Working with **PEOPLESOFT FORMS** and Approval Builder

PRESENTED BY:

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Some Fast Facts:

- Founded 1887 (relocated to Hamilton in 1930)
- Canada's most research-intensive, medical-doctoral university
- One of four Canadian universities ranked in the world's top 75.
- 31,843 Students 10,000+ employees, 988 FT Faculty
- 196,000 alumni representing 139 countries
- One of the Top 5 employers in Hamilton region

- More fast facts here:

THE DETAILS

McMaster's current environments and images

➢ **Financials And Supply Chain Management (FSCM)**

- (aka "Finance" and/or "GL")
- Version 9.2.25

➢ **Human Capital Management (HCM)**

- (aka "HR")
- Version 9.2.24

➢**Campus Solutions (CS)**

- (aka "student" and/or "campus")
- Version 9.2.07

PeopleTools Version = 8.55.22

PeopleSoft Cumulative Feature Overview

SESSION GOALS

❖ Connect with other PeopleSoft From and Approval Builder (PSFAB) users
- gain insight and learn from mutual experience
- encourage co-operation amongst individuals and institutions

❖ Connect with new/potential PSFAB users
- provide a resource, answer questions, provide tips and suggest best practices
- learn from the mistakes of others

❖ Build relationships and consensus amongst PSFAB users
- Increase interest and activity on community forums
- support existing enhancement "Ideas"
- build support content
- network with potential resources

Overview:

1 the PROMISE:
(and the process)

2 the STRUGGLE
(and the gaps)

3 the REWARDS
(and the reboots)

4 the LESSONS
(and the hope)

THE PROMISE

and the process

How McMaster come to implement PSFAB tools and what it took for us to produce work-able solutions for our business.

THE PROMISE so why am I doing this?

Ease of adoption

- Packaged tool
- Low cost/risk
- Minimal configuration
- Cross-Module
- Easy implementation
- Easy development

Potential

- Approval Workflow Engine (AWE)
- Database integration
- Component Interface (CI) mapping
- Customization potential

THE PROCESS so how am I doing this?

Form Design Tools
- Design Form / Manage Forms
- Define Prompt Records
- Form to CI Mapping
- Document Form References

Approval Workflow Engine (AWE)
- User List Setup
- Transaction Registry
- Configure Transactions
- Setup Process Definitions

Security
- Form Admin/Designer Role
- Form Access role (Fluid)
- Role based User Lists

Database Tables and Query Tools
- Query Manager
- Building views (Application Designer)
- Security Tree (delivered/custom)
- SQL Developer
- SQL statements (insert select)

Data Mover Scripts (DMS)
- Form migration tools
- Vital to avoid activation issues

People Tools / Portal
- Structure and Content

Consider… PS Utilities
- Chrome browser extension
- Identify Components
- Identify DB Tables/Fields
- Cross-environment Favourites

THE STRUGGLE
and the gaps

So if it's easy to adopt and use, why can it be difficult to implement effective forms?

THE

STRUGGLE

to accept the things you cannot change.

⚙	Not as robust as other form-specific applications
✓	Minor but significant differences between Fluid and Classic
⌛	Classic design tool can be challenging and time-consuming
🛠	Fluid has better design tools but imposes additional limitations
📚	Lack of formal documentation and resources

THE STRUGGLE to get to where you want to go

➢ Select an appropriate place to start

➢ Prepare for a realistic (potentially long) development cycle

➢ Include Form requirements in project management plan(s)

➢ Consider all the stake-holders for UAT

➢ Utilize all potential resources and documentation

➢ Work within the constraints of the tool(s) – > methodical

➢Carefully consider between Classic and Fluid (if applicable)

the FLUID versus CLASSIC question...

Classic – the good

- Rewards creativity
- More design flexibility – fonts/colours/size
- "Section" fields can display lengthy text/instructions/ headers
- Displays "Long Labels"
- More suitable for large forms with many fields /complicated layouts

Classic – the not so good

- Difficult and frustrating design environment
- Columns can be difficult to align
- Lack of real-time save / preview
- Premature navigation integration
- **No editing of Activated forms**

Fluid – the good

- Better design tool, easier and faster
- Real time preview w/3 display modes
- Adjusts column layout based on display
- Easy, real-time saving
- Introduces touch screen compatibility

Fluid – the not so good

- No "Long Labels" (18-character max)
- Cannot re-use labels after saving
- "Section" field type replaced by "Divider"
- Cannot change font, text-size, colour
- Replaces check boxes with Yes/No switch
- Instructions hard to find (hamburger menu)
- **No editing of Activated forms**

Fluid – other considerations

- Requires fluid approvals
- May requires PTools and Image updates

**In between good and evil,
black and white,
us and them,**

we find

THE GAPS

Form Designer Limitations:

➢ Maximum # of instances for each "Use Type" (FORM_SD table)
➢ "Code" and "Yes/No" map as 4- character "Text"
➢ "Prompt" fields also map as Text
➢ "Prompt" limited to 4, 5, 10, or 20-character maximums
  • will not prevent linking to fields that exceed configuration
  • exceeding max yields dead-end user validation error
➢ Activation dead-end
  • most form components permanently lock after activation
  • fields can be added but not deleted
  • major changes usually require complete rebuild
➢ Saving dead-end
  • cannot reuse field identifier (classic) / label (fluid) after saving
  • even if you delete the field you cannot reuse label
➢ Fluid is more restrictive:
  ➢ no "Section" fields/use types
  ➢ labels/header 18 characters max

