



**Quest
Oracle
Community**

PeopleSoft Financials PUG Meeting

WorkCenters and Activity Guides

Agenda

- Housekeeping
- Presentation and Open Discussion



Join us online!

2 great events, 1 great price



Registration opens March 1st

Plan for the future

Roadmaps, updates, enhancements

PeopleSoft
RECONNECT
ENVISION

April 26 – 29, 2021

With a **focus on planning ahead**, RECONNECT Envision is where IT leaders, decision-makers and end users learn about what's coming from PeopleSoft and how to plan for the next few years: product extensions to consider, and how to leverage technology investments to drive their business forward.

Get hands-on

How to's, workshops, demos

PeopleSoft
RECONNECT
DIVE DEEP

October 4 - 7, 2021

Providing **practical digital learning**, RECONNECT Dive Deep is where PeopleSoft users of all levels can dig into new releases, dive deep into practical learning, get new ideas from best practices, and hone their core PeopleSoft skills.

SAVE BIG with Corporate Pass Event Bundles

questoraclecommunity.org/reconnect

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Helpful Links

- Idea Space on My Oracle Support
 - https://docs.oracle.com/cd/E52319_01/infoportal/mosc.html
- PeopleSoft Information Portal
 - https://docs.oracle.com/cd/E52319_01/infoportal/index.html
- YouTube
 - <https://www.youtube.com/user/PSFTOracle>
- Planned Features
 - https://support.oracle.com/epmos/faces/DocumentDisplay?_afLoop=50996435081614&id=1966243.2&_afWindowMode=0&_adf.ctrl-state=16kfxpbalm_4
- Image 38 Video
 - <https://www.youtube.com/watch?v=dilMtj1hjTE&list=PL4okLhHVjSg5EY1HIVAFw6aBZWurBrqIY>

WorkCenters, Activity Guides, and more

WorkCenters vs Homepages

- WorkCenters have pagelets already configured with exception based reporting, activity/work you need to perform as well as navigational links
- Homepages contain tiles that allow you to navigate to a particular area within PeopleSoft
- The tiles within a homepage can also contain queries and exception reporting
- With a WorkCenter it is built on a framework that shows it all in a “one stop shop” type of experience

Are WorkCenters difficult to manage?

- Not at all.
- Navigation: PeopleTools > Portal > WorkCenter > Manage WorkCenter Pages
- https://docs.oracle.com/cd/F30998_01/pt858pbr2/eng/pt/tprt/task_ManagingWorkCenterPages.html?pli=ul_d46e253_tprt

Delivered WorkCenters

- Accounts Payable
- Asset Management
- Billing
- Buyer
- Contract/sourcing
- Contracts
- Expenses
- General Ledger
- Grants
- Maintenance Management
- Payables
- Pricing Manager
- Projects
- Receivables
- Resource
- Staffing
- Supplier Administration
- Supply/Demand
- Treasury

Pagelet Configuration

WorkCenter/Dashboard | My Work | Links | Queries | Reports/Processes

Configuration ID BI
Description
Portal Name EMPLOYEE

WorkCenter
Menu Item

Fluid WorkCenter
Menu Item

Dashboard/Homepage
Menu Item

Fluid WorkCenter Grouplet Display Order

Display Order	Fluid WorkCenter Grouplet	Show Grouplet	Start Grouplet Collapsed
<input type="text" value="1"/>	My Work	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="2"/>	Links	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="3"/>	Queries	<input checked="" type="checkbox"/>	<input type="checkbox"/>

WorkCenter/Dashboard | My Work | Links | Queries | Reports/Processes

Billing WorkCenter as an example

- Fluid
- Includes a Dashboard
- 4 Grouplets:
 - My Work
 - Links
 - Queries
 - Reports/Processes

My Work

WorkCenter/Dashboard **My Work** Links Queries Reports/Processes

Configuration ID BI

Description Billing WorkCenter

- Allow User to Personalize the Display Options
- Enable Scope

[Set Up Scope Security](#)

Update User Personalization Settings ?

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

Activate My Work Settings

Last Modified 05/18/2019 10:19:55AM GS4462
Last Run On 05/18/2019 10:19:55AM GS4462

My Work Groups ?

*Group Label Start Group Collapsed Hide Group

Display Order

My Work Links ?

Define Link/Security	Display Order	Link Label	Link Type	Classic/Fluid	Filter ID	Show in SFF	Show Count	Show Link	Starting Page		
Define	<input type="text" value="1"/>	Invoices Not Finalized	System-Defined	Both	BI_FILTER	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="2"/>	Consolidated Invoices Not Finalized	System-Defined	Both	BI_FILTER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="3"/>	Invoices Pending My Approval	System-Defined	Both		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="4"/>	Invoices Not Submitted for Approval	System-Defined	Both	BI_FILTER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="5"/>	Invoices Pending Approval	System-Defined	Both	BI_FILTER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="6"/>	Installment Invoices Not Generated	System-Defined	Both	BI_FILTER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Note:
Checkboxes for
Allow User to
Personalize and
Enable Scope

Always make sure
you Activate My
Work Settings

Flexibility in What
you show the
user, whether you
include the
Count and show
the link, and if it is
a starting page

Links

Link Groups ?

*Group Label Start Group Collapsed Hide Group

Display Order

Link List ?

