



PEOPLESOFT PAGE AND FIELD CONFIGURATOR

SESSION 7036 NOVEMBER 5, 2019 11:30 AM - 12:30 PM

PRESENTERS

Jessica Claeys

Functional Systems Specialist

Western University

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5 years Peoplesoft experience

AP, Expenses, Procurement, G/L

Functional Lead for expense and approval workflow for PeopleSoft 9.2 upgrade

Katherine Wojtowich

Financial Officer – Accounts Receivable

Western University

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21 years PeopleSoft experience from version 6 – 9.2

Billing, Accounts Receivable, G/L

Functional Lead for Billing & Accounts Receivable upgrades



WESTERN UNIVERSITY

Located in London, Ontario 30,500 full-time enrolment 4,000 Full-time Staff Western Mustangs



WESTERN UNIVERSITY & ORACLE

Implemented PSoft in 1998 Finance, HR, CS, CRM Finance 9.2 Image 30 PTools 8.56.14

AGENDA

- PAGE AND FIELD CONFIGURATOR OVERVIEW
 Overview, goals and benefits
- PAGE AND FIELD CONFIGURATOR PAGES Pages to configure a component
- 3. EXAMPLE

 Customer General Information
- SUMMARY and DEMONSTRATION
 Summary

Review set-up steps for Customer General Information

PAGE AND FIELD CONFIGURATOR OVERVIEW

Why Page and Field Configurator?

WHY USE PAGE AND FIELD CONFIGURATOR?

Page and Field Configurator eliminates the need for page customizations through Application Designer. It enables you to meet your user needs without page customizations. During an upgrade the cost and impact of customizations are reduced.

WHY USE PAGE AND FIELD CONFIGURATOR?

Page and Field Configurator offers the ability to:

- Alter behaviour of data fields on a page.
 - Hide data fields, disable data entry, modify a field label, make a required field or use a default value
- Hide or make a page display only
- Apply alterations conditionally and define criteria using data on the page.
- Assign alterations to selective users, based on user, roles or specific portals



Path

Enterprise Components>Page and Field Configuration>Page and Field Configurator

What you need before starting

Component Name for the page you want to modify

Browser IE/11.0
Operating System WIN10
Browser Compression OFF
Tools Release 8.56.14