Functionality Gaps:

➢ Cannot create default field values
➢ Cannot auto-populate fields / display read only fields
➢ Cannot disable default fields (e.g. "Subject", "More Info")
➢ Inactivating Form does not remove Navigator menu link
➢ Can't embed form into approval emails
➢ Accessibility to form instances very restrictive
  • only those who submit/approve can retrieve later
  • admin role does not provide access
➢ Only Form "Owner" can view in design, activate/inactivate   (Admins can take ownership)

PSFAB DESIGN

QUICK DEMONSTRATION

- Classic vs. Fluid Design Tool
- Field "Use Types"
- Workflow basics

CANADA ALLIANCE   4 - 6 NOVEMBER 2019

PSFAB DESIGN basics

(CLASSIC)

Navigation:

Enterprise components > Forms > Design a Form

Enterprise components > Forms > Manage Form

Security Roles:

FORM_ADMIN

FORM_DESIGNER

Design a Form

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

| Find an Existing Value | Add a New Value |

▼ Search Criteria

Search by: Form ⌄ begins with _____

[Search] Advanced Search

Find an Existing Value | Add a New Value

Design a Form

| Find an Existing Value | Add a New Value |

Form _____

[Add]

Find an Existing Value | Add a New Value

Design Form

①—②—③—④—⑤—⑥
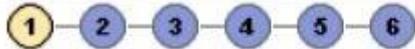
Step 1: Basic Information

Form EST   **Status** In Design

*Effective From 11/01/2019 📅   Effective Until 11/30/2100 📅

*Label Test Form for CHEUG presentati

*Long Description The description above is long enough

(254 Characters)

218 characters remaining

*Owner Id SMITHPA 🔍

Design Form

① — ② — ③ — ④ — ⑤ — ⑥
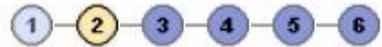
Step 2: Instructions

Form EST

Instructions

Typing instuctions is boring and we know that no one will ever read them so why not make some text BIG, **Bold** and **RED**

Design Form

①—②—③—④—⑤—⑥

Step 3: Form Fields

Form EST

Left Column

Personalize | Find | View 8 | 🔲 | 📊   First ◀ 1-9 of 9 ▶ Last

		*Label	*Use Type	*Length	Field Status	Details				
☐	1	Header / Info	Section ⌄		In Design	Details		⬇	➕	➖
☐	2	Text boxes	Text ⌄	10 ⌄	In Design	Details	⬆	⬇	➕	➖
☐	3	Drop Down	Code ⌄	4	In Design	Details	⬆	⬇	➕	➖
☐	4	Check box	Y/N ⌄	1	In Design	Details	⬆	⬇	➕	➖
☐	5	Date Field	Date ⌄	10	In Design	Details	⬆	⬇	➕	➖
☐	6	Time	Time ⌄	15	In Design	Details	⬆	⬇	➕	➖
☐	7	Data Base lookup	Prompt ⌄	20 ⌄	In Design	Details	⬆	⬇	➕	➖
☐	8	Signed numeric	Signed ⌄	7.2 ⌄	In Design	Details	⬆	⬇	➕	➖
☐	9	Number	Number ⌄	7.2 ⌄	In Design	Details	⬆		➕	➖

⬇ Move to Right Column   ⬆ Move to Left Column

Right Column

Personalize | Find | View All | 🔲 | 📊   First ◀ 1 of 1 ▶ Last

		*Label	*Use Type	*Length	Field Status	Details		
☐	1		Section ⌄		In Design	Details	➕	➖

☐ **Single column style**
Fields of right column will be moved under the fields of left column.

FORM "USE TYPE" MAXIMUM INSTANCES: FORM_SD TABLE:

FIELD "USE TYPE":	Maximum Allowable Fields	FORM_SD Field Label
Date	10 (or 8 may vary by module)	SD_DATE_#
Time	15 (or 8 may vary by module)	SD_TIME_#
Text		
4 Character Text **Code** (i.e. drop-down) **Yes/No** (Checkbox in classic) **Prompt**	10 (or 12 may vary by module) (maps here in classic finance)	SD_TEXT4_#
5 Character Text **Prompt**	10	SD_TEXT5_#
10 Character Text **Prompt**	15	SD_TEXT10_#
20 Character Text **Prompt**	15	SD_TEXT20_#
30 Character Text	10	SD_TEXT30_#
50 Character Text	10	SD_TEXT50_#
254 Character Text	5	SD_TEXT254_#
Number / Signed		
9 Digit	10	SD_INT_#
7.2 Digit	10	SD_NUM9_#
15.4 Digit	8	SD_NUM19_#

Design Form

1 — 2 — 3 — 4 — 5 — 6
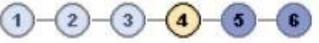
Step 4: Attachment Templates

Form EST

Form Attachment Templates		Personalize | Find | 🔁 | 🖥		First ◀ 1 of 1 ▶ Last		
Description	**Attached File**	**Attach**	**Open**			
1			Attach	Open	➕	➖
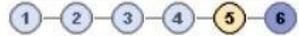
< Previous   Next >   Cancel

Design Form

①—②—③—④—⑤—⑥

Step 5: Publish to Menu

Form EST

Root > Customers > Customer Information ⬅

⬆ Up one level

Sequence number 100

Content References		Personalize	Find	View All		First 1-10 of 10 Last
Quick Customer Create		10
General Information		20
Dun & Bradstreet		30
Dun & Bradstreet Lookup/Order		31
MICR Information		40
Corporate Customer Tree		50
Corporate Tree Messages		60
Supplier Information		70
Electronic File Transfer Name		80
Reimbursable Agreements		90

DID YOU GET TO THIS SCREEN?

