

SctcLink PEOPLETOOLS 8.59 UPDATE OVERVIEW

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Introduction

The Image/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 an upcoming image or PeopleTools upgrade implementation. Oracle releases multiple PeopleSoft updates, called images, for each pillar every year. Each Image contains bug fixes and 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.

Homepage Changes

Using the Homepage

The global search icon has been replaced with a search bar that is located in the top-center of the homepage. The flag icon to access your notifications has been replaced with a bell icon in the banner at the top of the page. The homepage selector drop down has been moved to the top-left of the homepage. You can also toggle forwards and backwards through your available homepages with the arrows located towards the top right of the screen. A Quick Access Bar has been added on the left side of the homepage.

Navigation

Homepage on any pillar (Campus Solutions, Financials, or Human Capital Management)

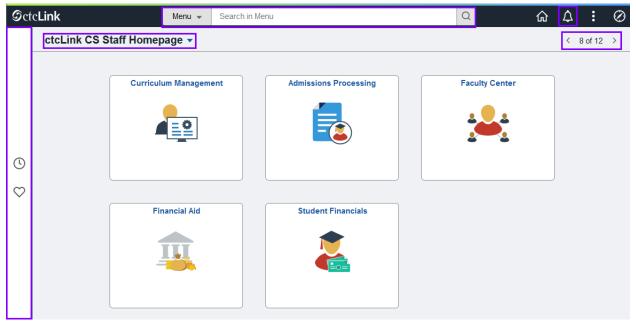


Image: PeopleTools 8.59 Homepage example from CS

Quick Access Bar

The Quick Access Bar provides easier access to your recently visited pages (clock icon) and your favorites (heart icon). It will display on the left side of the screen for larger screens, and will display

on the bottom of the screen for smaller screens such as smartphones.

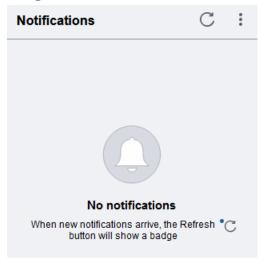
Image: Quick Access Bar



Notifications Panel

The Notifications Panel allows users to view their notifications directly on the homepage for larger screens, instead of needing to select the bell icon. The Notifications Panel is located on the right side of the homepage for users that have selected this option in their homepage settings.

Image: Notifications Panel



Changing the Notifications Panel Display Settings

Users can edit their homepage settings to have the Notifications Panel show or be hidden for each pillar they have access to. When the Notifications Panel is showing on the homepage, the notifications button (bell icon) will no longer display in the banner at the top of the page. To have the Notifications Panel display on the homepage, select the Actions button (three dots icon) in the banner at the top of the page, select the Personalize Homepage option in the drop down, and set the Show Notifications Panel button to Yes, then select the Save button. Setting this button to No and then saving will hide the Notifications Panel.

Navigation

Actions button (three dots icon) in the banner at the top of the page > Personalize Homepage

Image: Show Notifications Panel button on Personalize Homepage

Personalize Homepage

Common Settings	
Show Notifications Panel	Yes i

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Navigating PeopleSoft - Using the Home Page

Navigation Changes

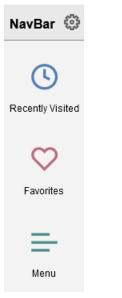
NavBar Button Changes

The Navigation Bar (NavBar) has new icons and descriptions. The Recent Places button in PeopleTools 8.57 is now called Recently Visited and it has a new clock icon. A heart icon now denotes the Favorites button, which used to have a star icon and was called My Favorites. The Navigator button has been replaced with the new Menu button.

Navigation

Select the NavBar (compass icon) at the top right of the screen.

Image: PeopleTools 8.59 NavBar



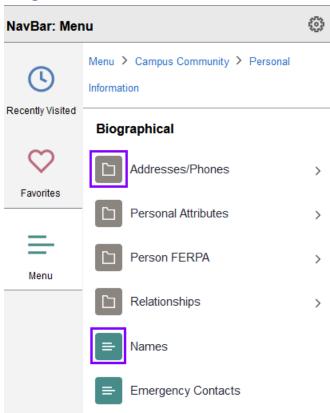
NavBar Menu Icons

New icons will display to the left of a menu item to differentiate between folders and pages. A brown folder icon denotes a folder with subsequent options, while the green icon with the horizontal lines will take you directly to that page.

Navigation

Select the NavBar (compass icon) at the top right of the screen, then the Menu button.

