PEOPLETOOLS 8.59 UPDATE OVERVIEW

TABLE OF CONTENTS

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
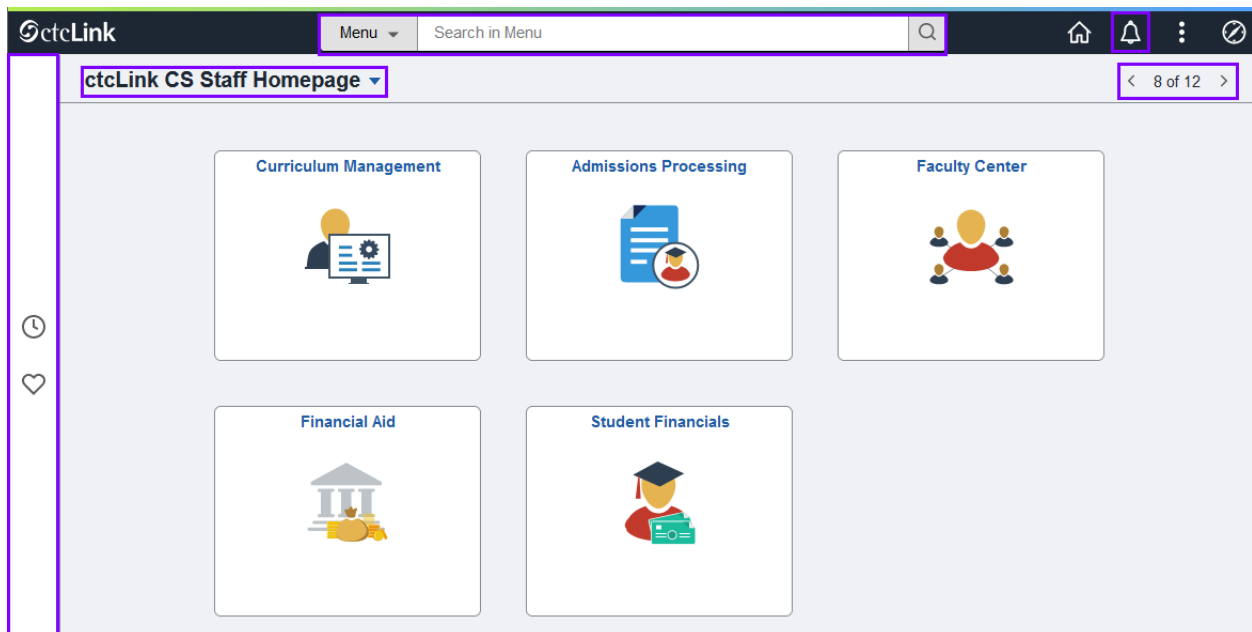
Quick Access Bar

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
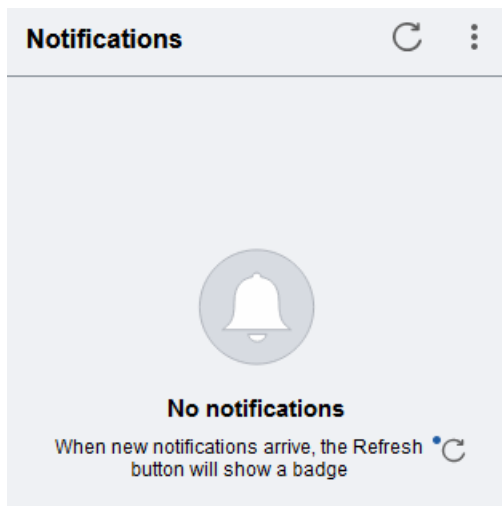
Changing the Notifications Panel Display Settings

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
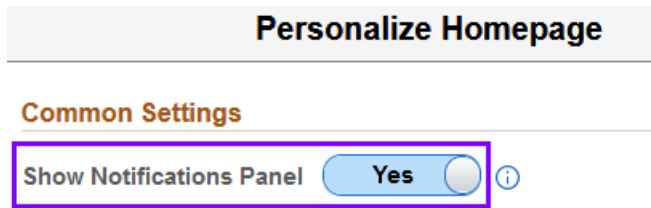
QRGs

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
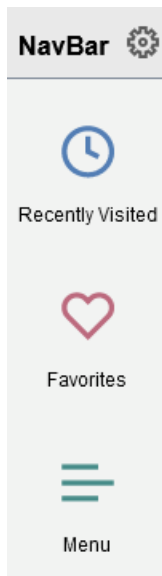
NavBar Menu Icons

