



# **PeopleSoft Security for All**

## **Introduction to How Security Works**



## MEET THE PRESENTER



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# AGENDA:

Need to Know - Before You Begin  
What is PeopleSoft Security?

- UserID's
- Roles
- Permission List

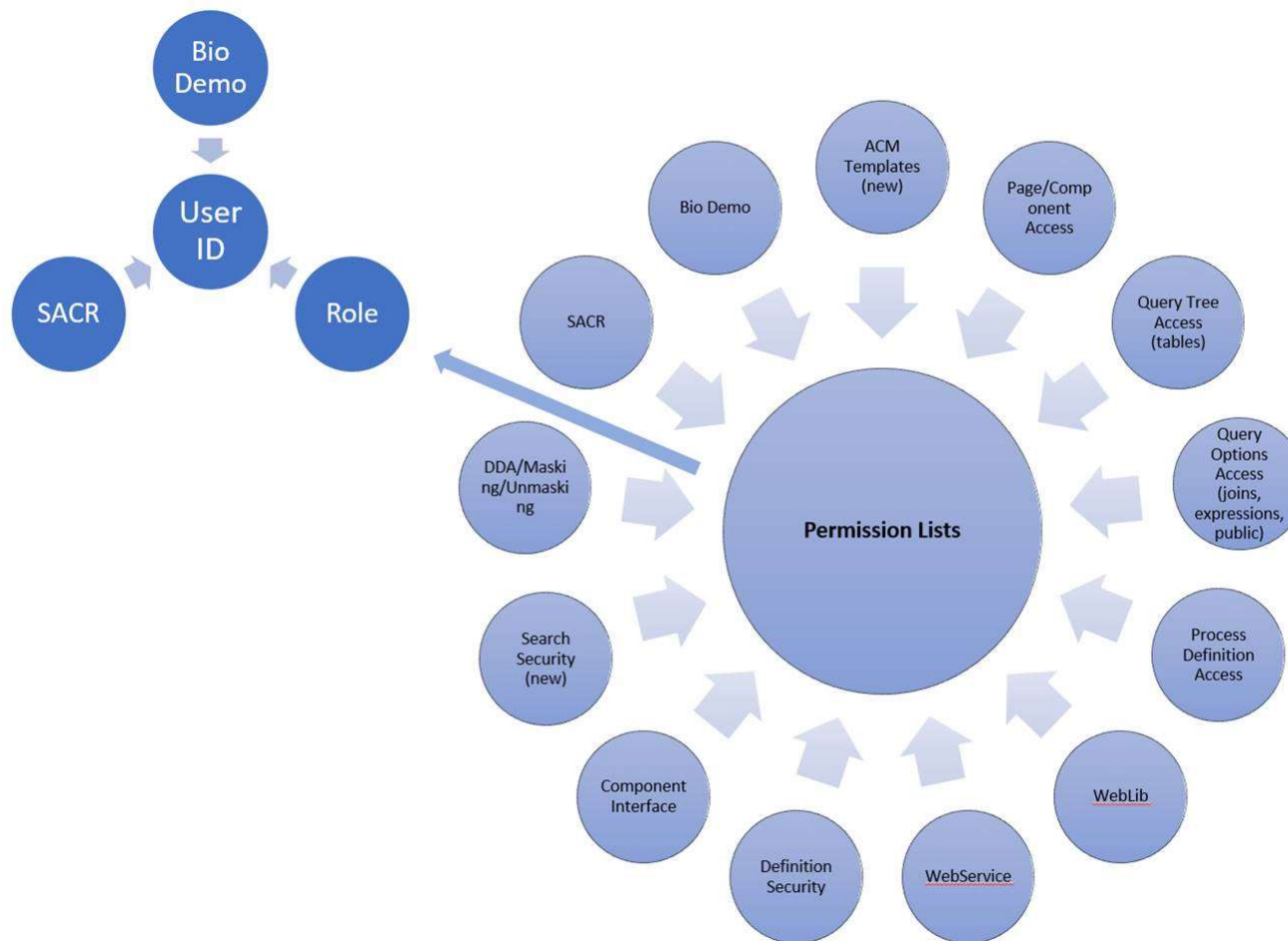
Trouble Shooting & Communication

Helpful Links

Questions



# HIGH LEVEL- WHAT IS SECURITY?



# Before You Begin

- Policies & Decisions
- Naming Standards

# POLICIES & DECISIONS

## **Security Policy Document**

- Defines what is acceptable and what is not acceptable for your environments- not just production.
- Lays out naming standards.
- Defines who can approve what, especially what approvals are required for elevated access, correct history

## **Data Access Policy**

- Defines who is allowed access to POI/Sensitive data (HIPPA/FERPA.)
- Query tree access/management

# SECURITY POLICY

## Sample of Security Policy/Strategy

<b>APPLICATION SECURITY STRATEGY .....</b>	<b>I</b>
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# DATA POLICY

## Sample of Data Access Policy

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# NAMING STANDARDS

## Consistency is important

- Many methods- no wrong or right -- think about who will be doing this job in 10 years
- Things to consider-
  - School, Campus, Location, Module, Actions- CH/A/U/DO or RO.
  - What kind of permission list is it? Pages/CI's/weblibs/query PeopleTools?
- Examples-
  - Prefix XX\_R\_PY\_PNA\_USAP\_CW2\_YE\_PRCs
  - Suffix XX\_PY\_PNA\_USAP\_CW2\_YE\_PRCs\_R
  - Abbreviations to be used (remember consistency)
    - Mst cmmn- rmv vwls
    - Use of 2-3 letter representation for common words/modules
  - Navigation Path (XX\_R\_PY\_PNA\_USAP\_CW2\_YE\_PRCs)
    - Payroll for North America > U.S. Annual Processing > Create W-2 Data > Load Year End Data

# NAMING STANDARDS: NOT JUST PERMISSION LISTS & ROLES

## UserID's

- Test accounts- if they all follow the same naming convention you can use a select statement in a datamover to pull out all testing accounts BEFORE a refresh- XX\_PYTEST001, XXBNTESTYE01
- Training Accounts- same as above- spend time creating basic training accounts for vastly different training groups, move them with dms or reload them with excel to ci.
- Batch Userids- same concept as above- XX\_HR\_BATCH
- Vendor/3<sup>rd</sup> party accounts
  - A good idea to have a separate account for each vendor, in case there is ever an issue you can shut down just that vendor account.

# What is PeopleSoft Security?

## User ID's:

- Unique to a person
- Multiple roles and data security to that UserID
- Ties to personal data on EMPLID tab

# USERID

GeneralIDRolesWorkflowAuditLinksUser ID Queries

User ID: HCRUSA\_KU0059

Description: [PS] Vicki Zinn - EE

☐ Account Locked Out?

**Logon Information**

Symbolic IDSYSADM1

☒ Change Password?

☐ Password Expired?

New Password

Confirm Password

User ID Alias

Edit Email Addresses

Instant Messaging Information

**General Attributes**

LanguageEnglish

CurrencyUS Dollar

Default Mobile Page

☐ Enable Expert Entry

**Permission Lists**

Navigator HomepageHCSPNAVHP

Process ProfileHCSPPRFL

PrimaryHCPPUSA

Row SecurityHCDPUSA

SaveReturn to SearchPrevious in ListNext in List

AddUpdate/Display

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

# USERID

General ID Roles Workflow Audit Links User ID Queries

User ID: HCRUSA\_KU0059

Description:

ID Types and Values Find | View All First 1 of 1 Last


\*ID Type: Employee

Attribute Name	Attribute Value	Description
Empl ID	KU0007	Locherty, Betty


User Description


Description:


< Home


 **Betty Locherty** ✓  
Director-Finance

[Update Photo](#)

 **Addresses**

 Contact Details

 Marital Status

 Name

**Addresses**

**Home Address**

643 Robinson St  
1  
Buffalo, NY 74940



# USERID

GeneralIDRolesWorkflowAuditLinksUser ID Queries

User ID HCRUSA\_KU0068  
Description Marc Kessler

Dynamic Role Rule

Execute on Server

Test Rule(s) Refresh

Execute Rule(s)

Process Monitor  
Service Monitor

User Roles

PersonalizeFindView All

First1-10 of 23Last

Role Name	Description	Dynamic		View Definition
AdhocUser_Role	Role for Adhoc User	<input type="checkbox"/>	Route Control	View Definition
Company Directory User	Company Directory User	<input type="checkbox"/>	Route Control	View Definition
EOAW_ADMINISTRATOR	EO Approvals administrator	<input type="checkbox"/>	Route Control	View Definition
EODI_RemoteUser	Desktop Integration User	<input type="checkbox"/>	Route Control	View Definition
EOPP_USER	Common Portal User	<input type="checkbox"/>	Route Control	View Definition
Employee	[WF] Employee	<input type="checkbox"/>	Route Control	View Definition
HCM Delegation Admin	HCM Delegation Admin	<input type="checkbox"/>	Route Control	View Definition
HCM SOA Services Port	HCM SOA Services Portal Access	<input type="checkbox"/>	Route Control	View Definition
Manager	Manager	<input type="checkbox"/>	Route Control	View Definition
PAPP_USER	Enterprise Portal User	<input type="checkbox"/>	Route Control	View Definition

SaveReturn to SearchPrevious in ListNext in List

AddUpdate/Display

# USERID

Favorites ▾ Main Menu ▾ > PeopleTools ▾ > Security ▾ > User Profiles ▾ > User Profiles

ORACLE® All ▾ Search >> Advanced Search Last S

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

User ID: HCRUSA\_KU0068  
Description: Marc Kessler

**Workflow Attributes**

Alternate User ID:  🔍

From Date:  31

To Date:  31

**Routing Preferences**

☒ Worklist User  
☒ Email User

**Reassign Work**

☐ Reassign Work To:  🔍

Total Pending Worklist Entries: 10

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

# USERID: PRIMARY PERMISSION LIST

## Definition Security

The screenshot displays the 'Definition Security' interface. On the left, the 'Permission List' is set to 'HCPPUSA' with the description 'Primary List - USA'. Below this, the 'Definition Groups' section shows a list with 'PEOPLETOOLS' selected. A yellow highlight is on the 'Definition Type Permissions' link. On the right, the 'Definition Permissions' panel shows the 'Permission List: HCPPUSA' and 'Description: Primary List - USA'. It features a table with 'Object' and '\*Access' columns, listing various system objects like 'Activities', 'Analytic Models', etc., all with 'No access'. To the right of the table are three buttons: 'Full Access (All)', 'Read Only (All)', and 'No Access (All)'. An arrow points from the 'Definition Type Permissions' link to the 'Definition Permissions' panel.

Object	*Access
Activities	No access
Analytic Models	No access
Analytic Types	No access
App Engine Programs	No access
Application Packages	No access
Approval Rule Sets	No access
Business Interlinks	No access
Business Processes	No access
Component Interfaces	No access
Components	No access
Fields	No access
File Layouts	No access
File References	No access

Definition security defines what you are allowed to do with certain objects that are grouped together- such as the Definition Group PeopleTools (Delivered)

# USERID: PRIMARY PERMISSION LIST

## Data Masking – (Campus Solutions)

- DDA (Demographic Data Access)
- Deciding who should get what?
- Search Match

Search Results	
View All First 1-5 of 5 Last	
Permission List	Description
<a href="#">UCPP_FULLMASK</a>	UC Primary PL w/ Full Masking
<a href="#">UCPP_SSNMASK_BDATEMASK</a>	UC Primary PL w/ both masked
<a href="#">UCPP_SSNMASK_BDATENOMASK</a>	UC Primary PL w/ one masked
<a href="#">UCPP_SSNMOMASK_BDATEMASK</a>	UC Primary PL w/ one masked
<a href="#">UCPP_SSNMOMASK_BDATENOMASK</a>	UC Primary PL w/ no masking

Demographic Data Access					
Configure Primary Permission List					
Personalize   Find   First 1-6 of 6 Last					
Set As Default	Primary Permission List	*Mask National ID	*Mask Birthdate		
<input checked="" type="checkbox"/>		Mask entire field	Mask entire field	+	-
<input type="checkbox"/>	<a href="#">UCPP_FULLMASK</a>	Mask entire field	Mask entire field	+	-
<input type="checkbox"/>	<a href="#">UCPP_SSNMASK_BDATEI</a>	Display partial field	Display partial date	+	-
<input type="checkbox"/>	<a href="#">UCPP_SSNMASK_BDATEI</a>	Display partial field	Display entire field	+	-
<input type="checkbox"/>	<a href="#">UCPP_SSNMOMASK_BDA</a>	Display entire field	Display partial date	+	-
<input type="checkbox"/>	<a href="#">UCPP_SSNMOMASK_BDA</a>	Display entire field	Display entire field	+	-

# USERID: PRIMARY PERMISSION LIST

## Mass Change

Users inherit mass change authorizations through their primary permission lists, not through roles.

Oracle PeopleTools Security > Permissions & Roles > Permission Lists

Search: All Search Advanced

Component Interfaces Web Libraries Web Services Personalizations Query **Mass Change**

Permission: HCPPALL  
List  
Description: Primary List - all countries

☐ OK To Execute Online

**Mass Change** Personalize | Find | 1-91 of 91

Mass Change Template ID		
Application Prog Update Select		
CR-Intv-Delete		
CR-Intv-Delete-Org		
CR-Intv-Insert 3CEngine		
CR-Intv-Insert 3CEngine-Org		
CR-Mbrshp-Delete		
CR-Mbrshp-Delete-Org		
CR-Mbrshp-Insert 3CEngine		
CR-Mbrshp-Insert 3CEngine-Org		
CompDir - Alumni		

Download Table to a File

**Message**

This Mass Group is comprised of Mass Changes that you are not authorized to execute. (106,18)

OK



# USERID: PRIMARY PERMISSION LIST / ROWSECCLASS

Oracle PeopleTools User Profiles page for user HCRUSA. The page shows various tabs like General, ID, Roles, Workflow, Audit, Links, and User ID Queries. The 'General' tab is active, displaying user details and permission lists. A blue arrow points to the 'Row Security' entry in the 'Permission Lists' section, which is highlighted in yellow.

**User ID:** HCRUSA  
**Description:** [PS] HRMS United States - User  
☐ Account Locked Out?

**Logon Information**

Symbolic ID: SYSADM1  
☐ Change Password?  
☐ Password Expired?  
User ID Alias:

**General Attributes**

Language: English  
Currency: US Dollar  
Default Mobile Page:   
☐ Enable Expert Entry

**Permission Lists**

Permission List	Value
Navigator Homepage	HCSPNAVHP
Process Profile	HCSPPRFL
Primary	HCPPUSA
Row Security	HCDPUSA

Buttons: Save, Return to Search, Previous in List, Next in List, Add, Update/Display

Data level security-  
Primary in Financials  
ROWSECCLASS in  
HCM and a part of  
Campus Data Security

# USERID: PROCESS PROFILE PERMISSION LIST

Process Profile-  
defines which  
ACTIONS can be  
completed when  
running processes

The screenshot shows the Oracle HRMS User Profile page for user HCRUSA. The page is titled "ORACLE" and has a navigation bar with "Favorites", "Main Menu", "PeopleTools", "Security", "User Profiles", and "User Profiles". A search bar is present with "All" and "Search" options. The "General" tab is selected, showing the "User ID: HCRUSA" and "Description: [PS] HRMS United States - User". The "Logon Information" section includes "Symbolic ID" (SYSADM1), "Change Password?" (unchecked), "Password Expired?" (unchecked), and "User ID Alias". The "General Attributes" section includes "Language" (English), "Currency" (US Dollar), "Default Mobile Page", and "Enable Expert Entry" (unchecked). The "Permission Lists" section shows "Navigator Homepage" (HCSPNAVHP), "Primary" (HCPPUSA), and "Row Security" (HCDPUSA). The "Process Profile" (HCSPPRFL) is highlighted in yellow. The bottom of the page has buttons for "Save", "Return to Search", "Previous in List", "Next in List", "Add", and "Update/Display".

# USERID: PROCESS PROFILE PERMISSION LIST

Might have 2 or 3 process profile permission lists- one for Self-service (includes students in CS), one for the majority of users, and one for powerusers or batch users.

Process Profile Permission

Permission List: HCSPPRFL

Description: Standard Process Profile

**Server Destinations**

File: %OutputDirectory%

Printer: lpt1

**OS/390 Job Controls**

Name:

Acct:

**Allow Requestor To**

- ☒ Override Output Destination
- ☒ Override Server Parameters
- ☒ View Server Status
- ☒ Update Server Status
- ☒ Enable Recurrence Selection

**Allow Process Request**

\*View By: All

\*Update By: All

OK Cancel

# USERID: PRIMARY PERMISSION LIST



All Primary Permission lists need to be registered here.




Setup Global Security

Primary Permission List HCPPUSA

Primary List - USA

Security Detail

Personalize | Find |   1 of 1

*Country	Description	Excluded Components		
USA 	United States	Excluded Components		

# USERID: PRIMARY PERMISSION LIST

Excluded Components -- you can restrict access to country-specific functionality in select components.

The screenshot displays the Oracle HRMS 'Setup Global Security' page. The breadcrumb trail indicates the path: Main Menu > Set Up HCM > Security > Component and Page Security > Setup Global Security. The page title is 'Setup Global Security' with a subtitle 'Primary Permission List HCPPUSA'. A table titled 'Security Detail' shows a single entry for 'USA' with the description 'United States'. A modal window titled 'Primary List - USA' is open, showing 'Excluded Panelgroups'. The modal has a search bar with 'PERSONAL\_DATA' entered and a search icon. Below the search bar are 'OK' and 'Cancel' buttons. The modal also includes a 'Data' section with 'Personalize', 'Find', 'View All', and '1 of 1' indicators.