Excellent! The Form is now **Saved.**
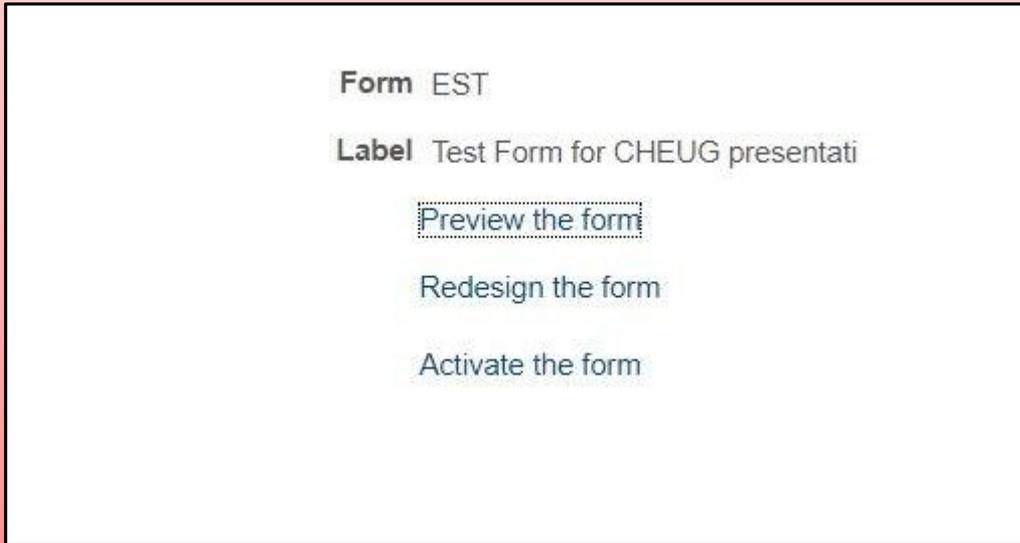
Form EST

Label Test Form for CHEUG presentati

Preview the form

Redesign the form

Activate the form

- Click Preview > confirm layout, test fields/prompts etc…
- Click Redesign > go back into design/make changes
- Click Activate > activate (seriously, don't activate)

YOU DID NOT GET THIS SCREEN?
Bummer! The form is NOT Saved ☹

Form **EST**
Label **Test Form for CHEUG presentati**
Preview the form
Redesign the form
Activate the form

Message

Changes conflict with another data item. (18,5)

When trying to save your changes, the system found a conflict with other information in the database.

This problem may be because of changes made simultaneously by another user. Make a note of the changes you have made, then cancel the page. Reload the page and look for changes. Ensure that your changes are still appropriate, then retry them.

If the problem persists, it may be due to an application programming error and should be reported to technical support staff.

This message occurs when a key is changed on an existing record, and the new set of key values conflicts with an existing record. The application should ensure that any changes to keys result in a unique record.

OK

There is a duplicate field label.. Go go back to step 3. Find it and change it.

Message

The form field "Random8" cannot be mapped to the storage record.

OK

There are too many instances of a field "Use Type".
Delete the extras in order to save; ccustomize FORM_SD
table if you need to add more fields of that type.

*** BUG ALERT ***

NavBar: Navigator

Customer Information

Recent Places

My Favorites

Navigator

Design Form

①—②—③—④—⑤—⑥

Step 5: Publish to Menu

Form EST

Root > Customers > Customer Information

Up one level

Content References   Personalize

Quick Customer Create

General Information

Dun & Bradstreet

Dun & Bradstreet Lookup/Order

MICR Information

Corporate Customer Tree

Corporate Tree Messages

Supplier Information

Electronic File Transfer Name

Reimbursable Agreements

Quick Customer Create

General Information

Dun & Bradstreet

Dun & Bradstreet Lookup/Order

MICR Information

Corporate Customer Tree

Corporate Tree Messages

Supplier Information

Electronic File Transfer Name

Reimbursable Agreements

Test Form for CHEUG presentati

Once you have completed all six stages of the Classic Form Designer / Activity Guide and your form has been saved, the navigation menu item as configured in Step 5 automatically publishes to the nav menu, even if you haven't activated the form. Not sure if this is a documented bug.

Anyone who clicks on this Menu item and tries to add a form instance will get this error message:

Message

Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11)

The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink.

OK

The form designer tool however will not allow you to skip this step. If working in a production environment, it may be best to first select a menu component that is not visible and change it later.