Application Release Financials/SCM 9.20.00.204

Service Pack 0

Page CUST_GENERAL1

Component CUSTOMER_GENERAL

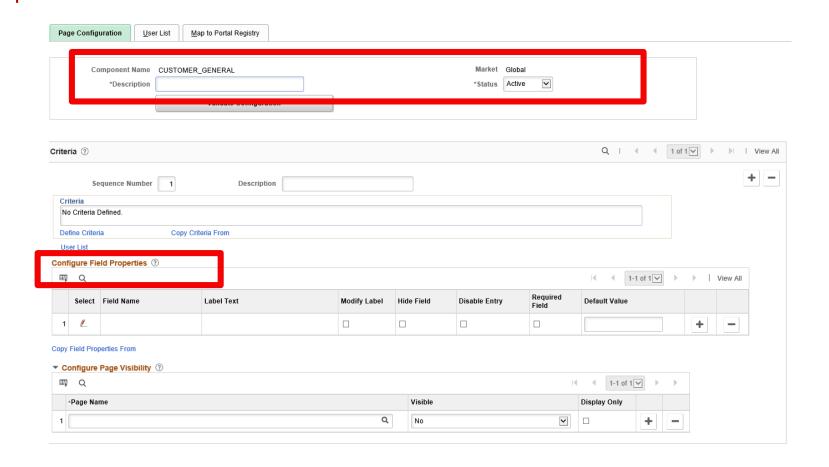
Menu MAINTAIN_CUSTOMERS

User ID KLWOJTOW
Database Name FSDEV
Database Type ORACLE

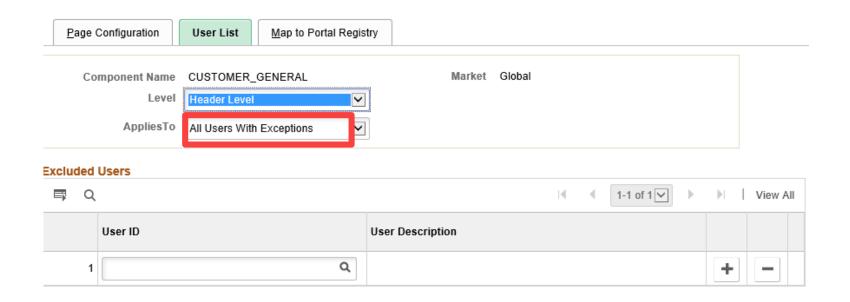
Application Server //alder01.its.uwo.pri:12120

Component Buffer Size (KB) 4029













EXAMPLE

Modify Customer General
Information Page



CUSTOMER GENERAL INFORMATION

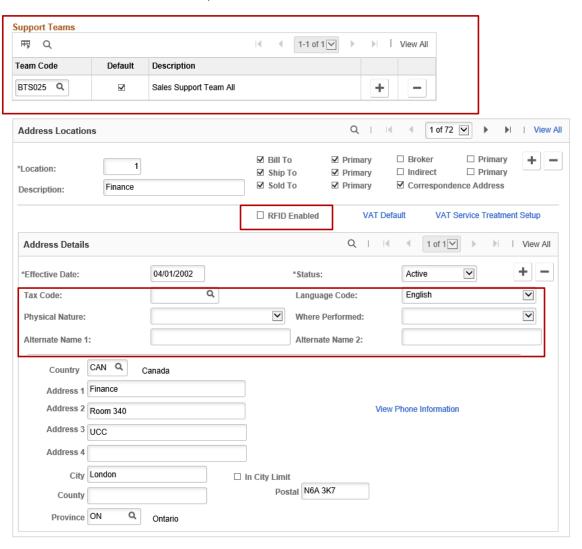
TOP OF GENERAL INFO PAGE (BEFORE USING PAGE AND FIELD CONFIGURATOR)

General Info	<u>B</u> ill	To Options	Ship 7	o Options	S <u>o</u> ld T	o Options	<u>M</u> iso	cellaneous Ge	eneral Info				
SetID: L	JWO	Custo	mer ID:		WES00	1555		G	General Info Links:	More			Gen
Status:		Active	V							Level:	Regular	~	7
Date Added:		01/01/1950			*Since:	01/01/1950	•••			*Type:	User 1	~	
Name:		USC					_		*Sho	ort Name:	USC		
Name 2:													
Currency Code:		CAD O		Ra	te Type:	CRRNT	Q						
Roles													
 ☑ Bill To Custo Bill To Selection ☑ Ship To Cust Ship To Selection ☑ Sold To Cust 	on comer tion			Corresp ✓ Remit	oondence From Cus rom Sele	ction							
Sold To Select	tion			Corpora	ate Select	ion			Consolida	4i Di-	11-:4-		7
☐ Indirect Cust	omer			☐ Grants	Manage	ment Sponso	r		Consolida	tion busin	less Unit:		_
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☐ Appropriation	n Symb	ool Not Req	uired for R		_				Dis	warsing C	moe.		



CUSTOMER GENERAL INFORMATION

BOTTOM OF GENERAL INFO PAGE (BEFORE USING PAGE AND FIELD CONFIGURATOR)