*Country	Description
USA	United States

Component Name
PERSONAL_DATA



# What is PeopleSoft Security?

## Roles:

- Logical grouping of permission lists, shared between UserID's with similar job DUTIES.

# ROLES

- Logical grouping of permission lists
- Good idea to have a Base role for main job location-SR/FA/SF/AD/AA/PY/HE/BN/AP
  - Can be used in future for querying and grouping, identifying a group of people to add additional access to.
- Self-Service Roles
  - Assigned by Affiliation/a queryable group of people
    - Active Employees
    - Students
    - Retirees
- Staff Roles
  - Assigned by Security Team or dynamic by key features

# ROLES: GENERAL

Make the description helpful when viewing on a User Profile

**General** | Permission Lists | Members | Dynamic Members | Workflow | Role Grant | Links | Role Queries | Audit

Role Name: SCI\_SAMPLE\_DYNROLE

\*Description: Sample of a DYNROLE

**Long Description**

Created on 5/8/2017- Please check with Denise Goin before removing  
This is a great spot for putting change control- document changes. Document Permission lists, put warnings- SOD conflicts- there are multiple uses for this box.

Save Add Update/Display

General | Permission Lists | Members | Dynamic Members | Workflow | Role Grant | Links | Role Queries | Audit

# ROLES: PERMISSION LISTS

When you name your permission lists and put in a description make them useful when viewing in the Role Permission List page.

General

Permission Lists

Members

Dynamic Members

Workflow

Role Grant

Links



Role Queries



Audit









Role Name: CRM\_Integration\_Admin

Description: CRM Integration Administrator

Permission Lists

Personalize | Find | View All |  

First  1-3 of 3  Last

*Permission List	Description	View Definition		
CRM8000	 CRM Integration Administrator	View Definition		
HCSPSERVICE	 Standard Service security	View Definition		
PTPT4000	 PeopleSoft Integration Network	View Definition		

# ROLES: WORKFLOW

General

Permission Lists

Members

Dynamic Members

Workflow

Role Grant

Links

Role Name

HCM Delegation Admin

Description


HCM Delegation Admin


Workflow Routing Options


☒ Allow notification


☒ Allow Recipient Lookup


☐ Use Query to Route Workflow

 Save

 Return to Search

 Previous in List

 Next in List



General | [Permission Lists](#) | [Members](#) | [Dynamic Members](#) | [Workflow](#) | [Role Grant](#) | [Links](#) | [Role Queries](#) | [Aud](#)



# ROLES: ROLE GRANT



General

Permission Lists

Members

Dynamic Members

Workflow

Role Grant

Links

Role Queries

Audit

Role Name

HCM Delegation Admin

Description

HCM Delegation Admin

Roles That Can Be Granted By This Role

Personalize

Find

View All

First

1 of 1

Last

Role Name	Description	View Definition
		View Definition

Roles That Can Grant This Role

Personalize

Find

View All

First

1 of 1

Last

Role Name	Description	View Definition
		View Definition

Save

Return to Search

Previous in List

Next in List

Add

Update/Display

General

Permission Lists

Members

Dynamic Members

Workflow

Role Grant

Links

Role Queries

Audit

# ROLES: ROLE GRANT

Why is Role Grant a favorite of mine?

## **In Non-Production Environments**

- Great for non-prd/testing access to team leads/functional testers
  - Let them add and remove all Self Service or module specific roles
  - Simplifies the testing process and reduces wait times
- Great for training environments
  - Let the training team assign/remove roles based on the upcoming training sessions
- To grant access to a “All Pages” role but you do not want it on all the time.

# ROLES: ROLE GRANT

Why is Role Grant a favorite of mine?

**In Production-** suggest only if auditing psroleuser table

- Multiple Campus School
  - If you need to restrict access to a specific set of roles based on location
- To grant access to specific pages when needed, instead of them being assigned 24x7x365-
  - Message Catalog
  - Translate Values
- SOD/Leading Practice fulfillment
- Enrollment Page- granted by Registrar when needed

# ROLES: DYNAMIC

General

Permission Lists

Members

Dynamic Members

Workflow

Role Grant

Links

Role Queries

Audit

Role Name

SCI\_SAMPLE\_DYNROLE

Description

Sample of a DYNROLE

Rules

☒ Query Rule Enabled

☐ PeopleCode Rule Enabled

☐ Directory Rule Enabled

Assign Directory Rule

Query Rule

Query

SCI\_DGOIN\_DYNROLE

Test Rule(s)

Execute on Server

Execute Rule(s)

Process Monitor

Service Monitor

Refresh

User ID

Search

Delete Members

Dynamic Members

Personalize | Find | View All |

First 1 of 1 Last

User ID	Description	
		View Definition
		View Definition

# ROLES: DYNAMIC

GeneralID**Roles**WorkflowAuditLinksUser ID Queries

User ID DGOIN  
Description Denise Goin

Dynamic Role Rule

Execute on

Server

Test Rule(s)Refresh

Execute Rule(s)

Process Monitor  
Service Monitor

User Roles

Personalize | Find | View 100 | First

Role Name	Description	Dynamic	
SCI_SAMPLE_DYNROLE	Sample of a DYNROLE	<input checked="" type="checkbox"/>	Route Control
AM EA Administra	AM EA Administrator	<input type="checkbox"/>	Route Control
AM Administrator	Absence Mngmnt Administrator	<input type="checkbox"/>	Route Control
ACM Administrato	ACM Administrator	<input type="checkbox"/>	Route Control
Benefits Administr	[WF] Benefits Administrator	<input type="checkbox"/>	Route Control

# ROLES: DYNAMIC POP QUIZ 1

- ```
SELECT DISTINCT A.OPRID
FROM PSOPRDEFN A, PS_EMPLOYEES B, PS_EMPLMT_SRCH_QRY B1
WHERE ( B.EMPLID = B1.EMPLID
AND B.EMPL_RCD = B1.EMPL_RCD
AND B1.OPRID = 'DGOIN'
AND ( A.ACCTLOCK = 0
AND B.EMPLID = A.EMPLID
AND B.EFFDT =
(SELECT MAX(B_ED.EFFDT) FROM PS_EMPLOYEES B_ED
WHERE B.EMPLID = B_ED.EMPLID
AND B.EMPL_RCD = B_ED.EMPL_RCD
AND B_ED.EFFDT <= SYSDATE)
AND B.EFFSEQ =
(SELECT MAX(B_ES.EFFSEQ) FROM PS_EMPLOYEES B_ES
WHERE B.EMPLID = B_ES.EMPLID
AND B.EMPL_RCD = B_ES.EMPL_RCD
AND B.EFFDT = B_ES.EFFDT) ))
```



# ROLES: DYNAMIC POP QUIZ 2

- ```
SELECT DISTINCT A.OPRID
FROM PSOPRDEFN A, PS_EMPLOYEES B, PS_EMPLMT_SRCH_QRY B1
WHERE ( B.EMPLID = B1.EMPLID
AND B.EMPL_RCD = B1.EMPL_RCD
AND B1.OPRID = 'DGOIN'
AND ( A.ACCTLOCK = 0
AND B.EMPLID = A.EMPLID
AND B.EFFDT =
  (SELECT MAX(B_ED.EFFDT) FROM PS_EMPLOYEES B_ED
  WHERE B.EMPLID = B_ED.EMPLID
  AND B.EMPL_RCD = B_ED.EMPL_RCD
  AND B_ED.EFFDT <= SYSDATE)
AND B.EFFSEQ =
  (SELECT MAX(B_ES.EFFSEQ) FROM PS_EMPLOYEES B_ES
  WHERE B.EMPLID = B_ES.EMPLID
  AND B.EMPL_RCD = B_ES.EMPL_RCD
  AND B.EFFDT = B_ES.EFFDT) ))
```

# ROLES: DYNAMIC POP QUIZ 3

- ```
SELECT DISTINCT A.OPRID
FROM PSOPRDEFN A, PS_EMPLOYEES B, PS_EMPLMT_SRCH_QRY B1
WHERE ( B.EMPLID = B1.EMPLID
AND B.EMPL_RCD = B1.EMPL_RCD
AND B1.OPRID = 'DGOIN'
AND ( A.ACCTLOCK = 0
AND B.EMPLID = A.EMPLID
AND B.EFFDT =
  (SELECT MAX(B_ED.EFFDT) FROM PS_EMPLOYEES B_ED
  WHERE B.EMPLID = B_ED.EMPLID
  AND B.EMPL_RCD = B_ED.EMPL_RCD
  AND B_ED.EFFDT <= SYSDATE)
AND B.EFFSEQ =
  (SELECT MAX(B_ES.EFFSEQ) FROM PS_EMPLOYEES B_ES
  WHERE B.EMPLID = B_ES.EMPLID
  AND B.EMPL_RCD = B_ES.EMPL_RCD
  AND B.EFFDT = B_ES.EFFDT) ))
```

# ROLES: DYNAMIC POP QUIZ 4

- EMPLID
- EMPL\_RCD
- BIRTHDATE
- BIRTHPLACE
- DT\_OF\_DEATH
- Name data including preferred first name
- ADDRESS1
- NATIONAL\_ID\_TYPE
- NATIONAL\_ID
- SEX
- HIGHEST\_EDUC\_LVL
- MILITARY\_STATUS

# What is PeopleSoft Security?

## Permission Lists:

- Logical grouping of pages/components based on TASKS
- Masking of SSN/Birthdates (on UserID)

# PERMISSION LISTS

- General- App Server/ and Timeouts
- Access to Pages  
Permissions to PeopleTools objects
- Data Set Access
- Process Group access
- Process Profile- What you can do in Process Monitor or when running processes
- Component Interface (just the basics)
- Web Libraries
- Query Access Group (tables to see/use)
- Query Profile (What can be done in Query)
- Mass Change (just the basics)
- Links/Audit
- Permission List Queries

# PERMISSION LISTS

|                |       |             |         |               |                      |   |
|----------------|-------|-------------|---------|---------------|----------------------|---|
| <b>General</b> | Pages | PeopleTools | Process | Sign-on Times | Component Interfaces | ▶ |
|----------------|-------|-------------|---------|---------------|----------------------|---|

Permission List: PTPT1000

Description:

**Permission List General**

Navigator Homepage:  🔍

☐ Can Start Application Server?

☐ Allow Password to be Emailed?

**Time-out Minutes**

☒ Never Time-out

☐ Specific Time-out (minutes)



# PERMISSION LISTS

General **Pages** PeopleTools Process Sign-on Times Component Interf

Permission HCCPAM1  
List  
Description Absence Mngmnt Administrator

Mobile Page Permissions

**Menus** Personalize | Find | View All | First 1-7 of 7 Last

| Menu Name                           | Menu Label                    | Edit Components |
|-------------------------------------|-------------------------------|-----------------|
| DEFINE_PAYROLL_RULES_(GBL)          | Define Global Payroll Rules   | Edit Components |
| DEFINE_TIME_AND_LABOR               | Define Time and Labor         | Edit Components |
| MAINTAIN_GLOBAL_PAYROLL_RULES_(GBL) | Maintain Global Payroll Rules | Edit Components |

Define Global Payroll Rules

**Components** Personalize | Find | First 1-130 of 130 Last

| Component Name  | Item Label                  | Edit Pages | View Content References for this Component |
|-----------------|-----------------------------|------------|--------------------------------------------|
| BANK_EC         | Add Bank Information        | Edit Pages | View                                       |
| DEP_SCHED       | Deposit Schedules           | Edit Pages | View                                       |
| EFT_NAME        | Electronic Transfer Formats | Edit Pages | View                                       |
| GPSC_ELM_BRW_FL | Element Browser - Viewer    | Edit Pages | View                                       |

Page Permissions

DEFINE\_PAYROLL\_RULES\_(GBL) / Setup 5 / Add Bank Information

**Pages** Personalize | Find | First 1-2 of 2 Last

| Panel Item Name | Authorized?              | Display Only             | Actions                                                                                                                                                       |
|-----------------|--------------------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Bank Table      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> Add<br><input type="checkbox"/> Update/Display<br><input type="checkbox"/> Update/Display All<br><input type="checkbox"/> Correction |
| Branch Table    | <input type="checkbox"/> | <input type="checkbox"/> |                                                                                                                                                               |

Select All  
Deselect All

# PERMISSION LISTS PEOPLETOOLS

General Pages **PeopleTools** Process Sign-on Times

Permission List PTPT1000  
Description PeopleSoft User

**PeopleTools Permissions**

☐ Application Designer Access  
Tools Permissions Miscellaneous Permissions

☐ Data Mover Access

☐ Definition Security Access

☐ Query Access

☐ Performance Monitor PPMI Access

☐ PeopleTools Data Set Access

**Realtime Event Notification**

Realtime Event Notification Permissions

**Data Archival**

☐ Generate SQL ☐ Edit SQL  
☐ Run SQL ☐ Purge Audit

Save Return to Search

**Tools Permission**

Permission List: PTPT1000  
Description: PeopleSoft User

Personalize Find First 1-9 of 9 Last

| Tool                  | *Access Code |
|-----------------------|--------------|
| Build / Data Admin.   | No access    |
| Change Control        | Supervisor   |
| Language Translations | No access    |
| Merge                 | No Access    |

Full Access (A)  
Read Only (A)  
No Access (A)

**Miscellaneous Permissions**

Permission List: PTPT1000  
Description: PeopleSoft User

Personalize Find First 1-6 of 6 Last

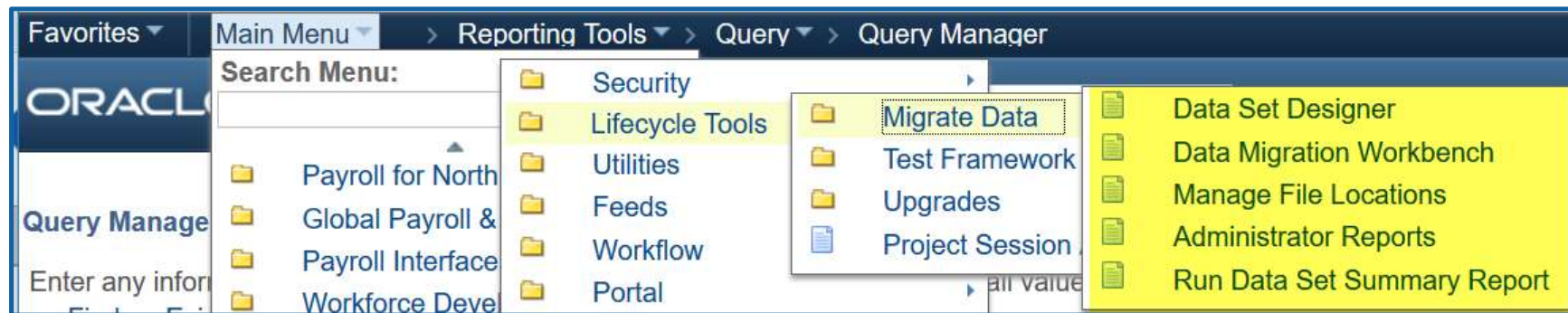
| Feature         | *Access   |
|-----------------|-----------|
| Access Profiles | No access |
| Colors          | No access |
| Field Formats   | No access |
| File Type Codes | No access |
| Styles          | No access |
| Tool Bar        | No access |

Full Access (A)  
Read Only (A)  
No Access (A)

# PERMISSION LISTS PEOPLETOOLS

## Newer Features

Data Sets- search for **Understanding the PeopleSoft Data Migration Workbench** in your PeopleBooks



# PERMISSION LISTS DATA MIGRATION

The screenshot displays the Oracle PeopleSoft Security interface. The breadcrumb navigation at the top reads: Favorites > Main Menu > PeopleTools > Security > Permissions & Roles > Permission Lists. The main header includes the ORACLE logo, a search bar with 'All' and 'Search' buttons, and links for 'Advanced Search' and 'Last Search Results'.

The left sidebar contains several tabs: Personalizations, Query, Mass Change, Links, Audit, and Data Migration (which is highlighted). Below these tabs, the 'Data Migration' section is active, showing 'Permission PTPT1000 List' and 'Description PeopleSoft User'. A button labeled 'Copy Compare Report Permission' is visible. Below this, the 'Access Group Permissions' section is highlighted, showing 'Copy Compare Report Permission'. At the bottom of the sidebar are buttons for 'Save', 'Return to Search', and 'Add'.

A modal dialog box titled 'Permission List Access Groups' is open in the foreground. It contains the same permission information: 'Permission PTPT1000 List' and 'Description PeopleSoft User'. Below this, there is a table with columns for '\*Tree Name', '\*Access Group', 'Read', and 'Write'. The table has one row with empty input fields for the first two columns and checkboxes for the last two. Navigation controls at the top of the dialog include 'Personalize', 'Find', and 'First 1 of 1 Last'.