Design Form

① ② ③ ④ ⑤ ⑥

Step 5: Publish to Menu

Form EST

Root > Customers > Customer Information

Up one level

Sequence number

Content References	Personalize	Find	View All		First ◄ 1-10 of 10 ► Last
Quick Customer Create	10
General Information	20
Dun & Bradstreet	
Dun & Bradstreet Lookup/Order	
MICR Information	
Corporate Customer Tree	
Corporate Tree Messages	
Supplier Information	
Electronic File Transfer Name	80
Reimbursable Agreements	90

Message

Field is required.

You have left a field empty and a value must be entered.

OK

< Previous   Next >   Cancel

PSFAB DESIGN basics

(FLUID)

Navigation:
Design Forms Tile
My Forms Tile

Security Role Needed:
FORM_ADMIN

FLUID FORM DESIGNER

FLUID FORM DESIGNER

MANAGING FORMS

FORM OWNERSHIP CONSIDERATIONS

Classic Navigation:

Enterprise components > Forms > Manage Form

Fluid Tile:

Design Forms

FLUID FORM OWNERSHIP

Design Forms

*Form [   ]

Add

4 rows

	Status ⬦	Effective Date From ⬦	Effective Date To ⬦			
	In Design	11/04/2019		Edit		Transfer
	Activated	09/30/2019	09/30/2100	Edit	Add To Homepage	Transfer
	In Design	11/04/2019		Edit		Transfer
	In Design	11/04/2019		Edit		Transfer

CLASSIC FORM OWNERSHIP

ENTERPRISE COMPONENTS > FORMS > MANAGE FORMS

NOTE: Forms in root Folder "Form and Approval Builder" are fluid forms so you can use this screen to manage both fluid and classic forms.

Manage Forms

Portal Label [   ]

*Time Period [Last 30 Days   ▼]

[Search]

Forms   Personalize | Find | View All | 🔁 | 🔢   First ◀ 1-17 of 17 ▶ Last

	Form	Portal Label	Root Folder	Status	Activate	Inactivate	Total	Initial	Pending	Canceled	Approved	Denied	*Owner Id		Change Owner
1	CF_REQUEST	OLD testing CF request	Catalog Management	In Design	Activate	Inactivate							SMITHPA	🔍	Change Owner
2	CRT_UPD_CF	OLD testing CF request	General Ledger	In Design	Activate	Inactivate							SMITHPA	🔍	Change Owner
3	CUST_SETUP	New Customer/Sponsor Request	Accounts Receivable	Activated	Activate	Inactivate	1	1					SMITHPA	🔍	Change Owner
4	EST	Test Form for CHEUG presentati	Customers	In Design	Activate	Inactivate							SMITHPA	🔍	Change Owner
5	FC_PO_CHNG	Facilities PO Change Request	Purchasing	Activated	Activate	Inactivate							PRENTIC	🔍	Change Owner
6	INVCANCEL	Inv. Cancel/Adjust/Write-off	Billing	Activated	Activate	Inactivate							SMITHPA	🔍	Change Owner
7	INVREQNEW	Invoice Request	Billing	Activated	Activate	Inactivate							SMITHPA	🔍	Change Owner
8	INVREQUEST	OLD DRAFT - Invoice Request	Billing	In Design	Activate	Inactivate							SMITHPA	🔍	Change Owner
9	LD_REP_APP	Labour Report Application	Employee Self-Service	In Design	Activate	Inactivate							SMITHPA	🔍	Change Owner
10	NEW_CUST	New Customer Request	Form and Approval Builder	Activated	Activate	Inactivate	6	1	1		4		SMITHPA	🔍	Change Owner
11	NEW_SPLR	OLD DRAFT Supplier Set-up	Purchasing	In Design	Activate	Inactivate							SMITHPA	🔍	Change Owner
12	NEW_SPLR2	Supplier Set-up/Change Request	Purchasing	Activated	Activate	Inactivate							SMITHPA	🔍	Change Owner
13	POC_TEST	Auto-Fill Testing	Form and Approval Builder	Activated	Activate	Inactivate							PRENTIC	🔍	Change Owner
14	PO_CHNG	Purchase Order Change Request	Purchasing	Activated	Activate	Inactivate							PRENTIC	🔍	Change Owner
15	PO_CHNG2	OLD Draft Add/Edit Sup	Purchasing	In Design	Activate	Inactivate							SMITHPA	🔍	Change Owner
16	RSH_APP	Research eApproval Application	Grants	Activated	Activate	Inactivate							FINEMOR	🔍	Change Owner
17	TST_FND	New Trust Fund	Project Costing	Activated	Activate	Inactivate							PRENTIC	🔍	Change Owner

📧 Notify

THE REWARDS

and the reboots

What have we ultimately managed to create, how we utilized some of the form-builder's more advanced functions and how we work around its limitations.

so what are THE REWARDS for all this struggle?

