

New Features Overview

Oracle's PeopleSoft PeopleTools 8.55

December 2015

New Features Overview for Oracle's PeopleSoft PeopleTools 8.55.

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Introduction

This section discusses:

- Purpose of this document.
- Related resources.

Purpose of This Document

This document provides an overview of the new features and enhancements planned for Oracle's PeopleSoft PeopleTools 8.55. It is a road map intended to help you assess the business benefits of upgrading to PeopleSoft PeopleTools 8.55 and to plan your IT projects and investments.

Related Resources

This section discusses four publications that provide in-depth technical and functional information for new and enhanced functionality in release PeopleTools 8.55. In many cases, the content in this document may have originated in the referenced documents.

PeopleSoft Planned Features and Enhancements

The PeopleSoft Planned Features and Enhancements document provides more functional details than the statement of direction, identifies major enhancements, and articulates the expected business benefit. This document is designed to help you to determine whether new product features might warrant upgrading from an old release or embarking on a new implementation. With this information, managers will be able to initiate preliminary budget planning and begin putting together a project team to further evaluate specific products.

The PeopleSoft Planned Features and Enhancements document (ID 1966243.2) is available on the Oracle support web site.

See Also

[PeopleSoft Planned Features and Enhancements](#)

New Features Overview

The New Features Overview document is published at general availability (GA) and validates the final scope of the release. The document discusses the features and enhancements that are available with the GA release of each product, describing the finalized functional and technical details that will enable project teams to confirm budgets and complete implementation plans.

The New Features Overview document (ID 2079572.1) is also available on the Oracle support web site.

See Also

[New Features Overview](#)

Cumulative Feature Overview Tool

The Cumulative Feature Overview Tool helps you plan your upgrades by providing concise descriptions of new and enhanced solutions and functionality that have become available between your starting and target releases. You simply identify the products that you own, your existing release, and your target implementation release. With a single click, the tool quickly produces a customized set of high-level, concise descriptions of features that have been developed between your starting and target releases. In an easy-to-use, web-based format, you can easily manipulate and sort the results any way you wish, download the results to Microsoft Excel, or copy the content into other implementation planning documents.

See Also

[Cumulative Feature Overview Tool](#)

Video Feature Overviews

PeopleSoft creates Video Feature Overview webcasts developed by PeopleSoft Information Development with input from the PeopleSoft Development and Strategy organizations. These videos provide overviews of PeopleSoft features and functionality. This document also contains direct links to specific Video Feature Overviews in those sections where the features are being discussed.

You can view all of the Video Feature Overviews on our [YouTube Channel](#).

PeopleSoft Information Portal

The [PeopleSoft Information Portal](#) provides you with a single entry point to locate the documentation, training, and other useful information you need to help with your implementation process and improve your daily experience with our products. The portal includes release content, product data sheets, and links to online help and support.

Social Media

We invite you to subscribe to the following social media sites to be kept current on the latest news and information about PeopleSoft applications and technology:

- [Applications Strategy Blog](#)
- [Legislative Updates Blog](#)
- [PeopleTools and Technology Blog](#)
- [Twitter](#)
- [Facebook](#)
- [LinkedIn](#)
- [YouTube](#)

Before You Begin

Before you upgrade to PeopleTools 8.55, always make sure that you have read any updates to the following:

- PeopleSoft upgrade documentation.
- PeopleSoft installation documentation.
- Certification information on My Oracle Support.
- Operating System, RDBMS & Additional Component Patches Required for Installation on PeopleTools 8.55.

Platform Support Enhancements

This section provides a summary of added and changed product support

The following table lists noteworthy changes to key infrastructure components planned for PeopleTools 8.55. Always check My Oracle Support for updates to this information. Keep in mind that the discontinuation of support for a component is generally due to the end of the vendor's mainstream support for the product.

Component	Added	Discontinued
Server Operating System	<ul style="list-style-type: none"> • Oracle Linux 7 (64-bit) with UEK 3.2+ • Oracle Linux Containers using OL 6.5+ and 7.1 • Red Hat Linux 7 (64-bit) • Windows Server 2012 R2 	<ul style="list-style-type: none"> • z/OS 1.12 • Windows Server 2008 R2
Client Operating System	<ul style="list-style-type: none"> • Windows 10 • Windows Server 2012 R2 	Windows Server 2008 R2
Mobile	<ul style="list-style-type: none"> • Chrome Android 5.x, 6x • Safari iOS 8.x, iOS 9.x 	<ul style="list-style-type: none"> • Chrome for Android 4.4 • Safari for iOS 7
RDBMS	<ul style="list-style-type: none"> • Oracle 12.1.0.2 • SQL Server 2014 	<ul style="list-style-type: none"> • Informix • Sybase • DB2 z/OS 9.1
Web Server	<ul style="list-style-type: none"> • WebLogic 12.1.3 • Websphere 8.5.5 (No change) 	WebLogic 12.1.2

Component	Added	Discontinued
Browser	<ul style="list-style-type: none"> • Chrome – 46 • Edge - 25.x • Firefox: <ul style="list-style-type: none"> ○ 38 (Extended Support Release) ○ 42 (RR version) • Safari (for Mac) 8.x, 9.x 	<ul style="list-style-type: none"> • Chrome 35 • IE 9, 10 • Firefox 24 • Safari 6 for Mac
Application Server	<ul style="list-style-type: none"> • Tuxedo 12.1.3 (VS2012 for Windows) • Tuxedo 12.1.1 (Solaris 10 x86 -64 only) 	Tuxedo 12.1.1
JRE	1.7	NA
Search	<ul style="list-style-type: none"> • Elasticsearch 2.3.2 with Bundle Patch 11 • SES 11.2.2.2 with Bundle Patch 5 (upgrade to 11.2.0.4 DB) • SES Verity 6.5.1.1 - no change 	NA
COBOL	<ul style="list-style-type: none"> • Net Express 5.1 WP11 • Server Express 5.1 WP11 • IBM Enterprise COBOL for z/OS 5.2 	NA
Enterprise Manager	EM 13.1.0.1	EM 12.1.0.1
Oracle Policy Automation (OPA)	12.1.1 and 12.2.4 (12.1.1 is the minimum version supported)	10.4
Office	Excel, Word 2013 64-bit	NA
Oracle Mobile Application Framework (MAF)	2.1.3 (for versions less than PeopleTools 8.55.05) 2.2.1 (for PeopleTools 8.55.05 and greater)	NA

Note: As previously announced in Tech Update [1927865.1](#), PeopleTools 8.55 does not support Crystal Reports.