# PERMISSION LISTS

Browser address bar: <https://employees.sierra-cedar.com/psp/pubhrdem/EMPLOYEE/HRMS/c/DanaInfo=hr> 83%

Navigation: Favorites ▾ Main Menu ▾ > PeopleTools ▾ > Security ▾ > Permissions & Roles ▾ > Permission Lists

ORACLE® All ▾ Search Advanced Search Last 5

General Pages **PeopleTools** Process Sign-on Times

Permission List: PTPT1000  
Description: PeopleSoft User

**PeopleTools Permissions**

- ☐ Application Designer Access
  - Tools Permissions
  - Miscellaneous Permissions
- ☐ Data Mover Access
- ☐ Definition Security Access
- ☐ Query Access
- ☐ Performance Monitor PPMI Access
- ☐ PeopleTools Data Set Access

**Realtime Event Notification**

Realtime Event Notification Permissions

**Data Archival**

- ☐ Generate SQL
- ☐ Edit SQL
- ☐ Run SQL
- ☐ Purge Audit

Buttons: Save Return to Search Add

**REN Permissions**

Permission List: PTPT1000  
Description: PeopleSoft User

Buttons: Full Access (F) No Access (A)

Permission Lists Personalize Find | 1-9 of 9 First Last

| Object              | *Access Code |
|---------------------|--------------|
| MCF Agent           | No Access ▾  |
| MCF CTI Server      | No Access ▾  |
| MCF Customer        | No Access ▾  |
| MCF MCFLOG Server   | No Access ▾  |
| MCF Notify Queue    | No Access ▾  |
| MCF Supervisor      | No Access ▾  |
| MCF UQSRV Server    | No Access ▾  |
| Optimization Notify | No Access ▾  |
| Reporting Window    | No Access ▾  |

Buttons: OK Cancel

# PERMISSION LISTS

## **Authorized Actions:**




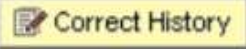
- Misunderstanding on CH: Not correction mode. It is Correct History, as in going back in history and changing data. Those changes must be brought forward in time where relevant. Can cause orphans and corrupt data if done incorrectly.
- Add: means when you first navigate to a page there is an Add and Search Tab- not needed to add a row in a grid on a page.

## **Update Display vs. Update Display All:**

- Update display means that you can load the page with the current data and any future data. You can Add a row of data- current or future. You can change future dated rows.
- Update Display All means you can do all above + view historical rows
- Correct History means you can do all the above plus make historical changes (see above- Misunderstanding on CH)



# PERMISSION LISTS

| Page Action Symbol                                                                                  | Action Type            | Rows to Retrieve            | Rows to Insert                     | Rows to Update |
|-----------------------------------------------------------------------------------------------------|------------------------|-----------------------------|------------------------------------|----------------|
|  Add               | Add                    | N/A                         | New high level key                 | N/A            |
|  Update/Display    | Update/Display         | Current, Future             | New EFFDT><br>Current Row<br>EFFDT | Future only    |
|  Include History   | Update/<br>Display All | History, Current,<br>Future | New EFFDT><br>Current Row<br>EFFDT | Future only    |
|  Correct History | Correction             | History, Current,<br>Future | Any EFFDT                          | All rows       |

# PERMISSION LISTS – AUTHORIZED ACTIONS

## **PSPGEACCESSDESC**

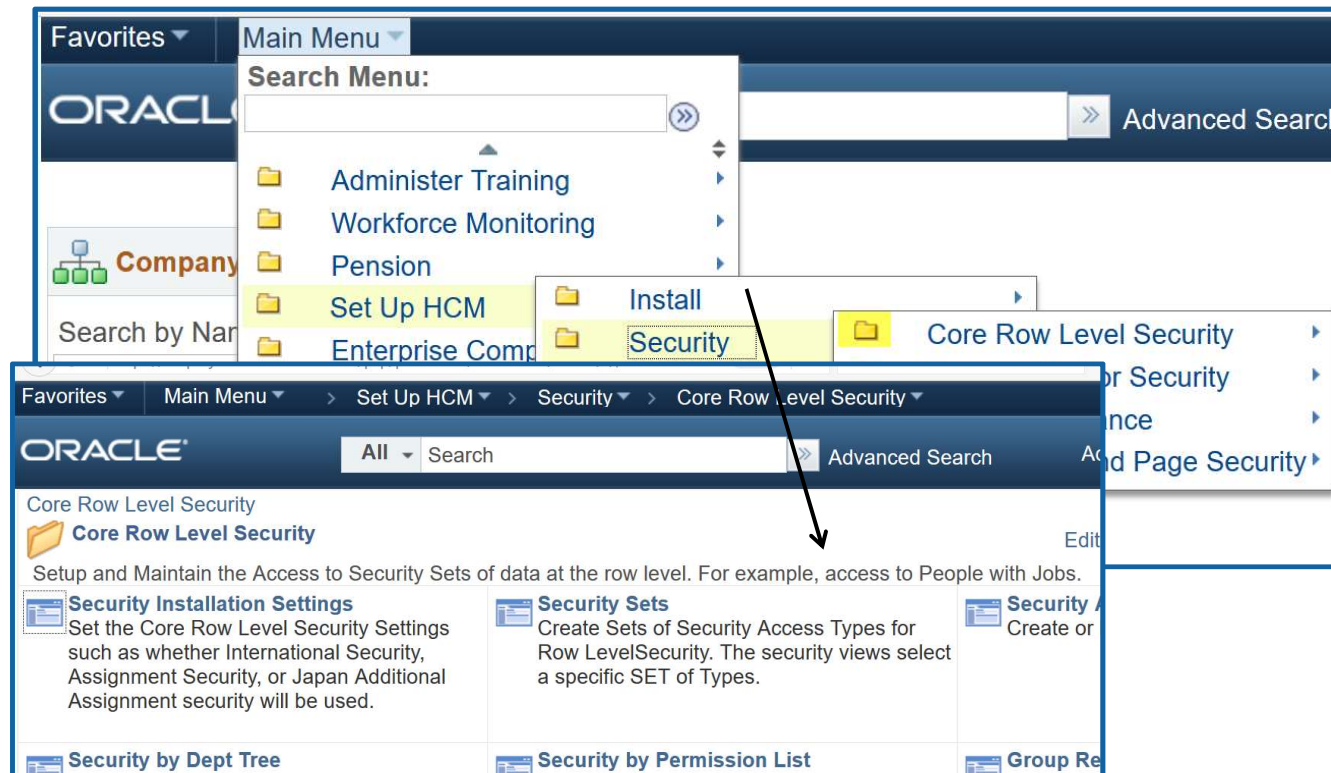
|     |                                                             |
|-----|-------------------------------------------------------------|
| 1   | Add                                                         |
| 2   | Update/Display                                              |
| 3   | Add Update/Display                                          |
| 4   | Update/Display All                                          |
| 5   | Add Update/Display All                                      |
| 6   | Update/Display Update/Display All                           |
| 7   | Add Update/Display Update/Display All                       |
| 8   | Correction                                                  |
| 9   | Add Correction                                              |
| 10  | Update/Display Correction                                   |
| 11  | Add Update/Display Correction                               |
| 12  | Update/Display All Correction                               |
| 13  | Add Update/Display All Correction                           |
| 14  | Update/Display Update/Display All Correction                |
| 15  | Add Update/Display Update/Display All Correction            |
| 139 | Add Update/Display Correction Data Entry                    |
| 143 | Add Update/Display Update/Display All Correction Data Entry |

# Security Trouble Shooting & Communication

My Security is Broken

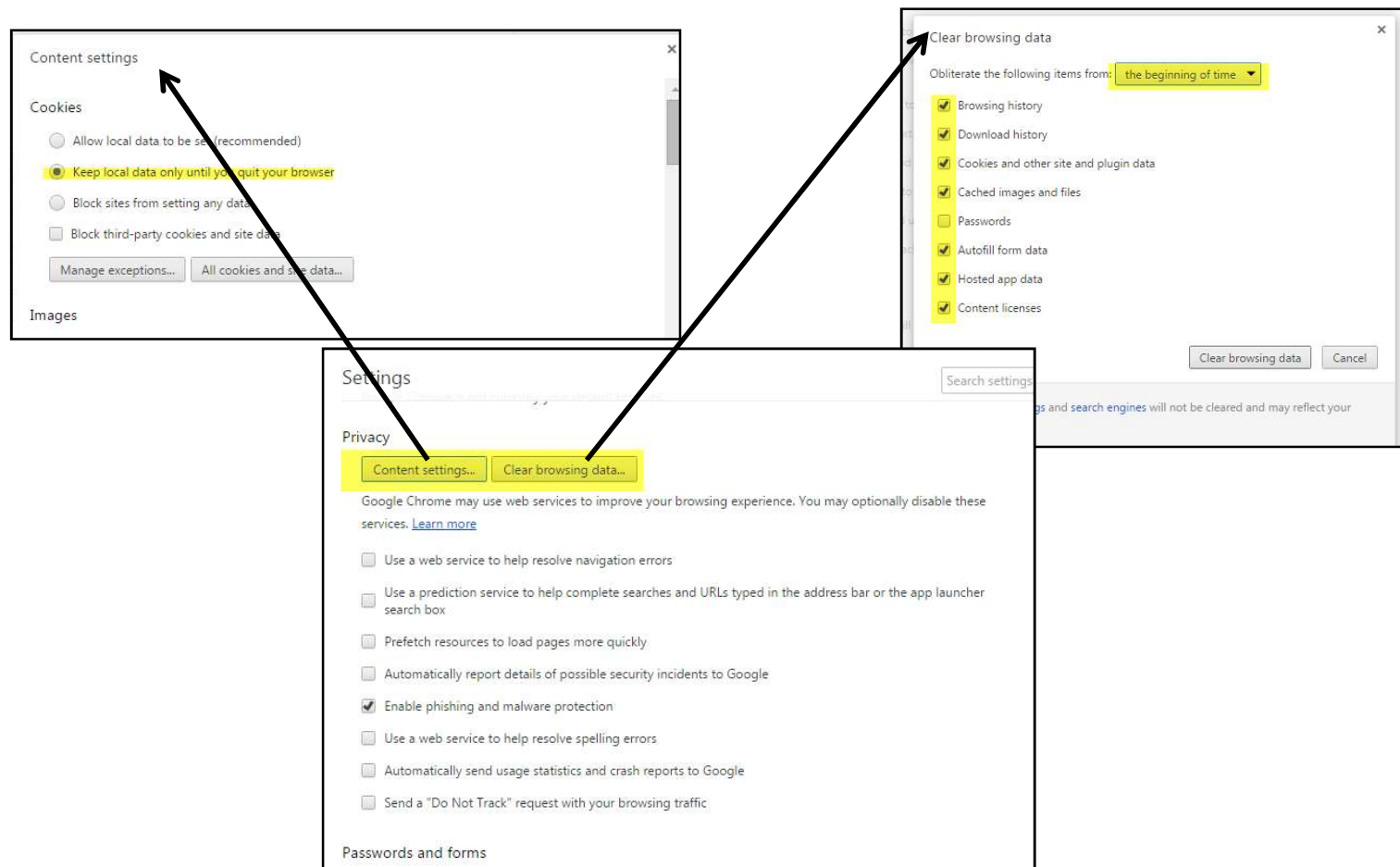
# MY SECURITY IS BROKEN: NAVIGATION

Sometimes cache can get “confused”. If you do not see it in the drop down navigation, try clicking on the folders.



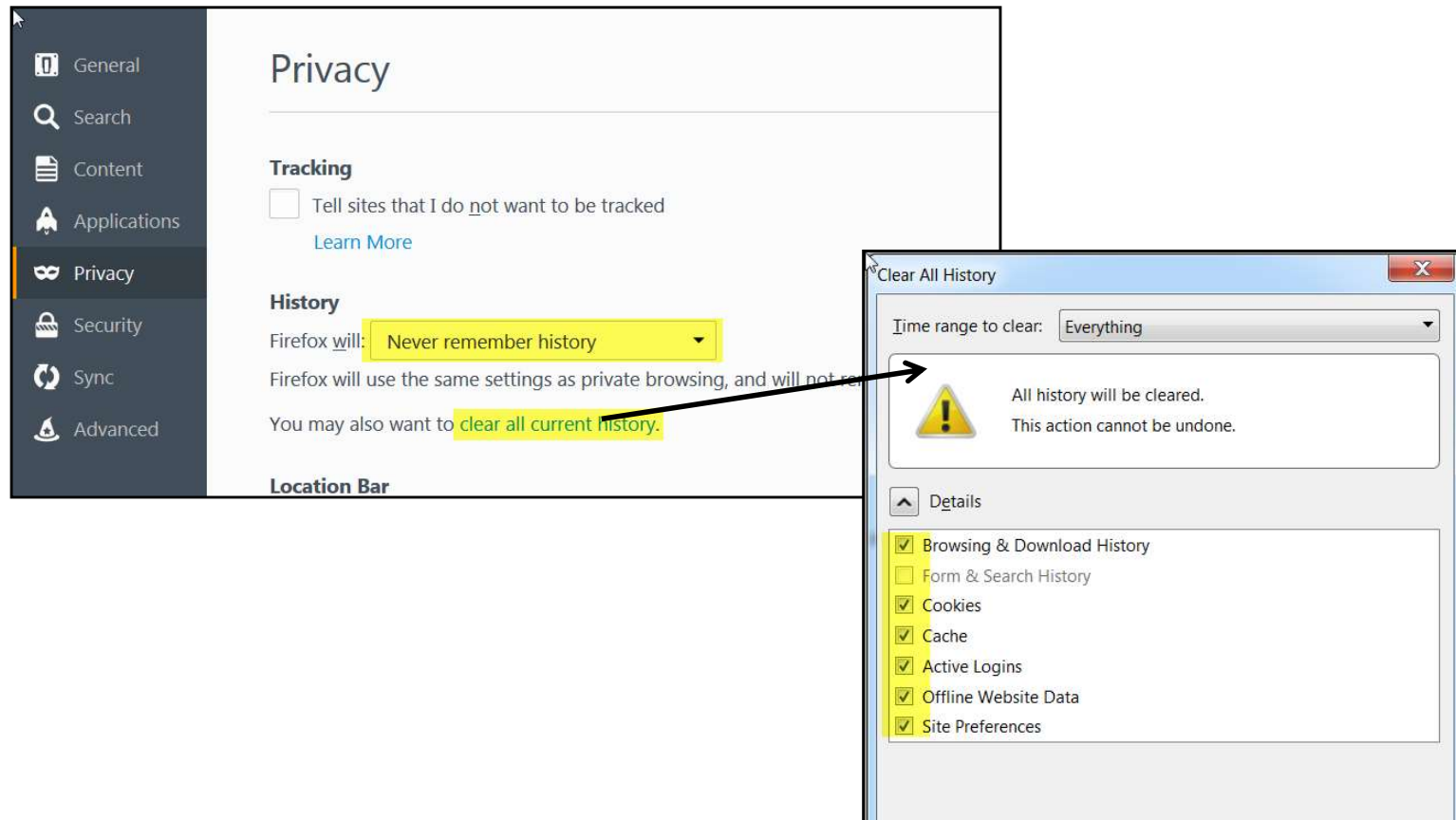
# MY SECURITY IS BROKEN: CACHE

## Chrome



# MY SECURITY IF BROKEN: CACHE

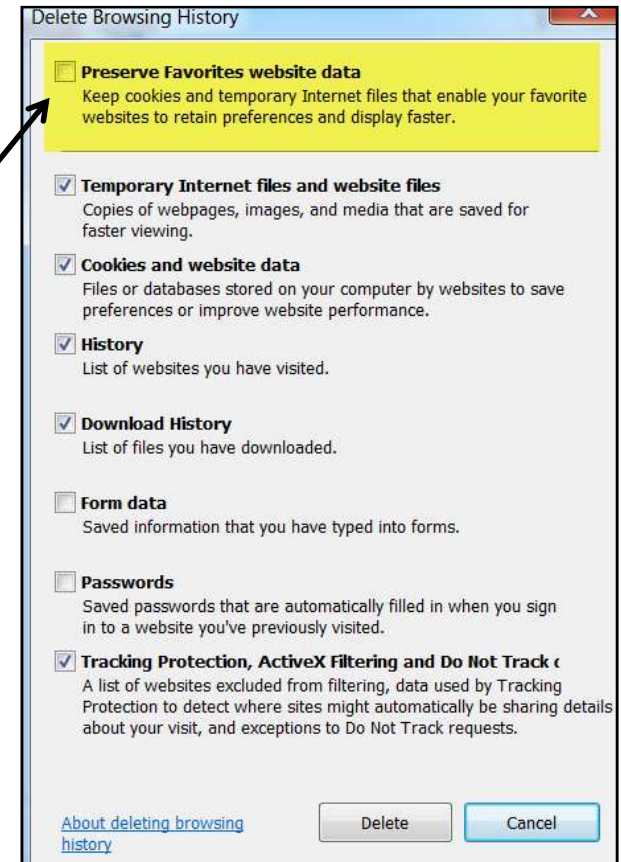
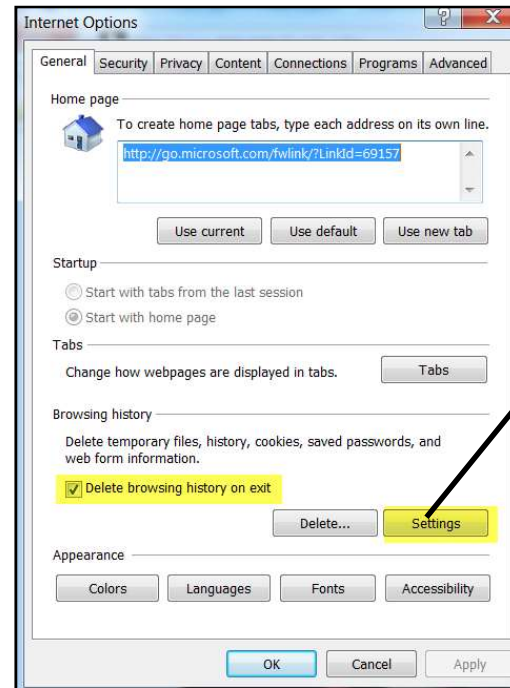
## Firefox





