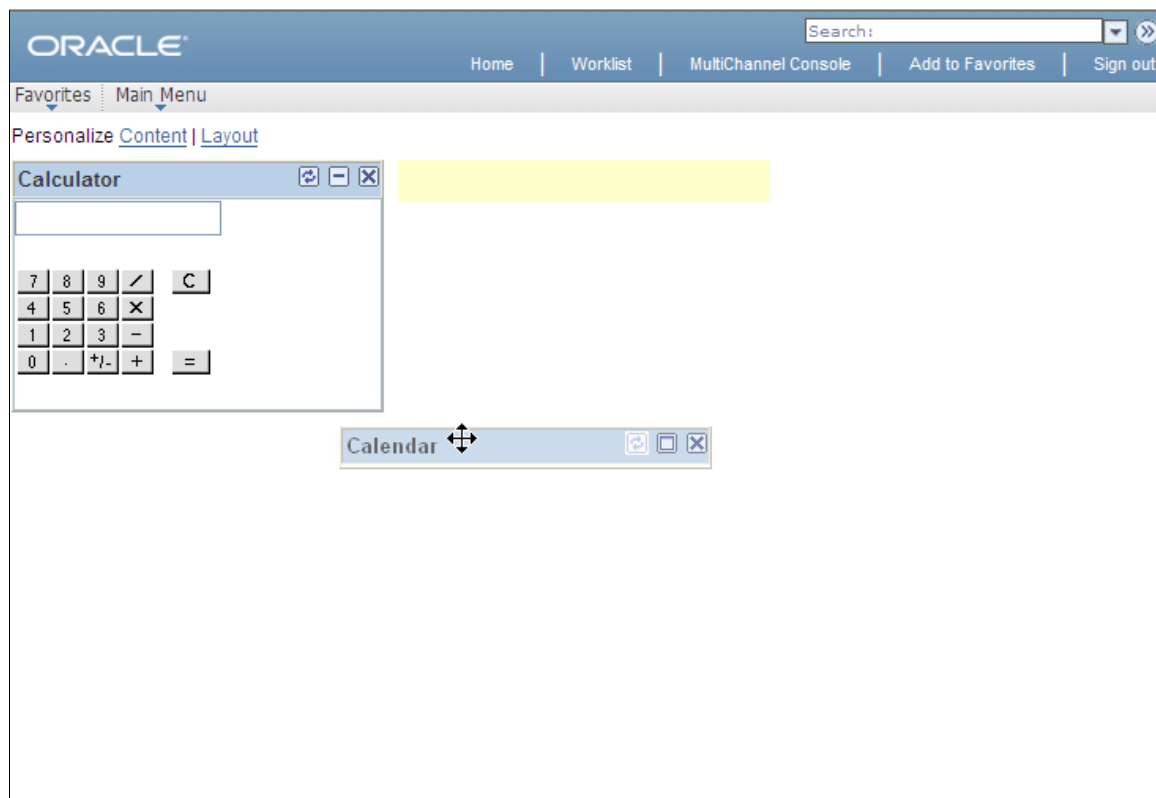
- Drag and drop pagelets.

- Configure the Personalize Layout page.

Dragging and Dropping Pagelets

You can rearrange pagelets on your homepage by dragging and dropping them between columns, as you see in this example:

Image: Example of dragging the Calendar pagelet to change the homepage layout

This example illustrates dragging the Calendar pagelet to change the homepage layout.

Access your homepage.

Note: Your homepage must be configured to display pagelets.

---

1. Move your cursor to the pagelet header.

   The cursor changes shape to indicate that you can drag the pagelet.

2. Click the pagelet header.

   The system automatically minimizes the pagelet when you click the mouse button.

3. Drag the pagelet to a new location.

When your pagelet header is in the new space, the background of the browser window changes color. This color change represents the new location. If you are changing columns, at least 50 percent of the width of the header must be in the new column before the system identifies the new location.

Note: If your mouse has a scrollable wheel, you can scroll the wheel while you press the mouse button to facilitate the movement of pagelets below the visible area of the browser window.

4. Release the mouse button.

    The pagelet maximizes automatically in the new location unless you manually minimized the pagelet.

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

See "Managing Homepages" (PeopleTools 8.53: Portal Technology).

Configuring the Personalize Layout Page

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

Image: Example of a Personalize Layout page

This example illustrates the fields and controls of a sample Personalize Layout page.

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 an asterisk [*]) 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: A number sign (#) indicates a required fixed position pagelet. An asterisk (*) 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 three-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 this button to delete the pagelet from your 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 system replaces the minimize button 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.

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 that appears in the pagelet. For example, on the Company News 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 only in your pagelet. Use one of the following methods to personalize a pagelet; the options that appear differ depending on which application version you use:

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

✎	Click the Personalize button on the pagelet title bar of a pagelet that supports personalization.
⚙▼	Click to access the Pagelet Settings menu, then select Personalize.

Image: Example of a Personalization page

This example illustrates the fields and controls on a sample Personalization page.

Related Links
"Understanding Pagelet Wizard" (PeopleTools 8.53: Portal Technology)

Personalizing Pages

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

• Control initial page display.

- Change the tabbing order.

- Copy, share, and delete page personalization settings.

Understanding Page Personalization

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

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

Image: Pagebar

This example shows the pagebar.

Select the Personalize Page link to open the Page Personalization page for the current page.

Image: Page Personalization page (1 of 2)

This example illustrates the fields and controls on the Page Personalization page.

Image: Page Personalization page (2 of 2)

This example illustrates the fields and controls on the Page Personalization page.

Note: Your system administrator can disable the page personalization feature. Disabling this feature may be necessary if your company is concerned about database growth.

Controlling Initial Page Display

The Page Personalization page includes four settings that enable you to control how the current page initially looks 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 appears only if the current component for the page contains more than one page based on your security profile. This option is deselected by default.
Save the state of the expanded/ collapsed sections on this page.	Enables you to personalize the initial appearance of collapsible sections on the current page. Before selecting Personalize 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 appearance of nested collapsible sections whether or not the parent collapsible section is expanded.
	This option is deselected by default. When it is disabled, the application determines the initial appearance of all collapsible sections unless you defined this option previously.
	This option only appears 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 appearance 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 deselected by default. When it is disabled, the application determines the initial View All display unless you defined this option previously.
	This option only appears if the current page contains a grid or scroll area with a View All setting.
Save tabbing order personalized 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.

Working with Autocomplete

By default, the system helps you enter data into fields using a built-in autocomplete feature. That is, based on what you have entered, the system "guesses" to help you complete your entry in a prompt field so that you don't have to type all of the characters into the field. For some prompt fields, this is a great benefit, while for others it can be unnecessary, and in many cases it depends on the user preference. The system enables you to decide if you want to enable or disable autocomplete for an entire component (group of pages), a single page, or a single prompt field.

Disable Autocomplete for the entire page	Turns off the autocomplete feature for all prompt fields on a single page.
Disable Autocomplete for the entire component	Turns off the autocomplete feature for all prompt fields, for all pages, within a single component (group of pages).
	Click to toggle between enabling and disabling autocomplete for a single prompt field.

Changing the Tabbing Order

The tabbing order is the order in which you move from page element to page element when you press the Tab key. You can change and save the default tabbing order of a page from the Page Personalization 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 precede 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 Personalize Page option.

Note: Tab order numbering may not begin with 1 and may appear to have gaps for page elements that are not currently visible.

Clear Tabbing Order	Click this button to define a new tabbing order. Clicking this button clears the current tabbing order and replaces 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 a new tabbing order to the page elements using the Include In Tabbing Order, Remove From Order, Move Up In Order, and Move Down In Orderbuttons.
Restore Default	Removes all tabbing order personalizations defined for the page and restores the original tabbing order.
Include In Tabbing Order, Remove From Order, Move Up In Order and Move Down In Order	These options enable you to control the tabbing order. 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 that you select sequentially, beginning with 1.

4. (Optional) If necessary, select the Move Up In Order or Move Down In Order radio buttons and click 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 personalized below option is selected.

2. Click the OK button.

    The original page appears with your new tabbing order and other personalizations applied.

Tabbing Order Exclusions

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

•   Header icons.

•   Browser elements.

•   Page and related page links.

•   HTML areas.

•   Charts.

•   Grid columns that you hid using the grid personalization feature.

    If you unhide a column after you set the tabbing order personalization, you must personalize 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 Personalize Page link for page elements in those sections to be available for tab ordering.

You can personalize 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. 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 a page has four fields, two of which are in a grid, then the tabbing sequence will keep the grid fields together regardless of the tabbing order that 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, then 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 multiple levels of scroll areas exist, then 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 in tabbing order personalization.

Copying, Sharing, and Deleting Page Personalization Settings

Access the Page Personalization page by clicking the Personalize Page link on the page you want to personalize. The page personalization toolbar at the top and bottom of the Page Personalization page enables you to save, cancel, copy, share, and delete your page personalization settings. The share and delete options appear only after you have personalized and saved the page.

Image: Page personalization toolbar

This example illustrates the controls on the page personalization 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 Personalization 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 personalization settings you created. You can make your profile Public or Private. The default setting is Private. If you make the personalization settings of one page in a component public, then all personalization settings for all pages in that component will be public.
	The Name field is only required if you choose to make your personalization 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 personalizations across all components. If you modify the profile name, it will be modified for all pages and grid personalization settings across all components. After 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 a string up to 30 characters long, for example, OSC_16AR. The system automatically converts alphabetical characters to uppercase.

Delete Settings   Opens the Delete Settings secondary page, where you can delete all page personalization 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 personalized 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 Personalization page for your changes to take effect.

Changing Your Password

This section discusses how to:

- Change your password.

- Set up forgotten password help.

Changing Your Password

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

Access the Change Password page (from Home, select Change My Password).

1. Enter your current password in the Current Password edit box.

2. Enter your new password in the New Password edit box.

   Remember that passwords are case sensitive.

3. Enter your new password again in the Confirm Password edit box.

4. 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. .

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

1. Select Change or set up forgotten password help.

2. Select a question from the drop-down list box or password hint set by your system administrator.

3. Enter the appropriate response to your question.

4. 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 applications 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 job. 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.

Defining Your User Personalizations

The Personalizations page provides links that access the option categories for which you can personalize your system. Access the Personalizations page.

Image: Personalizations page

This example illustrates the fields and controls on the Personalizations page.
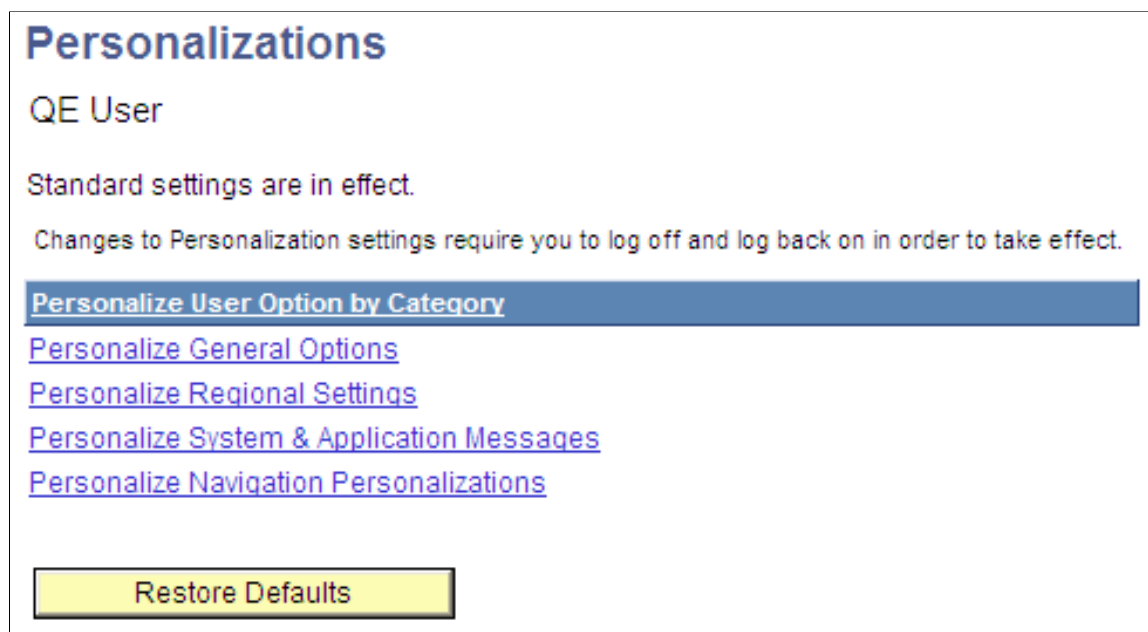
Personalize General Options	Click to access options for user accessibility features, the length of time the system holds a page in cache, multi-language settings, and the spell check dictionary. If you require support for assistive technologies, such as screen readers, you can change the accessibility options. For multi-language entry on pages where multiple language entry is available, you can enter data in the language that you specify in the Data Language drop-down list box. You can also reset your foreign language dictionary to use a different language for your spell check dictionary.

See Using Spell Check. |
Personalize Regional Settings	Click 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.
Personalize System & Application Messages	Click to access and personalize 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.
Personalize Navigation Personalizations	Select to access personalizations that enable 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 will never rest on a calendar button.

Note: Set the AutoComplete value to *Yes* to disable auto-complete on search pages.

Note: You must sign out and sign in again before the changes to your Personalization settings take effect.

Personalize Options

Access the Option Category page for the desired personalization category (from Home, select My Personalizations and then click an option category link).

Image: Option Category page

This example illustrates the fields and controls on the Option Category: Navigation Personalizations page.

Each personalization page 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 provides details about a particular setting. You can select the override value on this page or restore the option to its default value.

Image: Personalization Explanation page

This example illustrates the fields and controls on the Personalization Explanation page.

Setting Up Your System Profile

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

Image: General Profile Information page

This example illustrates the fields and controls on the 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 <u>Changing Your Password</u>.

Personalizations	This region 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 that will appear on pages when you enter currency values.

Note: The decimal placement is a property of the currency code; 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, note 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 is out of the office at some 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 the security configuration of your system. 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 Information grid to edit your current instant messaging 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 "Configuring Instant Messaging Server Details" (PeopleTools 8.53: PeopleSoft MultiChannel Framework).

Adding Words to Your Personal Dictionary

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

Image: Spell Check Personal Dictionary page

This example illustrates the fields and controls on the 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 only. After saving this word, the Spell Check Language field refreshes to the current spell check language.

Note: You must provide a language code for a 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 Defining Your User Personalizations.

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, then the following rules are valid:

  - Exact match, all lowercase (worklist).

  - All uppercase (WORKLIST).

  - Initial capitals (Worklist), regardless of the position of the word in the sentence.

    Mixed case (WorkList) is incorrect.

- If the added word is all uppercase, such as CRM, then only an exact match is valid. Lowercase and mixed case are not valid.

- If the added word is in initial capitals, such as California, then only an exact match (California) and all uppercase (CALIFORNIA) are valid.

- If the added word contains an embedded capital letter, such as PeopleSoft, then only an exact match is valid.

  If case is not relevant to the validity of the word, then enter the word into your dictionary in all lowercase.

Chapter 3

Retrieving Data Using Keys, Search Pages, and PeopleSoft Search Technology

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. Search keys are the fields that you are prompted for on a search page. If you search and exactly specify 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 component that is based on a different search record.

Understanding Search Pages

When you select a content reference, the system often displays a search page. Search pages enable you to find and select the values that you want to work with on the transaction pages.