Note: As previously announced in Tech Update [1915316.1](#), PeopleTools 8.55 does not support the Sybase and Informix database platforms.

Note. This document **does not** contain a comprehensive list of Oracle's support policy, nor is it intended to replace the information in the certification database on My Oracle Support. The information contained in the table is a snapshot of the current plans for platform support as of general availability for this release. **Always** refer to the certification database on the Certifications tab on My Oracle Support for the current and most comprehensive support information.

Development Tools Enhancements

This section covers changes and updates related to the development of PeopleSoft applications, including:

- PeopleSoft Fluid User Interface.
- Mobile Application Platform.
- PeopleCode.
- PeopleSoft Application Designer.
- PeopleSoft Search Technology.
- PeopleTools Portal Technologies.
- PeopleSoft Documents Technology.
- Application Engine.
- Global Technology.

PeopleSoft Fluid User Interface

This section describes enhancements provided in the area of developing fluid applications, including:

- Fluid component definition properties.
- Fluid page definition properties.
- Push notification.
- Mobile Application Framework.
- Navigation Bar enhancements.
- Master-detail components.
- Fluid enhancements to PeopleTools Portal Technology.

Fluid Component Definition Properties

This section describes the new options on the Fluid tab of the Component Properties dialog box.

Property	Description
Component Type	<p>When creating new fluid components, you may now select the component type from these options:</p> <ul style="list-style-type: none"> • Standard: Used for the majority of fluid components for containing general application transaction pages. • Activity Guide: Used for creating fluid activity guides. • Master/Detail: Used for creating the master-detail construct.
Search Type	<p>For selecting search pages, you have these options:</p> <ul style="list-style-type: none"> • None: Disables the search page from appearing prior to accessing the component. • Standard: Displays the "standard" search page, which enables users to view search results and access transaction pages from the results. • Master/Detail: Similar in look and feel to the "standard" search page, however, the Master/Detail option employs the master-detail construct, whereby the search results remain visible in the left pane after drilling into a transaction page. The search results in the left pane are the "master" and the transaction pages are the "detail."
Help	<p>Select for the Help option to appear in the Actions List for the fluid pages in this component.</p> <p>The Help URL value must be added to the General tab of the web profile to enable online help (same as for classic components and pages).</p>

See Also

Product documentation for *PeopleTools 8.55 Fluid User Interface Developer's Guide*: "Defining Components for Fluid Applications," Setting Component Properties for Fluid Components

Back Button Options - Return to Last Page in History

A new Back button option is available for both fluid and classic components, named Return to Last Page in History. If selected, when an end user clicks the Back button after being transferred to another component, the system returns the user to the previous component and displays the last page visited within that component. Otherwise, the system displays the first page in the component, regardless if it was the last page visited. This option can be enabled also using the SetTransferAttributes PeopleCode built-in function.

See Also

Product Documentation for *PeopleTools 8.55: Fluid User Interface Developer's Guide*, "Defining Components for Fluid Applications," Setting Component Properties for Fluid Components

Product Documentation for *PeopleTools 8.55: Application Designer Developer's Guide*, "Creating Component Definitions," Setting Component Properties

Product Documentation for *PeopleTools 8.55: PeopleCode Language Reference*, "PeopleCode Built-in Functions and Language Constructs," PeopleCode Built-in Functions and Language Constructs: S, SetTransferAttributes

Working with Fluid Homepages on Smartphones

Prior to PeopleTools 8.55.09, if an end user accessed the Fluid User Interface and no tiles in the system were associated with fluid components enabled for small form factor devices (smartphones), the system routed the user to the classic homepage, rather than displaying an empty fluid homepage.

Beginning with PeopleTools 8.55.09, this behavior has changed. The system displays an empty fluid homepage, rather than routing the end user to the classic homepage.

Remember that if a fluid component is suitable for small form factor display and usage, and you want it to be available on fluid homepages for small form factor devices, select Display on Small Form Factor Homepage on the Fluid tab in the Component Properties dialog box in Application Designer.

See Also

Product Documentation for *PeopleTools 8.55: Fluid User Interface Developer's Guide*, "Defining Components for Fluid Applications," Setting Component Properties for Fluid Components

Fluid Page Definition Properties

PeopleTools 8.55 introduces new page types that you can select from the Page Type drop-down list on the Use tab of the Page Properties dialog box. These new pages types are:

- *Side Page 1*: A side page that users can slide in from the left of the display to view its contents. The Side Page 1 is typically used to display left navigation.
- *Side Page 2*: A side page that users can slide in from the right of the display to view its contents. The Side Page 2 is typically used to display related content for a component.
- *Master/Detail Target Page*: Used within the master-detail framework. The master-detail target page displays the application transaction page (the detail) that is displayed after selecting an item in the left navigation pane (the master).

See Also

Product documentation for *PeopleTools 8.55: Fluid User Interface Developer's Guide*, "Creating Pages for PeopleSoft Fluid Applications," Setting Properties for Fluid Pages

Product documentation for *PeopleTools 8.55: Fluid User Interface Developer's Guide*, "Defining Components for Fluid Applications," Working with the Master - Detail Framework

Push Notification

Push Notification was first delivered in PeopleTools 8.54. It provided the ability for an end user to subscribe to events that occur on the server, and receive real-time notifications in the browser when those events occur on the server. This is achieved with the Tuxedo Event Broker passing events from the application server to the PeopleSoft web server, where WebSockets then deliver the notification of the event to the end user's browser.

With PeopleTools 8.55, the Push Notification feature is being extended. In addition to notifications being sent to the browser, end users may subscribe to events and have notifications directed to their Android or iOS mobile devices. Notifications will appear as *native* notifications for these devices, when deploying a PeopleSoft application on the mobile devices using the Oracle Mobile Application Framework. Push Notifications will also support dynamic tile updates, when the data changes in real-time.

See Also

Product documentation for *PeopleTools 8.55: Fluid User Interface Developer's Guide*: "Working with Push Notification Framework," Understanding the Push Notification Framework

Mobile Application Framework

Beginning with PeopleTools 8.54, PeopleTools provided support for the option of deploying PeopleSoft fluid applications to mobile devices using the Oracle Mobile Application Framework (MAF). With PeopleTools 8.55, we continue to provide this option and have also enabled Push Notifications for fluid applications deployed using MAF.

See Also

Product documentation for *PeopleTools 8.55: Fluid User Interface Developer's Guide*: "Deploying Applications Using the Oracle Mobile Application Framework," Understanding Mobile Application Framework Support for PeopleSoft

Supported Versions

The version of MAF that PeopleTools supports is provided with your PeopleTools license and PeopleTools download.