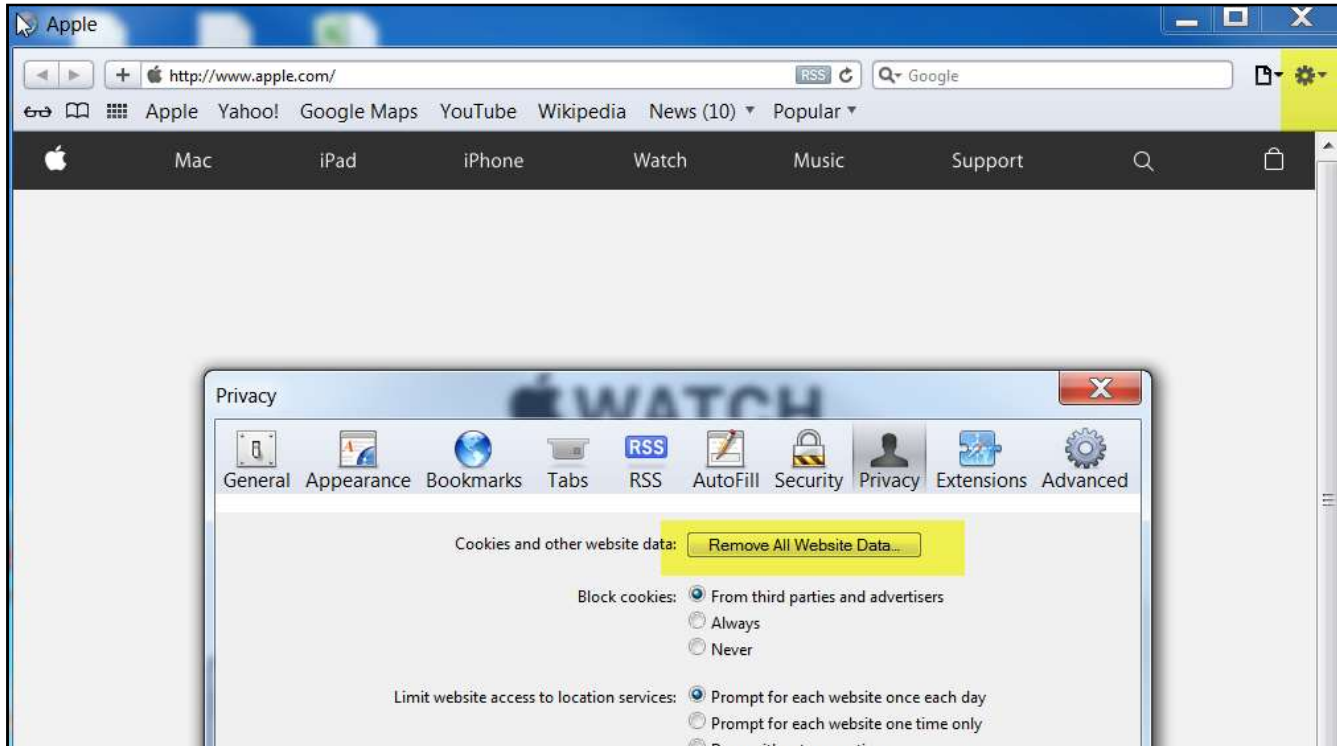
# MY SECURITY IF BROKEN: CACHE

## Internet Explorer



# MY SECURITY IS BROKEN: CACHE

## Safari

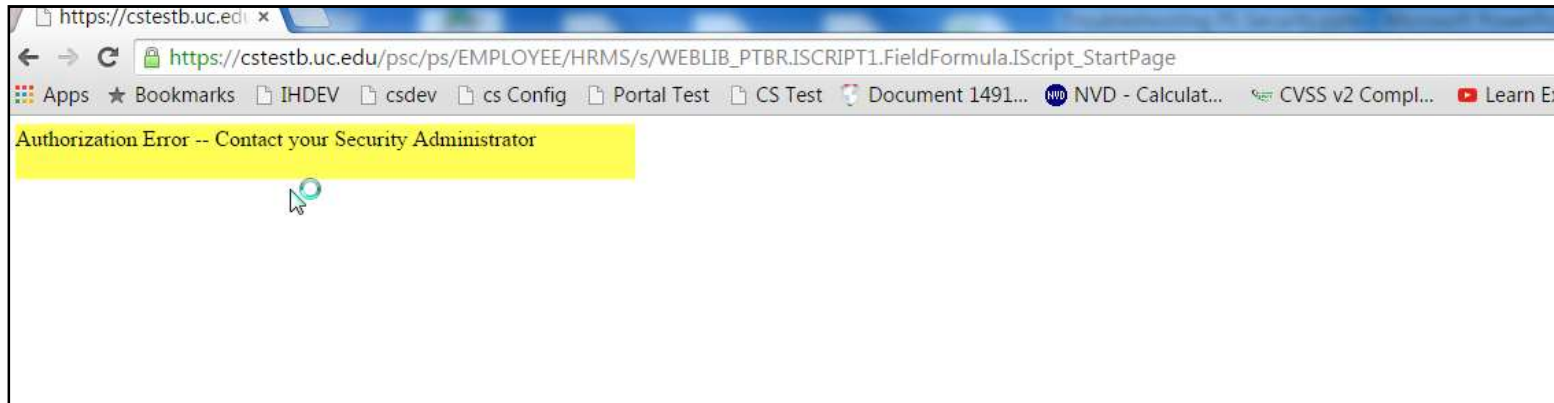


# MY SECURITY IS BROKEN: CACHE

## Hints:

- Always clear cache when **NOT on a PeopleSoft page**.
- Multiple tabs in the same browser window is the same as multiple windows.
- You will receive warning pop-ups, that might not pop up in front of the window you are working on, the time-outs are based on the longest inactive window, not the one you are working in.
- Always sign out from PS/Catalyst, and close all browser windows.
- Sometimes network cache is what is causing the issues, which is when clicking on the folders will work, when the normal drop down navigation will not work.

# MY SECURITY IS BROKEN: CANNOT LOG IN

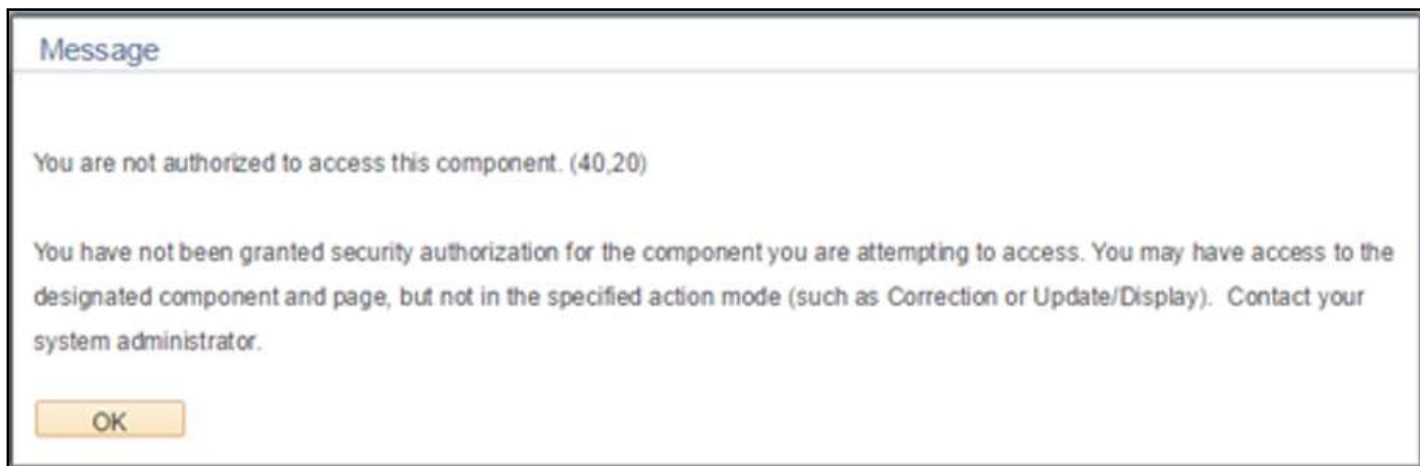


## **If you get this error on an all white page:**

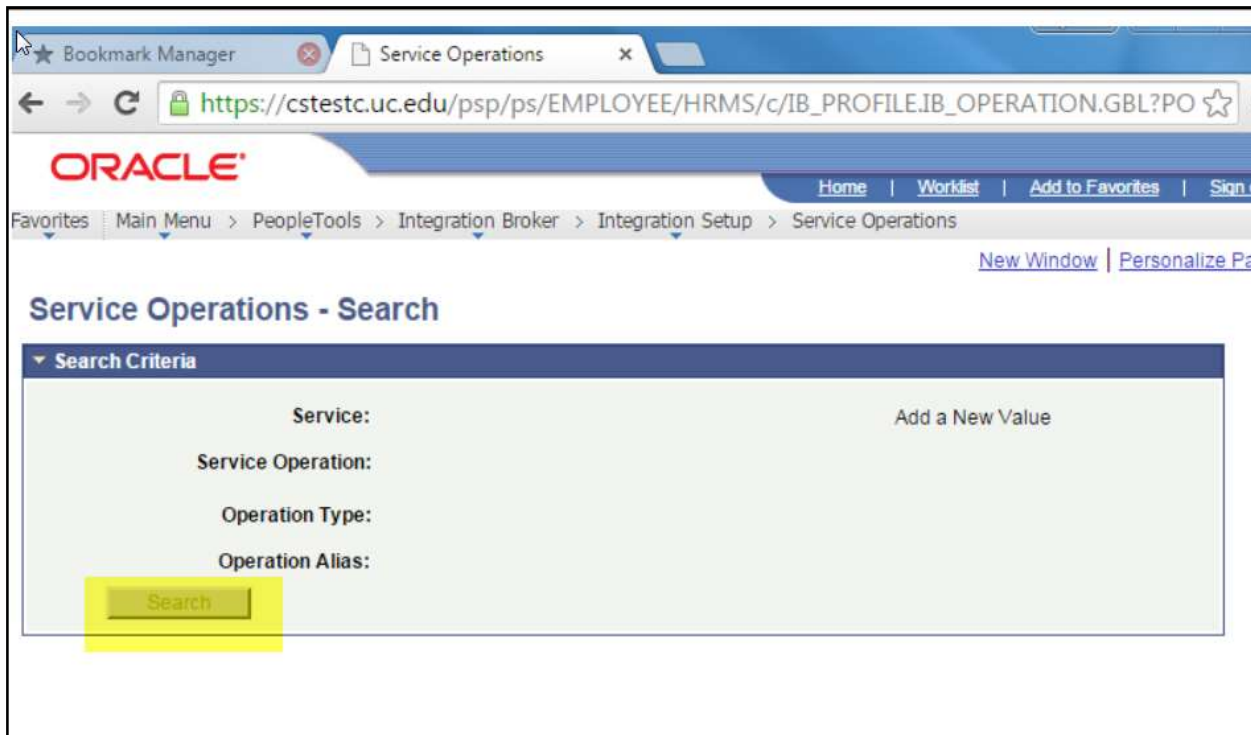
- There is something missing in your security access. Common causes are a permission list referenced in a role but the permission
- List was not actually moved into the environment you are logging into, or you are missing a base login role.

# MY SECURITY IS BROKEN: CANNOT ACCESS A PAGE

You do not have permission to the page or to one of the aspects of the page, such as a weplib (peoplecode behind the page build), or in the case of the centers (student/advisor/faculty), you do not have access to one of the main pages needed to open it. You also might have Update/Display permissions and not Correct History. In a couple of situations Oracle requires CH.



# MY SECURITY IS BROKEN: PAGE DOES NOT WORK AS EXPECTED



You have been granted Display Only access. In some cases, pages will not work in display only mode.

# MY SECURITY IS BROKEN: CANNOT POPULATE REQUIRED FIELD

You are missing SACR security. (Campus Solutions)

The screenshot shows the Oracle 'Maintain Applications' page. The breadcrumb trail is: Favorites | Main Menu > Student Admissions > Application Maintenance > Maintain Applications. The page title is 'Maintain Applications' with a subtitle 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button. A 'Search Criteria' section contains several fields: Application Nbr, ID, Academic Institution, Academic Career, Application Program Nbr, Academic Program, Admit Term, and Application Center. Each field has a 'begins with' dropdown menu. A 'Look Up Academic Institution' dialog box is open, showing 'Academic Institution' and 'Description' fields, both with 'begins with' dropdowns. Below these fields are 'Look Up', 'Clear', and 'Cancel' buttons, and a 'Basic Lookup' link. The message 'No matching values were found.' is displayed at the bottom of the dialog box.

ORACLE Hello lcl\_goinda on instance PC90TSTB

Favorites | Main Menu > Student Admissions > Application Maintenance > Maintain Applications

**Maintain Applications**

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

**Find an Existing Value**

**Search Criteria**

Application Nbr: begins with ▾  
ID: begins with ▾ %0  
Academic Institution: = ▾  
Academic Career: begins with ▾  
Application Program Nbr: = ▾  
Academic Program: begins with ▾  
Admit Term: begins with ▾  
Application Center: begins with ▾

**Look Up Academic Institution** [Help](#)

Academic Institution: begins with ▾  
Description: begins with ▾

**Look Up** **Clear** **Cancel** [Basic Lookup](#)

No matching values were found.



# MY SECURITY IS BROKEN: CANNOT SEE ANY DATA

You are probably missing the Row Security Permission list that grants access to Bio/Dem data.

The screenshot shows a web application interface for 'Maintain Applications'. The breadcrumb trail at the top reads: 'Favorites | Main Menu > Student Admissions > Application Maintenance > Maintain Applications'. Below the title, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A tab labeled 'Find an Existing Value' is active. Under the 'Search Criteria' section, there are several search fields, each with a 'begins with' dropdown and a search icon: 'Application Nbr:', 'ID:' (containing '%011'), 'Academic Institution:' (containing 'UCINN'), 'Academic Career:', 'Application Program Nbr:' (containing '0'), 'Academic Program:', 'Admit Term:', 'Application Center:', 'Campus ID:', 'National ID:', 'Last Name:', and 'First Name:'. Below these fields are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom of the search section are buttons for 'Search', 'Clear', and links for 'Basic Search' and 'Save Search Criteria'. A yellow message box at the bottom of the interface states: 'No matching values were found.'

# MY SECURITY IS BROKEN: CANNOT FIND A QUERY

You do not have access to the query tree where some of the records are.

**Favorites** | Main Menu > Reporting Tools > Query > Query Viewer

### Query Viewer

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

\***Search By**    Query Name ▾    begins with   

   [Advanced Search](#)

### Search Results

\*Folder View    -- All Folders -- ▾

| Query Name                    | Description | Owner | Folder | Run to HTML | Run to ... | Schedule | Definitional References | Add to Favorites |
|-------------------------------|-------------|-------|--------|-------------|------------|----------|-------------------------|------------------|
| US_00_00_00_HOEP_COTY_REPLIES |             |       |        |             |            |          |                         |                  |

**Personalize** | Find | View All | [Icons]    First 1-30 of 53 Last

Favorites | Main Menu > Reporting Tools > Query > Query Viewer

**Query Viewer**

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

\***Search By**    Query Name    begins with    UC\_    x

**Search**    [Advanced Search](#)

**Search Results**

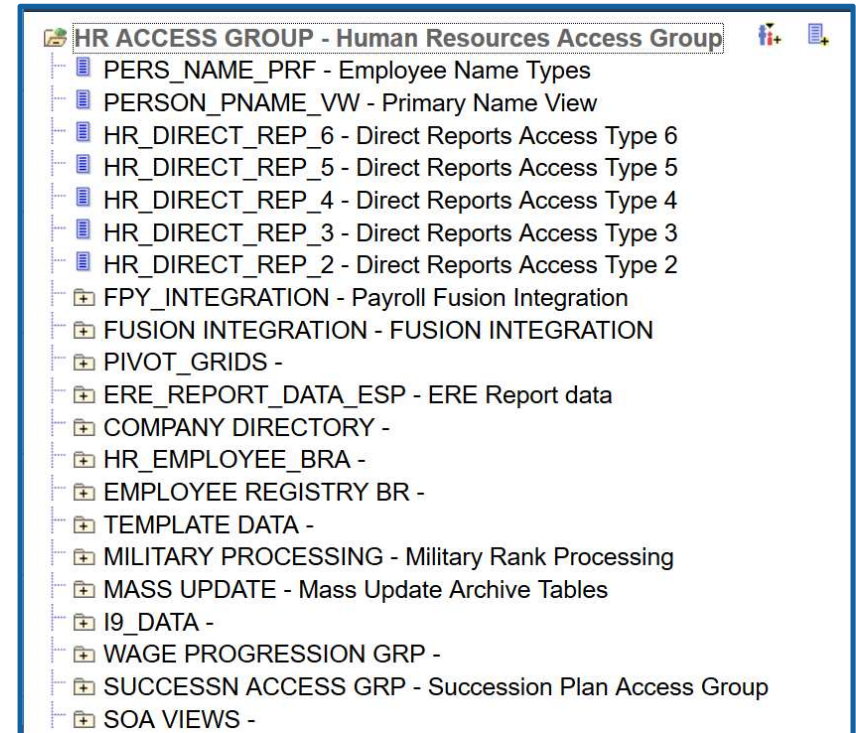
\***Folder View**    -- All Folders --

| Query | Personalize | Find   | View 100 | First | 1-30 of 171 | Last   |
|-------|-------------|--------|----------|-------|-------------|--------|
|       | Run to      | Run to | Run to   |       |             | Add to |

# MY SECURITY IS BROKEN: CANNOT FIND A QUERY

Think of a query tree as similar to Windows Explorer. We place records, such as NAMES (CC) and STDNT\_CAR\_TERM (SR), into the appropriate folders.