You can perform two types of searches on search pages:

- Basic searches.

- Advanced searches.

Basic Searches

A basic search 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 narrow your search by first entering part of a value or description in the begins with text box. For

instance, if you want to find all values beginning with the letters *PS,* you would enter *PS* in the begins with text box and then click Search or press the Enter key.

Image: Permission Lists - Basic Search page

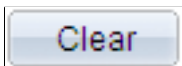This example illustrates the fields and controls on the Permission Lists - Basic Search page.

See Entering and Saving Search Criteria.

Advanced Searches

With advanced searches, you can further narrow your search, both by searching on multiple fields simultaneously and by using a variety of search operators.

In some cases, search pages may display 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.

Image: Permission Lists - Advanced Search page

This example illustrates the fields and controls on the Permission Lists - Advanced Search page.

Notice that both the basic and advanced search pages include the Limit the number of results to field. This field enables you to control the number of items returned in the search results, which lowers processing time in case your search could yield large numbers of items.

Search Page Buttons

The following search-related buttons appear on search pages of all types.
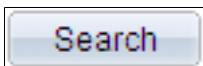
Search	Click to process the search. You can select search by criteria and enter characters in the begins with edit box to limit your search. You can also press Alt+1 to process the search.
Clear	This button appears only for advanced searches. Click to clear entered text from all fields on a page (without saving) so that you can enter new criteria. If the search key is binary, such as Yes or No, the search field might appear as a check box. In that case, clicking the Clear button deselects the check box.

Using Search Pages to Retrieve Data

This section discusses how to:

• Enter and save search criteria.

• Use wildcard characters to find information.

• Retrieve historical data.

• Use autocomplete to narrow a search.

• Access the results of your most recent component searches.

Related Links
Using Effective Dates

Entering and Saving Search Criteria

This section discusses how to:

• Enter search criteria.

• Limit the 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 queries the search record, presents a list of possible matches or, if only one match exists, displays 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,* then the system narrows the search by displaying all profiles that contain *Administrator* in the description. With this information, you might be able to determine which user profiles you want based on the results in the Search Results grid. Click any link in the row of the profile to access that profile in the Search Results grid.

Image: Advanced Search page showing a search where Description contains Administrator

This example illustrates specifying search criteria on an advanced search page.

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 appear at one time, you can click the Show Next Rows button (the right arrow) in the grid header 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 might be able to click a View All or View

n button to view all records at one time or to view a designated number of records. (The application developer configures the value of *n*.)

When you select a value and access a page, notice that the key fields from the row that you selected on the search page appear as the display-only fields in the upper section of the page, usually just below the page tab.

Limiting the Number of Rows to Return

Access the Permission Lists search page (PeopleTools, Security, Permissions & Roles, Permission Lists).

Image: Permission Lists - Basic Search page

This example illustrates the fields and controls on the Permission Lists - Basic Search page.

When you perform a search, you have some control over the number of items that the search retrieves. Although the maximum value and the default value are set by an administrator, you can enter a lower value in the Limit the number of results to field on the search page to further narrow your search results. If the search retrieves more than the maximum number of listings, the Search Results grid displays only the number of results requested in the Limit the number of results to setting. When the search criteria would otherwise yield a greater number of results than the limit, the actual total number of results appears in a message above the search results. You should narrow your search in another way if you cannot retrieve the data that you need on your first attempt.

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

See "Using Administration Utilities" (PeopleTools 8.53: System and Server Administration)

Using Operators

When performing an advanced search, you can use a variety of operators to narrow your searches. For example, you can hunt 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.

Operator	Field Use
contains	Character fields.
=	All field types.
not=	All field types.
<	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. After you save a search, you can use that 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.

Image: Advanced Search page showing the PTools saved search

This example illustrates the Permission Lists Advanced Search page showing the PTools saved search.

Note: The applications stores saved searches by user ID.

Using Wildcard Characters to Find Information

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

Note: Wildcard characters only work with the *begins with* and *contains* operators.

Note: Certain applications support wildcard characters that are specific only to that application. See your application-specific product documentation for details.

The supported standard wildcard characters are:

Wildcard	Search Action
% (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%admin* as the User ID, then the system returns a list of user IDs that begin with *Q* and contain '*admin*' as you can see in this example:

Image: Example of using wildcard characters on a search page

This example illustrates using wildcard characters on a search page.

Retrieving Historical Data

The presence of action mode fields on the search page indicate that the component uses PeopleSoft effective date logic.

Image: Search page showing the Include History and Correct History options

This example shows the Include History and Correct History options on a search page.

If you have the appropriate permissions for see and modify history records, then these two options can appear on a search page:

Include History	Select to retrieve history records when the system processes the search.
Correct History	Select to retrieve and be able to correct history records when the system processes the search.

Detailed information about PeopleSoft effective date logic is available in the next topic in this documentation.

See Using Page Action Options and Effective Dates.

Using Autocomplete to Narrow a Search

Autocomplete provides a list of suggestions that match the data you enter in edit fields. Autocomplete lists can appear for two types of fields:

• Edit fields on search pages.

• Prompt fields.

Edit Fields on Search Pages

When a search record field is autocomplete-enabled, as you type a letter into the field, and then pause, the autocomplete list appears and shows you values that match the letters you have entered to this point. The system returns the maximum number of allowed values, but it shows you a subset in the autocomplete window. An administrator sets the list limit, the list limit default is 50.

Image: Example autocomplete drop-down list showing user profiles that begin with the letters "Bene"

This example illustrates an autocomplete list on the User Profiles - Basic Search page.

Prompt Fields

All prompt fields are autocomplete capable. When you enter data in a prompt field, the autocomplete results can vary slightly because you can configure the list to display up to five additional columns to assist in choosing the correct value.

Image: Example Role Name field autocomplete list showing role names that begin with the letter "B"

This example shows an autocomplete list for the Role Name field.

Related Links

"Managing General Portal Settings" (PeopleTools 8.53: Portal Technology)

"Using Edit Boxes and Long Edit Boxes" (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide)

Accessing the Results of Your Most Recent Component Searches

You can configure PeopleSoft applications so that the results of your most recent search transactions are temporarily stored in the portal menu structure; these results are known as persistent or most recent search results.

Note these points about the accessibility and availability of persistent search results:

• The most recent transaction search results for the currently active component appear in the navigation path next to the component name; this is visually indicated by the search icon.

• The navigation path header retains your most recent transaction search results until another search is performed.

• The most recent search for each of the five (5) most recently viewed components appears in the Favorites, Recent Search Results menu. The results are stored by menu item name, for example, User Profiles.

• Only one search persists for any particular component: the most recently performed search.

• Search results are retained only until your PeopleSoft session expires or until you sign out or close the browser.

This table shows the persistent search icon that can appear in the navigation path.

  Click to access the results of the most recent search that was performed in the currently active component.

Accessing Search Results from the Navigation Path

To access the most recent search results for your current transaction page (component), click the persistent search icon in the navigation path. When you click the icon, the recent search results pop-up page appears, displaying a grid that contains the results of your last search. You can click the page header and drag the search results page to change its position within the browser window; however, the search results page retains focus until you:

• Select an item.

  To select another value from your recent search results, click any active link in the first column of the results grid.

  ──

  Note: Only the values in the first column are active links to the transaction page. All other column values are text, not links.

  ──

• Perform another search.

  To perform another search that uses different criteria than the persistent search, click the Search Again link; this action returns you to the component search page.

• Dismiss the search results page.

To dismiss the search results page, click the Close button in the upper left corner of the page header or press the Esc key.

Image: Example of Recent Search Results page as accessed from the navigation path for the Tree Manager component

In this example, you see the recent search results for the Tree Manager component. Notice the recent search icon in the navigation path.

Accessing Search Results From the Recent Search Results Menu

To access the Recent Search Results menu, from the home page select Favorites and then click the Recent Search Results folder. Your search results cascade to the side.

Image: Example of Recent Search Results menu showing the most recent search for three components

This example shows the Recent Search Results folder and three recent component searches.
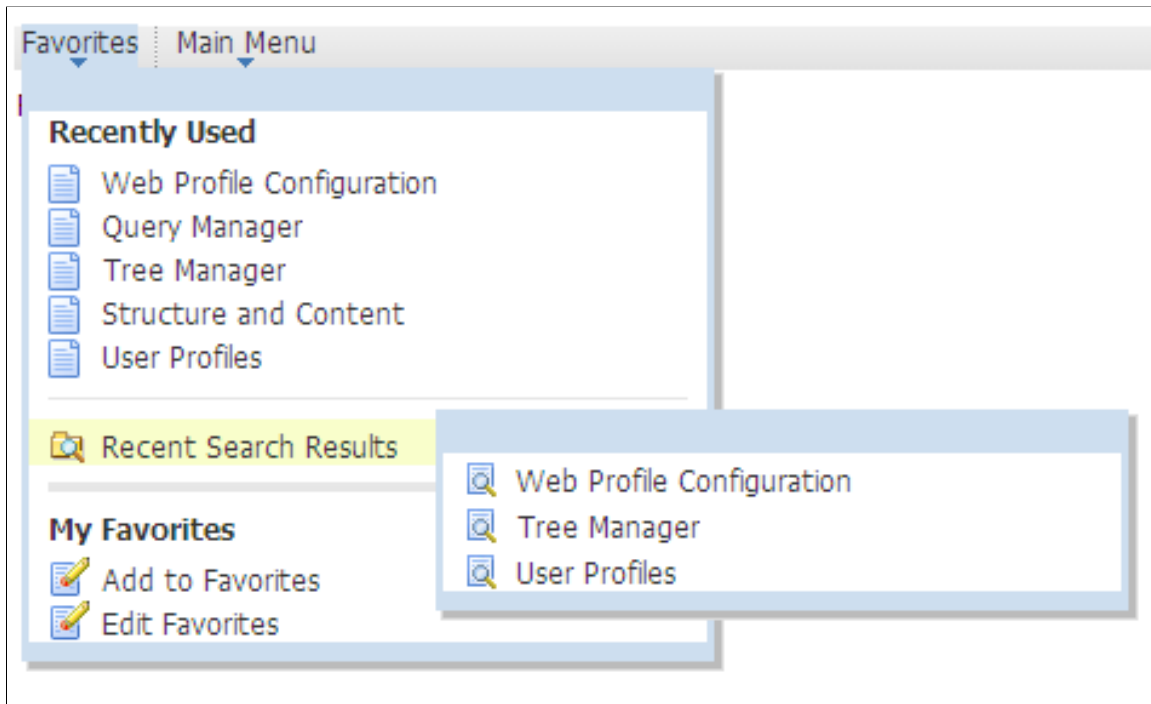
Click an item to retrieve the search results. When you select an item from the results, the application takes you to the component, retrieves the data, and updates the navigation path.

Using PeopleSoft Search Technology to Retrieve Data

This section provides an overview and discusses how to:

• Use the Keyword Search page.

• Use the Global Search Bar.

• Work with search results

Understanding PeopleSoft Search Technology

The options discussed in this section apply only to organizations that have implemented the PeopleSoft Search Framework and enabled these options for their end users. As such, you may or may not see these options available in your PeopleSoft application.

The PeopleSoft Search technology provides a way for you to retrieve data using a flexible, free-text approach to finding the data you need to view or update. The technology revolves around the Oracle

Secure Enterprise Search Engine, and these search options enable you to search for data similar to how you search for information using a typical internet search engine, such as Google. While you can still navigate to components and use the Find an Existing Value search page to retrieve your data, using the PeopleSoft Search technology lets you access the same component without knowing the exact navigation.

For example, if you are in the HCM system, you can enter *Torres* as the search text, press Enter, scan the search results, and click the *Torres, Fernando* search result. The system then displays the employee information page, with the information displayed for Fernando Torres. Using this technique, you can access your business transaction, without knowing where the transaction is in the system or how to navigate to it.

Using the Keyword Search Page

If enabled for your PeopleSoft application, you can use the Keyword search page to perform a free-text search as an alternative to using the traditional Find an Existing Value search page when accessing a component.

Image: Keyword Search page

This example illustrates the fields and controls on the Keyword Search page.

To use the Keyword Search page, add any keywords upon which you want to run your search, and click Search.

To display additional prompts for predefined search criteria, click Advanced Search. This is similar to selecting search criteria on the Find an Existing Value search page.

Using the Global Search Bar

If enabled for your PeopleSoft application, the Global Search Bar appears in the portal header.

Image: Global Search Bar

This example illustrates the fields and controls on the Global Search Bar.

The Global Search Bar enables you to search across specific groups of *search categories*. Search categories organize similar application information into groups to help you narrow your searches.

For example, to search information about jobs, you select the Job Data search category, and to search information about employees, select the Employee search category. For broader searches, you can also select the All category, which runs a search against *all* the categories to which you have access.

The Global Search Bar is comprised of these controls.

Search category drop-down list	Click this control to display the search categories to which you have access. The contents of the drop-down list can change, depending on where you are in the application. For example, you might see different items in the drop-down list while on a portal homepage than you do while in a WorkCenter. Your system administrators can configure this so that only items relevant to your current application context will display.
Free-text search edit box	This is where you enter your free-text key words so that you can find the data you need.
Start your search button	Click this button to initiate your search.
Advanced Search	Click to display predefined lists of criteria prompting you to narrow your search. This is similar to adding search criteria for the Find an Existing Value search page.
Last Search Results	Click to display the results of the last search you ran. This is convenient especially if you've specified detailed criteria that would be time consuming to re-select.

Working with Search Results

The following example illustrates a typical set of search results generated by PeopleSoft Search.

Image: Search Results

This example illustrates the fields and controls on the Search Results page.

| Filter by	The area to the left of the search results, displays various filters and categories that you can use to drill into the results and reduce the result set.
Title	The title, which is the clickable link (URL), enables you to identify the search result and navigate to the associated component. When you click this link, the system displays the page you use to view or modify the underlying data for the search result.
Summary	Displays a general overview of the target data to help you determine if this is the data you need.
Related Actions	If the component for this data has related actions associated with it, and you have security access to those related actions, you can navigate to those related actions from a search result. The system displays the related actions indicator when you drag the cursor over a search result. A grey bar (the related actions indicator) will appear to the right of the search result if there are related actions for that search result. To navigate to a related action, click the related actions indicator, and click the desired link in the related action popup list.

Working with Filters

A filter (also called a facet) is a search attribute (field) that provides an alternate representation of the list of values for a given attribute. Filters are attributes used to filter and narrow down a set of search results. In many cases, the filter for search results will be hierarchical, meaning that as you drill into the results you navigate through various levels of results. For example, you can narrow searches by applying filters such as Country, State, Province, City, and so on, with each filter reducing the result set.

**Image: Filter**

This example illustrates a filter.
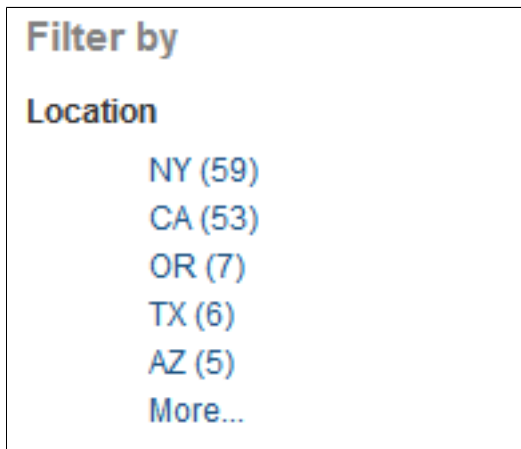
For a given filter, the system displays the values of that filter in a descending order determined by the number of each value. Five values display by default, but to see the remaining values, click *More.* By clicking a value, the system displays only the number of search results for that value. For example, if you clicked *TX* in the example above, only the six results for Texas would be displayed.