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
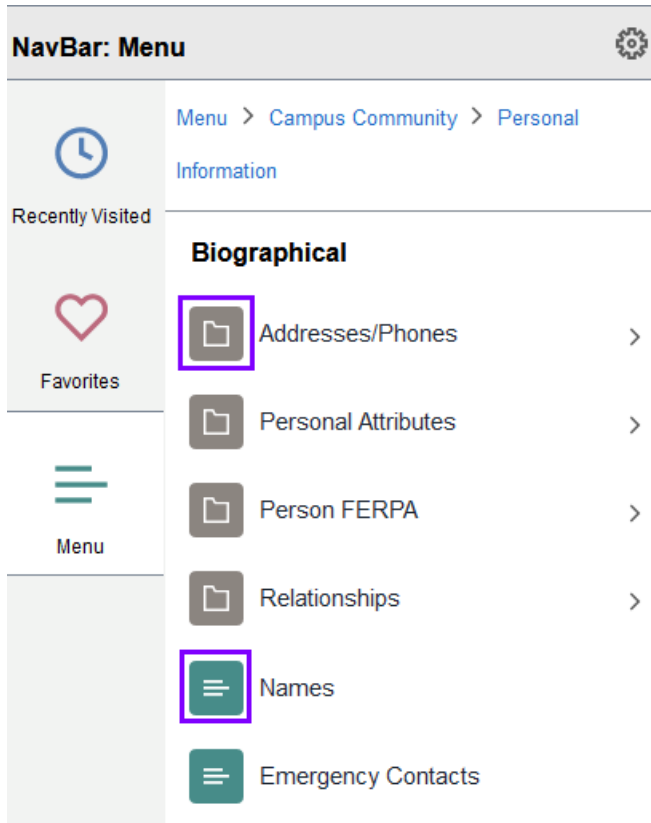
Breadcrumbs

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.
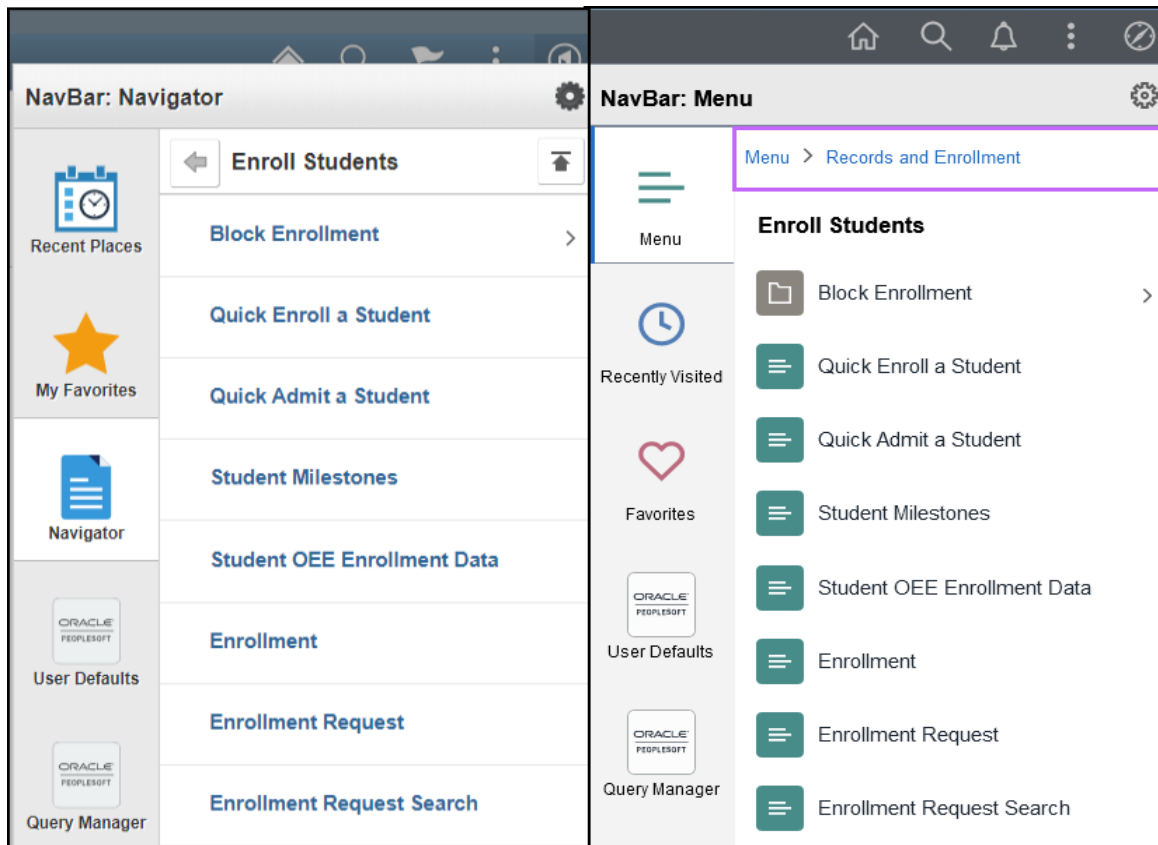
Changing the Menu Order

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.