Some contain restricted data and are put into restricted areas, such as PERS\_NID (CC restricted)  
SSR\_TSRSLT\_PERS (SR restricted)



# MY SECURITY IS BROKEN: ERROR MESSAGE IN PROCESS LOG

If you click 'Run' on a run control page and the process list is empty, you have not been granted access to that process group.

User ID DGOIN

Run Control ID Sample

Saved

Server Name

Run Date 05/12/2017

Recurrence

Run Time 11:18:45AM

Time Zone

Reset to Current Date/Time

Process List

| Select                   | Description                    | Process Name | Process Type       | *Type    | *Format  | Distribution |
|--------------------------|--------------------------------|--------------|--------------------|----------|----------|--------------|
| <input type="checkbox"/> | COBOL Multi-process Job        | 3CBL         | PSJob              | (None) ▾ | (None) ▾ | Distribution |
| <input type="checkbox"/> | SQR Multi-process Job          | 3SQR         | PSJob              | (None) ▾ | (None) ▾ | Distribution |
| <input type="checkbox"/> | Additional Appointment Upgrade | AA_CONV_JPN  | Application Engine | Web ▾    | TXT ▾    | Distribution |
| <input type="checkbox"/> | Simple AE test program         | AEMINITEST   | Application Engine | Web ▾    | TXT ▾    | Distribution |
| <input type="checkbox"/> | All Process Types              | ALLTYPES     | PSJob              | (None) ▾ | (None) ▾ | Distribution |

# MY SECURITY IS BROKEN: BI REPORTS

Oracle BI Publisher Report Definition page. The page shows the 'Definition' tab selected. The 'Report Name' is COHRCR\_DET19. The 'Data Source' section shows 'Data Source Type' as XML File, 'Data Source ID' as FMHRCRE\_DET47, and 'Data Source Description' as Person Address Check. The 'Report Properties' section shows 'Report Description' as Person Address Check, '\*Report Status' as Active, '\*Report Category ID' as ALLUSER (highlighted in yellow), 'Owner ID' as Fusion Migration (App Up), '\*Template Type' as RT, and 'Retention Days' as empty. A table shows registration and update history: Registered 11/10/2011 1:16:29AM by PS, Updated 11/28/2013 11:37:27PM by PPLSOFT. At the bottom are buttons for 'Add', 'Update/Display', 'Include History', and 'Correct History', along with navigation links.

If you are unable to run a BI-Report, you might not have access to the Report Category ID. Many institutions have created custom Report Category IDs to grant access for Self-service Users (Employees and Students) You also might not have access to the query tables that the report was built from.

Oracle BI Publisher Report Category page. The page shows the 'Report Category' section with 'Report Category ID' as ALLUSER (highlighted in yellow). The 'Properties' section shows 'Description' as All PeopleSoft User and '\*Owner ID' as PeopleTools. Below is a table titled 'Report Definition Editors and Viewers' showing a list of roles and their security IDs. The table has columns: \*ID Type, \*Security ID, Description, and Read Only. The roles listed are OD PeopleSoft User, OD PeopleSoft User No Password, and PeopleSoft User. The 'Read Only' column has checkboxes and plus/minus icons. At the bottom are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', and 'Update/Display'.

| *ID Type | *Security ID                   | Description                    | Read Only                |
|----------|--------------------------------|--------------------------------|--------------------------|
| Role     | OD PeopleSoft User             | On Demand PeopleSoft User      | <input type="checkbox"/> |
| Role     | OD PeopleSoft User No Password | OD PeopleSoft User No Password | <input type="checkbox"/> |
| Role     | PeopleSoft User                | PeopleSoft User                | <input type="checkbox"/> |



# MY SECURITY IS BROKEN: ERROR MESSAGE IN PROCESS LOG

The screenshot shows the PeopleTools Process Scheduler interface. At the top, a navigation bar includes 'Favorites', 'Main Menu', 'PeopleTools', and 'Process Scheduler'. Below this, a 'View Log/Trace' button is visible. The main content area is divided into several sections: 'Report', 'Distribution Details', 'File List', and 'Distribute To'. The 'Report' section shows 'Report ID 4495', 'Process Instance 538', 'Name UC\_SRACADPL1', and 'Process Type Application Engine'. The 'Distribution Details' section shows 'Distribution Node HTTP' and 'Expiration Date 08/19/2015'. The 'File List' section contains a table with three columns: 'Name', 'File Size (bytes)', and 'Datetime Created'. The 'Distribute To' section shows 'Distribution ID Type' and 'User dolezar'. An error message is displayed in a yellow box at the top right, stating: '(90,6) - Not Authorized (90,6) GetCompIntfc failed (0,0) UC\_SRACADPL1.MAIN.GBL.default.1900-01-01.Step02.OnExecute PCPC:1400 Statement:22 End'. An arrow points from the 'UC\_SRACADPL1\_538.log' file in the 'File List' table to the error message box.

Report

Report ID 4495 Process Instance 538 [Message Log](#)

Name UC\_SRACADPL1 Process Type Application Engine

Run Status Success

UC\_SRACADPL1

Distribution Details

Distribution Node HTTP Expiration Date 08/19/2015

File List

| Name                                       | File Size (bytes) | Datetime Created                |
|--------------------------------------------|-------------------|---------------------------------|
| <a href="#">AE_UC_SRACADPL1_538.stdout</a> | 340               | 08/12/2015 3:30:47.740537PM EDT |
| <a href="#">AE_UC_SRACADPL1_538.trc</a>    | 188               | 08/12/2015 3:30:47.740537PM EDT |
| <a href="#">UC_SRACADPL1_538.log</a>       | 146               | 08/12/2015 3:30:47.740537PM EDT |

Distribute To

| Distribution ID Type | *Distribution ID |
|----------------------|------------------|
| User                 | dolezar          |

(90,6) - Not Authorized (90,6)  
GetCompIntfc failed (0,0) UC\_SRACADPL1.MAIN.GBL.default.1900-01-01.Step02.OnExecute PCPC:1400 Statement:22  
End

If running an application engine, and you get this message, it is calling a component interface that you do not have permissions to access.

# Helpful Links:

<https://community.oracle.com/community/support/support-blogs/peoplesoft-enterprise-support-blog/blog/2015/10/23/peoplesoft-talk-security-featuring-greg-kelly?customTheme=mosc>

[https://blogs.oracle.com/peopletools/entry/peopletools\\_cpu\\_analysis\\_and\\_supported](https://blogs.oracle.com/peopletools/entry/peopletools_cpu_analysis_and_supported)

<http://www.learnpeoplesoftsecurity.com/>

<https://www.heug.org/p/bl/ar/blogaid=3238>





# Helpful Links *new*:



## Using Role and Permission List Aliases

PeopleTools enables you to create aliases to verify user membership in user-defined roles and permission lists. The PeopleCode APIs `IsUserInRole()` and `IsUserInPermissionList()` will extend the verification against these user-defined objects when they are configured as aliases of delivered objects. As a result PeopleCode will no longer need to be customized when calling these APIs.

### See Also

Product documentation for *PeopleTools 8.56: Security Administration*, "Using Role and Permission List Aliases"

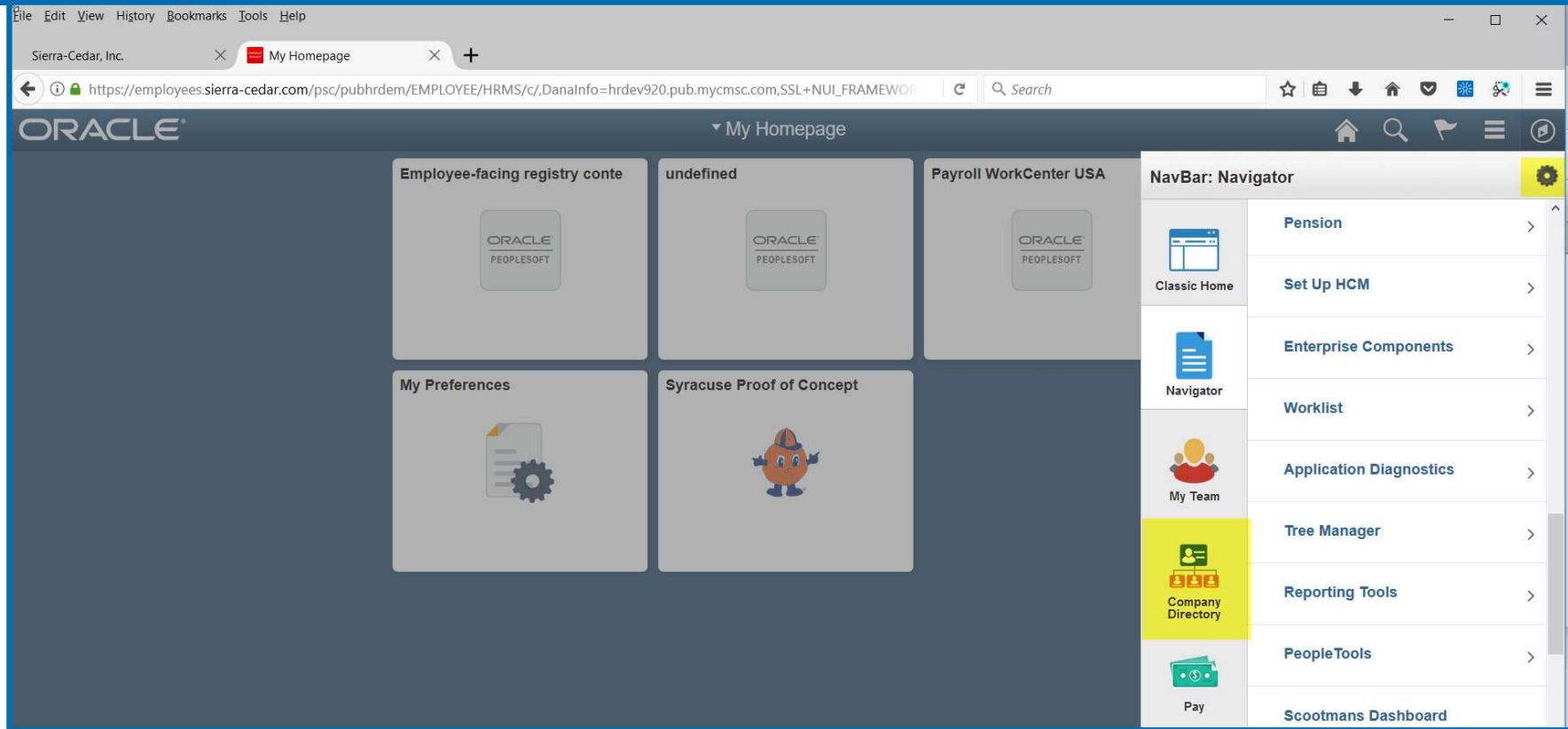
[http://docs.oracle.com/cd/E87544\\_01/pt856pbr1/eng/pt/tsec/task\\_UsingRoleAndPermissionListAliases.html](http://docs.oracle.com/cd/E87544_01/pt856pbr1/eng/pt/tsec/task_UsingRoleAndPermissionListAliases.html)

# If time- Fluid Just a taste

Fluid has introduced some new concerns for Security teams.

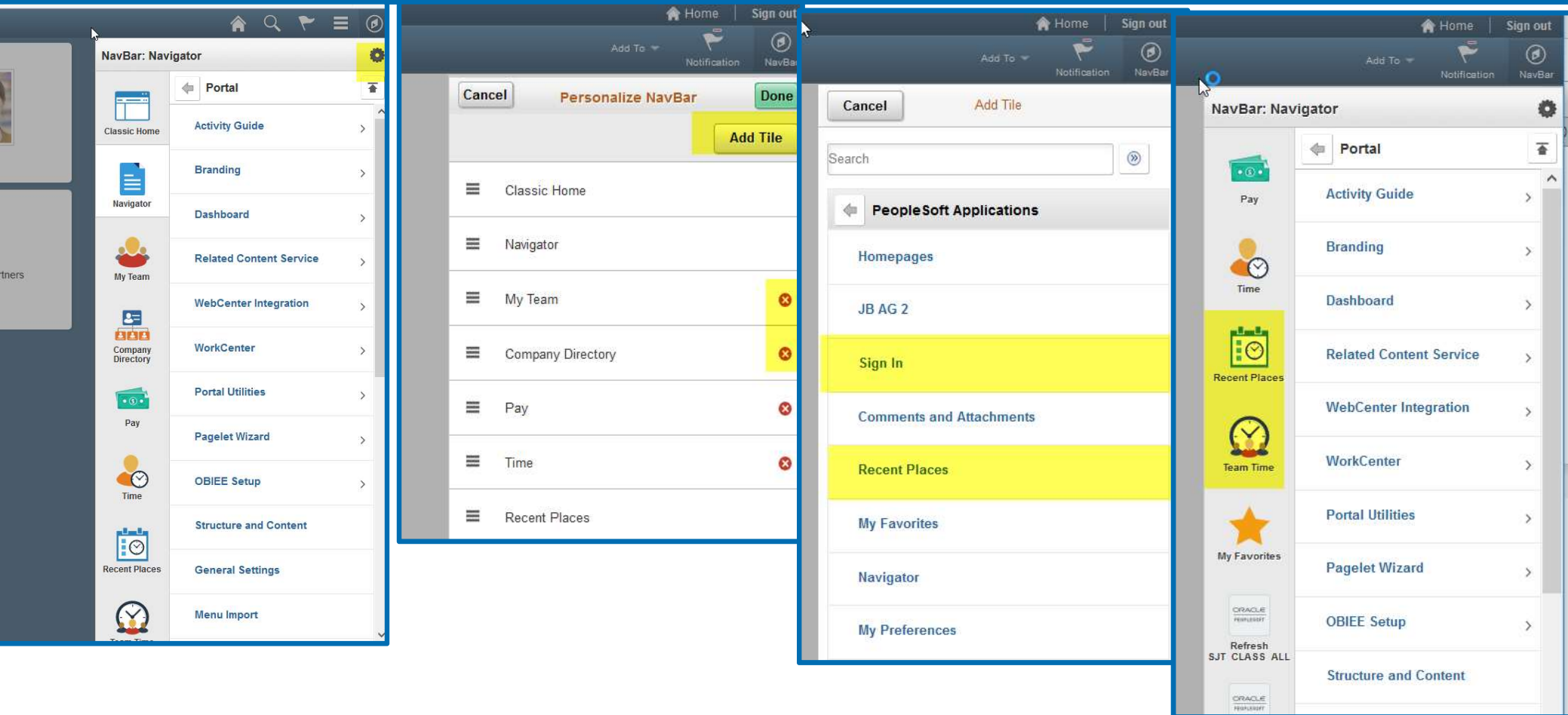
- Home Pages-
- NavBar- (hint this is also a home page)-
- Personalizations- what carries over to fluid from classic? (Big Gotcha)
- Redirects-

# FLUID: NAVBAR/NAVIGATOR

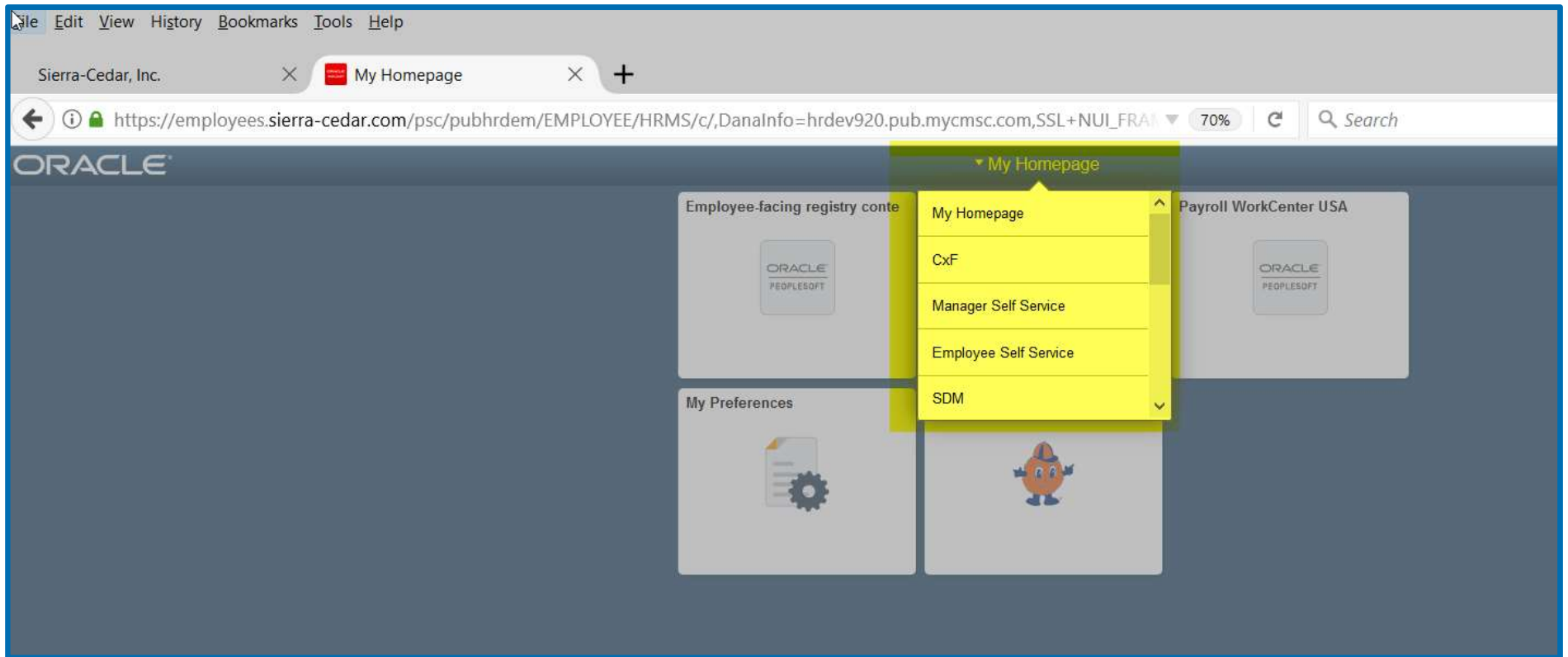


Welcome to Fluid- NavBar/Navigator on the right has the menu navigation, as well as a bar to put shortcuts, if you allow this.