As you drill into a set of facets, your path is expressed in the form of a filtering navigation path.

Image: Filtering breadcrumbs

This example illustrates a filtering navigation path.
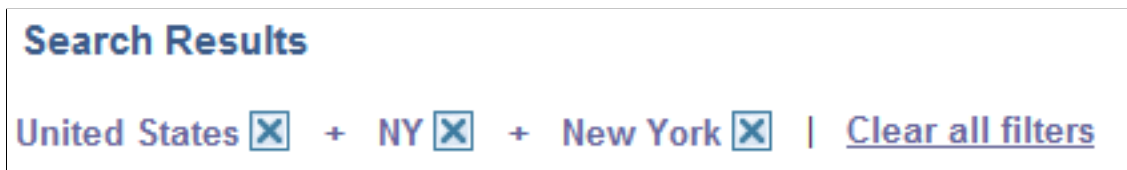
You can deselect the check box for a filter to remove its effect on the search results, or to reverse the direction of your filtering and expand the results.

Click Clear all filters to remove all applied filters, returning the search results to the state prior to filtering.

Viewing Search Results With Grid Format and List Format

Use the View As control to toggle between the grid format and the list format for viewing search results.
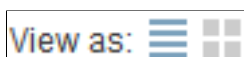
View as: ☰ ▦	Enables you to switch the view of the search results between list format and grid format. The icon representing the current view is greyed out.

Image: Search results: grid view

This example shows search results in a grid format.

To navigate to the page loading the desired data, click the key column with the link.

The related actions indicator does not appear for search results in the grid format.

Note: The default search result display format for Keyword Search is the grid format.

The following example displays the list format:

Image: Search results: list view

This example shows search results in a list format.

To navigate to the page loading the desired data, click the Title line of the search result.

The related actions indicator appears only for search results in the list format.

Note: The default search result display format for Global Search is the list format.

Chapter 4

Using PeopleSoft Application Pages

Understanding Pages

Pages are the primary graphical interface by which you access the data in your PeopleSoft application. 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 includes 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 limit server trips and perform partial page refreshes. With a partial page refresh, the browser refreshes the entire page only when you navigate to a new page. Much of the communication with the server happens in the background, unnoticed by you. You continue to work uninterrupted during the process and notice only the spinning processing icon that lets you know that the system is processing information.

Partial page refresh supports these actions:

* 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. Therefore, when you use some pages in the browser you can enter data while interacting minimally with the server. If deferred processing mode is specified for a component, then a page within that component or a field on a page within the component also performs processing in deferred mode. Interactive mode is the opposite of deferred mode processing; it is necessary for pages that perform complex calculations, in situations where many fields are interrelated, and several other scenarios.

Note: The terms *page*, *application page*, and *transaction page* are synonymous and used interchangeably throughout this book.

Using Effective Dates

This section provides an overview of effective dates and discusses how to use 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:

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

Using 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.

Action	*Rule*
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. You can modify only future rows. You can also add a new current row.
Correct History	Retrieves all rows and allows you to modify any row and insert new rows regardless of the effective date or sequence number. **Note:** 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, listed by effective date, in the career of employee Tom Sawyer. Assume that today is February 1, 2009:

Effective Date	History	Current	Future
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. This table lists this information by action mode:

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

The page action buttons appear in the toolbar in the lower-right corner of any relevant pages. A shaded button icon indicates current mode for the page.

Image: Sample page in Correct History mode

This example shows the Department 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—that is, any date 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 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 a page. You do not use these elements to update data in the database; they are purely visual. This table describes aesthetic elements:

Element	Description
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 a page, your transaction page may include 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 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.

Using Data-entry Fields

Data-entry fields are always associated with specific database fields. These date-entry fields are commonly used:

check boxes and radio buttons	Select a check box or radio button to enable 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.

long edit boxes	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 the text. Long edit boxes with spell check enabled have a spell check button in the upper-right corner. Long edit boxes that are rich text enabled have multiple formatting controls at the top of the edit box. See <u>Working With Rich Text Editor Fields</u>.
drop-down list boxes	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.
images	Insert photos or other images into a 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, and 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.
grids and scroll areas	These data-entry fields serve as containers or organizers for multifield data entry. Grids appear as a spreadsheet 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. 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.

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 to the next field or to 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.

Image: Edit box

This example shows an edit box.

Title:

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 zeroes); 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.

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

This example shows a long edit box with the 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.

Image: Drop-down list box

This example shows a drop-down list box.

```
┌─────────────┬───┐
│ English     │ ▼ │
├─────────────┼───┤
│ English     │ ▲ │
│ French      │   │
│ German      │   │
│ Greek       │   │
│ Italian     │   │
│ Japanese    │   │
│ Korean      │   │
│ Portuguese  │   │
│ SChinese    │   │
│ Spanish     │   │
│ Swedish     │ ▼ │
└─────────────┴───┘
```

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 for 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 no spelling errors are found, you will see the message "No misspellings found." You can also activate spell check by pressing Alt+5 when the cursor is in the field.
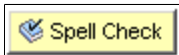
 Click to activate spell check for all fields in the component that have been enabled for spell check, regardless of whether those fields have changed. The system checks each field and then proceeds to the next spell check field until all fields in the component have been checked. If no errors are found, the "No misspellings found" message will appear.

Image: Spell check icons and button

This example illustrates that spell check is available for the Message Text, Description, and Explanation fields.

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 ignore the occurrence, ignore all occurrences, change the spelling, change the spelling for all occurrences, or add the word to the current language dictionary.

Image: Spell Check page

This example illustrates the fields and controls on the 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	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.
	If the system does not find any alternative spellings, the Change To field is blank and the Change and Change All buttons are disabled.

Alternatives	Lists other possible spellings. The options listed match the case of the misspelled word.
Ignore	Click to leave the current spelling as is and locate the next misspelled word.
Ignore All	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.
Change	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.
Change All	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.
Add	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. See Adding Words to Your Personal Dictionary.

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 a page has more than one spell check field, spell check runs in succession. If no errors are found, 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.*

Note: Hyphenation for Hungarian is not currently supported.

Working With Trees

PeopleSoft application pages use terminology derived from the concept of a family tree. The nodes that report to the root node are called its children, and 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 at the same time. In the following example,

Operations Administration is a child of Office of the President and a sibling of Human Resources, Controllers, and Retail Services.

Image: Sample HTML tree

This example illustrates the fields and controls on an 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 next to the nodes to see representations of the data. Clicking a link either opens a new page or displays data for that link to the right of the HTML tree.

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.

Collapse All	Click to close all of the visible nodes except for the root node. The root node is always expanded.
Expand All	Click to expand all of the nodes of the tree so that the entire tree or branch hierarchy is visible. Clicking this link expands all parent and child relationships, but the system still presents the tree hierarchy one page at a time. Use the next and previous page arrows to move forward and backward through the tree.
Find	Click to access the Find Value page, where you can search for nodes and detail values.

As you navigate a 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 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.

Related Links

PeopleSoft Tree Manager

Working With Rich Text Editor Fields

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

- Use the toolbar

- Enter, format, and modify text.

- Insert and modify images.

- Use spell check.

Understanding the Rich Text Editor

The rich text editor 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 image sizing. You use the rich text editor toolbar to apply additional formatting elements. The toolbar is extensible by means of a custom settings configuration file that application developers can create and implement.

See "Setting Page Field Properties for Controls" (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide).

**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 work with common text editors such as Microsoft Word or Oracle Open Office. It consists of these three distinct elements:

- Toolbar

- Editing area

- Pop-up menu

The Messages scroll area contains an example of the rich text editor control showing the toolbar, editing area, and pop-up menu elements:

Image: Rich text editor elements

This example shows the rich text editor controls.
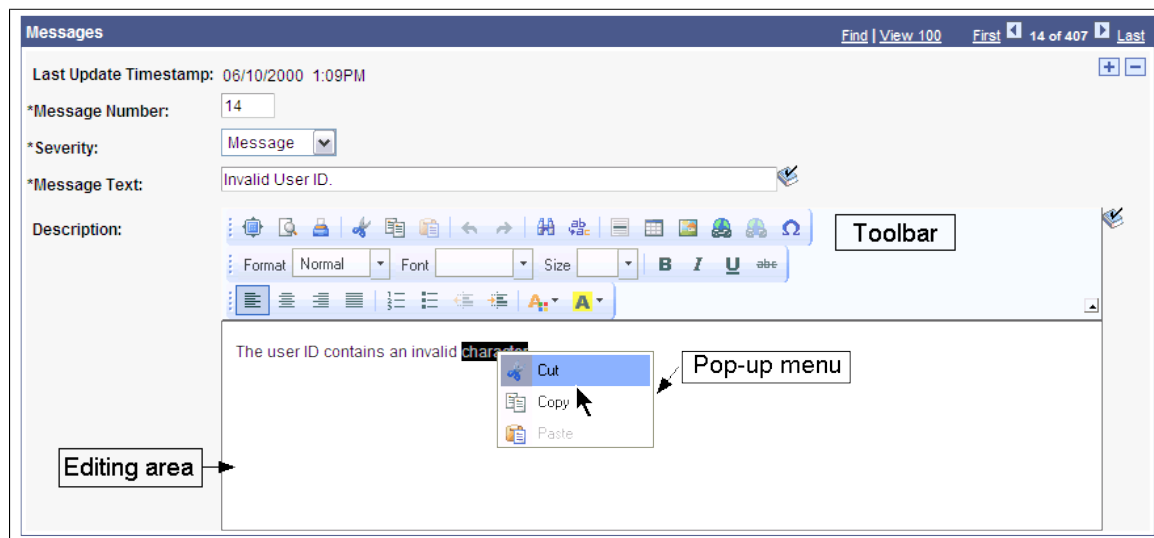
Toolbar

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

Editing Area

The editing area is directly below the toolbar. You enter text in this area.

Pop-up Menu

A pop-up menu is a contextual menu that appears when you right-click the mouse inside an editing area. The functions on the menu change based on what element, such as a table or an image, 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. Available functions are both simple, such as basic text formatting, and advanced, such as creating links and tables.

To use the buttons in the toolbar, place your cursor over the button. The button highlights and hover text with information about the function of the button appears. Click the button to execute its function. The graphics 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, toolbar drop-down list boxes are also available; they are white areas with an arrow on the side. You activate drop-down list boxes by clicking the white area or the arrow. After you click a menu, it expands so that you can select from 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 in desktop word processor text editors such as Microsoft Word or Open Office with one important difference. 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 read 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, 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 large 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.
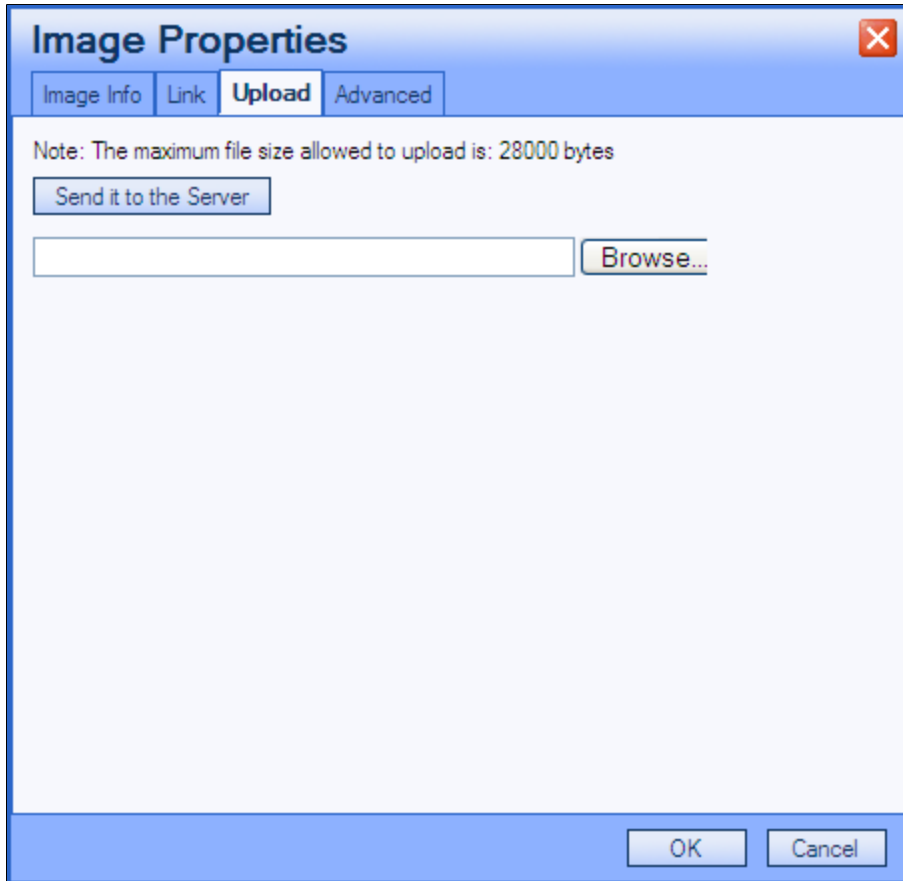
To modify images after you have inserted them, right-click the image and then click Image Properties.

Image Properties - Upload Tab

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

Image: Image Properties: Upload tab

This example illustrates the fields and controls on the Image Properties: Upload tab.

When you click the Image button, the Image Properties dialog box appears with the Upload tab activated. You must upload an image before you can change its 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: Image Properties: Image Info tab

This example illustrates the fields and controls on the Image Properties: Image Info tab.

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

URL	This field is automatically populated when you send the image to the server. This is the URL ID for the image.

Image Properties - Link Tab

Access the Link tab.

Image: Image Properties: Link tab

This example illustrates the fields and controls on the Image Properties: Link tab.
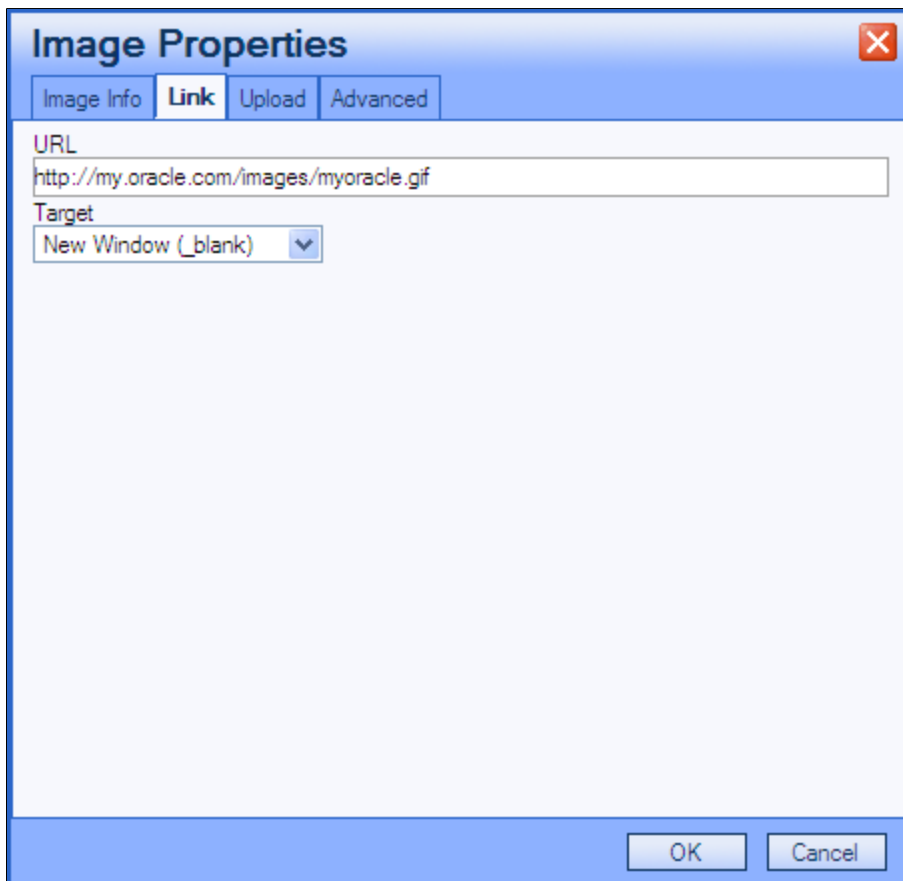
Use the Link tab to automatically link an image to another resource. You must set the Image Info tab URL value first, and then copy it to the Link tab URL field. The editor then encloses the <img> tag in an <anchor> tag. For example, if you specify *http://my.oracle.com/images/myoracle.gif* as the URL, the result is:

```
<a href="http://my.oracle.com/images/myoracle.gif"><img alt="" src="http://my.oracl⇒
e.com/images/myoracle.gif" /></a>
```

The Target drop-down list specifies where or how the image link will appear. 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: Image Properties: Advanced tab

This example illustrates the fields and controls on the 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 set the HTML img tag attributes: id, dir, lang, longdescr, class, title and style, respectively.