PeopleTools Version	Supported MAF Version
8.55.00 – 8.55.04	2.1.3
8.55.05 and greater	2.2.1

Disabling App Transport Security (ATS) for MAF Applications

For iOS devices only, if the server URL contains non-HTTPS server connections, then ATS needs to be disabled so that the URL works as expected in the device.

To disable ATS:

1. In JDeveloper, select Application, Application Properties, Deployment.
2. On the Deployment page, double-click the iOS deployment profile.
3. Select iOS Options.
4. Select Disable Application Transport Security.
5. Click OK.

Navigation Bar Enhancements

The Navigation Bar (NavBar) is improved for use with Small Form Factor devices. When screen width is limited, the NavBar will show only the tile list. The user can navigate from a tile in the list to the second level and make a selection, or navigate back to the tile list; but only the tile list will be displayed. This makes a fluid page and the NavBar specifically work better in touch first mode.

Master-Detail Components

For fluid development, you can now create master-detail components, offering developers more power and flexibility when designing pages for navigation and to assist users by aggregating commonly accessed application components within a single navigational structure.

Master-Detail structures are conceptually similar to classic PeopleSoft WorkCenters in that they provide a navigation pane and pane for target content. The overall master-detail component enables navigation between multiple components. The collection of components represents a collection of work typically performed by a particular role, for example, with the navigational items appearing in the left pane. When users tap items in the navigation pane, the target pane displays the appropriate detail content. In upcoming PeopleSoft application images, components using the master-detail model will be available.

PeopleTools ships a default master-detail component named PT_MDSTARTPAGE_NUI, containing basic elements, such as the navigation page and the target content page.

See Also

Product documentation for *PeopleTools 8.55: Fluid User Interface Developer's Guide*, "Defining Components for Fluid Applications," Working with the Master - Detail Framework

Fluid Enhancements to PeopleTools Portal Technology

PeopleTools portal technology includes these enhancements that support developing and delivering fluid applications in PeopleTools 8.55:

- Fluid activity guides.
- Fluid dashboards.
- Fluid related content.
- Tile enhancements.
- Tile Wizard.
- Branding enhancements.
- Conditional navigation enhancements.
- Homepage enhancements.

See Also

[PeopleTools Portal Technology](#)

Mobile Application Platform

This section describes enhancements to the Mobile Application Platform, including:

- CI to MAP integration.
- Related Actions.
- PeopleSoft Fluid User Interface compatibility.
- MAP store.

Related Actions

Related Actions are a very useful means of navigating the system without menus. They are used throughout the Classic and Fluid User Interface and now, with this release, are available in the Mobile Application Platform. MAP includes this feature by enabled related actions to be defined on static text, input fields and list views.

See Also

Product documentation for *PeopleTools 8.55: Mobile Application Platform*, “Defining Layout Page Navigation,” Configuring Related Actions

PeopleSoft Fluid User Interface Compatibility

Pages build with Mobile Application Platform did not integrate seamlessly with the PeopleSoft Fluid User Interface. Improvement to coexistence is made in two areas:

- **Improved back button support.** Back button integration has been enhanced to keep the last link coming from a PIA or Fluid page and being able to return to that link. This lets Fluid pages invoke MAP pages and let the user seamlessly navigate back to the calling application through means that they are familiar with.
- **Improved look and feel.** There is a new MAP template called PT_FLUID_TEMPLATE that is available to assign to MAP pages to give them the same look and feel as pages built with the PeopleSoft Fluid User Interface.

MAP Store

A repository of MAP UI components is now kept and available to users or developers to assemble MAP applications. Developers can create application ‘parts’ or ‘mini-apps’ that are included and listed in the MAP Store. Using the Rapid Application Designer, contents from the MAP store can be quickly assembled into applications that are deployed to users.

The store approach to MAP development emphasizes the ability to build once and reuse application parts to assemble end user applications. Libraries of ‘parts’ and ‘mini-apps’ can be created of commonly used business functionality that can be used and assembled into deployable applications without having to write program logic.

See Also

Product documentation for *PeopleTools 8.55: Mobile Application Platform*, “Using MAP Store”

Product documentation for *PeopleTools 8.55: Mobile Application Platform*, “Creating MAP Applications Using Layout Rapid App Designer”

PeopleCode

This section covers changes and updates to PeopleCode in the following documentation:

- PeopleCode Developer’s Guide.
- PeopleCode API Reference.
- PeopleCode Language Reference.

PeopleCode Developer’s Guide

This section covers changes to developing PeopleCode programs, including:

- Application Designer user interface improvements.
- Enhancements to Find Definition References.
- Additional keyboard shortcuts in Application Designer.
- Auto-complete feature in the PeopleCode Editor.
- Performance improvement for the Find In feature.
- Additional filters for Find In and Find Definition References search feature.

Application Designer User Interface Improvements

Improvements to the Application Designer user interface include:

- Support for retaining or clearing ‘Find In’ search result options in the PeopleCode Editor.
- Adding line numbers in the PeopleCode Editor.
- Support for displaying the database name in the PeopleCode Editor.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Developer’s Guide*, “Using the PeopleCode Editor,” Show Database Name Utility

Product documentation for *PeopleTools 8.55: PeopleCode Developer’s Guide*, “Using the PeopleCode Editor,” Adding Line Numbers

Product documentation for *PeopleTools 8.55: PeopleCode Developer’s Guide*, “Using the Find In Feature”

Enhancements to Find Definition References

This enhancement extends support to the Finding Definition References feature to enable searching for application classes and application class methods.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Developer's Guide*, "Finding References to Application Packages and Classes," Finding Definition References

Additional Keyboard Shortcuts in Application Designer

Keyboard support has been added to the following features in the PeopleCode Editor:

- Accessing the PeopleCode Editor from the current definition open in the Application Designer workspace by pressing Ctrl+E on the keyboard.
- Accessing the PeopleCode Editor for an application class from the Application Designer workspace by pressing Ctrl+E on the keyboard.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Developer's Guide*, "Using the PeopleCode Editor"

Auto-Complete Feature in the PeopleCode Editor

The auto-complete feature in PeopleCode Editor has been extended to include the following enhancements:

- Auto-completion support for keywords.
- Linking to context-sensitive online help for an item listed in the auto-complete list.
- Support for retaining the parameter information window until the user completes typing-in all the parameters.
- Support for highlighting the current parameter in the parameter information window.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Developer's Guide*, "Using the PeopleCode Editor," Using the Auto-Complete Feature

Performance Improvement for the Find In Feature

As a prerequisite step, compiling and saving all PeopleCode in the database will considerably improve searching for text strings in PeopleCode programs.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Developer's Guide*, "Using the Find In Feature"

Additional Filters for Find In and Find Definition References Search Features

This enhancement includes the addition of the following fields in the Find In and Find Definition References dialog windows:

- The Definition Name combination box that allows text edits and includes a drop-down list box that lists the 10 most recently used (MRU) items.
- The Owner ID list box.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Developer's Guide*, "Using the Find In Feature"

PeopleCode API Reference

This section covers changes to the PeopleCode API, including:

- Charting enhancements.
- New classes.
- New methods.
- New properties.
- New examples.
- Updated methods and properties.
- Deprecated methods and properties.