# FLUID: NAVBAR/NAVIGATOR

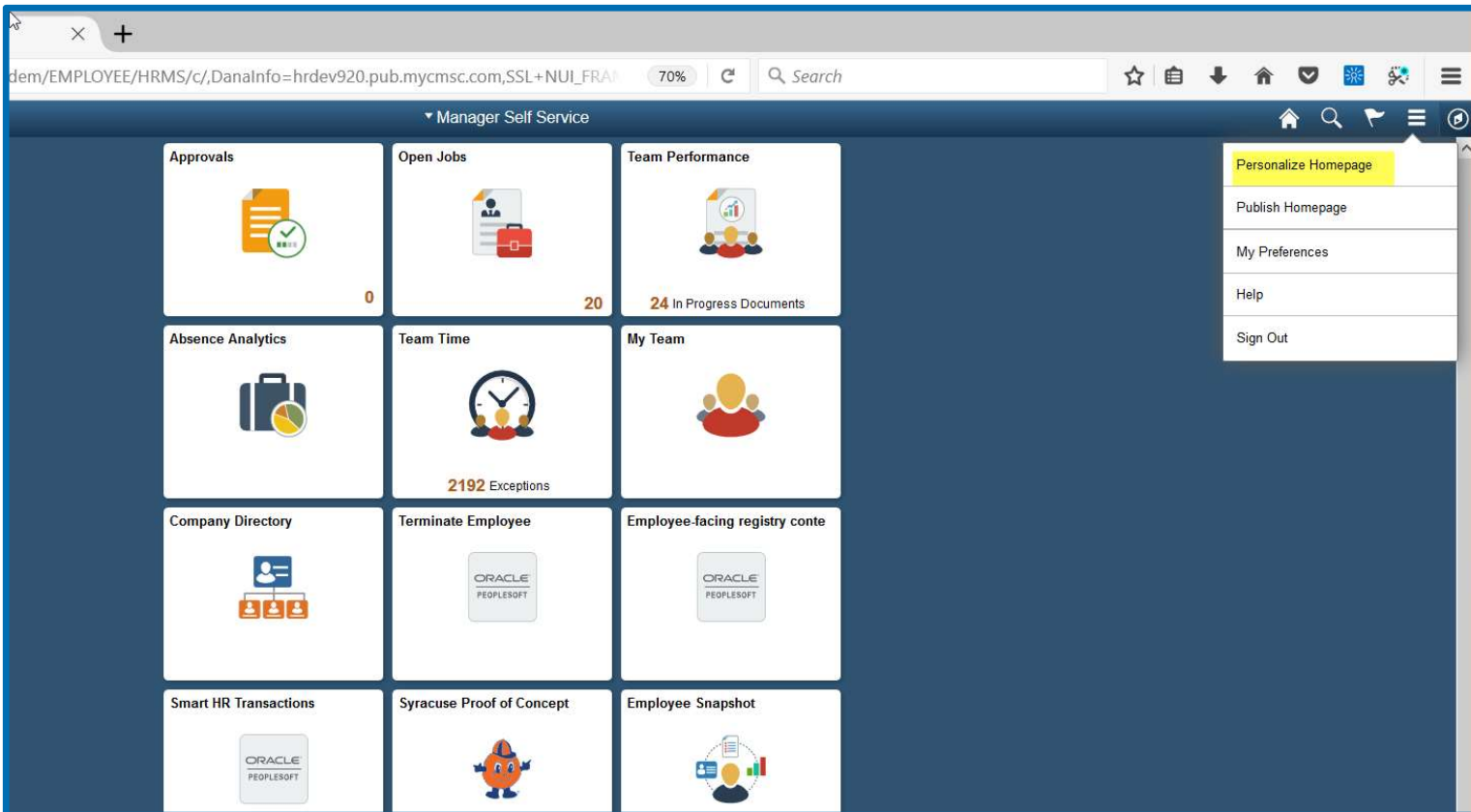


# FLUID: HOMEPAGE



If you do not remove this access here is what all people can do-  
Add Tiles, Remove Tiles from the NavBar.

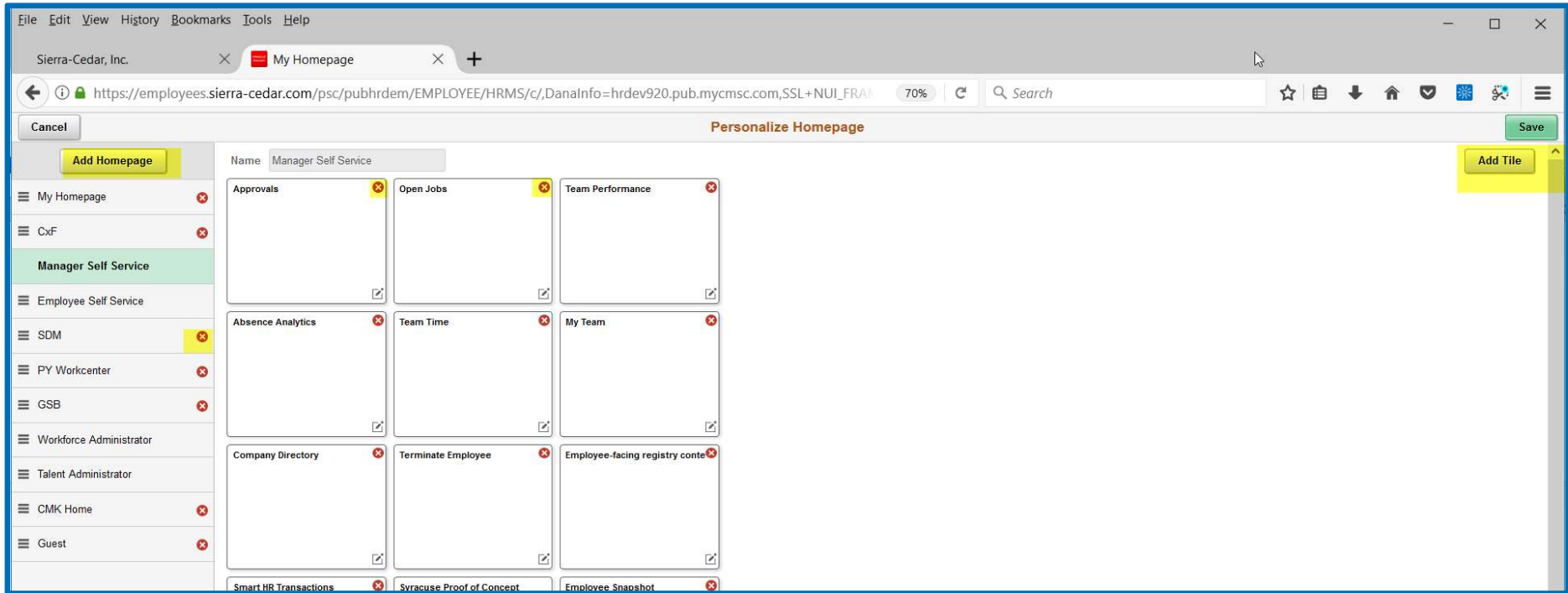
# FLUID: HOMEPAGE



If you do not remove this access here is what all people can do-  
To any of the homepages they have access to.  
Note- Only they can see their changes!



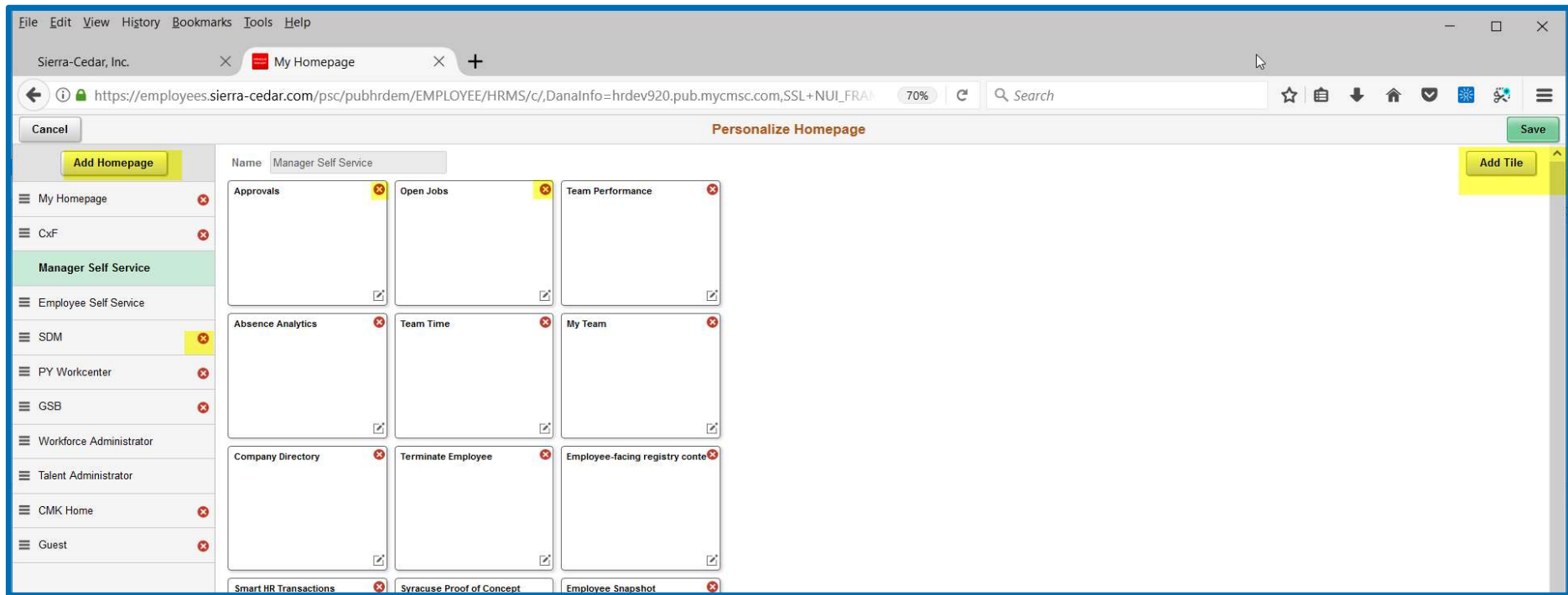
# FLUID: HOMEPAGE



If you do not remove this access here is what all people can do- Add tiles to HomePages and Add a NEW Homepage and delete tiles off of their HomePages

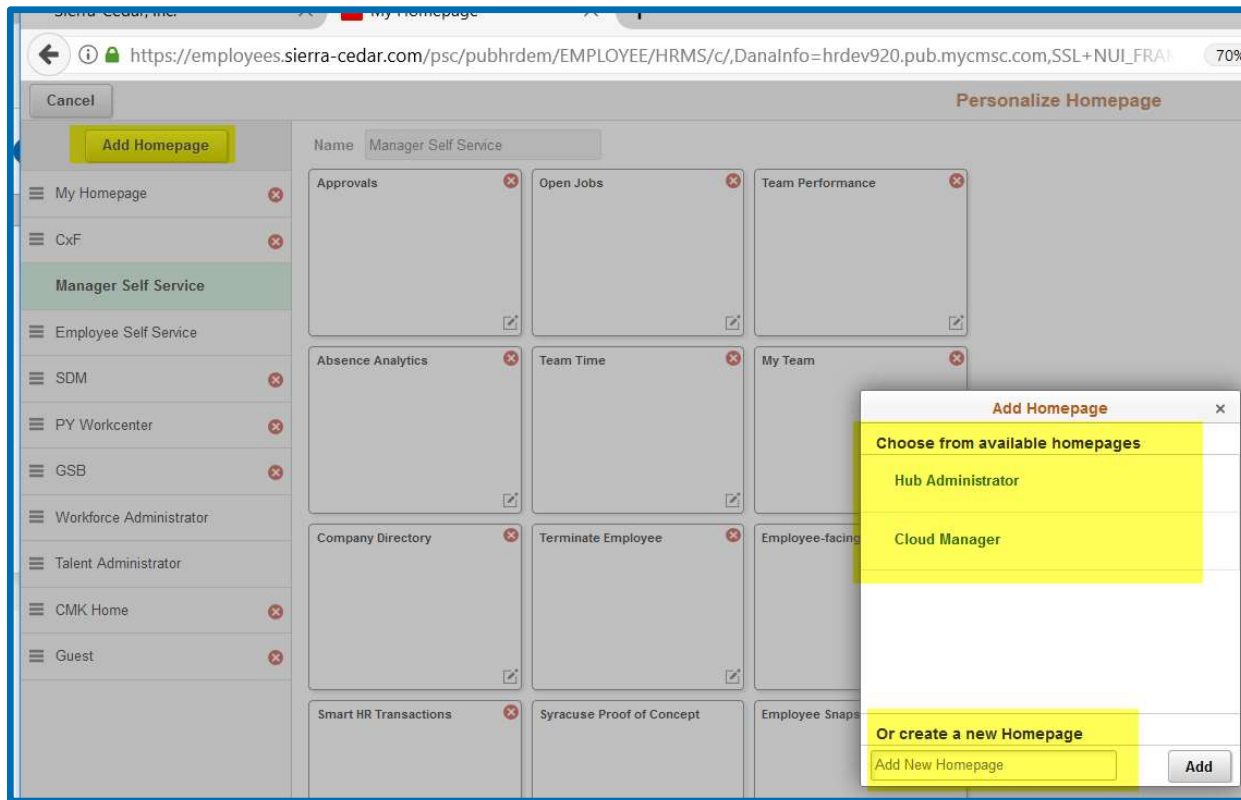


# FLUID: HOMEPAGE

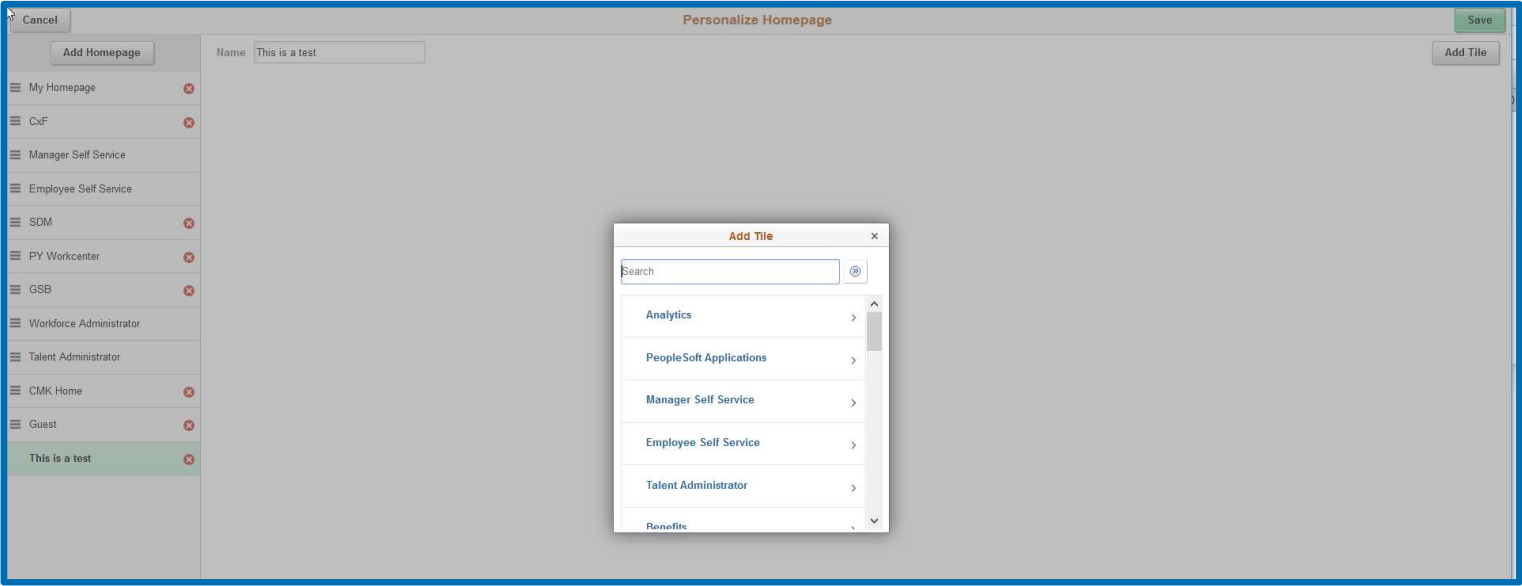


If you do not remove this access here is what all people can do- Add tiles to HomePages and Add a NEW Homepage