Complete user documentation for the rich text editor is available from CKEditor.

See CK Editor 3.x User's 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. Clicking this button invokes the current PeopleTools spell check functionality. The HTML tags are stripped and only the text is considered for spell check.

While in Spell Check mode, images that you 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 Field-level Prompts and Validation

Some edit box fields are linked to database prompt tables, which store values for information shared across your organization, such as department IDs, country codes, and state codes. These tables are called prompt or lookup tables because you prompt the system to look up 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 Look Up 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 Resultsgrid 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.

Image: Example of a Look Up page

This example illustrates the fields and controls on a sample 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 over the primary page, which is grayed out. When working with these pages, you can:

- Resize the page.

- Close the page from the title bar close icon.

Note: The New Window, Personalize Page, 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 buttons 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.

Related Links

Using Search Pages to Retrieve Data

"Setting Record Field Use Properties" (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide)

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 a locale.

Image: Calendar prompt window

This example shows the calendar window that appears when you click the calendar prompt button.
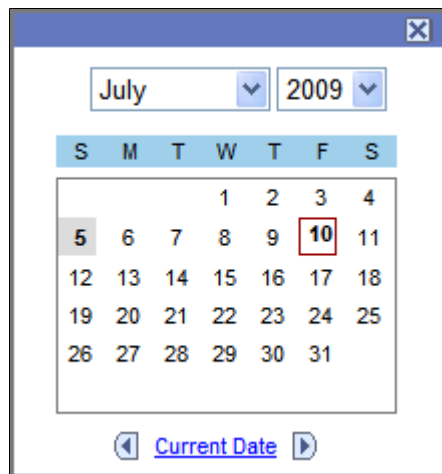
To change the calendar month, select the drop-down list box arrow for the month. To change the year, select the drop-down list box arrow for the year. Click the correct day of the month to select the day. Press Esc to cancel and close the calendar.

Accessing Related Content and Actions

In addition to the primary data on transaction pages, some pages include access to contextually relevant information called related content. Related content can be analytics, other PeopleSoft components, external web sites, discussions, wiki pages, UPK topics, and a variety of other content that you find helpful in performing your tasks. You can work with the related content just as you would any other PeopleSoft page. Related content is configured and secured by an administrator.

PeopleSoft applications divide related content services into two major categories—related content and related actions—based on where the content appears when the user accesses the service.

- Related content only appears in one of two Related Content frames, which appear at the bottom or to the right of the primary transaction page.

- Related actions appear outside of the Related Content frames. Target locations include modal windows, in new browser windows, or in the existing browser window replacing the current transaction page.

Contextual Menus

Related content can appear at the component, page, and field levels. You access the content at all levels similarly: through links that appear in contextual menus.
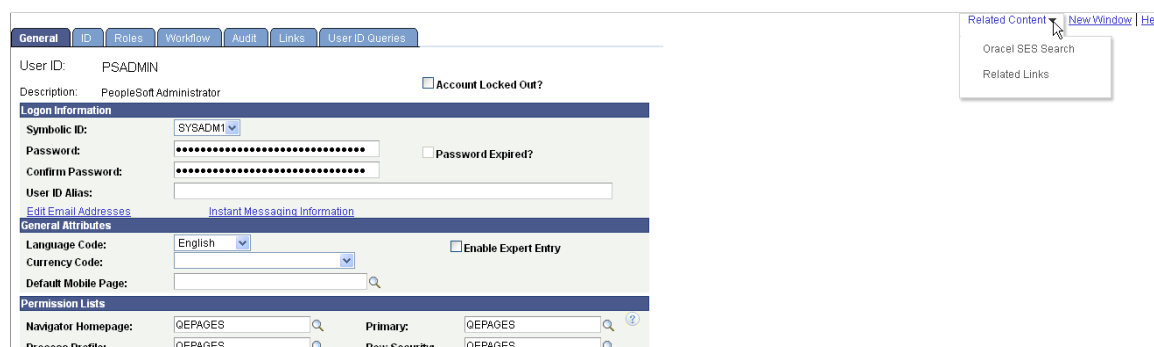
You work with these types of contextual menus in PeopleSoft applications:

- The Related Content menu, which displays only *related content.*

  The Related Content menu appears in the page bar at the top of the transaction page.

  Image: Related Content menu showing two services

  The following example shows two services in the Related Content menu:

- The related actions menus, which displays only *related actions.*

  The related actions menus can appear as:

- An Actions menu on a pivot grid chart.

  Image: Related actions on a pivot grid chart

  This example shows an Actions menu on a pivot grid chart:
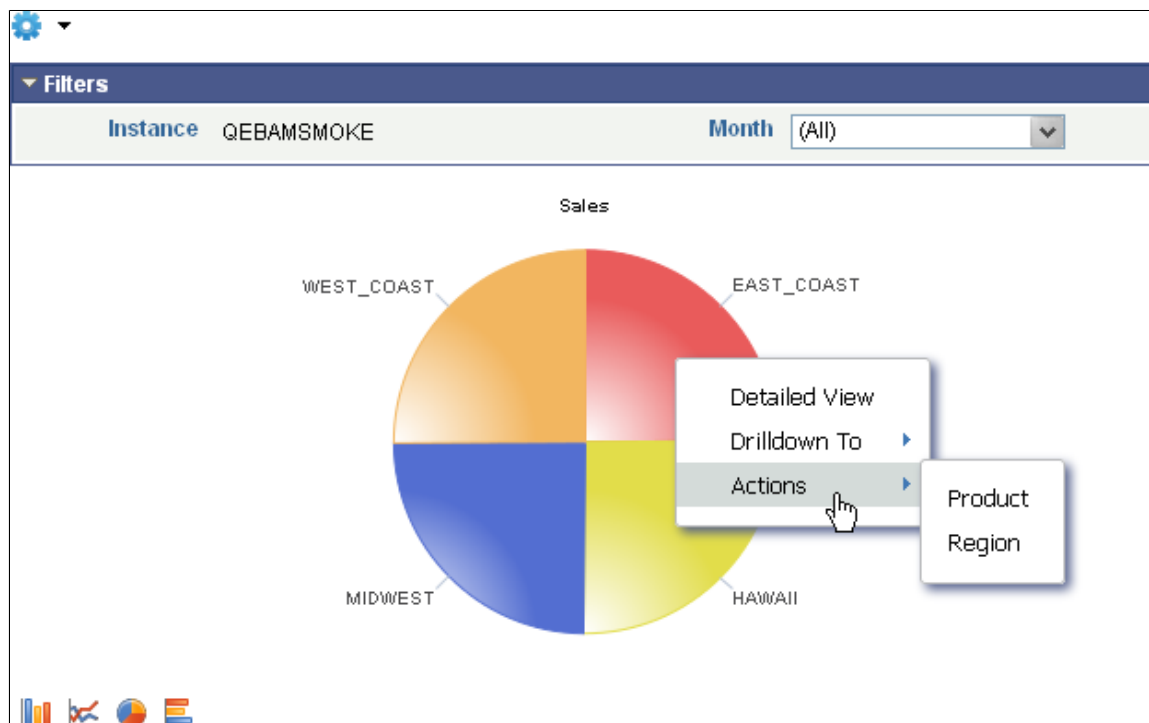
- A free-standing Actions button on any page.

  Note: The label on the Actions button is configurable within PeopleSoft Application Designer.

  Image: Related actions from a free-standing Actions button

  This example shows a free-standing Actions button that has been added to the page to display a list of related actions:

- An Actions folder in drop-down SmartNavigation menus.

   Image: Related actions in a drop-down SmartNavigation menu

   This example shows the Actions folder in a drop-down SmartNavigation menu:
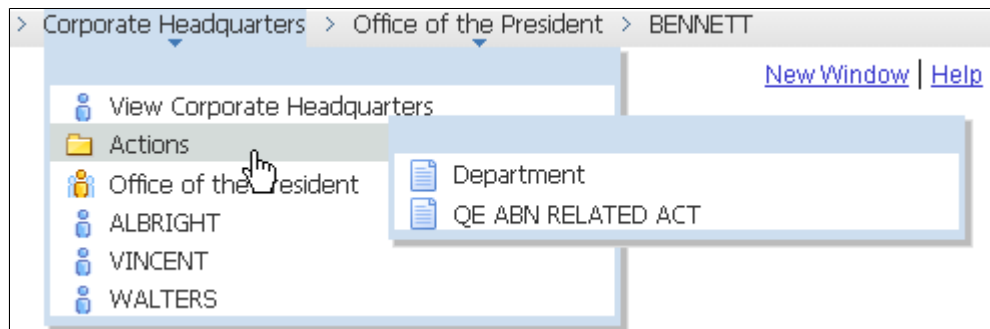
- A drop-down Actions menu on chart nodes of SmartNavigation charts.

   Image: Related actions on a SmartNavigation chart node

   This example shows a drop-down Actions menu on a chart node of a SmartNavigation chart:
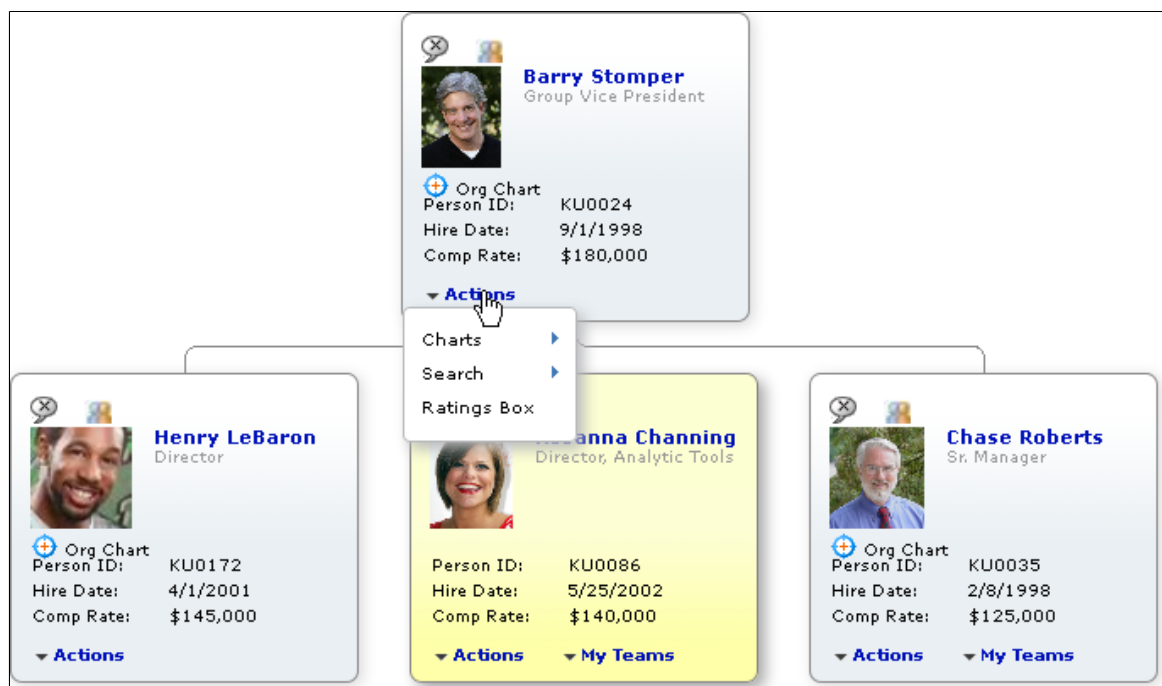
- As pop-up related actions in the search results of a keyword search.

    Image: Related actions on a keyword Search Results page

    The following example shows pop-up related actions links in the search results of a keyword search:

    Lee,Mary
    Last Updated Date: 2012-07-01 08:01:59
    This student is a DEV from Walnut Creek, CA.

    Personal Information
    Student Enrollment

- Page field contextual menus, which can combine both *related content* and *related actions*.

    Page field contextual menus appear when you click the red page-field glyph.

Using Related Content Frames

The Related Content frame appears at the bottom or to the right of the page.

Bottom Frame

Note these points about the Related Content frame when it appears at the bottom of the page:

- The frame extends across the width of the transaction page.

- The visible area increases and decreases when you drag the handle on the upper edge of the frame in a vertical direction.

- The frame appears and disappears when you click the Expand/Collapse button on the left side of the frame header.

- The frame reloads when you click the Refresh button in the frame header .

- The frame loads the current active service in a new window when you click the Zoom icon.

- The frame closes when you click the Close button.

- Open the active service in another window by clicking the zoom button in the frame header.

Note these points about the *services* that appear in the bottom frame:

- Only one service can be active and have focus at a time.

- Multiple services appear as tabs across the top of the frame.

- You click the tab to bring the service into focus.