Image: NavBar Menu Icons

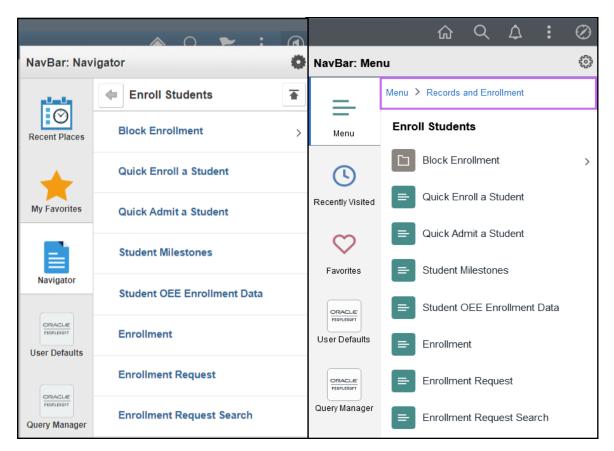


Breadcrumbs

The breadcrumbs display the path you took to get to the page you are on. In the breadcrumb list, each item represents a level of the breadcrumb sequence and links to a folder, subfolder, or component. Navigating the breadcrumb sequence can quickly return you to wherever you started.

Image: Example Navigation Links (Breadcrumbs)

With the PeopleTools 8.59 upgrade, you can view the path you took to reach your current location using the breadcrumbs. Click the Menu link in the breadcrumbs to navigate to the root of the menu structure. Click any other link in the breadcrumbs to browse the contents of the menu folder.



Changing the Menu Order

Users can edit their NavBar settings to determine how menu items are sorted. In addition to the same Standard option that was used in PeopleTools 8.57, Oracle has provided an option that allows menu items to display alphabetically. To edit the Menu order, select the NavBar (compass icon) at the top right of the screen, select the Personalize NavBar button (gear icon), and select either Alphabetical or Standard, then select the Save button.

Navigation

Select the NavBar (compass icon) at the top right of the screen, then select the Personalize NavBar button (gear icon). To set the Menu Order, select either Alphabetical or Standard, then select the Save button.

Image: Personalize NavBar Button

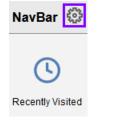
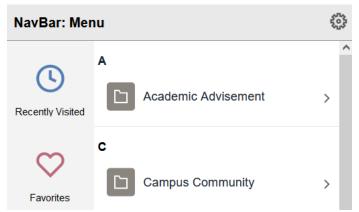


Image: Personalize Menu Order

Cancel	Personaliz	nalize Save			
Menu Order					
Alphabetical	Standard				

Image: NavBar Menu sorted Alphabetically



Menu Item Name Changes

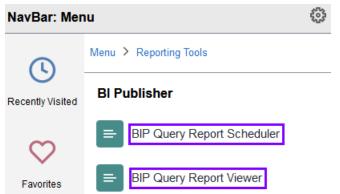
Oracle has modified the name of some Menu items to make them more descriptive for users and to help differentiate search results. Below is the list of pages college staff interact with and should be aware are updated. The page functionality and navigation to these pages is not otherwise impacted.

Previous Page Name	Previous Navigation	Updated 8.59 Page Name	Updated 8.59 Navigation
Data Source	Main Menu > Reporting Tools > Bl	Register BIP Data	Menu > Reporting Tools > BI Publisher >
	Publisher > Data Source	Sources	Register BIP Data Sources
Report Definition	Main Menu > Reporting Tools > Bl	Create BIP Report	Menu > Reporting Tools > BI Publisher >
	Publisher > Report Definition	Definitions	Create BIP Report Definitions
Query Report Viewer	Main Menu > Reporting Tools > Bl	BIP Query Report	Menu > Reporting Tools > BI Publisher >
	Publisher > Query Report Viewer	Viewer	BIP Query Report Viewer
Query Report	Main Menu > Reporting Tools > Bl	BIP Query Report	Menu > Reporting Tools > BI Publisher >
Scheduler	Publisher > Query Report Scheduler	Scheduler	BIP Query Report Scheduler
BIP Report Search	Main Menu > Reporting Tools > Bl	Search for BIP	Menu > Reporting Tools > BI Publisher >
	Publisher > BIP Report Search	Reports	Search for BIP Reports
Report Category	Main Menu > Reporting Tools > Bl Publisher > Setup > Report Category	BIP Report Categories	Menu > Reporting Tools > BI Publisher > Setup > BIP Report Categories
Design Helper	Main Menu > Reporting Tools > Bl	BIP Designer Client	Menu > Reporting Tools > BI Publisher >
	Publisher > Setup > Design Helper	Tools	Setup > BIP Designer Client Tools
Schedule Query	Main Menu > Reporting Tools > Query > Schedule Query	Schedule Queries	Main Menu > Reporting Tools > Query > Schedule Queries
Jobs	Main Menu > PeopleTools > Process	Process Scheduler	Main Menu > PeopleTools > Process
	Scheduler > Jobs	Jobs	Scheduler > Process Scheduler Jobs
Common Queries	Main Menu > PeopleTools > Security >	Review Security	Main Menu > PeopleTools > Security >
	Common Queries	Information	Review Security Information