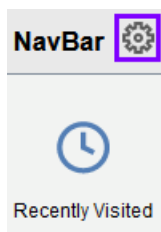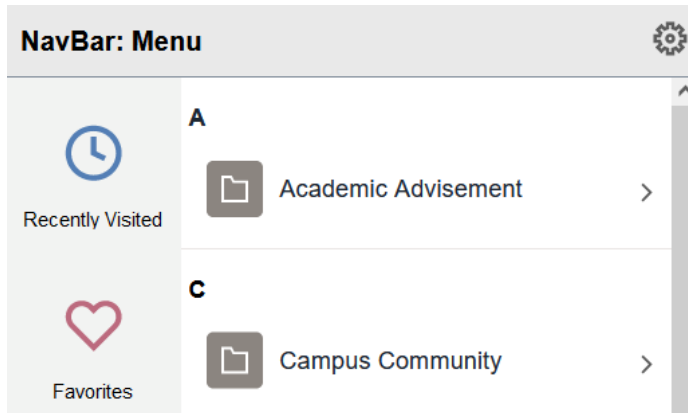### Image: Personalize NavBar Button

Image: Personalize Menu Order

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

NavBar: Menu

Menu > Reporting Tools

BI Publisher

BIP Query Report Scheduler

BIP Query Report Viewer
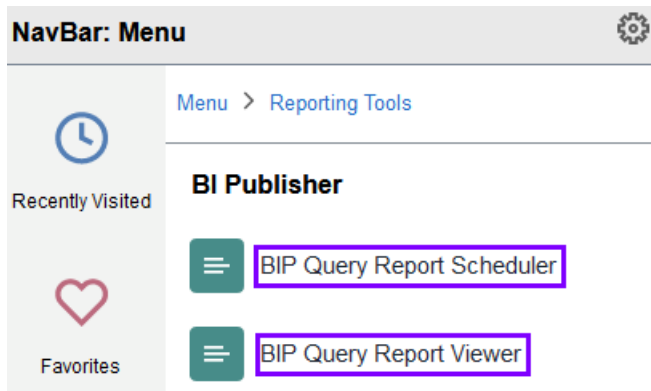
QRGs

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

Menu ▾   query

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

View Search Results

7 results for keyword: **"query"**

Query Viewer
Review and run existing **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

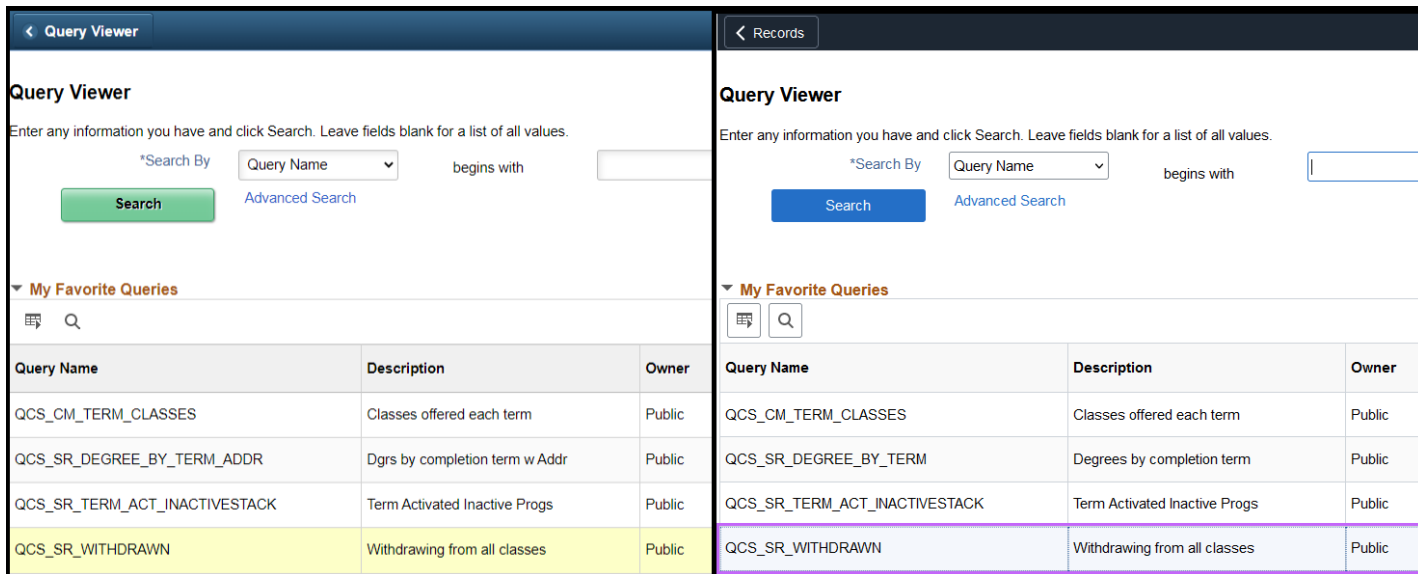With the PeopleTools 8.59 upgrade, the active row is highlighted in a light blue/grey.