➤ Potential to create powerful and flexible Forms
  ➤ have implemented Forms with up to 45 fields, 25 prompts and sophisticated AWE routing
  ➤ proof of concept in place for Forms to Component Interface (CI) mapping

➤ Prompts are a useful and versatile tool
  ➤ speeds form entry
  ➤ limits field input to existing data
  ➤ validates field contents
  ➤ "Prompt Controls" can be used to feed data into other prompts and filter/limit options
  ➤ can be utilized to build advanced workflow

➤ AWE integration offers good configuration options and flexibility
  ➤ basic workflow elements are created automatically when Form is saved
  ➤ little to no configuration is necessary for simple workflow.
  ➤ can be configured to route to different approvers based on form contents and/or queries
  ➤ same workflow components and configuration as other AWE elements

➤ Forms to Content Interface Mapping
  ➤ can save redundant and time-consuming data entry

➤ Potential for future enhancements and user customizations to fill gaps
  ➤ FORM_SD table can be modified to accept more data
  ➤ people code event mapping to auto-fill fields

what mistakes can lead to unnecessary **REBOOTS?**

1. Poor planning

2. Activating too quickly

3. Not getting feed back from enough stake-holders

4. Allowing requirements to become a moving target

5. Not adapting business processes to fit

6. Neglecting customizations / configurations

ADVANCED FORM FEATURES

DEMONSTRATION

- Prompts and Prompt Controls
- Advanced Workflow
- Component Interface

Invoice Request

*Subject CHEUG Demonstration

Priority 3-Standard ▼   Due Date [   ] 📅

Status Initial

REQUESTER INFORMATION:

*Requester Name: PaulyP

*Email: smithpa@mcmaster.ca

*Department: UTS

*Phone# / Extension: 28705

*AR Business Unit: RFMAC 🔍

CUSTOMER DETAILS:

*Customer Number: [   ] 🔍

*Customer Address: [   ] 🔍

Contact: [   ] 🔍

***If the customer number does not yet exist, please complete the "New Customer/Sponsor Request" form first.

PO # (If appl) [   ]

Is this Repeating? [   ] ▼

If "YES", Frequency: [   ] ▼

If "Other" please specify: [   ]

INVOICE DETAILS:

Billing Currency: [   ] 🔍

Date: [   ] 📅

Payment Terms: [   ] ▼

INVOICE DETAILS / DESCRIPTION (line 1):

Description (more info): [   ]

254 characters remaining

Quantity: [   ]

Unit of Measure: [   ] 🔍

Unit Price: [   ]

Taxable? [   ] ▼

If "Yes" Select type: [   ] 🔍

Charge Code: [   ] 🔍

Fund: [   ] 🔍

Account: [   ] 🔍

Department: [   ] 🔍

Program (if appl): [   ] 🔍

PC Business Unit (if appl): [   ] 🔍

Project (if appl): [   ] 🔍

PC Activity (if appl): [   ] 🔍

INVOICE DETAILS / DESCRIPTION (if additional line):

Description (more info): [   ]

PROMPT CONTROLS

DEMONSTATION

Navigation:

Enterprise components > Forms > Define Prompt Records

Enterprise components > Forms > Manage Form

Security Role Needed:

FORM_ADMIN

Enterprise components > Forms > Define Prompt Records

Define Prompt Records

	*Prompt Record	Record Description		
		Personalize | Find | View All | 🗗 | 🖩	First ◀ 1-15 of 32 ▶ Last	
1	AR_BU_VW 🔍	Business Units from Item Table	+	−
2	BI_CHARGE 🔍	Billing Charge Id Table	+	−
3	BI_CHARGE2_VW 🔍	Charge Id View	+	−
4	BI_CHARGE_VW 🔍	Charge Id View	+	−
5	BUS_UNIT_AR_VW 🔍	AR BU, and GL BU View	+	−
6	BUS_UNIT_TBL_GL 🔍	GL Business Units	+	−
7	BUS_UNIT_TBL_PC 🔍	PC Business Unit Table	+	−
8	COUNTRY_TBL 🔍	Countries	+	−
9	CURR_PYMNT_VW 🔍	View built over currency codes	+	−
10	CUSTOMER 🔍	Customer Header Information	+	−
11	DEPT_TBL 🔍	Departments	+	−
12	EX_EMPLID_VW 🔍	Employee View	+	−
13	FUND_TBL 🔍	Fund Table	+	−
14	GL_ACCOUNT_TBL 🔍	Accounts	+	−
15	ITEM_DST 🔍	Customer Item Distribution	+	−

💾 Save   ✉ Notify

Step 3: Form Fields

Form INVREQNEW

		*Label	*Use Type	*Length	Field Status	Details				
☐	1	REQHEADER	Section		Activated	Details		⬇	➕	➖
☐	2	REQNAME	Text	50	Activated	Details	⬆	⬇	➕	
☐	3	REQEMAIL	Text	50	Activated	Details	⬆	⬇	➕	
☐	4	REQDEPT	Text	20	Activated	Details	⬆	⬇	➕	
☐	5	REQPHONE	Text	20	Activated	Details	⬆	⬇	➕	
☐	6	REQARBU	Prompt	5	Activated	Details	⬆	⬇	➕	
☐	7	CUSTHEADER	Section		Activated	Details	⬆	⬇	➕	➖
☐	8	CUSTNUM	Prompt	10	Activated	Details	⬆	⬇	➕	
☐	9	CUSTADDY	Prompt	4	Activated	Details	⬆	⬇	➕	
☐	10	CONTEMAIL	Prompt	20	Activated	Details	⬆	⬇	➕	
☐	11	CUSTINSTCT	Section		Activated	Details	⬆	⬇	➕	➖
☐	12	CUSTPO	Text	10	Activated	Details	⬆	⬇	➕	
☐	13	RECURR	Code	4	Activated	Details	⬆	⬇	➕	
☐	14	FEQUENCY	Code	4	Activated	Details	⬆	⬇	➕	
☐	15	REQOTHER	Text	20	Activated	Details	⬆	⬇	➕	