Navigation

Select the NavBar (compass icon) at the top right of the screen, then the Menu button.

Image: Example of Page Name Changes for BI Publisher



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Navigating PeopleSoft - Using the NavBar

Changes to Search Functionality

Menu Search

Users can also access pages through Menu search, which was called Navigator search in PeopleTools 8.57. The search bar will display automatically in the banner at the top of the page for homepages, and will show up after selecting the search button (magnifying glass icon) on transactional pages. Type your search criteria, then press the Enter key or select the search button (magnifying glass icon) to perform a keyword search based on your entry.

Navigation

Place cursor in the Menu search bar at the top of the page, enter search criteria, then press the Enter key or select the search button (magnifying glass icon).

Image: Example of Using the Menu Search



Image: Example of Accessing the Query Viewer Page Using the Menu Search

View Search Results

7 results for keyword: "query"

```
      Query Viewer

      Review and releasing queries.

      BIP Query Report Scheduler

      Schedule query-based BI Publisher reports.

      Schedule Queries

      Run the schedule query process.
```

Highlighted Page Elements when Hovering

Hovering over a field, row or menu item with the mouse pointer may highlight the item with a different color. With PeopleTools 8.59, the color of this highlight may appear different, such as light blue/grey.

Image: Example My Favorite Queries Row Highlight

With the PeopleTools 8.59 upgrade, the active row is highlighted in a light blue/grey.

C Query Viewer			Records			
Query Viewer Enter any information you have and click Search. Leave	fields blank for a list of all values.	Query Viewer Enter any information you have and clic	k Search Leave f	ields blank for a list of all values		
*Search By Query Name	✓ begins with			uery Name	begins with	
Search Advanced Search		Search A	dvanced Search			
■ Q						
Query Name	Description	Owner	Query Name		Description	Owner
QCS_CM_TERM_CLASSES	Classes offered each term	Public	QCS_CM_TERM_CLASSES		Classes offered each term	Public
QCS_SR_DEGREE_BY_TERM_ADDR	Dgrs by completion term w Addr	Public	QCS_SR_DEGREE_BY_TERM		Degrees by completion term	Public
QCS_SR_TERM_ACT_INACTIVESTACK	Term Activated Inactive Progs	Public	QCS_SR_TERM_ACT_INACTIVESTA	ск	Term Activated Inactive Progs	Public
QCS_SR_WITHDRAWN	Withdrawing from all classes	Public	QCS_SR_WITHDRAWN		Withdrawing from all classes	Public

Image: Example Menu Highlight

With the PeopleTools 8.59 upgrade, the active item is highlighted with a left-side indicator bar and a light blue/grey color.

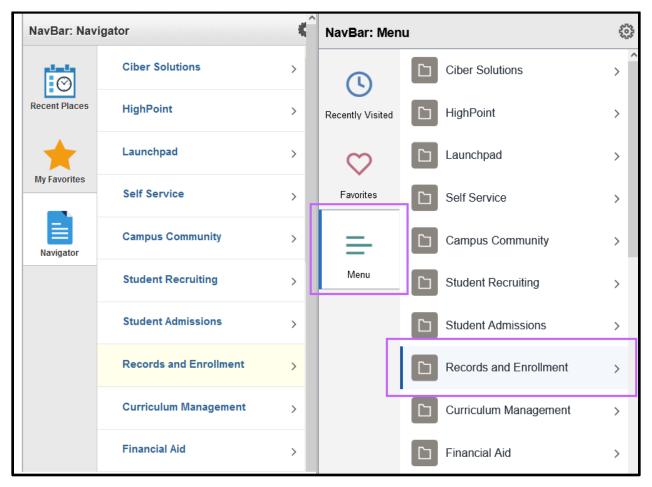


Image: Example Homepage Tile Highlight

With the PeopleTools 8.59 upgrade, the homepage tile that is hovered over is highlighted with a surrounding blue box.