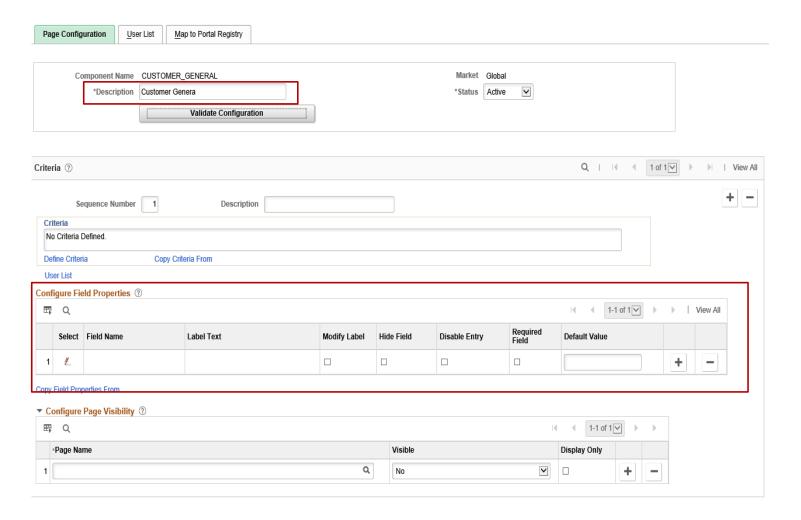
PAGE AND FIELD CONFIGURATOR

Page and Field Configurator

Find an Existin	g Value	Add a New \	V alue
Component Name	CUSTON	IER_GENERAL	Q
Market	Global		V
Add			

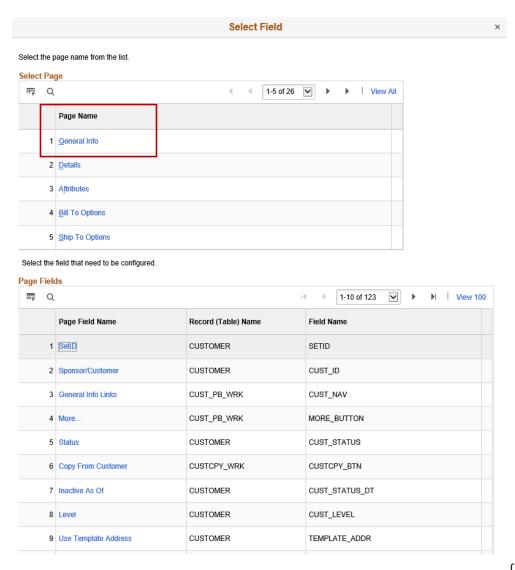


PAGE CONFIGURATION





CONFIGURE FIELD PROPERTIES — SELECT FIELD





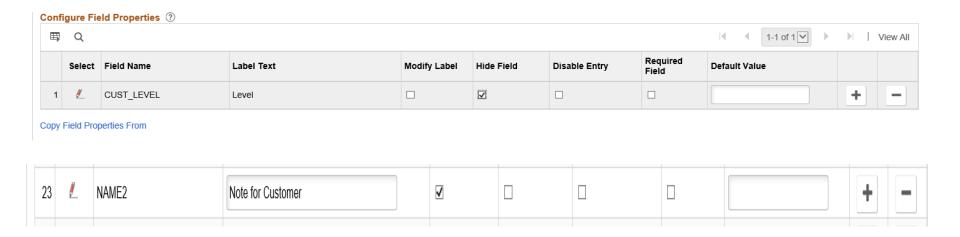
SELECT PAGE FIELDS

Select the field that need to be configured.

, 0	l.						
Page Field Name≜		Record (Table) Name	Field Name				
61	House Type Label	COUNTRY_TBL	HOUSE_TYPE_LBL				
62	PAC Interface	CUSTOMER	IPAC_INTERFACE				
63	In City Limit	CUST_ADDRESS	IN_CITY_LIMIT				
64	Inactive As Of	CUSTOMER	CUST_STATUS_DT				
65	Indirect	CUST_ADDR_SEQ	INDIRECT_ADDR				
66	Indirect Customer	CUSTOMER	INDIRECT_CUST_FLG				
67	Language Code	CUST_ADDRESS	LANGUAGE_CD				
68	Legal Name	UWO_DERIVED	WFS_NAME1_AC				
69	Level CUSTOMER		CUST_LEVEL				
70	Location	CUST_ADDR_SEQ	ADDRESS_SEQ_NUM				