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.
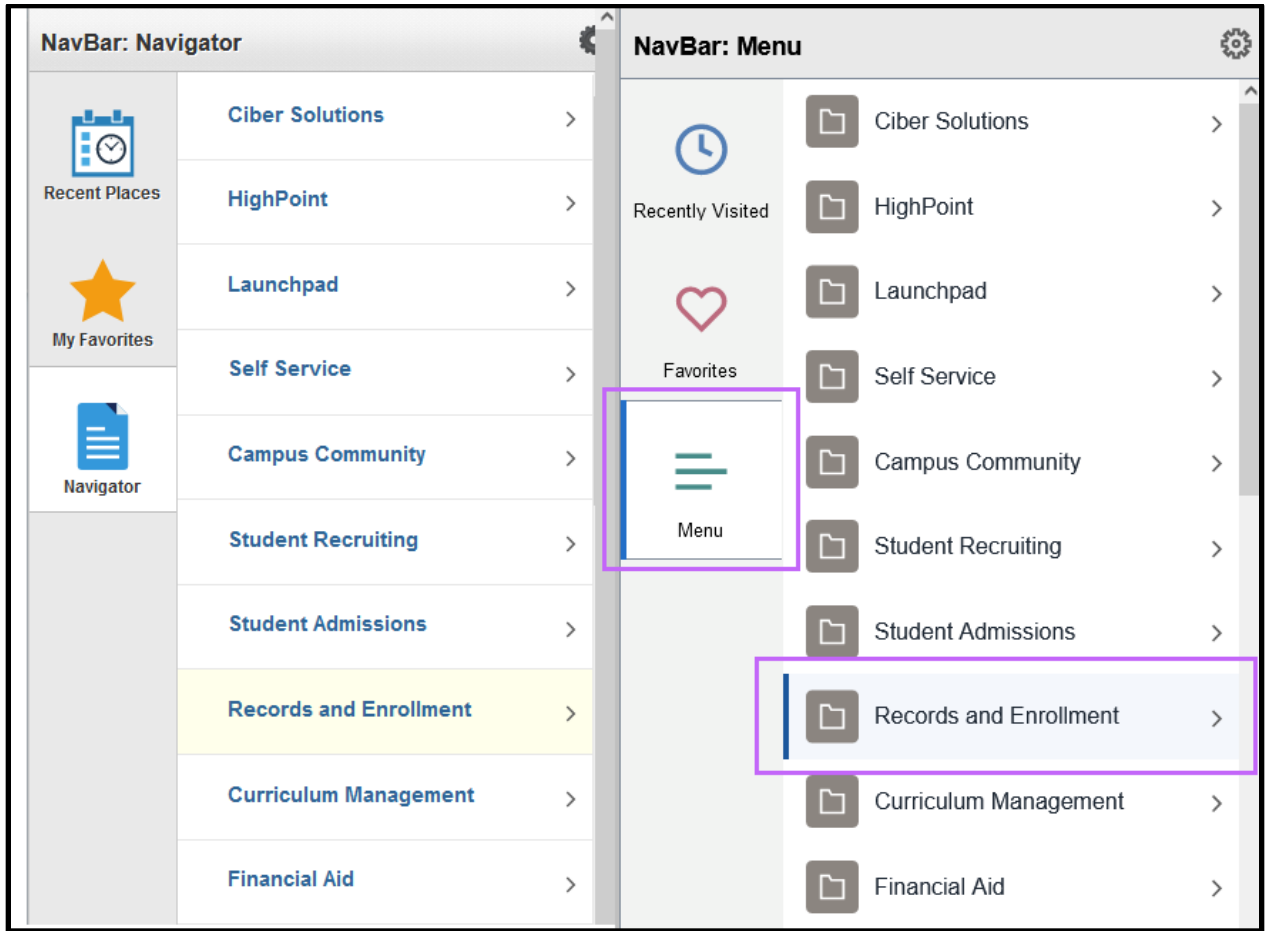
Image: Example Homepage Tile Highlight