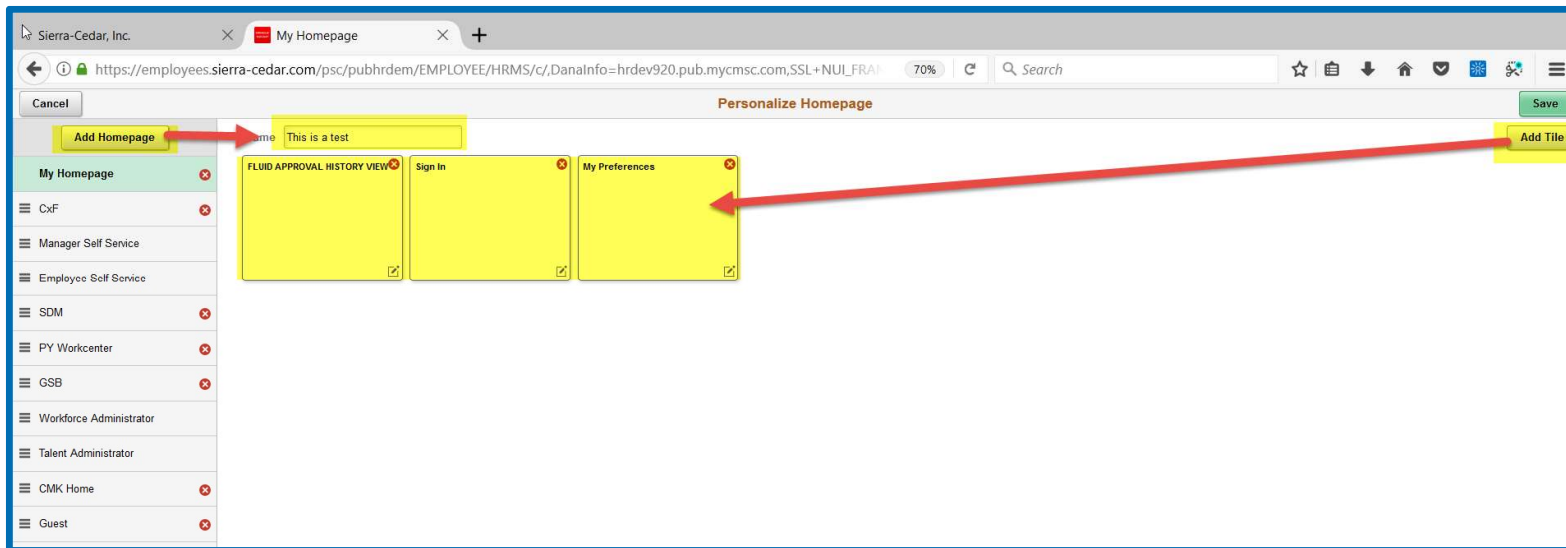
# FLUID: HOMEPAGE



# FLUID: HOMEPAGE

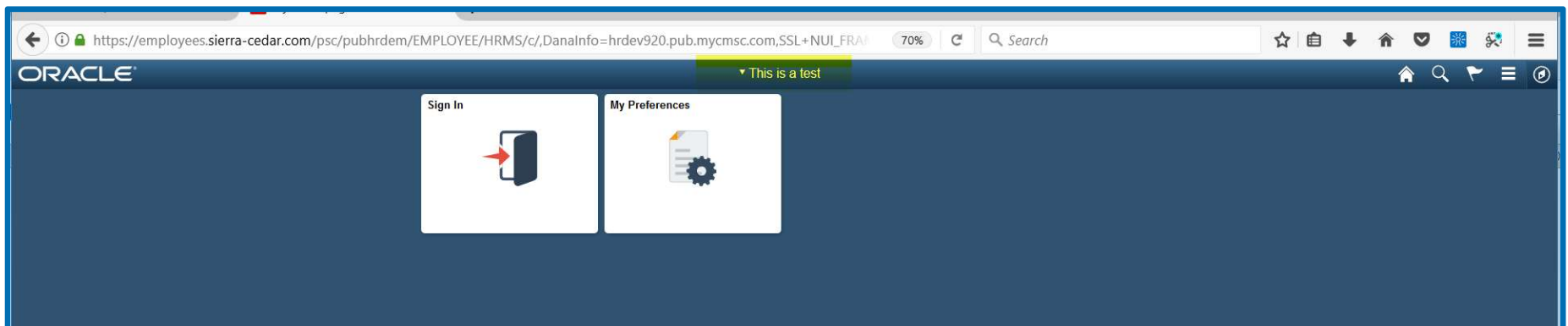


# FLUID: HOMEPAGE

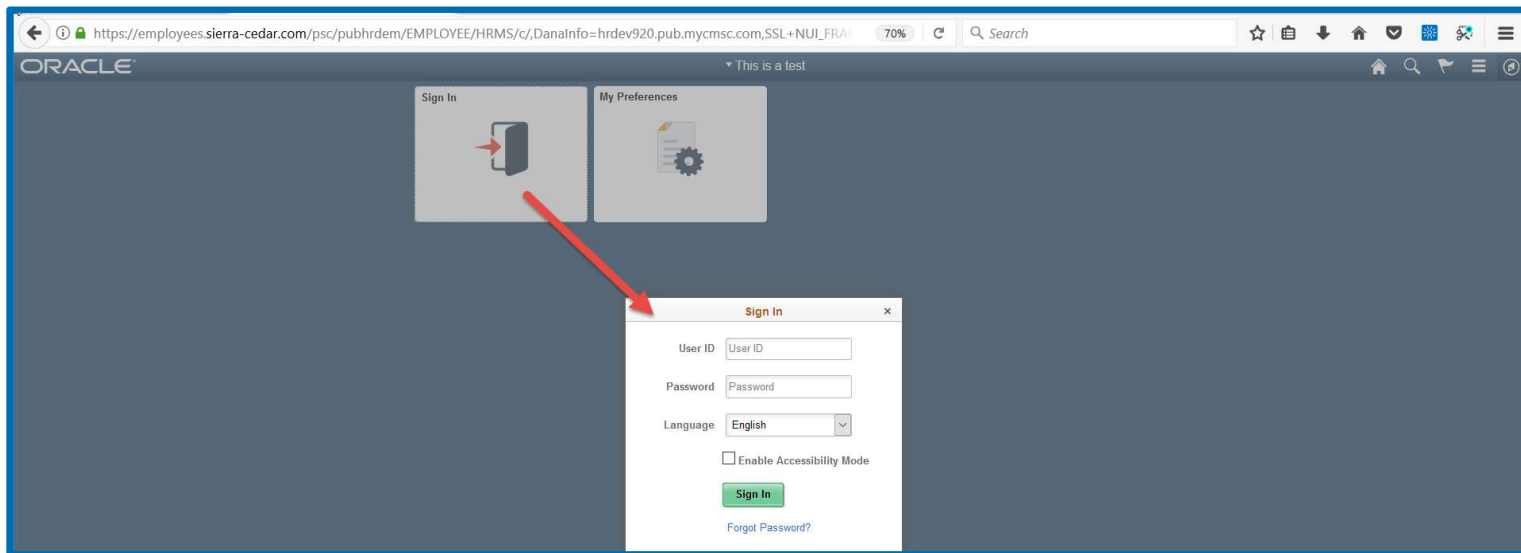


Cool Right?

Or Not?



# FLUID: HOMEPAGE



# FLUID: HOMEPAGE

The screenshot shows the Oracle Fluid Structure and Content interface. The breadcrumb trail is 'Root > Fluid Structure Content > Fluid Homepages'. The page title is 'Structure and Content'. Below the title, there are instructions: '\* Click the folder label to view the child folders and content references for that folder' and '\* Click the "Edit" link to edit the folder definition'. The main content area shows a table of 'Content References' with columns: Link, Node Name, Label, Edit, Sequence number, Create Link, and Number of links. The table lists various content references, including 'My Homepage', 'Navigation Bar', 'OnBoarding', 'Manager Self Service', 'Update Manager HomePage', 'Employee Self Service', and a series of 'USERDEFINEDLP' entries (1 through 6). A blue arrow points to the 'USERDEFINEDLP' entries, highlighting the 'Edit' and 'Create Link' columns.

| Link                     | Node Name  | Label                       | Edit | Sequence number | Create Link | Number of links |
|--------------------------|------------|-----------------------------|------|-----------------|-------------|-----------------|
| <input type="checkbox"/> |            | My Homepage                 | Edit | 0               | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | Navigation Bar              | Edit | 0               | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | OnBoarding                  | Edit | 50              | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | Manager Self Service        | Edit | 100             | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | Update Manager HomePage     | Edit | 100             | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | Employee Self Service       | Edit | 200             | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | USERDEFINEDLP1              | Edit | 999             | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | USERDEFINEDLP2              | Edit | 999             | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | USERDEFINEDLP3              | Edit | 999             | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | USERDEFINEDLP4              | Edit | 999             | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | USERDEFINEDLP5              | Edit | 999             | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | USERDEFINEDLP6              | Edit | 999             | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | Workforce Administrator     | Edit | 1100            | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | Talent Administrator        | Edit | 1200            | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | Career Planning             | Edit | 9999            | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | Compensation Review         | Edit | 9999            | Create Link | 0               |
| <input type="checkbox"/> | LOCAL_NODE | My Update Manager Dashboard | Edit | 9999            | Create Link | 0               |

Each "New HomePage" adds a line here- if you have 800 staff, that is 800 lines that no one knows what they are and who they belong to until you go into the edit for each one!

# FLUID: HOMEPAGE

**Structure and Content**

\* Click the folder label to view the child folders and content references for that folder  
\* Click the "Edit" link to edit the folder definition

**Content References**

| Link                                | Node Name  | Label                   |
|-------------------------------------|------------|-------------------------|
| <input type="checkbox"/>            | LOCAL_NODE | My Homepage             |
| <input type="checkbox"/>            | LOCAL_NODE | Navigation Bar          |
| <input type="checkbox"/>            | LOCAL_NODE | OnBoarding              |
| <input type="checkbox"/>            | LOCAL_NODE | Manager Self Service    |
| <input type="checkbox"/>            | LOCAL_NODE | Update Manager HomePage |
| <input type="checkbox"/>            | LOCAL_NODE | Employee Self Service   |
| <input type="checkbox"/>            | LOCAL_NODE | USERDEFINEDLP1          |
| <input type="checkbox"/>            | LOCAL_NODE | USERDEFINEDLP2          |
| <input type="checkbox"/>            | LOCAL_NODE | USERDEFINEDLP3          |
| <input type="checkbox"/>            | LOCAL_NODE | USERDEFINEDLP4          |
| <input type="checkbox"/>            | LOCAL_NODE | USERDEFINEDLP5          |
| <input checked="" type="checkbox"/> | LOCAL_NODE | USERDEFINEDLP6          |
| <input type="checkbox"/>            | LOCAL_NODE | Workforce Administrator |
| <input type="checkbox"/>            | LOCAL_NODE | Talent Administrator    |

**Content Ref Administration**

Name: USERDEFINEDLP6  
\*Label: USERDEFINEDLP6  
Long Description (254 Characters):  
Product: 999  
Sequence number: 999  
Owner ID: [Search]  
Usage Type: Fluid Homepage  
Storage Type: Local (in HTML Catalog)  
Parent Folder: Fluid Homepages  
\*Valid from date: 10/12/2017  
Valid to date: [Date]  
Creation Date: 10/12/2017

**Homepage tab attributes**

☒ Allow rename  
☐ Operational Dashboard  
Help ID: [Text]  
Behavior: Optional  
IWC Message Events

**Content Reference Attributes**

Name: [Text]  
Label: [Text]  
Attribute value: [Text]  
☒ translate  
Attribute Information

**Tab Content**

Label: [Text]  
\* Selected the pagelets that can be used for this homepage tab definition.  
\* Set the pagelet behavior with the drop down list next to the selected pagelet.  
\* Selected the "Include all?" checkbox to display all pagelets from the portal registry for this category. This setting is used for the "Personalize Content" page.

**Include all?**

- ☐ Attendance Violations
- ☐ Leave Balances by Type
- ☐ Time Categories Comparison
- ☐ Job Opening Aging Analysis
- ☐ Current Headcount Profile
- ☐ Current Salary Analysis
- ☐ Headcount Movement
- ☐ Performance Status
- ☐ Performance Status
- ☐ Performance vs. Compa-Ratio

**Update Manager**

☐ Include all?

- ☐ My Update Manager Dashboard
- ☐ Update Manager Dashboard
- ☐ BUG by Target Database
- ☐ BUG Status by Tag
- ☐ BUG Status by Product
- ☐ Select Target Database
- ☐ BUG Status by Image

**PeopleSoft Applications**

☐ Include all?

- ☐ Homepages
- ☐ JB AG 2
- ☒ Sign In
- ☐ Comments and Attachments
- ☐ Recent Places
- ☐ My Favorites
- ☐ Navigator
- ☐ Approvals
- ☒ My Preferences
- ☐ Classic Home
- ☐ Fluid Home
- ☐ GSB Test 1 Classic Timesheet
- ☐ GSB Test PS9.2 YouTube

**Manager Self Service**

☐ Include all?

- ☐ Guided Self Service DP2
- ☐ KP Associate Termination AG
- ☐ KP Termination
- ☐ Launch AG CREF
- ☐ Syracuse Proof of Concept



# FLUID: HOMEPAGE

**ORACLE**

**Analytics**

☐ Include all?

☐ Attendance Violations

☐ Leave Balances by Type

☐ Time Categories Comparison

☐ Job Opening Aging Analysis

☐ Current Headcount Profile

☐ Current Salary Analysis

☐ Headcount Movement

☐ Performance Status

☐ Performance Status

☐ Performance vs. Compa-Ratio

**Update Manager**

☐ Include all?

☐ My Update Manager Dashboard

☐ Update Manager Dashboard

☐ BUG by Target Database

☐ BUG Status by Tag

☐ BUG Status by Product

☐ Select Target Database

☐ BUG Status by Image

**Employee Self Service**

☐ Include all?

☒ JB New Head Count

☐ KP Test

☒ OnBoarding

☐ OnBoarding Activities

☒ Time

☐ Time

**PeopleSoft Applications**

☐ Include all?

☐ Homepages

☐ JB AG 2

☐ Sign In

☐ Comments and Attachments

☐ Recent Places

☐ My Favorites

☐ Navigator

☐ Approvals

☐ My Preferences

☐ Classic Home

☐ Fluid Home

☐ GSB Test 1 Classic Timesheet

☐ GSB Test PS9.2 YouTube

**Manager Self Service**

☐ Include all?

☒ Guided Self Service DP2

☐ KP Associate Termination AG

☐ KP Termination

☐ Launch AG CREF

☐ Syracuse Proof of Concept

☒ Company Directory

☐ My Team

☐ My Team

☐ Employee Snapshot

☐ Team Time

☐ Team Time

☐ Absence Analytics

**Personalize Homepage**

Name: Employee Self Service

**Company Directory**

**Time**

**Pay**

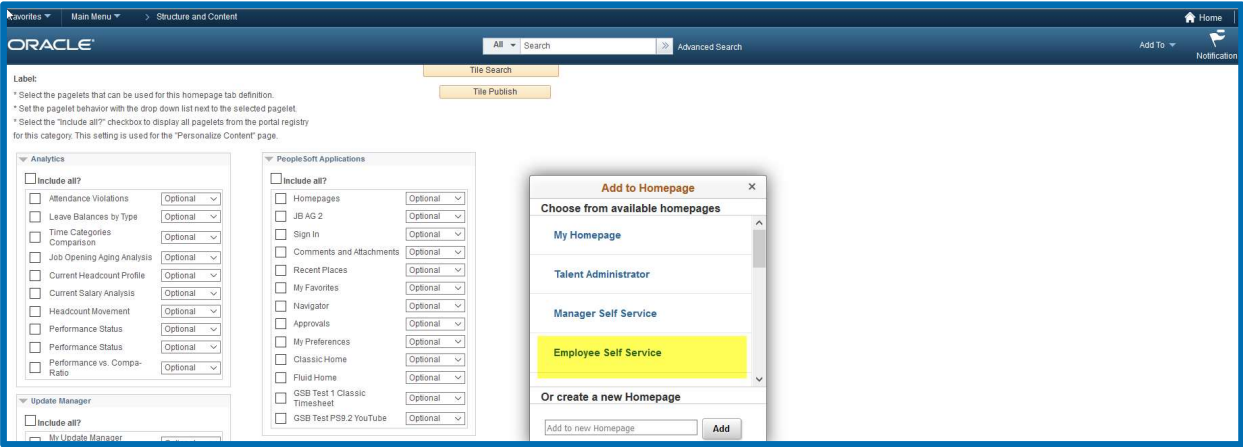
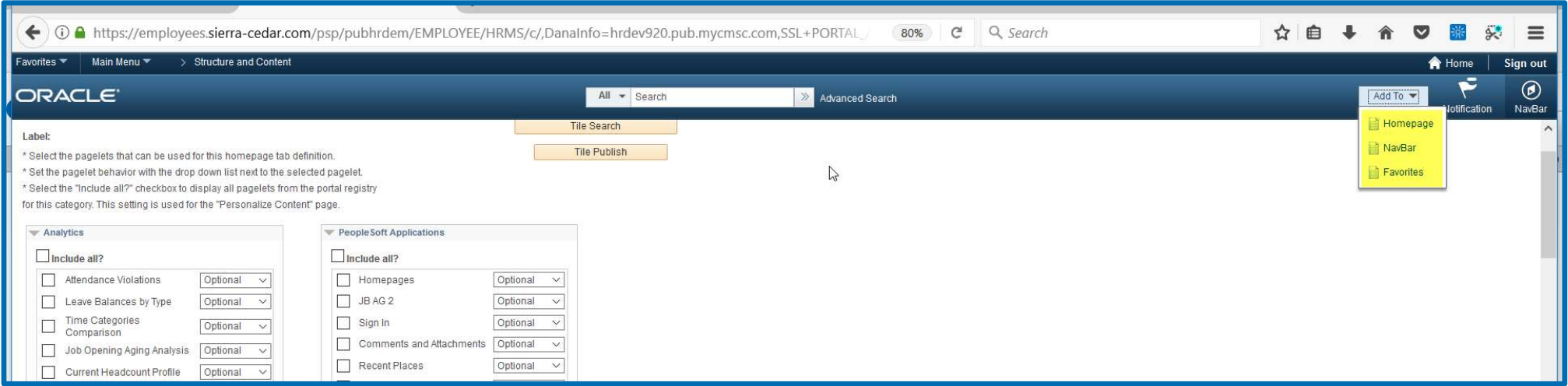
**Personal Details**

