





**PeopleTools 8.57 Upgrade Overview**

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## Introduction

The Upgrade Overview Document is intended to provide ctcLink users with a summary of the changes that will be made in the system as a result of the upcoming image or PeopleTools upgrade implementation. Oracle releases multiple PeopleSoft updates, called images, for each pillar every year. Each Image contains bug fixes and new features that are important for PeopleSoft to work well. PeopleTools upgrades update the underlying framework of the system. There are minimal changes that are noticeable to the end users. Below is an overview of the changes that you can expect to see as part of this upgrade.

## Accessibility

In the navigation bar (NavBar), pressing the Tab key now moves the focus through the three sections of the NavBar - the Header, the Navigation List, and the Content Area.

### Using the Keyboard with the NavBar

The navigation bar (NavBar) is a control that provides quick access to pages and folders in your PeopleSoft system. The NavBar contains buttons on the left that, when activated, display a list of associated items to the right. The list items can be links, folders, or other objects. Users can use the list items to access a page or folder, without having to navigate through the main menu.

#### Navigation Bar (NavBar)

This example illustrates the appearance of the NavBar.



## Notifications

Notifications were enhanced with:

* Two-panel action view.
* Filter all notifications by priority.

### Using the Two-Panel Action View

You can now view all of your pending actions in the action view, a master/detail presentation of just your actionable items.

In the action view, you can take action directly on the currently displayed item. You can browse the list of all your actionable items, work on an item, and then move to the next or other items on the list without closing the notifications window.

#### Navigation

Notifications button >Action View button

 

#### Two-panel action view

This example illustrates the fields and controls on the two-panel action view.



### Filter by Priority

When using the View All Notifications page, you can now filter notifications by priority.

#### Viewing All Notifications

Use the View All Notifications page to review all of your actions and alerts together.

#### Navigation

Notifications button >View All

 

#### View All Notifications page

This example illustrates the fields and controls on the View All Notifications page. You can find definitions for the fields and controls later on this page.



In the left panel, you can filter the list of notifications by:

* Category name
* Category type
* Message state
* Priority

You can perform these actions on notifications:

* Click a link to open the transaction for that notification.
* Select one or more notifications, and then select an item from the Actions menu:
	+ Mark the notifications as read.
	+ Mark the notifications as unread.
	+ Dismiss the notifications (available for alerts only).

## Background Color

The background color for fluid homepages and dashboards has changed from dark blue to light blue.



## Personalization

When you use Add To Homepage, Add To NavBar, and Add To Favorites, you can now personalize the label for the tile or favorite item.

### Adding Ad Hoc Tiles to Fluid Homepages

You can add ad hoc tiles to fluid homepages using the Add To Homepage link in the Actions List. No actual tile definition will be created for ad hoc tiles.

#### Add To Homepage dialog box

When you add an ad hoc tile to a fluid homepage, you can edit and personalize the label for the item. For example:



### Adding Ad Hoc Tiles to the NavBar

You can also add ad hoc tiles to the NavBar using the Add To NavBar link in the Actions List. No actual tile definition will be created for ad hoc tiles. The information is stored in the system as personalization data only.

#### Add To NavBar dialog box

When you add an ad hoc tile to the NavBar, you can edit and personalize the label for the item. For example:



### Working with Favorites

In the Actions List, click the Add to Favorites link to add the current page as a favorite.

#### Add To Favorites dialog box

When you add a favorite, you can edit and personalize the label for the item. For example:



In the NavBar, click the My Favorites tile to display your list of favorite pages.

#### My Favorites

This example illustrates links added to My Favorites:



Click the Edit Favorites link to access the Edit Favorites page. On the Edit Favorites page you can re-label favorites, delete favorites, or modify the sequence in which they appear under My Favorites.

## Using Autocomplete to Suggest Valid Values

Autocomplete (sometimes referred to as 'type ahead') now supports the use of % and \_ wildcard characters anywhere within the string.



## Process Scheduler Changes

### Addition of Report Manager Link in Process Monitor Page

A Report Manager link is now available on the Process Monitor – Process List page to go to the Report Manager page.

#### Process List page

To access the Process List page, select PeopleTools > Process Scheduler > Process Monitor.

This example illustrates the fields and controls on the Process List page. 

### Addition of Return button in Report Details Page for Report Manager List Page

A Return button is now available on the Report Details page to go to the Report Manager List page.

#### Report Detail Page

To access the Report Detail page, select Reporting Tools > Report Manager > List > Report

This example illustrates the fields and controls on the Report Detail page.



Click the Return button on the Report Detail page to go back to the Report Manager - List page.

### Copying Data from an Existing Job Definition

You can now copy data from an existing Job definition, edit the editable fields for any updates, and save it as a new Job definition with a new name.

#### Schedule JobSet Definition page

To access the Schedule JobSet Definition page, select PeopleTools > Process Scheduler > Schedule JobSet Definitions > Schedule JobSet Definition.

This example illustrates the fields and controls on the Schedule JobSet Definition page.



#### Copying Data From an Existing JobSet Definition

To copy data from an existing JobSet Definition:

1. Access the Schedule JobSet Definition page by selecting PeopleTools > Process Scheduler > Schedule JobSet Definitions > Schedule JobSet Definition.
2. Click the Copy from look up button. The Look Up Copy From page appears.
3. Find an existing JobSet definition by typing all or part of the existing JobSet definition name in the Search by field.
4. Click the JobSet Definition that you want to copy from.
5. Click Yes. The data from the existing JobSet definition is copied to the corresponding fields in the Schedule JobSet Definition page.
6. Update the fields that you want to edit with the correct data.
7. Click Save.



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