Image: Transaction page showing the Related Content frame at the bottom

The following example shows a transaction page with related content in the Related Content frame at the bottom of the page:
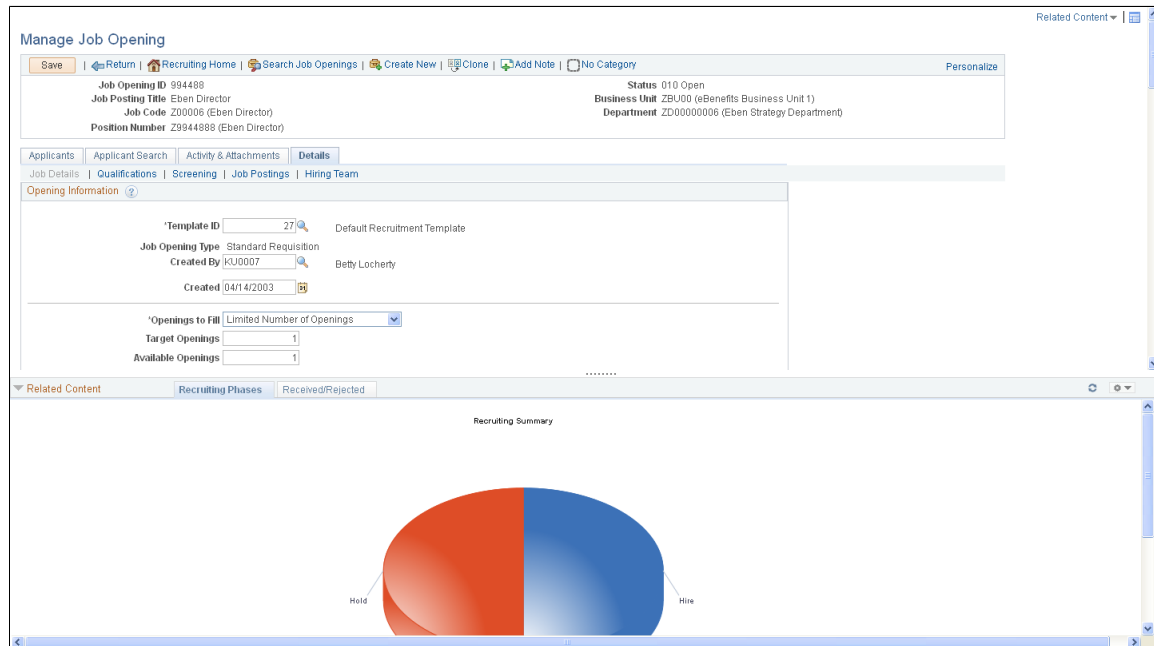
Right Frame

Note these points about the Related Content frame when it appears at the right of the page:

- The frame extends down the length of the transaction page.

- The visible area increases and decreases when you drag the left edge of the frame in a horizontal direction.

- The frame appears and disappears when you click the Maximize and Minimize buttons on the left border of the frame.

- The frame divides the visible area equally among all open pagelets.

- The bottom of the frame displays a More menu, which you use to access minimized pagelets.

Note these points about the *services* that appear in the right Related Content frame:

- Each service exists as a self-contained pagelet inside the Related Content frame.

- Any number of services can open be active and in the expanded state simultaneously.

- All maximized service pagelets divide the available space equally and always share the same vertical and horizontal dimensions. As users maximize and minimize other service pagelets in the frame, any service pagelets that remain open resize automatically so that the space appears equally divided.

- Each pagelet header can contain:

  - A Zoom button that you click to display the service in a new window.

- A Refresh button that you click to reload the service.

- A Maximize/Minimize button that you click to toggle the service between the expanded and collapsed states.

Note: The state of each pagelet persists based on the state from your last session.

- Scroll bars appear on the right and bottom of a service pagelet if it is too small to fully display the content.

Image: Transaction page showing the Related Content frame at the right

The following example shows a transaction page with related content in the Related Content frame at the right of the page:
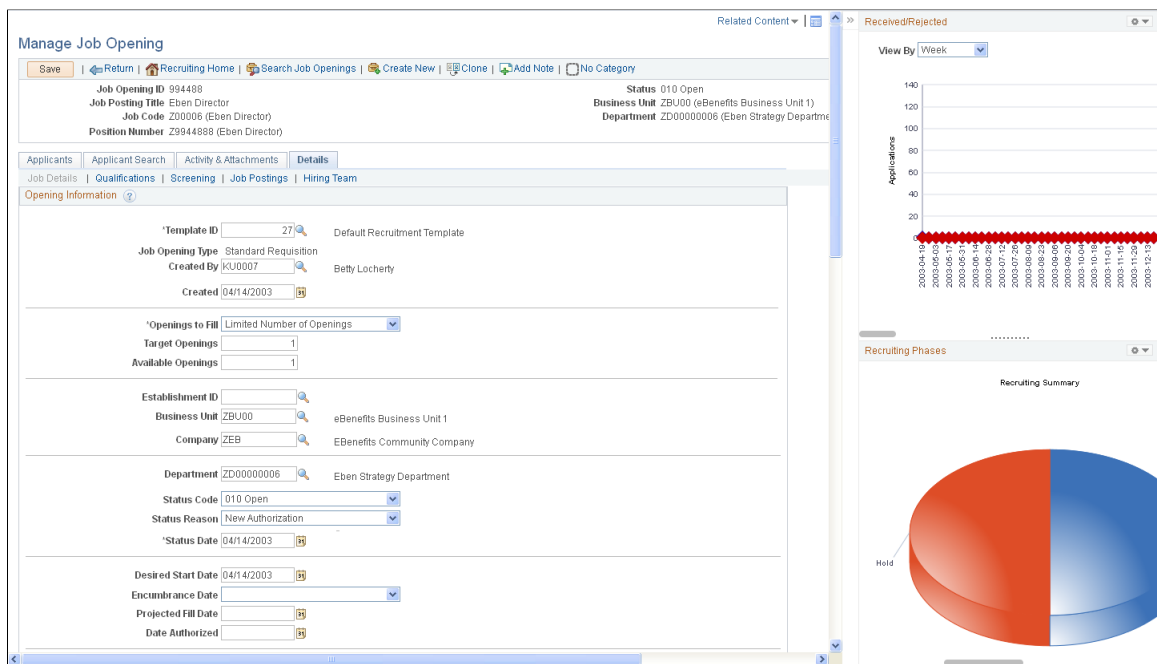
Using WorkCenter Pages

PeopleSoft WorkCenter pages provide you with streamlined access to commonly performed tasks. WorkCenter pages are intuitive and can be designed and targeted based on the various needs of multiple business roles. For instance, executives demand intuitive applications with analytics and summaries at the organization level for applications such as Compensation. Human resources clerks, focused on applications such as Payroll, Time & Labor, and Benefits, require consolidated navigation collections for the business process pages and components needed to complete their work and to ensure that all the information goes properly to other systems. WorkCenter pages are robust and flexible enough to accommodate these and other types of demands from the different users and roles within your organization.

WorkCenter pages address your need for a more streamlined user interface—one that will reduce time-consuming and complex navigations and increase productivity by providing a central place from which to do day-to-day work.

Working with WorkCenter Pages

WorkCenter pages divide the browser window into two frames:

- A pagelet area.

- A target content area.

These two areas of the WorkCenter interact; they pass information back and forth by using an event-driven model. The actions in the pagelet area determine the content in the target area. When you click a link in the pagelet area, it triggers the appropriate transaction, and passes values from the pagelet area so that the application can display the appropriate content in the target content area or in a new browser window.

Pagelet Area

The pagelet area, which is always accessible for WorkCenter pages, aggregates related transactions as navigation collection pagelets, query pagelets, activity guide pagelets, component-based pagelets, and analytics pagelets and makes them constantly available for instant access. Your pagelet area might be divided into groups indicated by tabs at the top of the pagelet area; the pagelets appear below the tabs. Pagelets can be based on queries, navigation collections, or components. Pagelets can include folders, links, and even charts. If you click a navigation collection folder, the folder opens and only the contents of that folder are visible in the pagelet. If you click a link, the transaction is started in the target content area or a new browser window.

This table describes the icons that can appear in the WorkCenter header and the pagelet area headers. The pagelets and pagelet area are highly configurable; not all icons appear for all users, and they may differ from those shown here.

WorkCenter Settings	Click to access the WorkCenter Settings menu, and select an option. Possible options are reload, personalize, and configure.
Pagelet Settings	Click to access the Pagelet Settings menu, and select an option. Possible options are minimize, expand, and personalize.
Help	Click to show the help information associated with the pagelet.
Reload	Click to reload a pagelet.
Hide	Click to hide the WorkCenter frame and associated pagelets. Use this option to maximize the size of the target area.
Show	Click to restore the WorkCenter frame and associated pagelets.
Resize	Click and drag up or down to resize a pagelet.

Target Content Area

The target content area displays the object that is associated with the link that you click in the pagelet area. When you click a link or button in the pagelet area, it launches in the target content area and is ready for you to start the task. This area is the primary area for performing any transaction. You complete your task in this area just as you would in a standard PeopleSoft page.

Note: Developers and administrators can design tasks to launch in a new browser window, a modal pop-up page, or to take you out of the WorkCenter page and to a standard PeopleSoft application page.
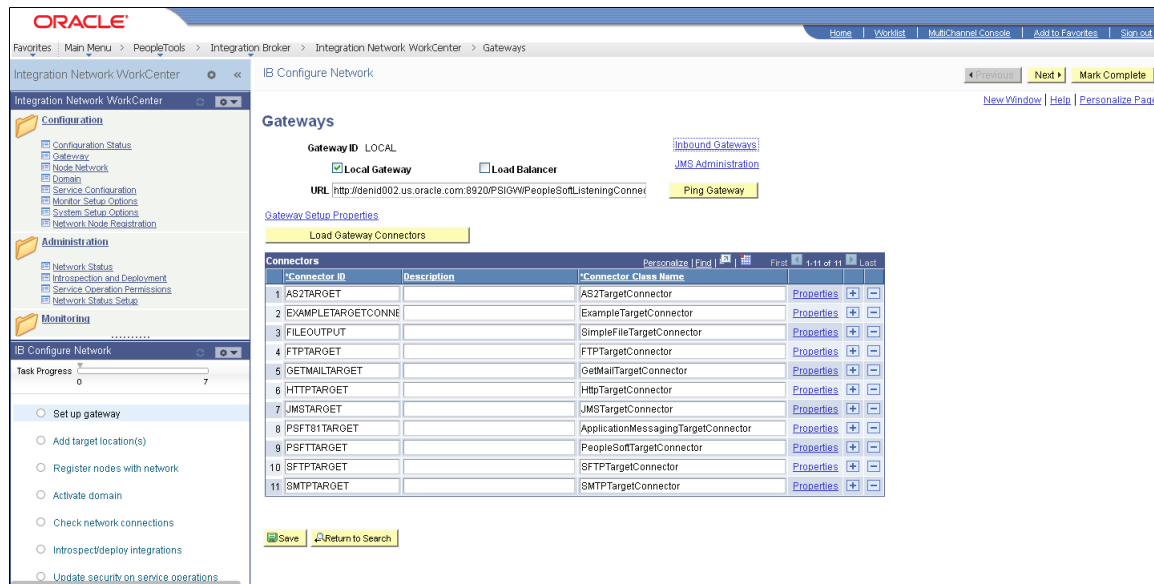
WorkCenter Examples

This section shows several WorkCenter examples.
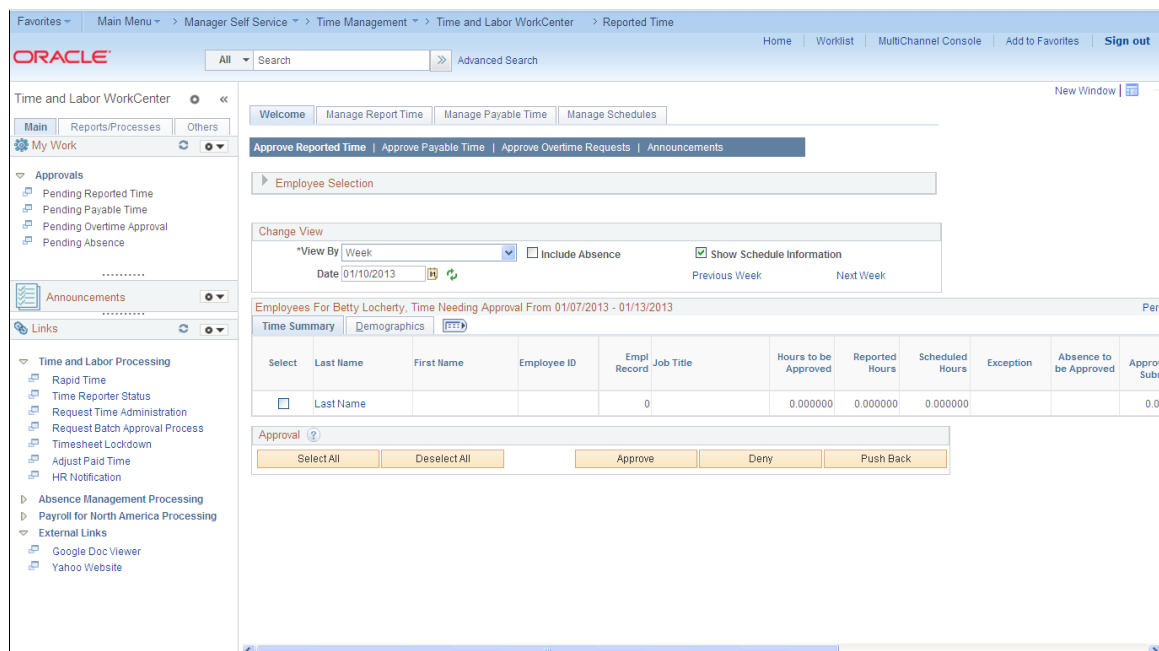
Image: Integration Network WorkCenter

The following example illustrates the main parts of a WorkCenter page. On the left, the pagelet area displays two pagelets configured to display in this WorkCenter. On the right, the target area displays the current transaction page as selected in a WorkCenter pagelet. The standard portal header, including the drop-down menu and navigation breadcrumbs, appears above the WorkCenter page.

Image: Time and Labor WorkCenter

This example shows the Time and Labor WorkCenter. The pagelet area includes three groups: Main, Reports/Processes, and Others. Here you see the three pagelets for the Main group: My Work, Announcements, and Links.

Using Activity Guides

An activity guide is a specialized WorkCenter pagelet that guides you through a procedure by providing a list of predefined tasks and tracking your progress, similar to a "to-do" list. Activity guides can be useful in a number of procedural scenarios. For example:

• Benefits enrollment.

• A life change event, such as a marriage or the birth of a child.

• Period end closing.

• System or feature configuration.

Note: This documentation describes the *basic* features and controls that are available for activity guides. Additional functionality may exist for a specific activity guide; see your application documentation for details.

Activity guides provide a hierarchical organization of dependent and sequential tasks. An activity guide lists the tasks, also referred to as action items, that you need to complete. Each action item is linked to a specific local or remote transaction or external URL. As you use an activity guide, you see the lists of action items that you need to complete in the pagelet area. When you click an action item, the associated page appears in the target content area of the WorkCenter. To complete an action item, complete the associated page, and save your work; the status of the action item will update to complete. The activity guide pagelet remains visible as you move from step to step, with the current action item highlighted, and you can see your progress by viewing the Task Progress bar, if included, that is located at the top of the activity guide pagelet. An icon appears next to each activity item to indicate its status.

A navigation frame appears above the target content area, which includes buttons that enable you to navigate through each action item. Next and Previous buttons are provided; additional buttons and controls may also appear, if defined by the Activity Guide developer, such as the Mark as Complete button that you see in some of the examples we provide below. Typically, these additional buttons enable you to mark an action item as complete or cancel your actions.

Action items can include the following characteristics:

• Action items can be required or optional.

  An asterisk designates a required action item. For an activity guide status to be designated as complete, all *required* action items must have a complete status.

• Action items can be organized hierarchically with a parent (summary) action item composed of child (detail) action items.

  All required child action items must be complete *before* the parent item is considered complete.

  Note: Parent action items are collapsible/expandable headings which groups related tasks; they do not load content in the target area when clicked.
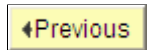
• Action items can be date-dependent and include required start or completion dates.

• Action items can include dependencies; for example, one action item can be set to be dependent on the status of another action item.

- Action item access can be controlled by role. If you do not have permission to access an action item, it will be disabled and you will not be able to access it.