**Talent Profile**

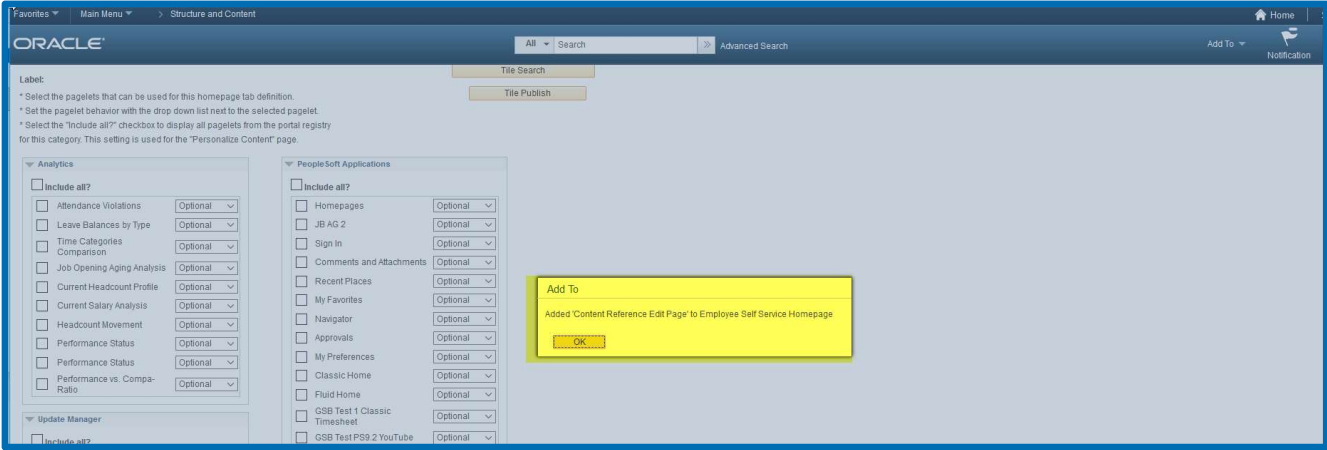
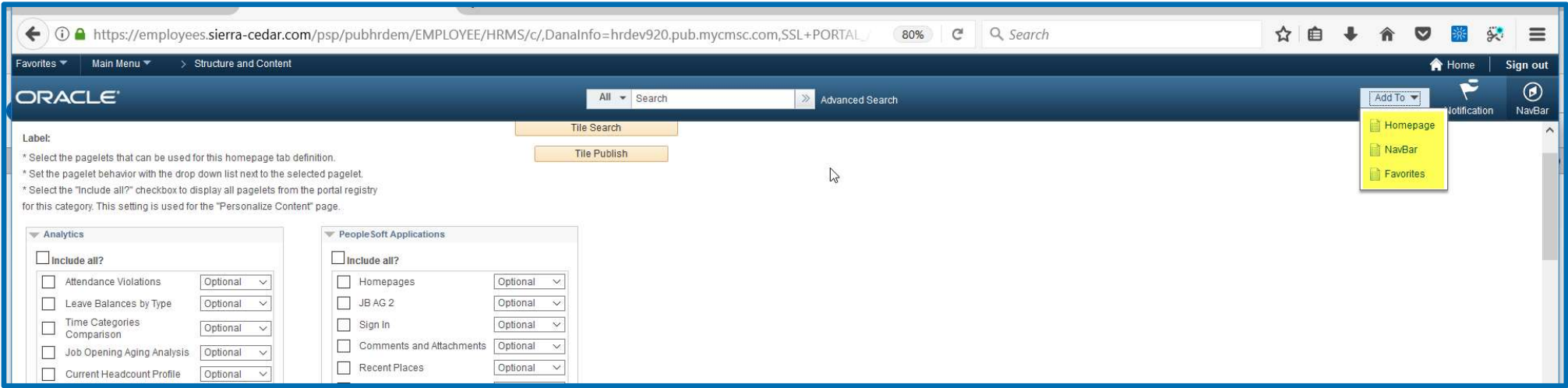
**Performance**

**Company News**

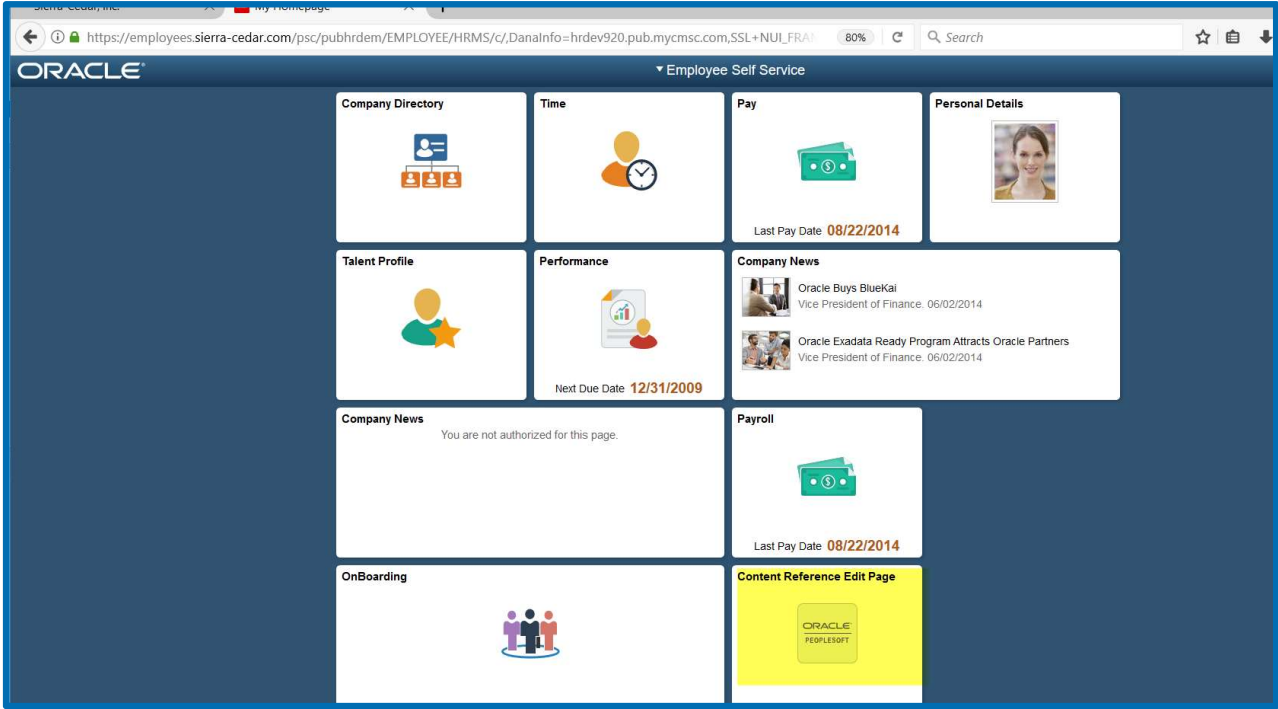
# FLUID: HOMEPAGE



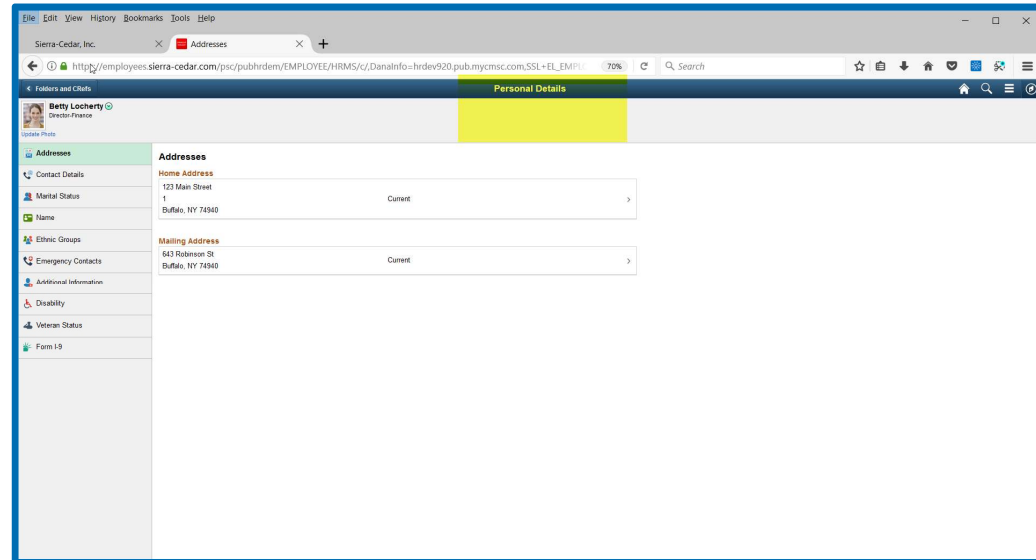
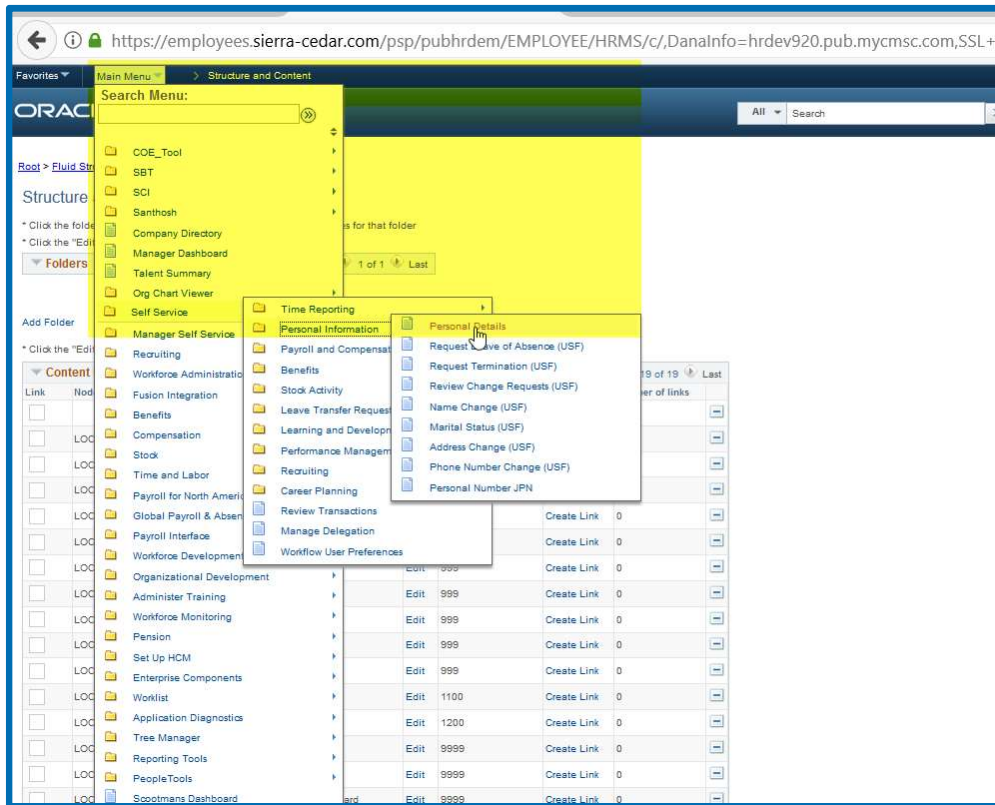
# FLUID: HOMEPAGE



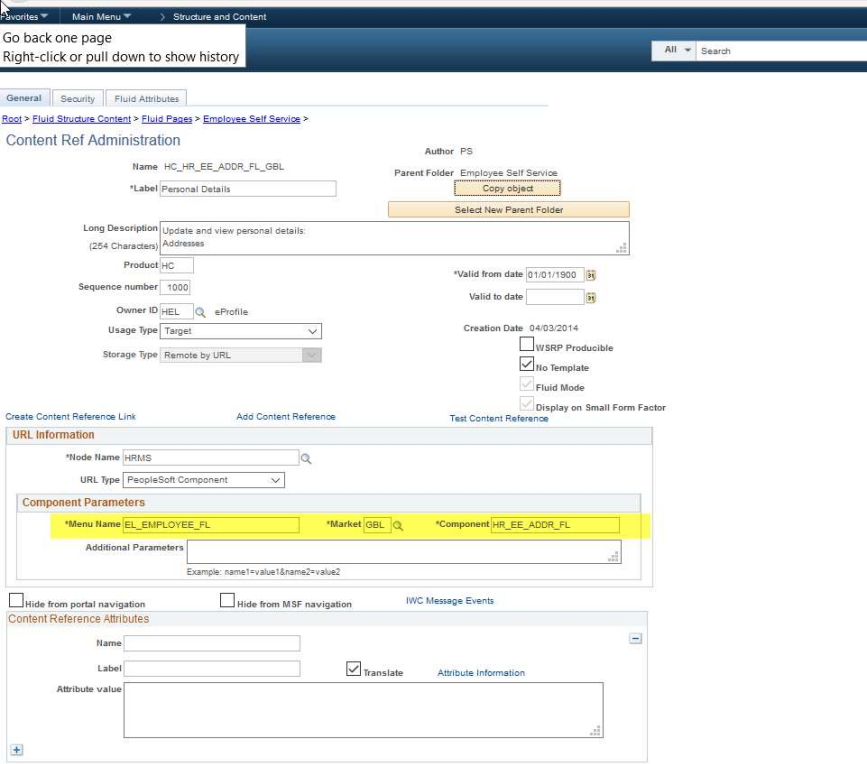
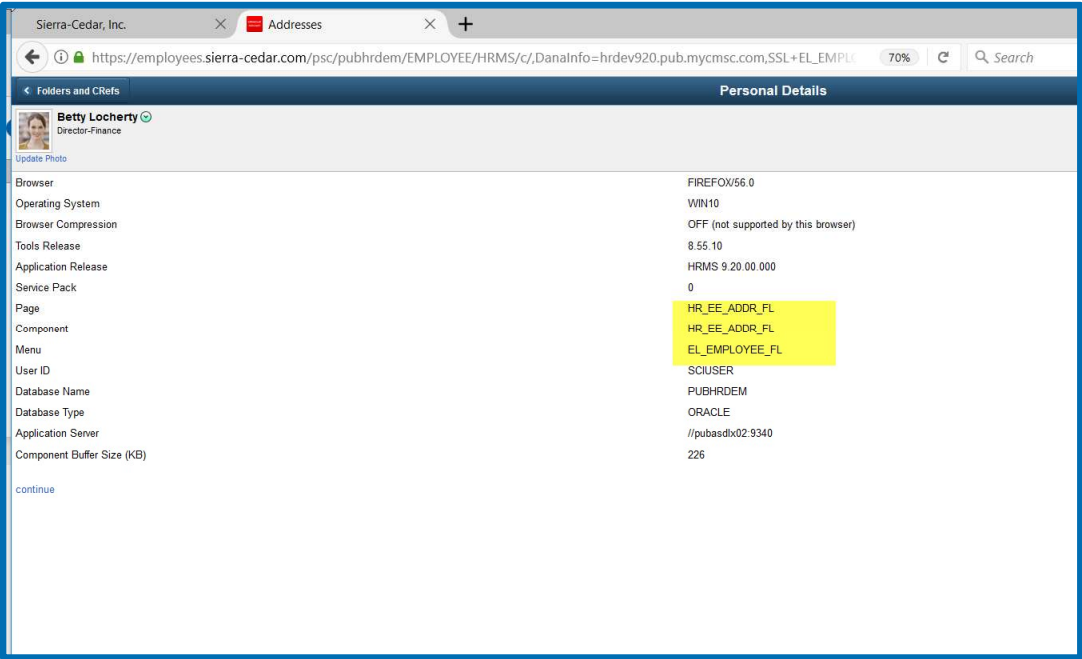
# FLUID: HOMEPAGE



# FLUID: REDIRECTS



# FLUID: REDIRECTS



SQL- Find redirects

SQL- Find Missing Security in Redirects

Base Fluid [Spreadsheet](#)



Thank You for Attending  
Any Questions?

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Phone: 402-730-4388