@ctcLink		 ctcLink Advisor Homepage 	<u>ନ</u> ସ୍	۲ ا	٥	Oct	tc Link 🗉 Se	earch in Menu Q	ŵ 4 : ∅
	My Advisees	My Advising Notes	Advisor Center				ctcLink Advisor Homepag	ge 🗸	< 6 of 10 >
		<u>E</u>				00	My Advisees	My Advising Notes	Advisor Center
		0000000000			C				

Required Field Asterisk

An asterisk (*) indicates a mandatory field. To proceed to the following field or to save the page, you must enter data in that field. A message will display if the user does not enter a required field.

Image: Example Required Field Asterisk

Example, on the Quick Enroll a Student page, when adding a new value, the ID, Academic Career, Academic Institution, and Term fields will have an asterisk to indicate that they are required.

Quick Enroll a Student	Quick Enroll a Student Find an Existing Value Add a New Value
Eind an Existing Value Add a New Value	
ID Q Academic Career UGRD Q Academic Institution WA220 Q Term Q	*ID XX220CS03 Q *Academic Career Q *Academic Institution WA220 Q *Term Q
Add Find an Existing Value Add a New Value	Add

Process Monitor Changes

New Options Available on the Process Monitor Page

You can now select the Clear button to clear all the filters. The Reset button can be selected to reset the filters to their default values. A new column titled Actions has been added to the Process List. Select the Actions link to have a dropdown menu display a list of related actions that can be taken for that process.

Navigation

PeopleTools > Process Scheduler > Process Monitor

< ctcLin	ık Advisor Hoi	mepage				Pro	ocess Monitor			
Proce	ess List	Server List								
View Pr	ocess Requ	uest For								
User		Q	Туре	∽ Last	~	1 Days ~	Refre	sh		
Ser	/er	~	Name	Q Instance Fr	rom	Instance To	Clea	ar		
Run S	Status	~	Distribution Status		∕ ✓ Save	On Refresh Report Mana	ger Res	et		
Proce	ess List							I ■ 1-1 o	f1 v	▶ View All
	_	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	I I I I I I O Distribution Status	f 1 v 🕨	View All
	۹		Process Type Application Engine	Process Name PSXP_DIRCLN	User APPSRV	Run Date/Time 03/14/2023 6:29:50AM PDT	Run Status Success	Distribution		

Image: PeopleTools 8.59 Process Monitor Page

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Process Scheduler/Process Monitor

Save Message Appears Incorrectly when Updating Notification Status

After the 8.59 PeopleTools upgrade, a save message appears incorrectly after the status of the message is updated. However, the status is saved if either the yes or the no button is selected and after the user navigates away from the page.

Navigation

Notification Icon > Select the Three Vertical Dots Icon > View All Notifications

Image: View All Notifications

< IB			View All Notifications		Q D	: Ø
Notifications List				Open Action View	View Archived No	otifications 47 rows
Notification Name 🛇	Category Type 🗘	Message State 🛇	Message 🗘	Last Update Date/Time $=$	Priority 🗘	
D PTPNPRCSEVENT	Alert	Unread	Your request is submitted for Index Search Documents	03/22/23 2:18:15PM	Default	^
D PTPNPRCSEVENT	Alert	Unread	Your request is submitted for Index Search Documents	03/22/23 2:18:08PM	Default	
D PTPNPRCSEVENT	Alert	Unread	Your request is submitted for System Audit	02/24/23 3:00:28PM	Default	
D PTPNPRCSEVENT	Alert	Unread	Your request is submitted for System Audit	02/24/23 3:00:24PM	Default	
D PTPNPRCSEVENT	Alert	Unread	Do you want to save your changes?	02/24/23 3:00:14PM	Default	
D PTPNPRCSEVENT	Alert	Unread	Yes to go back and save, No to discard your changes	02/24/23 3:00:09PM	Default	
D PTPNPRCSEVENT	Alert	Unread	Yes No	02/24/23 3:00:00PM	Default	
D PTPNPRCSEVENT	Alert	Unread	Your request is submitted for System Audit	02/24/23 2:59:55PM	Default	





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Washington State Board for Community and Technical Colleges