Activity Guide Icons and Controls

This table describes the icons and controls for an activity guide:

Task is not started	Indicates the task has not been started.
Task is visited	Indicates you have accessed the task, but not completed it.
Task is completed	Indicates you have completed the task.
Task is In-Progress	Indicates an in progress summary task, which has required subordinate tasks that are not yet complete.
Task is Overdue	Indicates a task that is late.
Expand	Click to expand a summary (parent) action item, and view its subordinate tasks.
Collapse	Click to collapse a summary (parent) action item, and hide its subordinate tasks.
Next	Click this button to navigate to the next step.
Previous	Click this button to navigate to the previous step.

Activity Guide Examples

This section shows several examples of activity guides.

Image: IB Configure Network Activity Guide

This activity guide contains tasks to configure PeopleSoft Integration Broker (IB). In this example, the IB Configure Network Activity Guide pagelet appears in the pagelet area of the Integration Network WorkCenter page, with the Gateways page in the target content area:

Here is an example where three out of seven action items are now complete, and the Activate domain action item, which uses the Domain Status page, is in progress.

Image: IB Configure Network Activity Guide with completed tasks.

Activity Guide example showing three completed action items.

This example shows the Life Events Activity Guide. This activity guide includes required tasks, which are indicated by an asterisk, as well as two summary tasks: Personal Information (collapsed), and Pay and Compensation (expanded).

Image: Life Events Activity Guide

Activity Guide example showing required action items and summary tasks.

Personalizing Your Pagelet Area

You can set preferences to personalize your WorkCenter page experience. Changes are visible when you click the Save button.

Access the Personalize page (select the Personalize option from the Pagelet Settings menu).

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Note: Your page title reflects the label that your WorkCenter administrator enters. The page name always begins with *Personalize*.

Image: Personalize page

This example illustrates a sample Personalize page.

Pagelet Group	Select the tab (group) for which you want to set your preferences.
Pagelet Label	Displays the names of the pagelets in the group.
Selected	Select to make the pagelet visible in this pagelet group. Deselect the check box to hide the pagelet.
	Deselecting this check box does *not* remove the pagelet from the group. The check box is disabled if the administrator requires that the pagelet appear.
Initially Minimized	Select to collapse the pagelet so that only the pagelet header is visible when you access the WorkCenter page.
Display Order	Enter a number between 0 and 999 to specifically determine the position of the pagelets in the group. This field is empty by default and pagelets appear in the order configured by the administrator. Pagelets for which you leave the Display Order field blank precede pagelets for which the field contains a value.
Reset to Defaults	Click to set all fields to their original settings as specified by the administrator who configured the WorkCenter page.

Working With Mouse Over Pop-up Pages

PeopleSoft applications provide mouse over pop-up pages, which display additional, read-only, context-sensitive information that would otherwise clutter the main page. Pop-up pages are small pages that appear or *pop up* when you move your cursor over a pop-up-enabled edit field or link. Fields that have associated pop-up pages are indicated by a dashed underline.

Pop-up pages hover over the main page as long as you leave your mouse over the activating control. When you move your mouse, the pop-up window disappears.

Image: Sample pop-up page

This example illustrates a sample pop-up page.

Accessing Embedded Help

Some scroll areas, grids, and group boxes display a question mark icon, which indicates that the page element has an embedded help message that is stored in the message catalog. Click the icon to make the help message appear in a pop-up page. The availability of embedded help is controlled by the application developer. Not all scroll areas, grids, and group boxes are configured for embedded help.

See Configuring Embedded Help for Scroll Areas and Grids (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide).

Image: Embedded help icon in the group box and scroll area headers

This example illustrates the embedded help icon in the scroll area and group box headers on a sample page.

Embedded help differs from the Help link in the navigation bar. If your system is configured for online help, clicking the Help link in the navigation bar causes a browser window to open and access page-specific product documentation. Clicking the embedded help icon causes a pop-up page to appear and display information that it retrieves from the Message Catalog. This information is generally more granular and specific to the functionality of the scroll area, grid, or group box that contains the embedded help icon. Embedded help pop-up pages can also contain active links that you click to access PeopleSoft application documentation, or any internal or external URL. When you have finished reading the information on the pop-up page, click the Close button on the pop-up page to dismiss it.

Note: Only one embedded help pop-up page can be open at a time. Clicking the help icon associated with another control will close any open pop-up page before opening a new one.

Chapter 5

Working With Grids and Scroll Areas

Understanding Grids and Scroll Areas

Scroll areas and grids serve as containers or organizers for multi-field 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 free form 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 Personalize 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 Viewing Data in Original Layout Grids.

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 Personalize 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 Viewing Data in Scrollable Layout Grids.

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 cube collection.

Working with Analytic Grids
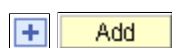
Navigating Through Data

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 Personalize 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.

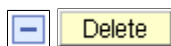- Find data.

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 in a grid or scroll area.

⊞ Add	Click to insert one new row after the current row.
⊞	Click to insert multiple rows. Specify the number of rows (1 to 99).
⊟ Delete	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.
Personalize	Click to access the personalization 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 the application developer sets it.
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.

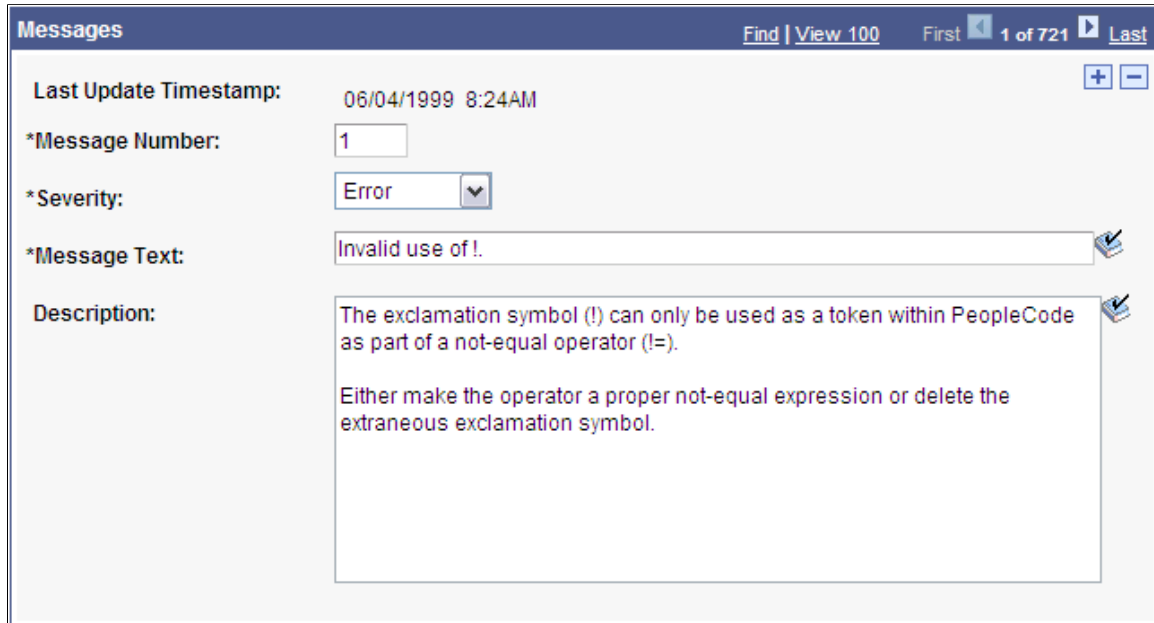Keyboard shortcuts are also available for all of the buttons and links described.

See Using Hot Keys.

In addition to these links and buttons, rows use a numbering system. For example, if a grid or scroll area were set to view only one row at a time, then 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 721 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.

Image: Sample scroll area

This example shows a sample scroll area.

The example shows View 100 instead of View All because of the personalization (GRDRWS) that limits the number of rows that appear in View All mode. Setting it too high could affect performance; the default setting is 100.

See Understanding Navigation Personalizations (PeopleTools 8.53: Security Administration).

Note: Be aware of the differences between the grid and 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 following 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 it has no instantiation on the database unless the user enters data in 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.

Image: Example of selecting rows

This example illustrates using the Select check box to select rows.

Finding Data

The find feature on grids and scroll areas enables you to locate specific data. This feature 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. It does not search HTML areas that are on the grid or scroll area. The find feature 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. If a scroll area has nested grids or scroll areas, 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 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 a 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 a 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 and remove data from the database tables.

See Navigating Through Data.

Image: Example scroll area

This example illustrates the Messages scroll area.

Collapsing and Expanding 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 appears 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:

Image: Department Details scroll area in the expanded state

This example illustrates the Department Details scroll area in the expanded state.

Image: Department Details scroll area in the collapsed state

This example illustrates the 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 Using Scroll Areas and Scroll Bars (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide).

Viewing Data in Original Layout Grids

Original layout grids offer several functional benefits that 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

• 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.

Image: Define Personalizations grid showing three tabs

This example illustrates the Define Personalizations grid showing three tabs.

To view all columns without tabs:

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

    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 because 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 only move and freeze columns by using the Personalize link.

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

See Personalizing Grid Column Appearance.

See Inserting and Resizing Grid Controls (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide).

Changing Column Sort Order

You can change the sort order of a grid column directly on a transaction page. Sorts persist only as long as you are on a 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 Personalize link. This type of sort persists until you change it by using the Personalize link again.

See Personalizing Grids.

See Removing User-Specific Grid Settings.

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 Personalize link.

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

   Note: If no Delete Settings link is available, click the OK button to restore the default settings.

3. On the Delete Settings page, click the Delete button.

4. On the Personalize Column and Sort Order page, click the OK button to restore the default settings.

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 navigation bar of the grid.

   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 theYes 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:

Image: The Component Interfaces grid in the collapsed state

This image illustrates the Component Interfaces grid in the collapsed state.

Image: The Component Interfaces grid in the expanded state

This image illustrates 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 Using Scroll Areas and Scroll Bars (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide).

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 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.

Using Grids (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide)

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 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.
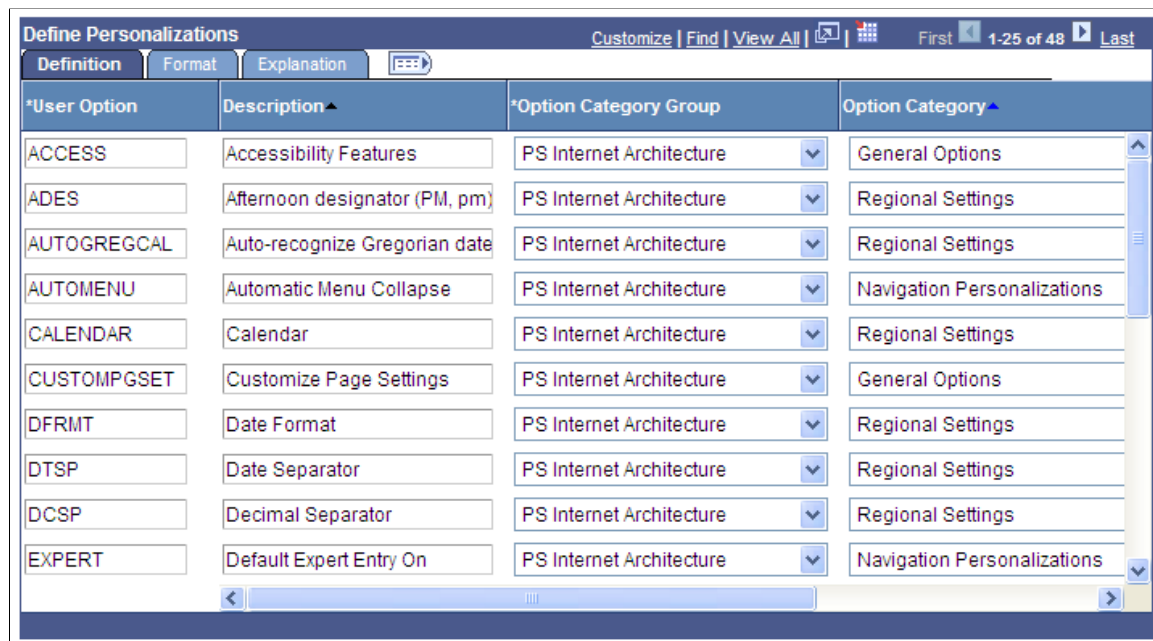
Grid Scroll Bars

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 to 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.

- Application developers can configure grid scroll bars and grid tabs 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.

Image: Define Personalizations grid showing grid scroll bars

This example illustrates grid scroll bars in the Define Personalizations grid.

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.
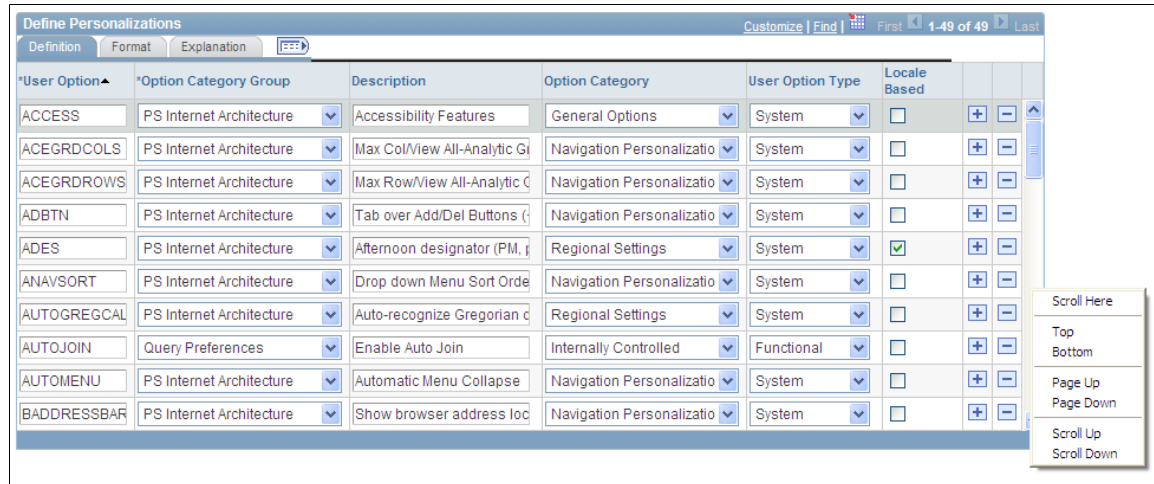
See Using Grids (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide).

Grid Scroll Bar Pop-up Menus

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

Image: Define Personalizations grid showing scroll bar pop-up menu

This example illustrates a scroll bar contextual pop-up menu.

This table describes the contextual pop-up menu options:

Scroll Here	Select to move the scroll slider so that the center of the slider is located under the cursor.
Left Edge	Select to move the horizontal scroll slider to the far left of the grid.
Right Edge	Select to move the horizontal scroll slicer to the far right of the grid.
Top	Select to move the vertical scroll slider to the top of the grid.
Bottom	Select to move the vertical scroll slider to the bottom of the grid.
Page Up	Select to move the rows up the length of one visible set of rows.
	For example, if 12 rows are showing in a grid, then selecting this option moves the rows in increments of 12 rows at a time. The bottom row becomes the top row.
Page Down	Select to move the rows down the length of one visible set of rows.
	For example, if 12 rows are showing in a grid, then selecting this option moves the rows in increments of 12 rows at a time. The top row becomes the bottom row.
Page Left	Select to move the columns to the left the width of one visible set of columns.
	The far right column becomes the left-most column in view.