Charting Enhancements

This section covers changes to developing charts using the PeopleCode charting classes, including:

- Series class.
- ToolTipLabel class.
- User selection and highlighting of data points.
- Specifying data series.
- Creating a chart with two y-axes.
- Rating gauge charts.
- Spark charts.

The PeopleTools 8.55 product documentation contains complete information on charting classes and enhancements. In addition, these release notes list new classes, methods, and properties.

See Also

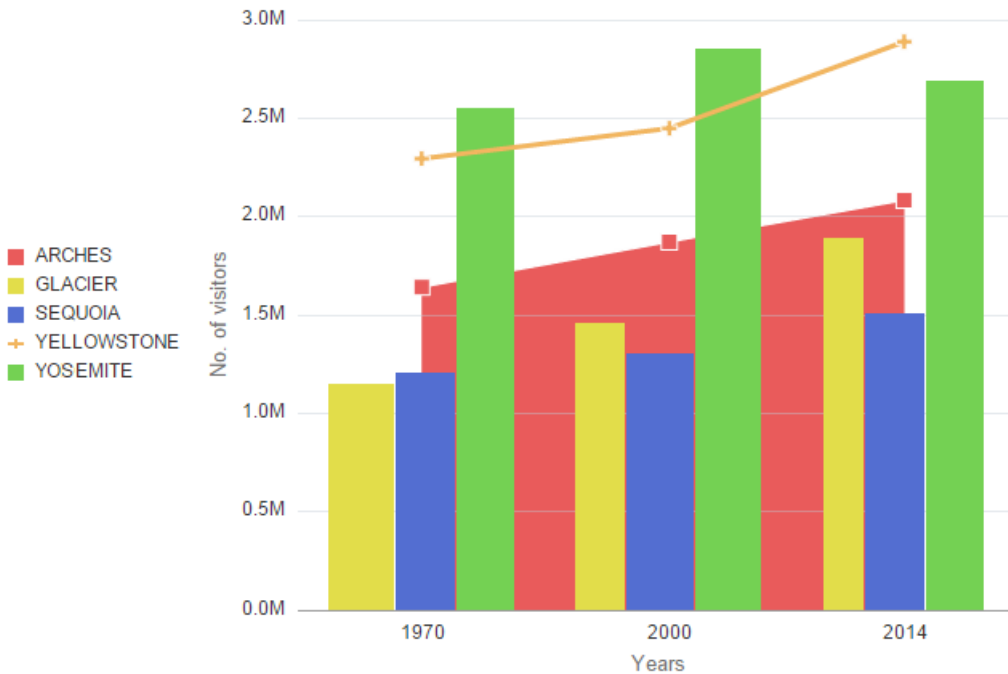
[New Classes](#), [New Methods](#), and [New Properties](#)

Product documentation for *PeopleTools 8.55: PeopleCode API Reference*, “Charting Classes”

Series Class

The Series class is used in conjunction with the Chart class to override the default chart type (as defined by the Type property for the Chart object) for selected members of a data series. Using the Series class allows you to create combination (or overlay) type charts by rendering more than one chart type simultaneously.

Visiting National Parks

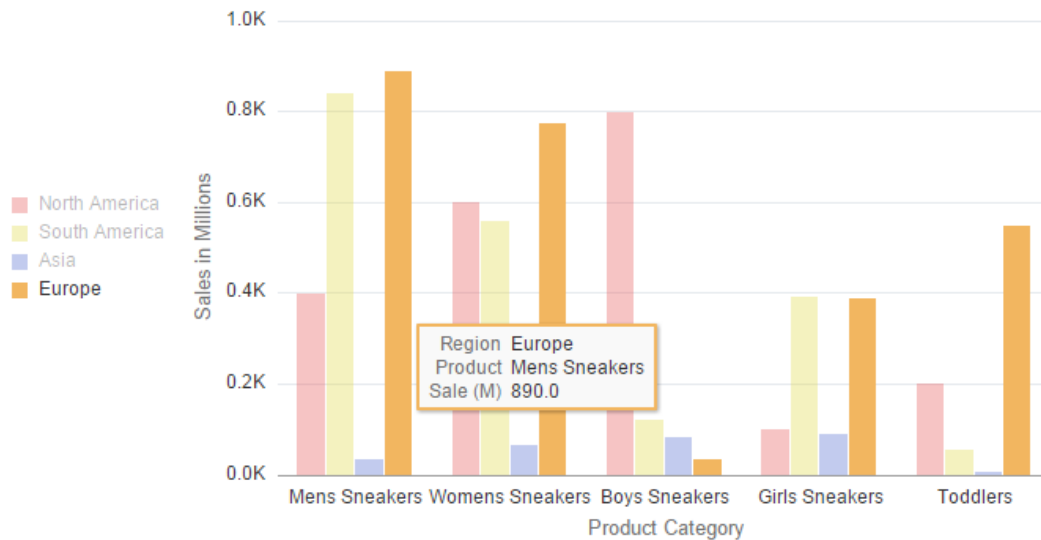


A bar chart displaying two additional chart types

ToolTipLabel Class

The ToolTipLabel class is used in conjunction with the Chart class to display custom tooltips (also referred to as “data hints” or “hover text”) on chart data points thereby overriding the default tooltips that are automatically created from the chart data.