Left Column   Personalize | Find | View 8 | | First 1-23 of 23 Last

ADVANCED WORKFLOW

DEMONSTATION

Navigation:

Enterprise Comp. > Approvals > Approvals > Transaction Registry

Enterprise Comp. > Approvals > Approvals > User List Setup

Reporting Tool > Query > Query Manager

Design Form

① — ② — ③ — ④ — ⑤ — ⑥

Step 6: Approval Process

Form INVREQNEW

*Lockdown Options Lockdown After Submit ▼

Steps		Personalize | Find | View All | 🔼 | 🔣	First ◀ 1 of 1 ▶ Last	
	Approver User List	Description		
1	INV_REQUEST_APPRV 🔍	Invoice Request Form Approval	➕	➖

< F

User List Definition

User List INV_REQUEST_APPRV

*Description Invoice Request Form Approval

User List Source

○ Role

○ SQL Definition

◉ Query   Query Name MCM_FORM_WF_INVREQUEST 🔍

○ Application Class

☐ Include Users as Input

☑ Transaction Keys as Input

[💾 Save] [🔍 Return to Search] [📧 Notify]

Status Initial

REQUESTER INFORMATION:

*Requester Name: PaulyP

*Email: smithpa@mcmaster.ca

*Department: UTS

*Phone# / Extension: 29705

*AR Business Unit: RFMAC 🔍

CUSTOMER DETAILS:

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View SQL

Query Name MCM_FORM_WF_INVREQUEST   **Description** Form Workflow for BI Specialis

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record		
A	FORM_SD - Form Supplemental Data Store	Hierarchy Join	−
B	BI_SPECIALIST - Billing Specialist Table	Hierarchy Join	−

Expand All Records

Save   Save As   New Que

Return To Search

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View SQL	Run

Query Name MCM_FORM_WF_INVREQUEST   **Description** Form Workflow for BI Specialis   Feed ▾

Add Criteria   Group Criteria   Reorder Criteria

Criteria   Personalize | Find | 📷 | 📊   First ◄ 1-4 of 4 ► Last

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
▼	A.SEQ_NBR - Sequence Number	equal to	:1	Edit	−
AND ▼	B.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	−
AND ▼	A.SD_TEXT5_8 - Text Field	equal to	B.SETID - SetID	Edit	−
AND ▼	B.BILL_AUTHORITY_FLG - Billing Authority Flag	equal to	Y	Edit	−

Save   Save As   New Query   Preferences   Properties   Publish as Feed   Publish as Pivot Grid   New Union

Return To Search

Register Transactions

*NOTE: In Fluid, Process ID = EOFM

Process ID	FormApproval
*Description	Form Approval
Owner ID	Enterprise Components ▾
*Cross Reference Table	FORM_AW 🔍
Worklist Prefix	

▶ **Notification Options**

▶ **Internal URL Definition**

▶ **External URL Definitions**

▶ **URL Appending Parameters**

▶ **Default Approval Component**

▶ **Approval Event Handler Class**

▶ **Approval Status Monitor**

▼ **Transaction Approval Levels**

	*Level	*Record (Table) Name		
1	Header ▾	FORM 🔍	＋	－

Level Record Key Field Label IDs

	Record (Table) Name	Field Name	*Field Label ID	
1	FORM	SEQ_NBR	SEQ_NBR	🔍

Expand/Collapse All

COMPONENT INTERFACE

FORMS TO CI PROOF OF CONCEPT

Navigation:

Enterprise Comp. > Forms > Forms to CI Mapping

FORM TO CI STEPS:

1. Select Your Component
2. Identify Key Fields
3. Determine Security / Approvers
4. Build Your Form
5. Build Your Component Interface
6. Reap the rewards (presumably)

CREAMERD FS PRE ⭐ 📁 ✏️ 🔍 🖨️ ❓

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

SetID SHARE   Customer ID NEXT

Page Information (CTRL+J) ✕

General Info

*Status Active ▼   Copy From Customer
*Date Added 11/05/2019 📅   *Since 11/05/2019 📅
*Name 1 [ ]
Name 2 [ ]
Currency Code [ ] 🔍   Rate Type [ ] 🔍

Roles

Menu:	MAINTAIN_CUSTOMERS
Component:	CUSTOMER_GENERAL
Page:	CUST_GENERAL1
App Server:	localhost:9000
Peopletools Version:	8.55.22

OK

Form to CI Collection Mapping

Document Category Form   *Description Marlon's NEW_CUST   **Enterprise Components > Forms > Forms to CI Mapping**
Document Name NEW_CUST
Form Type NEW_CUST
*Mode Add

Document Component Interfaces   Find | View All   First ◀ 1 of 1 ▶ Last

Component Interface Name CUSTOMER_MAIN_CI 🔍   Level0 Record Name CUSTOMER 🔍   ➕ ➖
Menu Name MAINTAIN_SPONSOR ▼   Sequence [ ]