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window		
Define	<input type="text" value="1"/>	Express Billing	Menu Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="1"/>	Standard Billing	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="2"/>		Menu Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="3"/>		Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="4"/>	Recurring Bill Schedules	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="5"/>	Installment Bill Schedules	Menu Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="6"/>	Copy Single Bill	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Define	<input type="text" value="7"/>	Copy Bill Group	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

- Defining the links
- Delivered vs you adding your own
- Links can be external or internal(menu item or URL)
- Have fun with this section – think about your user and the resources

Queries

Query Groups [?] 1 of 2 ▶ | [View All](#)

*Group Label Start Group Collapsed + -

Display Order Hide Group

Query Definition [?] 1-12 of 12 ▶

Display Order	*Type	Override Title/Description	Query Name	Description	Access	Show Link	Starting Page		
<input type="text" value="1"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_BI014_MANUAL_INV_BY_USERID"/> 🔍	BI Manual Invoices by User ID	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="2"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_BI013_INV_BY_BU_RECTYPE"/> 🔍	Billing Invoices by BU&RecType	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="3"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_BI009_HSPHD_ONGOING_CHARG"/> 🔍	HSPHD Monthly On-Going Charges	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="4"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_BI006_SWT_BILLINGS"/> 🔍	Solid Waste Billings	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="5"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_BI015_SWT_INTFC_MGTFEE"/> 🔍	Solid Waste BI Intfc Mgt Fees	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="6"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_BI016_SWT_MGMTFEE_REC"/> 🔍	Solid Waste Mgmt Fee Received	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="7"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="BI_PENDING_CRCARD_SUM"/> 🔍	Pending Credit Card summary	Access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="8"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="BI_PENDING_WKSHEET"/> 🔍	Pending Worksheet	Access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="9"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_BI005_SPD_PERDIEM_PROC"/> 🔍	Sheriff Per Diem & Processing	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="10"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_BI011_HSPHD_VSP_CHARGES"/> 🔍	HSPHD VSP Charges	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="11"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_AR100_INVOICES_OVER_365"/> 🔍	Invoices outstanding 1 year +	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="12"/>	Query ▼	<input type="checkbox"/>	<input type="text" value="HC_AR101_INV_OVER_25K"/> 🔍	Invoices over 25k for prior yr	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Reports/Processes

[WorkCenter/Dashboard](#)

[My Work](#)

[Links](#)

[Queries](#)

Reports/Processes

Configuration ID BI

Description Billing WorkCenter

Allow User to Personalize the Display Options

Allow User to Add Additional Links

Update User Personalization Settings ?

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

Activate Reports/Processes Settings

Last Modified 05/18/2019 10:19:55AM GS4462

Last Run On 09/08/2018 8:11:40AM FSCMBATCH

Link Groups ?

Q | << < 1-3 of 3 > >> | View 1

*Group Label

Start Group Collapsed

+ -

Display Order

Hide Group

Link List ?

Q << < 1-4 of 4 > >>

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window		
Define	<input type="text" value="1"/>	Reprint Invoices	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	<input type="text" value="2"/>	Process Billing Interface	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	<input type="text" value="3"/>	Single Action Invoice	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	<input type="text" value="4"/>	Request Credit Card Processing	Menu Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

WorkCenter Discussion

- Do you use workcenters?
- If so, which ones?
- Have you created a custom workcenter?
- Other discussion questions.

Activity Guides

Understanding Activity guides

- Allow you to define guided procedures for a user or group of users to complete.
- Users are presented with a list of tasks, or steps, that need to be completed to finish the procedure.
- Activity guides can be useful in a number of procedural scenarios.
- https://docs.oracle.com/cd/F30998_01/pt858pbr2/eng/pt/tprt/concept_UnderstandingActivityGuides.html?pli=ul_d69e265_tprt

Hennepin created Grants Activity Guide

Create New Proposal

*Business Unit *Proposal ID *Version ID

*Short Title

*Budget ID No. Periods

*PI ID *Sponsor ID

*Start Date *End Date

*Institution *Department

*Subdivision *Location Code

Created a custom page to capture information that is required to save a grant proposal

HC Grants AG Welcome Page

HC Grants Pre-Proposal Process

Previous Next Continue Later Mark Complete

New Window Personalize Page

HC Grants Pre-Proposal

Legend

Task Progress 0 11

- Grants-Proposal
- Proposal CFDA
- Grants-Project
- Grants-Budget
- F&A Pricing Setup
- Budget Detail
- Grants-Resource
- Grants Attachment
- Start Approval
- Submit Proposal
- Generate Award

Proposal ID CON000000000844

Version ID V101

Description testing for PUG

Currency USD

Add to My Proposals

Reference Award Number

Federal Award Identification Number

*Title testing for PUG

Start Approval Process

Long Description

254 characters remaining

*PI ID 902394004 Ingram, Pamela Marie

*Sponsor ID 0000000001 MN Homeland Security & Emerg Mgmt-State

Pre-Award Administrator

Status

*Proposal Status Draft

Submit Status: Not Submitted

Generate Status: Not Generated

In Approval Process

Facilities & Admin Requested

Work Flow By Pass

Foreign Application/Component

NIH Modular Grant

Due By

Budget Express

Additional Information

CFDA

*Start Date 02/01/2021

*End Date 02/01/2022

No. Periods

Build Periods

Budget Periods

1-1 of 1

Details PHS Incomes

Previous End Next End

Activity Guide Discussion

- What activity guides would you like to see delivered by Oracle?
- Have you developed any?
- Other discussion questions?

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Open Discussion

Questions, comments, or concerns?