Page Right	Select to move the columns to the right the width of one visible set of columns.
	The far left column becomes the right-most column in view.
Scroll Up	Select to move the rows up one row.
Scroll Down	Select to move the rows down one row.
Scroll Left	Select to move the scroll slider five pixels to the left.
Scroll Right	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 the Shift + Up Arrow keys to move up one cell.

  Movement ceases at the top of the column.

* Press the Shift + Down Arrow keys to move down one cell.

  Movement ceases at the bottom of the column.

* Press the Shift + Right Arrow keys to move right one cell.

  Movement ceases at the end of the row.

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

* Press the Shift + Left Arrow keys to move left one cell.

  Movement ceases at the beginning of the row.

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

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

  Movement continues from row to row and outside the grid.

* Press the Shift + Tab keys 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 Personalize link is not present in the navigation header, then 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. Moved and frozen columns persist until you change them. Resized columns persist until you leave the page.

Important! If the grid navigation header is not present or if the Personalize 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.

Image: Dragging the Option Category Group column

This example illustrates moving the Option Category Group column.
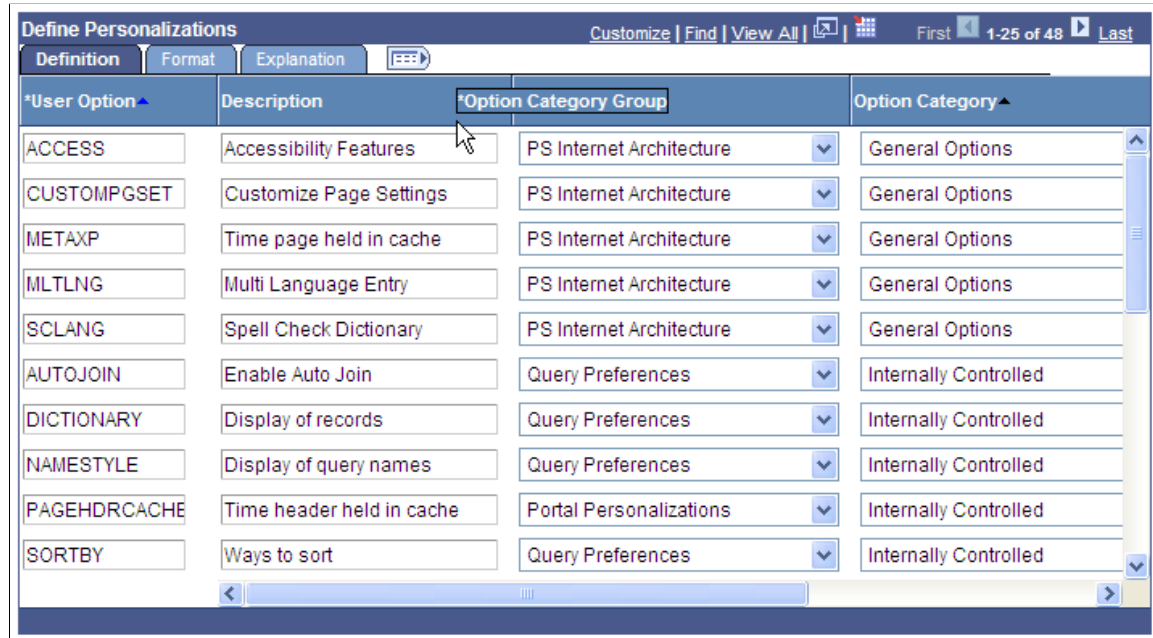
You can also change the column order by using the Personalize link.

Note: Drag-and-drop functionality is enabled only if the grid can be personalized. If you do not see the Personalize link in the grid header, you cannot 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 the right panel width. If the grid has frozen columns, you can freeze other columns on the transaction page.

To freeze grid 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 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 Personalize link. Likewise, if you see no frozen columns, you cannot drag a column to freeze it; you must use the Personalize 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 functionality is enabled only if the grid can be personalized. If you do not see the Personalize link in the grid header, you cannot drag and drop columns.


Resizing Grid Columns

To resize grid columns on a transaction page.

1. Move the cursor into the column header.

2. When the mouse changes to a hand, click and drag to resize the column.

3. When the column is the size you want, release the mouse.

Note: You cannot resize columns to be smaller than the column header width.

Image: Resizing the Description column

This example illustrates resizing the Description column.
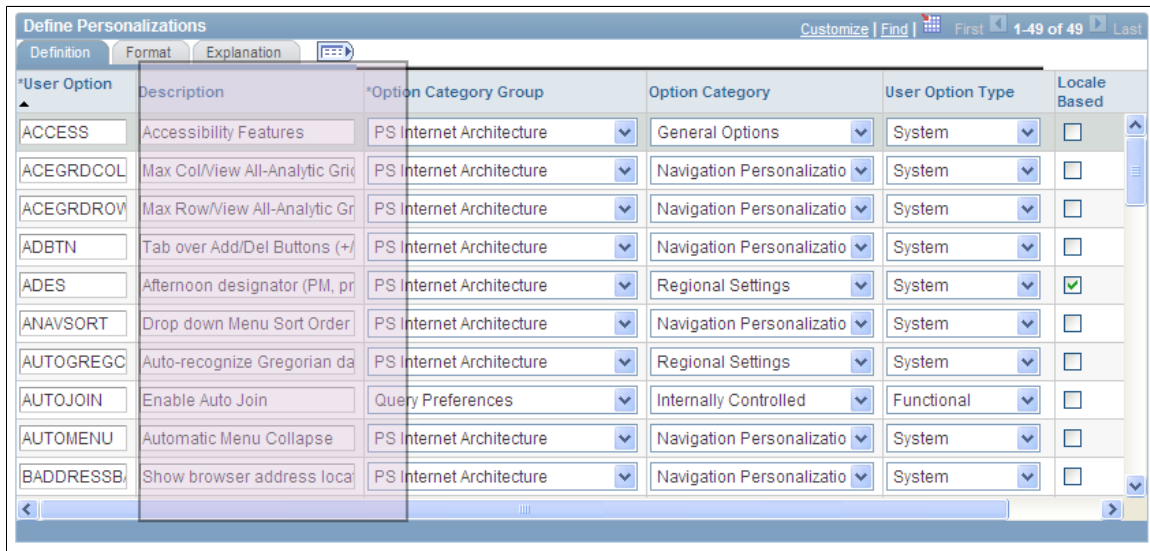
Removing User-Specific Grid Settings

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

1. Click the Personalize 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.

Related Links
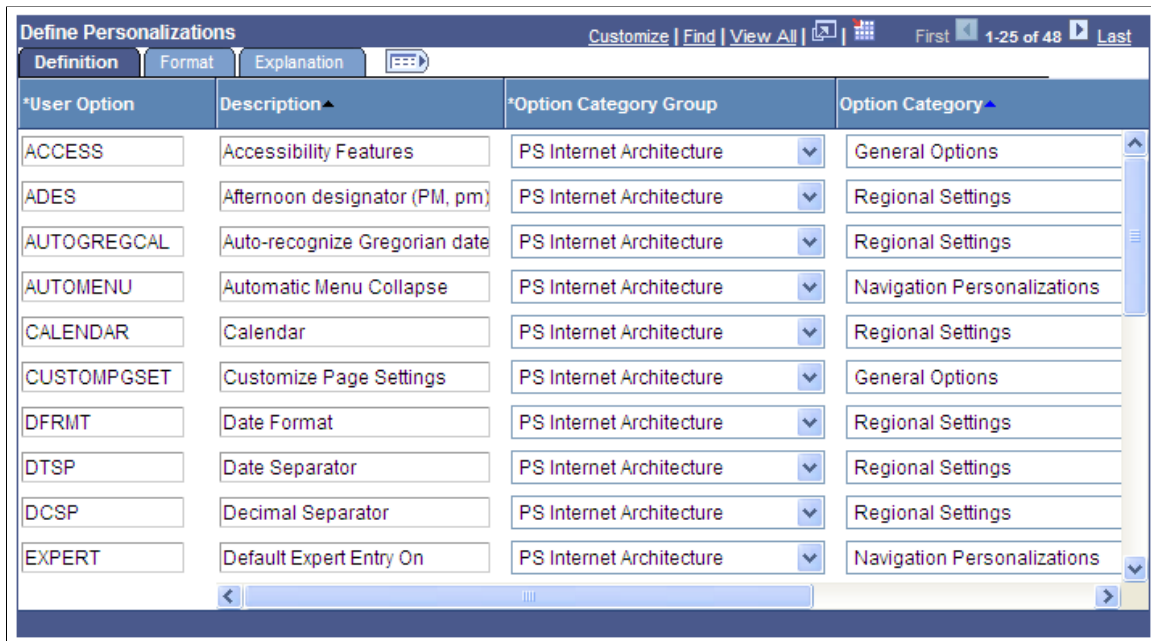Personalizing Grids

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 Removing User-Specific Grid Settings.

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:

Image: Grid showing user-specified sort order

This example illustrates the user-specified sort order on the Define Personalizations grid.

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

Related Links
Personalizing Grids

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 navigation bar of the grid.

   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 theYes button in this situation.

Collapsing Grids

You might 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 User Roles grid:

Image: User Roles grid in the collapsed state

This example illustrates the User Roles grid in the collapsed state.

Image: User Roles grid in the expanded state

This example illustrates the User Roles grid in the expanded state.

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

Using Grids (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide)

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.

Using Grids (PeopleTools 8.53: PeopleSoft Application Designer Developer's Guide)

Personalizing Grids

This sections presents an overview of grid personalization and discusses how to:

- Personalize grid column appearance.

- Manipulate grid column sort order

Understanding Grid Personalization

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

Note: The system automatically deletes all user grid personalizations if changes are made to the grid in PeopleSoft Application Designer. After your system administrators apply updates or upgrades to your PeopleSoft application, it is likely that you will need to reapply any grid personalizations you've created.

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

Image: Personalize Column and Sort Order page

This example illustrates the fields and controls on the Personalize Column and Sort Order page.

Note: If a page has grid tabs, they remain active so that you can view all sample data.

Use the following toolbar buttons to personalize a grid:

OK	Click to save your personalization settings and return to the transaction page with the changes in effect.
Cancel	Click to cancel any personalization settings that you made and return to the transaction page.
Preview	Click to preview any personalization settings that you made.
Copy Settings	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.
	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.
Share Settings	Available if you have created and saved grid personalizations. Opens the Share Settings secondary page, which you can use to enable public sharing of the grid personalization settings that you created by making your profile Public. (The default setting is Private.) If you make the personalization settings of your grid public, all of your personalization settings for all components will be public.
	The Name field is only required if you make your personalization settings public. Each user who shares personalization settings must have a unique profile name. The profile name you enter is the same for all pages and shared grid personalizations across all components. If you modify a profile name, it is modified for all pages and grid personalization settings across all components. After 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 any string of up to 30 characters long, for example, OSC_16AR. The system automatically converts alphabetical characters to uppercase.
Delete Settings	Available if you created and saved grid personalizations. Opens the Delete Settings secondary page, where you can delete all grid personalization settings for the current grid. Select the Delete button to delete the settings for the current grid only and to restore the default grid settings. Select the Cancel button to retain your settings and return to the grid personalization page.
Hidden	Select a column and select this check box to hide the column in question.
Frozen	Select a column and select this check box to freeze the column in question. When you freeze a column, the column appears in all tabs within the grid.

Descending   Select a row from the Sort Order list and select this check box to sort the row in descending order rather than in ascending order, which is the default.

Personalizing Grid Column Appearance

When personalizing 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 one time.

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 1 and 2 to move 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 deselecting 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 one time. 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 ascending order, which is the default), 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 your 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 action 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 Grids and Scroll Areas

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, you should maintain records of past reviews so that you can refer to them 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 system automatically populates the Effective Date field 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 becomes 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.)

Related Links
Using Effective Dates

Using Multiple Grids and Scroll Areas on a Page

Some PeopleSoft applications include pages that contain multiple grids and scroll areas. 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. Using 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, and then click the double left arrow button to move those descriptions to the Assigned Competencies grid.

Image: Side by side grids

This example illustrates two grids side-by-side.

After you have assigned 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:

Image: Nested grid in a scroll area

This example illustrates a 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.

• Edit analytic grid data.

• Download analytic grid data.

• Drag and drop data cubes and dimensions.

• Pivot data cubes and dimensions.

• Slice analytic grid data.

• Work with hierarchical dimension data.

• Saving personalized analytic grid layouts.

Understanding Analytic Grids

Analytic grids are specific to PeopleSoft Analytic Calculation Engine, which is the PeopleSoft multidimensional reporting tool. Within PeopleSoft Analytic Calculation Engine, analytic models define the rules for calculating data. 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 data, pivot data cubes and dimensions (you move them between the row and column axis of the grid) to gain a different view of data, and view selected slices of data. Within an analytic grid, you can expand and collapse dimensions with a hierarchical structure; you can also drill down into such dimensions. Finally, you can modify preferences within an analytic grid and then save a particular layout that you have created or return to the default grid layout.

See Analytic Calculation Engine.

Image: Example of analytic grid components

This example illustrates the components of an analytic grid.

Navigating Through Analytic Grid Data

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

See Navigating Through Data.

However, in an analytic grid you can also:

• Collapse or expand the slice bar by clicking the arrow to the right of the analytic grid name (the name is Analytic Grid by default), which appears in the upper-left corner of the grid.

• Collapse and expand the entire grid if 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 the expand node or the 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 cells are not editable.

Downloading Analytic Grid Data

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

See Viewing Data in Scroll Areas.

Dragging and Dropping Data Cubes and Dimensions

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

Location	Drag-and-Drop Possibilities
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 axis 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 the analytic grid. In addition, if Freeze Column Mode is specified, you cannot move frozen columns.

Pivoting Data Cubes and Dimensions

Using drag-and-drop functionality, 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.

Adjacent 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 appearance of the help text.

Image: Analytic grid with help text displayed before pivot operation

This example illustrates help text for an analytic grid before completing a pivot operation.
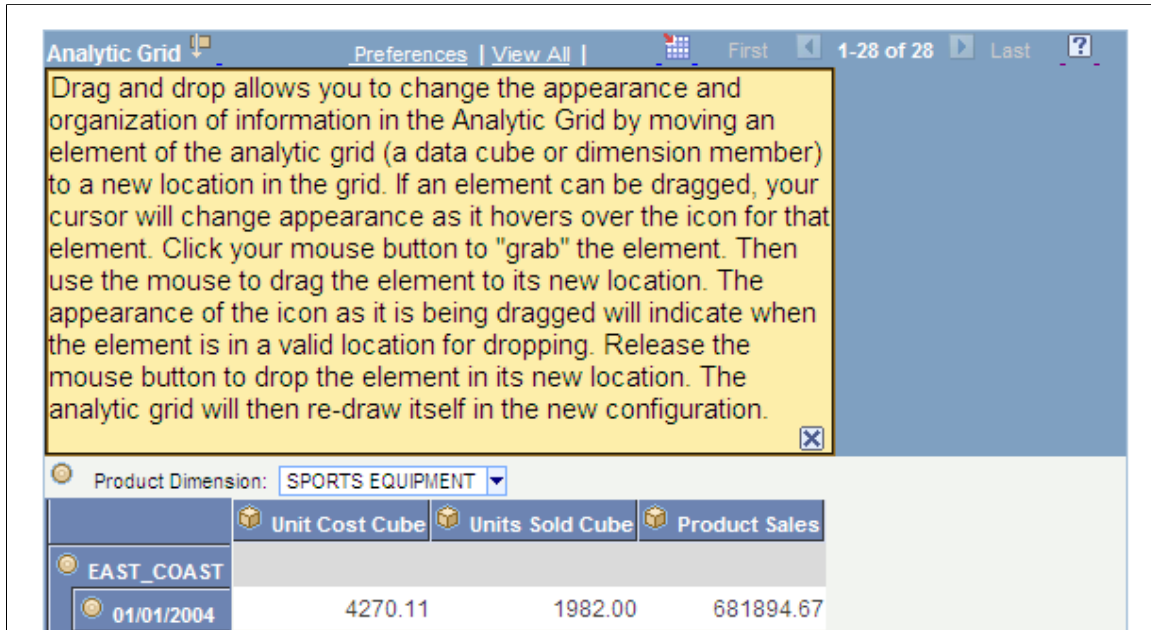
Image: Analytic grid after pivot operation

This example illustrates an analytic grid after completing a 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 a slash) when you are over locations where you cannot drop. You will 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 want. 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.