☑ Select All   ☐ Clear All   Delete   Get CI Properties

CI Collection Property Mappings   Personalize | Find | View All | 🔢   First ◀ 1-15 of 15 ▶ Last

	Seq	Form Field Name	CI Scroll Level	CI Key Field	CI Collection	CI Collection Property Name	CI Property Default	Active Flag	CI Level Main Record	CI Parent Collection Name	CI Record Name	CI FieldName	
☐	1		Level 0	☑	PS_ROOT	SETID	SHARE	☑			CUSTOMER	SETID	➕➖
☐	2		Level 0	☑	PS_ROOT	CUST_ID	NEXT	☑			CUSTOMER	CUST_ID	➕➖
☐	3	CUSTOMER NAME:	Level 0	☐	PS_ROOT	NAME1		☑			CUSTOMER	NAME1	➕➖
☐	4	CURRENCY (BILLING)	Level 0	☐	PS_ROOT	CURRENCY_CD		☑			CUSTOMER	CURRENCY_CD	➕➖
☐	5		Level 0	☐	PS_ROOT	CUR_RT_TYPE	CRRNT	☑			CUSTOMER	CUR_RT_TYPE	➕➖
☐	6		Level 1	☐	CUST_TEAM	SUPPORT_TEAM_CD	SUP	☑	CUST_TEAM	PS_ROOT	CUST_TEAM	SUPPORT_TEAM_CD	➕➖
☐	7		Level 1	☐	CUST_TEAM	DEFAULT_FLAG	Y	☑	CUST_TEAM	PS_ROOT	CUST_TEAM	DEFAULT_FLAG	➕➖
☐	8		Level 1	☐	CUST_ADDR_SEQ	ADDRESS_SEQ_NUM	1	☑	CUST_ADDR_SEQ	PS_ROOT	CUST_ADDR_SEQ	ADDRESS_SEQ_NUM	➕➖
☐	9	COUNTRY:	Level 2	☐	CUST_ADDRESS	COUNTRY		☑	CUST_ADDRESS	CUST_ADDR_SEQ	CUST_ADDRESS	COUNTRY	➕➖
☐	10	ADDRESS 1:	Level 2	☐	CUST_ADDRESS	ADDRESS1		☑	CUST_ADDRESS	CUST_ADDR_SEQ	CUST_ADDRESS	ADDRESS1	➕➖
☐	11	ADDRESS 2:	Level 2	☐	CUST_ADDRESS	ADDRESS2		☑	CUST_ADDRESS	CUST_ADDR_SEQ	CUST_ADDRESS	ADDRESS2	➕➖
☐	12	CITY:	Level 2	☐	CUST_ADDRESS	CITY		☑	CUST_ADDRESS	CUST_ADDR_SEQ	CUST_ADDRESS	CITY	➕➖
☐	13	PROVINCE / STATE:	Level 2	☐	CUST_ADDRESS	STATE		☑	CUST_ADDRESS	CUST_ADDR_SEQ	CUST_ADDRESS	STATE	➕➖
☐	14	POSTAL / ZIP:	Level 2	☐	CUST_ADDRESS	POSTAL		☑	CUST_ADDRESS	CUST_ADDR_SEQ	CUST_ADDRESS	POSTAL	➕➖
☐	15	CUST PHONE# / EXT	Level 2	☐	CUST_ADDRESS	PHONE		☑	CUST_ADDRESS	CUST_ADDR_SEQ	CUST_ADDRESS	PHONE	➕➖

🖫 Save   ↻ Return to Search   ✉ Notify   ⟳ Refresh   ➕ Add   📄 Update/Display

ER 2017

Save   Preview Approval   Submit

*Description   Proof of Concept for Forms to Component Interface Mapping

Approval Status   Initial   Created On   11/05/2019

Requestor Info:

Requestor Name: PaulyP   Requestor Email: smithpa@mcmaster.ca

Phone# /Extension: 24357   Department   UTS

Customer Details:

Customer Name: Hoping it all Works Out   Address 1:   1 Nowhere St

Address 2:   City: Hamilton

Country: CAN   🔍   Province / State: ON   🔍

Postal / Zip: 2BorNot2B   Cust Phone# / Ext   905-945-3243

Currency (billing)   CAD   🔍

Cust. Contact

Cust. Contact Name   Some Guy   Contact Title: Mr. Nobody

Contact Email: someguy@someplace.ca   Contact Phone   416-905-1234

Pref. Del. Method   Email ∨

Research Detail

Cust a Sponsor?   Yes ⬤   If Yes Type: 008   🔍

More Information

Attachments

There is no attachment uploaded.

Add Attachment

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*Description   Proof of Concept for Forms to Component Interface Mapping

Approval Sta...

Cancel

Review/Edit Approvers

Requestor Na...

Phone# /Extens...

Approver Information	⧉
▸ VALLBACKA,JENNIFER Pending	
▸ LEWINGTON,KELLY Pending	
▸ FIGURA,GRAZYNA Pending	
▸ KNOTT,DEBORAH Pending	
▸ 🖻 CREAMER,DIANNA Pending	

Customer Na...