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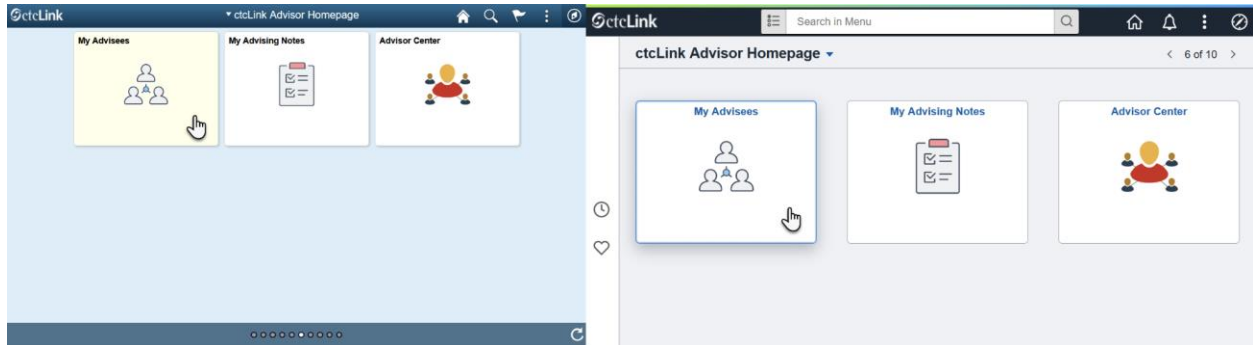
Required Field Asterisk

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.
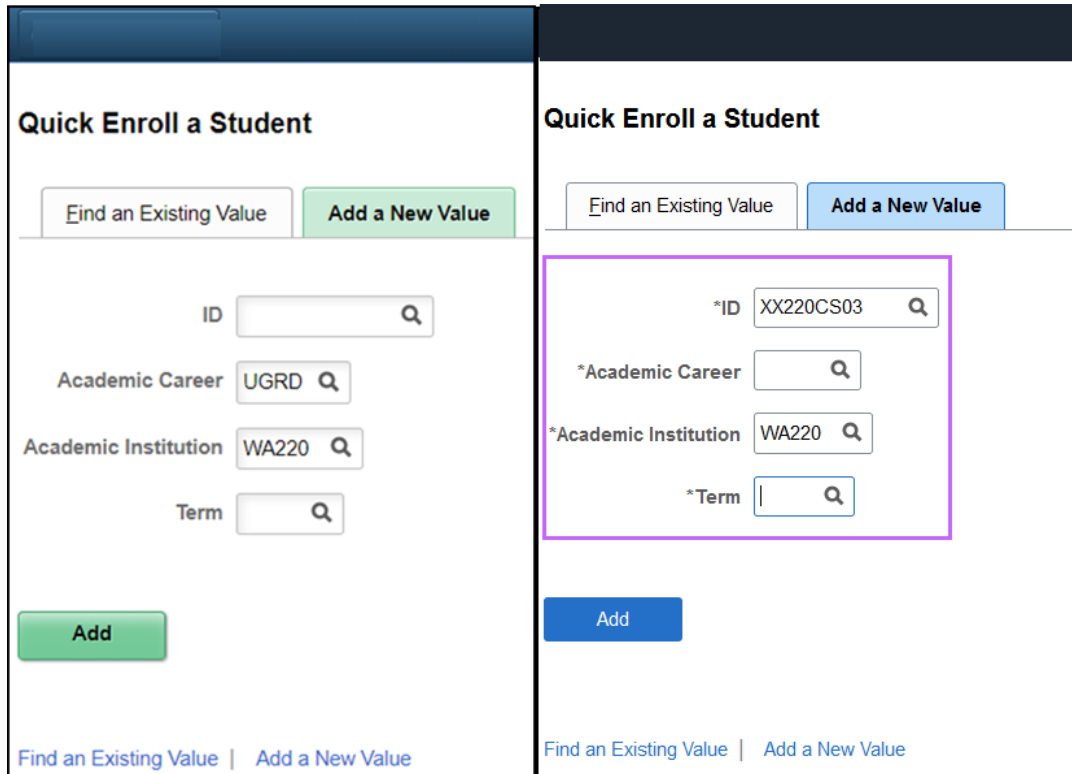
Process Monitor Changes

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

Image: PeopleTools 8.59 Process Monitor Page

QRGs

[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

Washington State Board for Community and Technical Colleges