Shoes sales data for North America



Custom tooltips

User Selection and Highlighting of Data Points

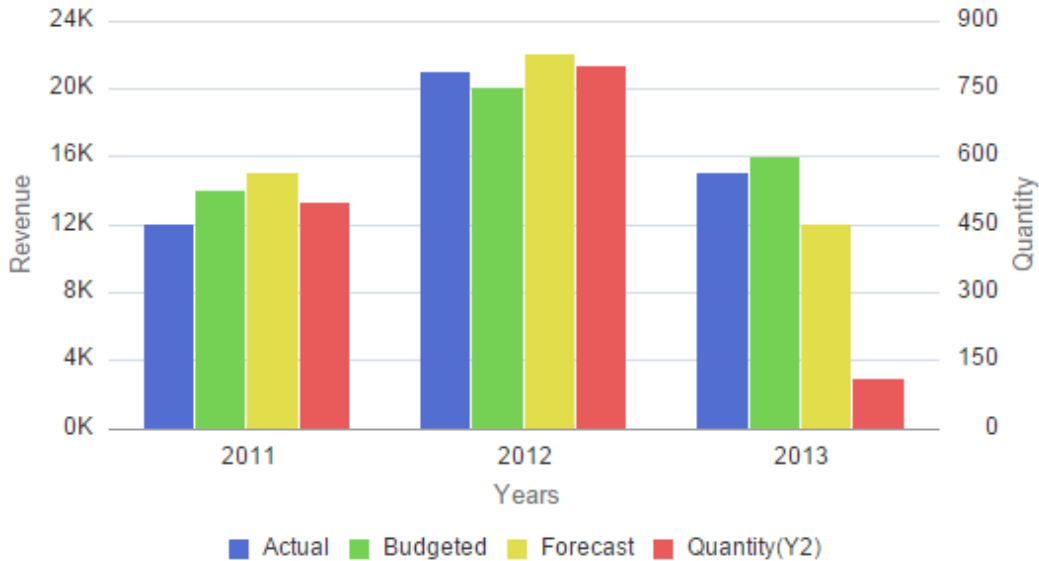
Users can select one or more data points (bars, slices, and so on) on a chart. Selection creates a highlight around the data item. Users can also de-select one or more of these items. The ChartClientState class used in conjunction with the Chart class allows PeopleSoft applications to manage and maintain user-selected data items.

Specifying Data Series

Previously, the SetDataYAxis method and other Chart class methods took one RECORD.FIELD parameter only, which meant you had to use the SetDataSeries method to specify series values in a separate record field. With PeopleTools 8.55, the SetDataYAxis method and three other Chart class methods now take multiple RECORD.FIELD parameters, each representing a series. This allows your record data to be organized in a more natural tabular form.

Creating a Chart with Two Y-Axes

When the values in a chart vary widely from data series to data series, or when you have mixed types of data (for example, both revenue and quantity data), you can plot the additional data series on a second vertical axis referred to as a “secondary y-axis” (or Y2 axis). The scale of the secondary y-axis reflects the values for the associated data series.



Example of two y-axes

Rating Gauge Charts

Rating gauges are typically used to display or accept user feedback on a product or service. A rating gauge can be interactive or display only.



A rating gauge in the hover state

Spark Charts

Spark charts are used to visualize the trend of a data set in a compact form factor. They are best used to view trends over time, especially when paired with additional context such as in a table. Absolute values and individual data points are not emphasized, so spark charts should not be used to visualize data where such things are important.

While the typical chart is designed to show as much data as possible, spark charts are intended to be succinct, memorable, and located where they are discussed.



A bar spark chart

New Classes

In PeopleTools 8.55, the following new classes have been added to the PeopleCode API:

- BIP_EMAIL_DATA class. (BI Publisher classes.)
- Charting classes:
 - ChartClientState class.
 - GaugeThreshold class.
 - RatingGaugeChart class.
 - RatingGaugeState class.
 - Series class.
 - SparkChart class.
 - SparkChartItem class.
 - ToolTipLabel class.
- Fluid page utilities classes (PT_PAGE_UTILITIES application package):
 - Banner class.
 - PanelController class.
 - Utils class.
- ProcessRequest class. (Oracle Policy Automation (OPA) classes.)
- PSSpreadsheet class.
- Tile Wizard classes (PTGP_APPCLASS_TILE:Tiles application package):
 - Tile class.
- XmlDocFactory class. (XmlDoc classes.)

The PeopleTools 8.55 product documentation contains complete documentation on each new class including constructors, methods, and properties as is appropriate for each class. To save space, the new methods and properties for these new classes have not been listed in these release notes.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode API Reference*

New Methods

In PeopleTools 8.55, the following new methods have been added to the PeopleCode API:

- Chart class, SetDataLabel method.
- Chart class, SetDataLabelPosition method.

- Chart class, SetDataLabelStyle method.
- Chart class, SetDataMarker method.
- Chart class, SetDataMarkerSize method.
- Chart class, SetDataZAxis method.
- Chart class, SetSelectedData method.
- Chart class, SetSeries method.
- Chart class, SetSeriesLabels method.
- Chart class, SetToolTipLabels method.
- Chart class, SetYAxisColumnType method.
- Compound class, Clear method.
- Field class, GetBaseName method.
- Field class, SetGroupletEventMsg method.
- Field class, SetGroupletImage method.
- Field class, SetGroupletImageUrl method.
- Field class, SetImageUrl method.
- IntBroker class, GenLayoutDoc method.
- IntBroker class, GetContentURI method.
- IntBroker class, GetPortalURI method.
- IntBroker class, MAPSessionTimeout method.
- IntBroker class, MAPTimeout method.
- IntBroker class, UpdateCSSMetadata method.
- IntBroker class, UpdateJSMetadata method.
- Map class, AddAttribute method.
- Map class, ClearAttributes method.
- Map class, DeleteAttribute method.
- Map class, GetAttributeName method.
- Map class, GetAttributeValue method.
- Map class, GetNumberOfAttributes method.
- Map class, GetWebServerInfo method.

- MapElement class, SetTableGridRowControl method.
- ReportDefn class, EmailOutput method.
- ReportDefn class, setPDFConversionFiles method.
- ReportDefn class, setPDFConversionTimeOut method.
- ReportDefn class, SetPrinterType method.
- SearchFilterGenerator class, AfterDateTime method.
- SearchFilterGenerator class, AfterDateValue method.
- SearchFilterGenerator class, AppendFilter method.
- SearchFilterGenerator class, BeforeDateTime method.
- SearchFilterGenerator class, BeforeDateValue method.
- SearchFilterGenerator class, BoostCompositeFilterScore method.
- SearchFilterGenerator class, BoostFilterScore method.
- SearchFilterGenerator class, ContainsKeyWords method.
- SearchFilterGenerator class, EqualsDateTime method.
- SearchFilterGenerator class, EqualsDateValue method.
- SearchFilterGenerator class, GetFilter method.
- SearchFilterGenerator class, NotContainsWord method.
- SearchFilterGenerator class, NotEqualsDateTime method.
- SearchFilterGenerator class, NotEqualsDateValue method.
- SearchFilterGenerator class, OnOrAfterDateTime method.
- SearchFilterGenerator class, OnOrAfterDateValue method.
- SearchFilterGenerator class, OnOrBeforeDateTime method.
- SearchFilterGenerator class, OnOrBeforeDateValue method.
- SearchFilterGenerator class, setBoostMode method.
- SearchFilterGenerator class, setBoostModeAverage method.
- SearchFilterGenerator class, setBoostModeMaximum method.
- SearchFilterGenerator class, setBoostModeMinimum method.
- SearchFilterGenerator class, setBoostModeSum method.