Image: Slice showing only February data

This example illustrates a slice that shows 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.

    For example, a Months dimension 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 slice bar.

See "Filter User Functions" (PeopleTools 8.53: Analytic Calculation Engine).

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.

Image: Collapsed analytic grid with multiple nodes to expand

This example shows a collapsed analytic grid with multiple nodes to expand.

Image: Collapsed analytic grid

This example shows a collapsed analytic grid.

Image: Expanded analytic grid

This example shows an expanded analytic grid.

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 beneath 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, then all the dimensions are expanded.

2. Click the plus sign to the left of any subdimensions to expand them.

3.   Click the minus sign to the left of any dimension to collapse it.

Image: Drilling in to see just the water sports information

This example illustrates 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 to a Drill out this node arrow, and you see only the dimension or
     subdimension you clicked plus any elements directly beneath 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 that you clicked plus one level above it.

Saving Personalized Analytic Grid Layouts

You have learned how to personalize 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
personalizations and return to them later. If you have saved a personalized 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 a cube is in the column header. If a cube is in the header, then you have the option to hide nondimensional fields. If not in the header, then this option is not available.

Image: Preferences dialog box

This example illustrates the fields and controls on the Preferences dialog box.
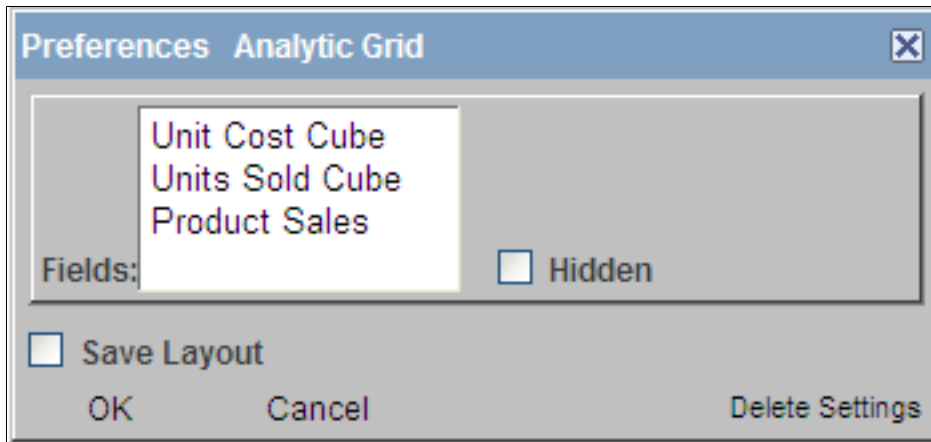
To save a personalized analytic grid layout:

1. Modify the grid 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 the default settings of an analytic grid:

1. Click the Preferences link.

   The Preferences dialog box appears.

2. Click Delete Settings.

Note: Clicking Delete Settings restores the default layout of the analytic grid and also unhides hidden nondimensional fields.

Chapter 6

Working With Processes and Reports

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 offline or batch processes that run in the background while you continue to use the application or even after you have left the office.

A batch process is a predefined process or program that runs independently of any end-user intervention. Typical offline 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 to scan for and run submitted processes.

As an end user, your only concern is 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 documentation covers the general procedure for running the standard reports that come with your PeopleSoft applications. If you or someone in your organization has added custom reports to the system, the procedure should be similar.

Note: The procedures described in these topics apply 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.

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 define 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 about 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 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 offline 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.

Image: Ledger Activity Report page

This example illustrates the fields and controls on the Ledger Activity Report 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 are using a PeopleSoft Human Capital Management 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 for running your process and select the check box for each process that you want to run. Click OK to queue your process request.

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 to run your process. Depending on your security, you can select the server and the 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.

Image: Process Scheduler Request page

This example illustrates the fields and controls on the Process Scheduler Request page.

See "Submitting Process Requests" (PeopleTools 8.53: PeopleSoft Process Scheduler).

Selecting Output Formats and Setting Report Distribution

You can choose several kinds of output formats for your process. The following table lists output formats 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
COBOL	WINDOW	TXT	TXT
Crystal	EMAIL	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM
Crystal	FILE	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM

Process Type	Output Type	Output Format	Default
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
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 "Selecting Output Types and Formats" (PeopleTools 8.53: PeopleSoft Process Scheduler).

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 "Setting Report Distribution" (PeopleTools 8.53: PeopleSoft Process Scheduler).

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.

Access Process Monitor (click the Process Monitor link or select PeopleTools, Process Scheduler, Process Monitor.

Image: Checking process status with Process Monitor

This example illustrates the fields and controls on the Process Monitor component.

Note: Your user ID appears in the User ID list box. If the list of processes is long, you can use the navigation arrows on the screen to scroll through the list.

1. Use the Server, Type, Run Status, Last, and Instance list boxes to limit the processes that Process Monitor displays.

2. 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 Run Status of a report is *Completed*, you can delete information about the report from Process Monitor. Click Details to display the options for canceling or holding a request.

Related Links

"Understanding Process Monitor" (PeopleTools 8.53: PeopleSoft Process Scheduler)

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.

Access Report Manager (Main Menu, Reporting Tools, Report Manager.)

Image: Report Manager - List page

This example illustrates the fields and controls on the Report Manager - List page.

1. Click the report name link to view your report output.

   The Report/Log Viewer page appears in another browser window.

2. Click the link to the report or any associated files that you want to view.

   The report appears in Adobe Acrobat (.pdf) format.

Related Links

"Understanding Report Manager" (PeopleTools 8.53: PeopleSoft Process Scheduler)

Chapter 7

Using Workflow

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 routings— notifications to inform other people of the work awaiting them. So when you enter an invoice, the PeopleSoft application automatically notifies the appropriate individual that the invoice has been submitted and is awaiting review.

Related Links
Workflow Technology

Sending and Receiving Notifications

This section discusses how to:

• Send notifications.

• Use worklists to receive notifications.

Sending Notifications

The system sends notifications automatically as part of 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).

Image: Send Notification page

This example illustrates the fields and controls on the Send Notification page.

To	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.
CC (carbon copy)	Enter the names or email addresses of CC recipients, who are made aware of this notification publicly.
BCC (blind carbon copy)	Enter the names or email addresses of BCC recipients, who are made aware of this notification privately.
Priority	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.
Subject	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.
Template Text	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.

Message	Enter your own comments. The message text is sent in the language of the sender.
Rich Text	Select this check box to enable rich text.
Lookup Recipient	Click to access the Lookup Address page. Enter the first characters of a recipient's name and click Search to see 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.
Delivery Options	The system populates the check boxes based on the delivery options that are defined in the recipient's user profile. The Worklist check box is unavailable for external email addresses.

Related Links

"Setting Notification Options" (PeopleTools 8.53: Workflow Technology)

Using Worklists to Receive 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 have completed the work.

See Sending and Receiving Notifications.

Viewing a Worklist

When you use workflow-enabled applications, 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, which enables you to bypass any other navigational structure and work directly from the worklist.

The Worklist page provides summary information about all items in your personal worklist. This page also provides links that enable 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 personalize the sorting and columns within the Worklist grid.

Image: Worklist page

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

Work List Filters	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 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	Ranks 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, you cannot use the Find function for this column and you cannot use the Download to Excel function to download the information in this column.

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.
Reassign	Click to forward the item to another user and remove it from your list.
Refresh	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, then 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.

Access the Worklist. (Click Worklist in the universal navigation header.)

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 in your worklist; it includes all of the information from the Worklist page along with the additional information described here.

Timed Out Dttm (timed out date and time)	Displays the date and time when the item will time out if it is not already worked.
Previous User	Displays the user whose action triggered this item.

Selected Dttm (selected date and time)   Displays the date and time when you first selected this item (to work the item).

Comment   Displays the comment (if any) entered by the user if the item was forwarded from another user.

Timed Out   Indicates whether the item has timed out.

Instance   Displays a unique identifier for each item of the same type.

Transaction   Displays a unique identifier for each item in the worklist.

Working Items

Depending on how a worklist item is defined, different requirements exist 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:

Worklist Type	*Description*
User Specified	A work item is not marked as worked until you click Mark Worked. You typically use this option 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. You typically use this option 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 a worklist. You typically use this option 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. You typically use this option 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

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.

- 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 the PeopleSoft Navigator process-oriented organization, however, you might have a hiring activity that includes both payroll-related and benefits-related steps.

The PeopleSoft Navigator process orientation also provides a high-level view of the process, which helps you understand the overall flow of work in your organization. Unlike text and menu-based navigations, 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.

Related Links
Workflow Technology
"Understanding Workflow Maps" (PeopleTools 8.53: Workflow Technology)

PeopleSoft Navigator Hierarchy
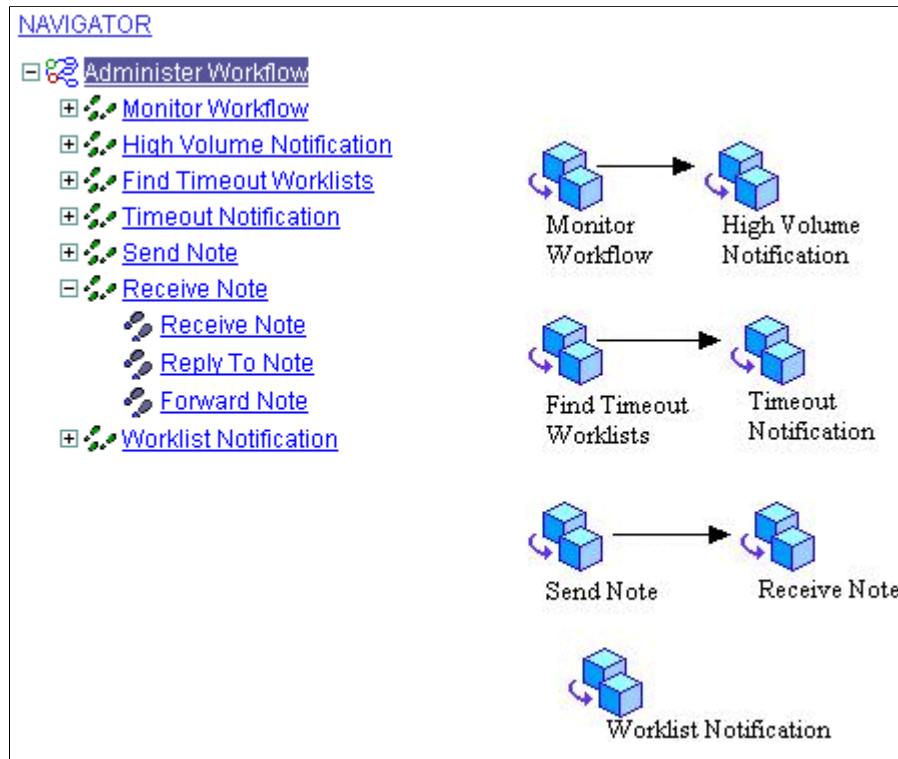
PeopleSoft Navigator maps are organized hierarchically, enabling you to navigate from processes to subprocesses to the lowest level page, where individual transactions occur. Workflow uses three hierarchical levels. The first two levels, business processes and activities, are both maps: graphical representations 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 they represent the level at which the user interacts directly with application pages.

Image: Example PeopleSoft Navigator hierarchy

This example illustrates the PeopleSoft Navigator hierarchy.

Related Links
"Understanding Map Hierarchies" (PeopleTools 8.53: Workflow Technology)

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:

Image: Map with workflow icons

This example illustrates a PeopleSoft Navigator map with workflow icons.
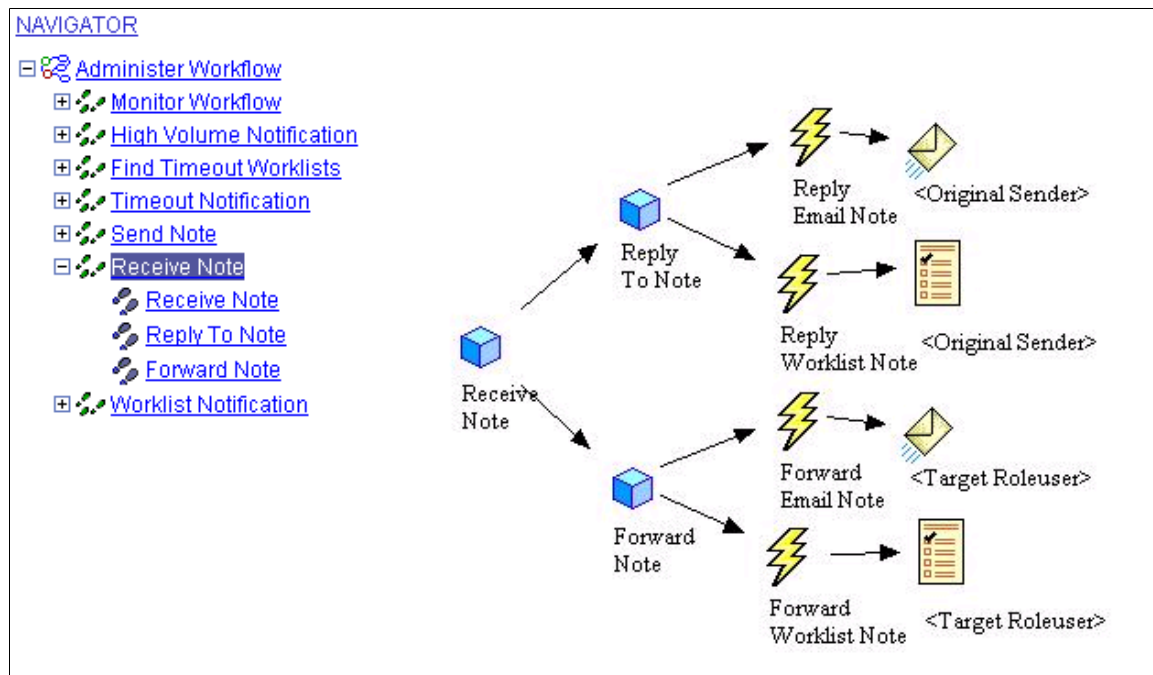
Some of the icons that you are likely to see include:

	Event: A condition that triggers a workflow notification.
	Email Routing: A workflow notification that is delivered to users by email.
	Worklist Routing: A workflow notification that is delivered to users through their worklist.

Related Links
"Understanding Workflow Maps" (PeopleTools 8.53: Workflow Technology)

Working With PeopleSoft Navigator

This section discusses how to:

• Navigate the map hierarchy.

• Navigate to pages.

- Navigate to the next page in an activity.

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 Pages

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. Therefore, you may need to go through a search page before accessing a 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.