



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

1. PAGE AND FIELD CONFIGURATOR OVERVIEW
Overview, goals and benefits
2. PAGE AND FIELD CONFIGURATOR PAGES
Pages to configure a component
3. EXAMPLE
Customer General Information
4. 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

PAGE AND FIELD CONFIGURATOR ACCESS



PAGE AND FIELD CONFIGURATOR PAGES

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

PAGE AND FIELD CONFIGURATOR PAGES

Page Configuration | User List | Map to Portal Registry

Component Name: CUSTOMER_GENERAL | Market: Global
*Description: | *Status: Active

Criteria [?] | 1 of 1 | View All

Sequence Number: 1 | Description:

Criteria: No Criteria Defined
[Define Criteria](#) | [Copy Criteria From](#)

User List

Configure Field Properties [?] | 1-1 of 1 | View All

Select	Field Name	Label Text	Modify Label	Hide Field	Disable Entry	Required Field	Default Value		
1	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Copy Field Properties From](#)

Configure Page Visibility [?] | 1-1 of 1 | View All

Page Name	Visible	Display Only		
1 <input type="text"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



PAGE AND FIELD CONFIGURATOR PAGES

Page Configuration **User List** Map to Portal Registry

Component Name CUSTOMER_GENERAL Market Global

Level **Header Level** ▼

AppliesTo **All Users With Exceptions** ▼

Excluded Users

🗨️ 🔍 1-1 of 1 ▼ ▶️ | View All

	User ID	User Description			
1	<input type="text"/>		<input data-bbox="1508 972 1561 1022" type="button" value="+"/>	<input data-bbox="1591 972 1644 1022" type="button" value="-"/>	



PAGE AND FIELD CONFIGURATOR PAGES

Page Configuration User List **Map to Portal Registry**

Component Name CUSTOMER_GENERAL Market Global

▼ **Map Configuration to Portal Registry** ?

Select	Portal	Navigation
<input type="checkbox"/>	EMPLOYEE	Root > Customers > Customer Information > General Information
<input type="checkbox"/>	EMPLOYEE	Root > Grants > Sponsors > General Information

▶ **Advanced Options** ?

Apply Configuration **Remove Mapping**

EXAMPLE

Modify Customer General
Information Page

CUSTOMER GENERAL INFORMATION

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

General Info | Bill To Options | Ship To Options | Sold To Options | Miscellaneous General Info

SetID: UWO Customer ID: WES001555 General Info Links: General Info Links:

*Status:
*Date Added: *Since:
*Name:
Name 2:
*Level:
*Type:
*Short Name:
Currency Code: Rate Type:

Roles

<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection
<input checked="" type="checkbox"/> Ship To Customer Ship To Selection	<input checked="" type="checkbox"/> Remit From Customer Remit From Selection
<input checked="" type="checkbox"/> Sold To Customer Sold To Selection	<input checked="" type="checkbox"/> Corporate Customer Corporate Selection
<input type="checkbox"/> Broker Customer	<input type="checkbox"/> Consolidation Customer Consolidation Business Unit: <input type="text"/>
<input type="checkbox"/> Indirect Customer	<input type="checkbox"/> Grants Management Sponsor

Federal Attributes

<input type="checkbox"/> Federal Customer	Trading Partner Code: <input type="text"/>	Disbursing Office: <input type="text"/>
<input type="checkbox"/> Appropriation Symbol Not Required for Reimbursable Agreements		

CUSTOMER GENERAL INFORMATION

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

Support Teams

1-1 of 1 | View All

Team Code	Default	Description		
BTS025	<input checked="" type="checkbox"/>	Sales Support Team All	+	-

Address Locations

1 of 72 | View All

*Location: Bill To Primary Broker Primary Primary

Description: Ship To Primary Indirect Primary

Sold To Primary Correspondence Address

RFID Enabled [VAT Default](#) [VAT Service Treatment Setup](#)

Address Details

1 of 1 | View All

*Effective Date: *Status:

Tax Code: <input type="text"/>	Language Code: <input type="text" value="English"/>
Physical Nature: <input type="text"/>	Where Performed: <input type="text"/>
Alternate Name 1: <input type="text"/>	Alternate Name 2: <input type="text"/>

Country Canada

Address 1

Address 2 [View Phone Information](#)

Address 3

Address 4

City In City Limit

County

Postal

Province Ontario



PAGE AND FIELD CONFIGURATOR

Page and Field Configurator

Find an Existing Value

Add a New Value

Component Name

CUSTOMER_GENERAL 

Market

Global



Add

PAGE CONFIGURATION

Page Configuration

User List

Map to Portal Registry

Component Name CUSTOMER_GENERAL

Market Global

*Description Customer Genera

*Status Active

Validate Configuration

Criteria ?