Note. The preceding list does not include the methods that are new due to the addition of a new class in the PeopleCode API. However, the new classes themselves are listed in these release notes.

The PeopleTools 8.55 product documentation contains complete information on each new method.

See Also

[New Classes](#)

Product documentation for *PeopleTools 8.55: PeopleCode API Reference*

New Properties

In PeopleTools 8.55, the following new properties have been added to the PeopleCode API:

- Chart class, AspectRatio property.
- Chart class, ChartURL property.
- Chart class, DataSelectionMode property.
- Chart class, FooterAlignment property.
- Chart class, HideShowBehavior property.
- Chart class, IsSplitDualY property.
- Chart class, IsY2AxisInteger property.
- Chart class, SubTitleAlignment property.
- Chart class, TitleAlignment property.
- Chart class, Y2AxisMax property.
- Chart class, Y2AxisMin property.
- Chart class, Y2AxisPrecision property.
- Chart class, Y2AxisTitle property.
- Chart class, Y2AxisTitleOrient property.
- Field class, AriaAttributes property.
- Field class, AriaWrapperAttributes property.
- Gantt class, AdditionalStyleSuffix property.
- Grid class, Selector property.
- Map class, DeviceCanvas property.
- Map class, DeviceDatePicker property.
- Map class, DeviceDnd property.
- Map class, DeviceDtPicker property.

- Map class, DeviceGeoLocation property.
- Map class, DeviceHC property.
- Map class, DeviceHeight property.
- Map class, DeviceHistory property.
- Map class, DeviceLocalStorage property.
- Map class, DevicePixelRatio property.
- Map class, DevicePostMessages property.
- Map class, DeviceSessionStorage property.
- Map class, DeviceSVG property.
- Map class, DeviceTimePicker property.
- Map class, DeviceTouch property.
- Map class, DeviceWebSockets property.
- Map class, DeviceWebWorkers property.
- Map class, DeviceWidth property.
- Map class, MAPURL property.
- Map class, PIAOriginLabel property.
- Map class, PIAOriginURL property.
- Map class, RAClass property.
- Map class, RAImage property.
- Map class, RAPopupClass property.
- Map class, RASyle property.
- Map class, SecureRequest property.
- MapElement class, FieldContClass property.
- MapElement class, FieldContSyle property.
- MapElement class, GridRowClass property.
- MapElement class, GridRowStyle property.
- MapElement class, RefLayoutCont property.

- MapElement class, RefLayoutContHidden property.
- MapElement class, RowCountLabel property.
- MapElement class, TableRowClass property.
- MapElement class, TableRowStyle property.

Note. The preceding list does not include the properties that are new due to the addition of a new class in the PeopleCode API. However, the new classes themselves are listed in these release notes.

The PeopleTools 8.55 product documentation contains complete information on each new property.

See Also

[New Classes](#)

Product documentation for *PeopleTools 8.55: PeopleCode API Reference*

New Examples

A new topic, “Search Filter Generator Examples,” includes 6 examples of how to create complex search filters and 12 examples on how to perform score boosting.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode API Reference*

Updated Methods and Properties

The following PeopleCode items were updated in PeopleTools 8.55:

- Chart class, IsTrueXY property. As of PeopleTools 8.55, if IsTrueXY is set to True for a histogram chart, the chart will no longer be rendered.
- Chart class methods: SetDataColor, SetDataHints, SetDataURLs, and SetDataYAxis. Each method now takes multiple RECORD.FIELD parameters to specify each data series. See [Specifying Data Series](#) for more information.
- Chart class, Type property. The Type property takes new constant values. In addition, other constants have been deprecated.
- SearchFilterGenerator class, AfterDate, BeforeDate, EqualsDate, NotEqualsDate, OnOrAfterDate, and OnOrBeforeDate methods. These methods accept a datetime parameter (not a date parameter) and generate a datetime filter (not a date filter).
- SearchFilterGenerator class, ContainsWord method. While the *word* parameter can include one or more words, the ContainsWord method differs from the ContainsPhrase method.

- StatusMeterGauge class, Type property. The Type property now takes a new constant value: %GaugeType_StatusMeter_Circ.

The PeopleTools 8.55 product documentation contains complete information on each updated method and property.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode API Reference*

Deprecated Methods and Properties

The following PeopleCode items were deprecated in PeopleTools 8.55:

- Chart class, HighlightSelectedDataPoint property. Instead, use the DataSelectionMode property, the SetSelectedData method, and the ChartClientState class to manage data item selection in charts.
- Chart class, SetDataAnnotations method. Use the SetDataLabel and SetDataLabelPosition methods instead.
- Chart class, SetDataGlyphScale method. Use the SetDataZAxis method instead.
- Chart class, SetChartURL property. Use the ChartURL property instead.
- Document class properties: GetDocumentName and GetVersion. Use DocumentName and Version instead.
- Folder class properties: AbnContentProvider, AbnDataSource, AbnPeopleCode, DefaultChartNavigation, TreeEffectiveDate, TreeName, TreeSetId, TreeStructureName, and TreeUserKeyValue. SmartNavigation has been deprecated in PeopleTools 8.55.
- Leaf class methods: GenABNMenuElement, GenABNMenuElementWithImage, LoadABNChart, and LoadABNChartOrdered. SmartNavigation has been deprecated in PeopleTools 8.55.
- Node class methods: GenABNMenuElement, GenABNMenuElementWithImage, GenBreadCrumbs, GenRelatedActions, LoadABNChart, and LoadABNChartOrdered.
- Trace settings class properties: SybBindInfo and SybFetchInfo.

PeopleCode Language Reference

This section covers changes to the PeopleCode language, including:

- New built-in functions.
- New meta-SQL information.
- Updated built-in functions.
- Updated system variables and meta-SQL functions.
- Limitations on launching modal components in PeopleSoft applications.
- Deprecated built-in functions.