Addres...

Cour...

Postal /...

Currency (bill...

New Customer Request

Save | **Approve** | Deny

*Description | Proof of Concept for Forms to Component Interface Mapping

Approval Status Pending Approval | Created On 11/05/2019

Requestor Info:

Requestor Name: PaulyP | Requestor Email: smithpa@mcmaster.ca

Phone# /Extension: 24357 | Department UTS

Cancel | **Approve** | Submit

Comment

I approve. I hope the Component Interface works.

New Customer Request

Save & Post Form | Save

*Description | Proof of Concept for Forms to Component Interface Mapping

Approval Status Approved | Created On 11/05/2019

Requestor Info:

Requestor Info:

Requestor Name: PaulyP | Requestor Email: smithpa@mcmaster.ca

Phone# /Extension:

Customer Details:

The form (SHARE/10001929) has been successfully posted to the transactional tables thru CUSTOMER_MAIN_CI Component Interface.
Link(s) to the transactional component(s) is(are) now available on the form.

OK

Customer Name:

Address 2: | City: Hamilton

Cust. Contact Name Some Guy	**Contact Title:** Mr. Nobody
Contact Email: someguy@someplace.ca	**Contact Phone** 416-905-1234
Pref. Del. Method Email ▾	

Research Detail

Cust a Sponsor? Yes **If Yes Type:** 008

More Information

Attachments

There is no attachment uploaded.

Add Attachment

Related Documents

1 ro

Link to Related Component ◇	Component Name ◇	Submitted By ◇	Last Update Date/Time ◇
1 Document Key String	CUSTOMER_GENERAL	CREAMERD	11/06/19 12:10:54AM

| General Info | Details | Attributes | Bill To Options | Ship To Options | Sold To Options | Miscellaneous General Info | Grants Management |

SetID SHARE   Sponsor 10001929   General Info Links ...More ▾

*Status Active ▾   Level Regular ▾
*Date Added 11/06/2019   *Since 11/06/2019   *Type User 1 ▾
*Name 1 Hoping it all Works Out   *Short Name Hoping it
Name 2
Currency Code CAD 🔍   Rate Type CRRNT 🔍

Roles

☐ Bill To Customer   ☐ Correspondence Customer
  Bill To Selection   Correspondence Selection
☐ Ship To Customer   ☐ Remit From Customer

General Information

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

Find an Existing Value | Add a New Value

▼ **Search Criteria**

SetID	= ▼	∫HARE 🔍
Customer ID	begins with ▼	10001929 🔍
Name 1	begins with ▼	
Name 2	begins with ▼	
Telephone	begins with ▼	
City	begins with ▼	
State	begins with ▼	
Postal Code	begins with ▼	

☐ Include History   ☑ Correct History   ☐ Case Sensitive

[Search]   [Clear]   Basic Search 🔖 Save Search Criteria

Search Results

View All   First ◀ 1 of 1 ▶ Last

| SetID	Customer ID	Name 1	Name 2	Telephone	City	State	Postal Code
SHARE	10001929	Hoping it all Works Out	(blank)	905/945-3243	Hamilton	ON	2BORNOT2B

Find an Existing Value | Add a New Value

THE LESSONS

and the hope

Recapping some of the things we've learned about the tool and some tips for best practices. What we hope to implement in the future and what future enhancements we hope Oracle will introduce.

what are THE LESSONS that I wish I knew back then?

➤ Start Simple and temper expectations

➤ **Never** Activate > work-around activation dead-ends

➤ Requirements > design > test > requirements > redesign > retest

    ➤ (repeat as much as necessary)

➤ Stake-holders: get input from everyone

➤ Use "Section" fields creatively (classic)

➤ Save constantly in Classic

➤ Save wisely in Fluid (or consider starting with temp. field names)

➤ Consider that: More Forms might be >= more fields

➤ Know thy tables => FORM_SD (Data mover Scripts Info)

➤ Don't forget about attachments

➤ Utilize SQL views to:

    ➤ build better prompts / prompt controls

    ➤ work around 20-character max

    ➤ build advanced workflow routings

what are some things that provide **THE HOPE** for the future?

Implementation of Enhancement requests

Component interface potential

Customizations successfully implemented by others

Auto-populate with People Code event mapping (PT 8.56 minimum)
https://leanitdesigns.blog/2017/06/25/enhancing-fluid-forms-with-peoplecode-event-mapping/

Potential to clone forms via SQL Insert/Select statements

Application Designer / People code work-arounds

More engagement from more users

Better resources

THE HOPE THAT EVERYONE WILL PITCH IN...

<u>Peoplesoft Enhancement Requests ("Ideas") Related to Forms</u>

Allow "related fields" to auto-populate / default values in noneditable fields
https://community.oracle.com/ideas/13356

Issue with Restricted access to approved forms
https://community.oracle.com/ideas/21374
https://community.oracle.com/ideas/20697

App Designer ability to migrate PSFABS content
https://community.oracle.com/ideas/17546

Forms need to be more dynamic and configurable (Possible user customizations)
https://community.oracle.com/ideas/24941

Forms Approval Builder Clone Feature
https://community.oracle.com/ideas/25162

THANK YOU!

HEUG
Higher Education User Group