1 of 1 | View All

Sequence Number 1

Description

+ -

Criteria

No Criteria Defined.

Define Criteria

Copy Criteria From

User List

Configure Field Properties ?

1 of 1 | View All

Select	Field Name	Label Text	Modify Label	Hide Field	Disable Entry	Required Field	Default Value		
1			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		+ -	

Copy Field Properties From

Configure Page Visibility ?

1 of 1 | View All

Page Name	Visible	Display Only		
1	No	<input type="checkbox"/>	+ -	

CONFIGURE FIELD PROPERTIES – SELECT FIELD

Select Field ×

Select the page name from the list.

Select Page

	Page Name	
1	General Info	
2	Details	
3	Attributes	
4	Bill To Options	
5	Ship To Options	

Select the field that need to be configured.

Page Fields

	Page Field Name	Record (Table) Name	Field Name	
1	SetID	CUSTOMER	SETID	
2	Sponsor/Customer	CUSTOMER	CUST_ID	
3	General Info Links	CUST_PB_WRK	CUST_NAV	
4	More...	CUST_PB_WRK	MORE_BUTTON	
5	Status	CUSTOMER	CUST_STATUS	
6	Copy From Customer	CUSTCPY_WRK	CUSTCPY_BTN	
7	Inactive As Of	CUSTOMER	CUST_STATUS_DT	
8	Level	CUSTOMER	CUST_LEVEL	
9	Use Template Address	CUSTOMER	TEMPLATE_ADDR	

SELECT PAGE FIELDS

Select the field that need to be configured.

Page Fields

	Page Field Name▲	Record (Table) Name	Field Name
61	House Type Label	COUNTRY_TBL	HOUSE_TYPE_LBL
62	IPAC 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 ?

	Select	Field Name	Label Text	Modify Label	Hide Field	Disable Entry	Required Field	Default Value		
1		CUST_LEVEL	Level	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1700 749 1748 785" type="button" value="+"/>	<input data-bbox="1767 749 1816 785" type="button" value="-"/>

[Copy Field Properties From](#)

23		NAME2	<input type="text" value="Note for Customer"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1719 935 1767 971" type="button" value="+"/>	<input data-bbox="1787 935 1835 971" type="button" value="-"/>
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CONFIGURE FIELD PROPERTIES

Configure Field Properties ?