New Built-in Functions

In PeopleTools 8.55, the following new built-in functions have been added to PeopleCode:

- GetComponentTitle.
- GetPagePrefix.
- GetPanelControlStyle.
- GetRatingGauge.
- GetRatingGaugeState.
- GetSeries.
- GetSparkChart.
- GetSparkChartItem.
- GetToolTip.
- GroupletRequestSource.
- HashSHA256.
- IsAddEnabled.
- IsAGComponent.
- IsAGRequest.
- IsGroupletInteractive.
- IsIScriptAuthorized.
- IsMDComponent.
- IsMDGuided.
- IsMDListPopup.
- IsMDNonOptimized.
- IsMDRequest.
- IsMDSearchEnabled.
- IsModeless.
- IsNotificationEnabled.
- IsNotifyEnabled.
- IsSearchEnabled.
- IsSingleComponentAG.

- `IsSingleUnitOfWork`.
- `IsSmallFFOptimized`.
- `IsStandardSearchEnabled`.
- `OverrideConditionalNav`.
- `SetMDGuided`.
- `SetMDListAccordion`.
- `SetMDListPopup`.
- `SetPanelControlStyle`.
- `ViewContentURLModeless`.
- `ViewURLModeless`.

The PeopleTools 8.55 product documentation contains complete information on each new function.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Language Reference*

New Meta-SQL Information

The meta-SQL chapter contains new information:

- A new column indicates which meta-SQL elements can be used in PeopleSoft queries.
- `%DateTimeDiffExtended` is a new meta-SQL function.

The PeopleTools 8.55 product documentation contains complete information on each new function.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Language Reference*

Updated Built-in Functions

The following PeopleCode built-in functions were updated in PeopleTools 8.55:

- `AddAttachment` and `MAddAttachment`. A cloud storage location can be selected by the user as location to upload from.
- `CopyAttachments`. The `FileRefRecords` parameter can now accept an empty array thereby retaining the default behavior of copying from all the records that contain the `FILE_ATTACH_SBR` subrecord.
- `GetGrid`. Now includes an optional third parameter: `L1_row_num`, which specifies the row in the parent (level 1) scroll that contains this grid. Specify this parameter for grids at level 2 only.
- `HashWithSalt`. Now includes two additional optional parameters. `hash_type` specifies the hashing algorithm to be used as a quoted literal string. `disallow_emptystring` specifies a Boolean value indicating whether to disallow an empty string as the text to be hashed.

- **InsertImage**. Now includes a fourth, optional parameter. *max_size* specifies the maximum size for this image file in kilobytes.
- **IsNotifyEnabled**. This function is to be used in classic components only, and indicates whether the Notify toolbar option has been enabled on the component's Internet tab.
- **ISOToDate** and **ISOToDateTime**. Each function returns a String value.
- **SetTransferAttributes**. This function can be invoked prior to the transfer (for example, in a FieldChange program) or after the transfer in the target component (for example, in a page Activate program). In addition, for the *user_data* parameter, use of the **returntolastpage** attribute to specify which page is displayed when returning to this component via the Back button.

The PeopleTools 8.55 product documentation contains complete information on each updated function.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Language Reference*

Updated System Variables and Meta-SQL Functions

Because PeopleTools 8.55 does not support the Sybase and Informix database platforms, the following system variables and meta-SQL functions were updated:

- **%DbType** and **%SqlHint**. INFORMIX and SYBASE are no longer valid values for input parameters.
- **%DbServerName** has been deprecated. **%DbServerName** now returns an empty string.

Limitations on Launching Modal Components in PeopleSoft Applications

Certain PeopleCode built-in functions have limitations on which component type (fluid or classic) can be launched as a modal component. For example, certain functions support launching only a fluid modal component from a fluid source component (fluid-to-fluid).

When launching modal components, please be aware of the following limitations:

- **DoModalComponent** and **DoModal** support fluid-to-fluid, or classic-to-classic only.
- **DoModalComponentPopup** and **DoModalPopup** support fluid-to-fluid only.
- As a workaround, **Transfer** or **ViewContentURLModeless** can be used for fluid-to-classic.
- As a workaround, **Transfer**, **ViewURL**, or the **RedirectURL** method of the **Response** class can be used for classic-to-fluid. However, each of these functions are not applicable in certain situations:
 - **Transfer** can be used to launch components defined on local nodes only.
 - If the classic component will be included in a fluid activity guide or master/detail component, do not use **ViewURL** or **RedirectURL**.

Note. **TransferModeless** is currently not supported for transfers from or to fluid components.

Deprecated Built-in Functions

The following PeopleCode built-in functions were deprecated in PeopleTools 8.55:

- CreateBreadcrumb and GetBreadcrumbs.
- GenABNNodeURL, GenDynABNElement, GenHTMLMenu, GetABNChartRowSet, GetABNInitialNode, GetABNNode, GetABNRelActnRowSet, GetABNReqParameters, GetABNTreeEffdt, GetABNTreeName, GetABNTreeSetid, GetABNTreeUserKey, and LoadABN. SmartNavigation has been deprecated in PeopleTools 8.55.
- OverrideCNAVDisplayMode. Use the OverrideConditionalNav function instead.

PeopleSoft Application Designer

This section describes changes made to the interface of Application Designer to enhance productivity and flexibility, including:

- Dynamic group box labels.
- Search filters for options for Finding Definition References.
- Keyboard shortcuts.

Dynamic Group Box Labels

Application developers are no longer limited to static text for group box labels. Text displayed for group box labels can now be defined in the Message Catalog, and referenced from the Group Box Properties dialog box, providing increased flexibility for page display. Because messages can be populated with variables from PeopleCode, group box labels can now change based on the page content.

See Also

Product documentation for *PeopleTools 8.55: Application Designer Developer's Guide*, "Using Page Controls," Using Group Boxes, Setting Group Box Properties

Search Filters for Finding Definition References

The Find Definition References dialog box now provides additional filtering options so you can fine-tune your searches even more. You can now filter by full or partial definition name and by Owner ID.