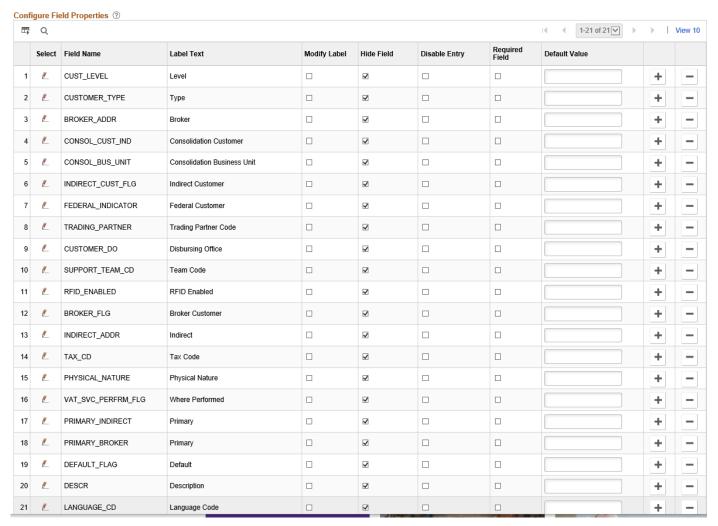


CONFIGURE FIELD PROPERTIES



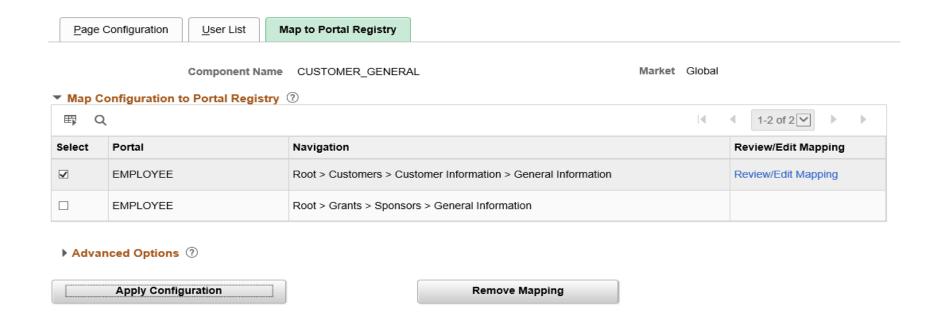


CONFIGURE FIELD PROPERTIES





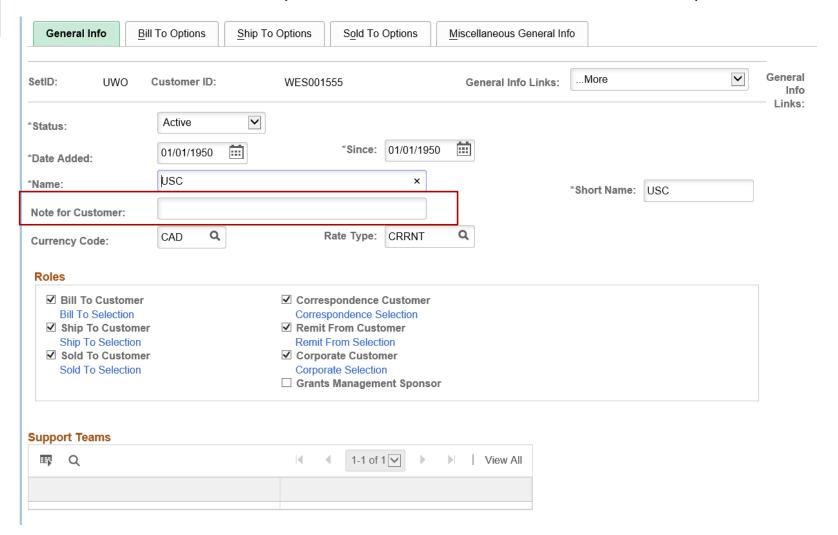
MAP TO PORTAL REGISTRY





CUSTOMER GENERAL INFORMATION

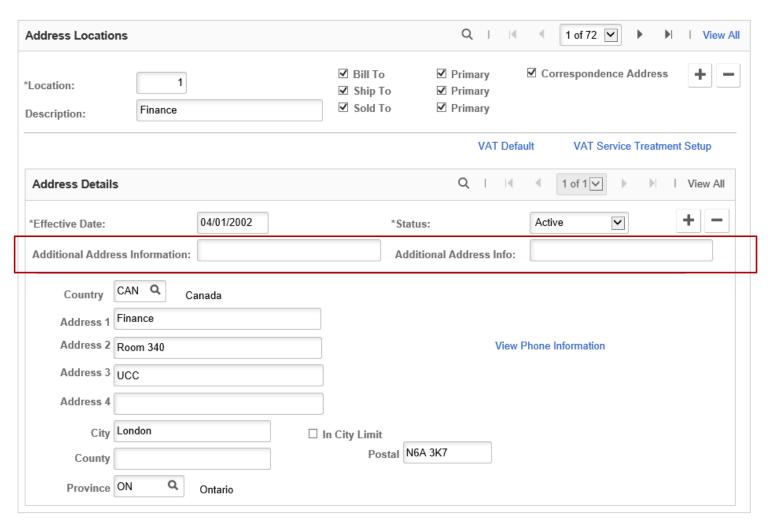
TOP OF GENERAL INFO PAGE (AFTER USING PAGE AND FIELD CONFIGURATOR)





CUSTOMER GENERAL INFORMATION

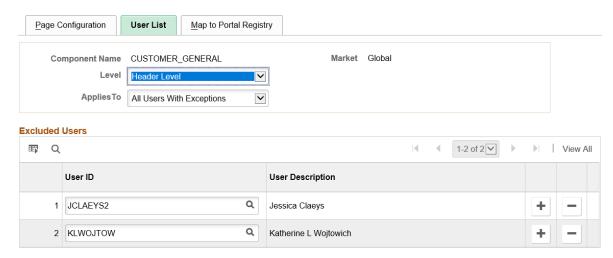
BOTTOM OF GENERAL INFO PAGE (AFTER USING PAGE AND FIELD CONFIGURATOR)



USER LIST

Applies to All Users With Exceptions

- 1. Enter the User ID you do not want to see the page modifications.
- We have used this so individuals in our Functional Systems group can turn off or on the page modification for themselves when working on a systems issue.



SUMMARY AND DEMONSTRATION

Review set-up steps
View A/P WorkCenter
example



SUMMARY

1. Page and Field Configurator allows

 The ability to hide, disable entry, indicate it is a required field or specify a default value and to also modify the label test(we used this on several pages for SpeedCode)

2. Down side of Page and Field Configurator

- a. Each field needs to be added one at a time
- b. Some page sections can not be hidden
- c. When a table is modified, you will find that some fields will reappear when moving back and forth between pages
- d. Need to determine if there is any Event Mapping on the page as this can wipe it out

3. Up side of Page and Field Configurator

- a) Customizations can be eliminated or reduces
- b) In our case Functional Systems staff can apply this to a page

4. Pages we have used Page and Field Configurator on so far

a) Standard Billing, Express Billing, Billing inquiry, Expense Entry, Expense Approvals, View Expenses, Advance Entry, View Advances, Journal Entry, Journal Copy, Voucher Entry, Vendor



DEMONSTRATION

Demonstration of the Customer General Information Page

CONCLUDING THOUGHTS ANY QUESTIONS?

PRESENTERS

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ALL ALLIANCE PRESENTATIONS WILL BE AVAILABLE FOR DOWNLOAD FROM THE CONFERENCE SITE





THANK YOU!