Select	Field Name	Label Text	Modify Label	Hide Field	Disable Entry	Required Field	Default Value		
1	CUST_LEVEL	Level	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 458 1483 478" type="button" value="+"/>	<input data-bbox="1522 458 1549 478" type="button" value="-"/>
2	CUSTOMER_TYPE	Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 505 1483 525" type="button" value="+"/>	<input data-bbox="1522 505 1549 525" type="button" value="-"/>
3	BROKER_ADDR	Broker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 544 1483 564" type="button" value="+"/>	<input data-bbox="1522 544 1549 564" type="button" value="-"/>
4	CONSOL_CUST_IND	Consolidation Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 582 1483 602" type="button" value="+"/>	<input data-bbox="1522 582 1549 602" type="button" value="-"/>
5	CONSOL_BUS_UNIT	Consolidation Business Unit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 635 1483 655" type="button" value="+"/>	<input data-bbox="1522 635 1549 655" type="button" value="-"/>
6	INDIRECT_CUST_FLG	Indirect Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 674 1483 694" type="button" value="+"/>	<input data-bbox="1522 674 1549 694" type="button" value="-"/>
7	FEDERAL_INDICATOR	Federal Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 718 1483 738" type="button" value="+"/>	<input data-bbox="1522 718 1549 738" type="button" value="-"/>
8	TRADING_PARTNER	Trading Partner Code	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 765 1483 785" type="button" value="+"/>	<input data-bbox="1522 765 1549 785" type="button" value="-"/>
9	CUSTOMER_DO	Disbursing Office	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 803 1483 823" type="button" value="+"/>	<input data-bbox="1522 803 1549 823" type="button" value="-"/>
10	SUPPORT_TEAM_CD	Team Code	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 848 1483 868" type="button" value="+"/>	<input data-bbox="1522 848 1549 868" type="button" value="-"/>
11	RFID_ENABLED	RFID Enabled	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 892 1483 912" type="button" value="+"/>	<input data-bbox="1522 892 1549 912" type="button" value="-"/>
12	BROKER_FLG	Broker Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 931 1483 951" type="button" value="+"/>	<input data-bbox="1522 931 1549 951" type="button" value="-"/>
13	INDIRECT_ADDR	Indirect	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 975 1483 995" type="button" value="+"/>	<input data-bbox="1522 975 1549 995" type="button" value="-"/>
14	TAX_CD	Tax Code	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 1019 1483 1039" type="button" value="+"/>	<input data-bbox="1522 1019 1549 1039" type="button" value="-"/>
15	PHYSICAL_NATURE	Physical Nature	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 1063 1483 1083" type="button" value="+"/>	<input data-bbox="1522 1063 1549 1083" type="button" value="-"/>
16	VAT_SVC_PERFRM_FLG	Where Performed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 1102 1483 1122" type="button" value="+"/>	<input data-bbox="1522 1102 1549 1122" type="button" value="-"/>
17	PRIMARY_INDIRECT	Primary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 1146 1483 1166" type="button" value="+"/>	<input data-bbox="1522 1146 1549 1166" type="button" value="-"/>
18	PRIMARY_BROKER	Primary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 1190 1483 1210" type="button" value="+"/>	<input data-bbox="1522 1190 1549 1210" type="button" value="-"/>
19	DEFAULT_FLAG	Default	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 1235 1483 1255" type="button" value="+"/>	<input data-bbox="1522 1235 1549 1255" type="button" value="-"/>
20	DESCR	Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 1279 1483 1299" type="button" value="+"/>	<input data-bbox="1522 1279 1549 1299" type="button" value="-"/>
21	LANGUAGE_CD	Language Code	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input data-bbox="1456 1323 1483 1343" type="button" value="+"/>	<input data-bbox="1522 1323 1549 1343" type="button" value="-"/>

MAP TO PORTAL REGISTRY

Page Configuration

User List

Map to Portal Registry

Component Name CUSTOMER_GENERAL

Market Global

Map Configuration to Portal Registry ?

Select	Portal	Navigation	Review/Edit Mapping
<input checked="" type="checkbox"/>	EMPLOYEE	Root > Customers > Customer Information > General Information	Review/Edit Mapping
<input type="checkbox"/>	EMPLOYEE	Root > Grants > Sponsors > General Information	

Advanced Options ?

Apply Configuration

Remove Mapping

CUSTOMER GENERAL INFORMATION

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

General Info | Bill To Options | Ship To Options | Sold To Options | Miscellaneous General Info

SetID: UWO Customer ID: WES001555 General Info Links: General Info Links:

*Status:

*Date Added: *Since:

*Name: *Short Name:

Note for Customer:

Currency Code: Rate Type:

Roles

<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection
<input checked="" type="checkbox"/> Ship To Customer Ship To Selection	<input checked="" type="checkbox"/> Remit From Customer Remit From Selection
<input checked="" type="checkbox"/> Sold To Customer Sold To Selection	<input checked="" type="checkbox"/> Corporate Customer Corporate Selection
	<input type="checkbox"/> Grants Management Sponsor

Support Teams

 1-1 of 1 |

CUSTOMER GENERAL INFORMATION

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

Address Locations 1 of 72 [View All](#)

*Location: Bill To Primary Correspondence Address
 Ship To Primary
Description: Sold To Primary

[VAT Default](#) [VAT Service Treatment Setup](#)

Address Details 1 of 1 [View All](#)

*Effective Date: *Status:

Additional Address Information: **Additional Address Info:**

Country Canada

Address 1

Address 2 [View Phone Information](#)

Address 3

Address 4

City In City Limit

County Postal

Province Ontario

USER LIST

Applies to All Users With Exceptions

1. Enter the User ID you do not want to see the page modifications.
2. 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.

Page Configuration **User List** Map to Portal Registry

Component Name CUSTOMER_GENERAL Market Global
Level **Header Level**
Applies To All Users With Exceptions

Excluded Users

1-2 of 2 | View All

	User ID	User Description		
1	JCLAEYS2	Jessica Claeys	+	-
2	KLWOJTOW	Katherine L Wojtowich	+	-

SUMMARY AND DEMONSTRATION

Review set-up steps
View A/P WorkCenter
example



SUMMARY

1. Page and Field Configurator allows
 - a. 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!