See Also

Product documentation for *PeopleTools 8.55: Application Designer Developer's Guide*: "Using PeopleSoft Application Designer," Working with Definitions, Finding Definition References

Keyboard Shortcuts

A set of new keyboard shortcuts have been added for Application Designer so that you can use the keyboard to select various options that previously you accessed using menus only. The list of new Application Designer shortcuts you can begin using include:

Keyboard Shortcut	Description
CTRL + SHIFT + F	Invokes the Find In... option.
Up/Down Arrows	Use to navigate information displayed in the output window.
CTRL + ENTER	Displays the Record Field Properties dialog box when a record is open.
ALT + ENTER	Displays the Record Properties dialog box when a record is open
CTRL + D	Opens the selected definition(s) in various situations, such as when a node (or nodes) is selected in a project tree, when a grid column is selected, etc.
CTRL + E	Displays the PeopleCode Editor when a record definition or page definition is open.
CTRL + ALT + R	When a record definition is open displays the Find Definition References dialog box for the selected record field.
CTRL + SHIFT + R	When a record definition is open displays the Find Definition References dialog box for the selected field.
SHIFT + E	When a grid column is selected, displays the record PeopleCode.

See Also

Product documentation for *PeopleTools 8.55: Application Designer Developer's Guide*, "Using PeopleSoft Application Designer," Using PeopleSoft Application Designer, Working with Keyboard Shortcuts

PeopleSoft Search Technology

This section describes enhancements to the PeopleSoft Search Technology, including:

- Support for Elasticsearch.
- Improved search user interface.
- PeopleSoft Search activity guides.
- Custom namespace.

- Other search improvements.
- Enhanced Back button on search page.
- Boosting search result scores.

Support for Elasticsearch

PeopleTools Search Framework, starting with PeopleTools 8.55.11, adds support for a new search engine - Elasticsearch 2.3.2. This is in addition to the support for Oracle Secure Enterprise Search (SES). Elasticsearch is a distributed, open source search and analytics engine that is designed for horizontal scalability, reliability, and easy management. The search engine is based on the popular search library Lucene.

Note that Oracle Secure Enterprise Search will be supported for eighteen months, until April 30, 2018, after Elasticsearch is delivered in PeopleTools 8.55.11.

In the integration of Elasticsearch as the new search engine, PeopleSoft Search Framework builds on the existing search functionality features and adds new features to enhance the end user experience. While the familiar processes of creating queries, creating search definitions and categories, deploying search definitions and categories, and viewing search results are not changed in the PeopleSoft implementation of Elasticsearch, Search Framework has enhanced the processes of crawling, processing attachments, and indexing data. The existing objects of Search Framework, such as search definitions and categories can be reused in Elasticsearch, but indexes need to be built for these search definitions.

Key advantages include:

- Easier deployment using Elasticsearch DPK and ACM plug-ins.
- Ability to deploy high availability, fail over that is scalable.
- Improved crawl and search performance.
- Enhanced resource utilization on the search engine host during high volume crawling and searching.
- Ability to transition from SES to Elasticsearch on a live system (using live cutover).

Elasticsearch Deployment

Elasticsearch is delivered in a deployment package (DPK) which includes:

- A specific version of Elasticsearch and the required Java runtime engine.
- PeopleSoft-developed Elasticsearch plug-ins for security and attachment processing.

When deployed, the Elasticsearch DPK automatically:

- Installs Oracle JRE and Elasticsearch.
- Installs PeopleSoft plug-ins.
- Configures the cluster, node, and administrator and proxy users.

The delivered ACM plug-ins can be used to create the necessary search instance for the Elasticsearch cluster.

For more information about the Elasticsearch DPK, see the Installation and Implementation tab on the PeopleTools Elasticsearch Homepage (Doc ID 2205540.2).

In order to utilize Elasticsearch for your PeopleSoft application, you will need to apply updates and fixes from your application's most current update image.

For more information about updates and fixes, see the Installation and Implementation tab on the PeopleTools Elasticsearch Homepage (Doc ID 2205540.2).

During your implementation and use of Elasticsearch for PeopleTools 8.55, you may encounter some errors, issues, and limitations along the way. Review the page below to identify these known issues and limitations you may encounter.

For more information about known issues, see the Troubleshooting and Known Issues tab on the PeopleTools Elasticsearch Homepage (Doc ID 2205540.2).

High Availability

Elasticsearch is typically deployed as a cluster of nodes to provide a scalable search service, which is continuously operational. PeopleSoft Search Framework integrates with Elasticsearch to allow for high availability, failover, and scalable search deployments for PeopleSoft users.

In Elasticsearch, the recommended approach to high availability is by deploying an Elasticsearch cluster with at least three nodes on machines that are not on the same physical server and by following the configuration guidelines.

Fail Over

PeopleSoft Search Framework provides a fail-over mechanism as part of the High Availability feature. Elasticsearch search engine is distributed by nature, that is, it knows how to manage multiple nodes. A cluster can contain one or more nodes and one of the nodes acts as a master node. Elasticsearch automatically distributes the indexed data to the nodes based on its constructs of primary shards and replica shards, so indexed data is available even when a node fails.

PeopleSoft Search Framework extends the ability to set up multiple nodes on the PeopleSoft side by enabling users to add Elasticsearch nodes that are created for an Elasticsearch search instance. In order to uptake this functionality, users need to use the Search Instance page in PIA to add the Elasticsearch nodes.

Additionally, PeopleSoft Search Framework provides another fail-over mechanism from PeopleSoft by using the ability to set up multiple search instances for the Elasticsearch search engine and prioritizing the search instances. In this scenario, users can perform the tasks of deploying search definitions and search categories and building indexes on multiple search instances so that if one of the search instances fails, the system administrator can set the priority of the search instance to provide uninterrupted search for their end users. It is important to regularly perform incremental builds to keep the alternate system up-to-date, as well as make sure that the alternate instance is located on a different server.

High Volume Crawling and Search Performance

An Elasticsearch cluster can contain multiple nodes. Each node can store index documents to its capacity, and by using the Elasticsearch bulk indexing option, heavy volume indexing is possible with a better throughput.

Search performance with Elasticsearch is faster due to the way Elasticsearch distributes the data and performs parallel querying from multiple shards.

Cutover from SES to Elasticsearch

In PeopleTools 8.55.11, the Elasticsearch search engine can coexist with SES for the purpose of moving from SES to Elasticsearch. Many of the concepts and processes used with SES remain the same for implementing Elasticsearch, which makes the transition from SES to Elasticsearch easier.

You can move from SES to Elasticsearch in two ways:

- With production downtime (traditional approach).
- Using the new live cut-over feature, which allows you to move to Elasticsearch without taking down your production environment. PeopleSoft Search Framework enables you to set up Elasticsearch and test the indexes while you have SES up and running. The live cut-over feature ensures that there is no impact to your end users.

For more information about moving from SES to Elasticsearch and performing a live cutover, see the Moving from SES to Elasticsearch tab on the PeopleTools Elasticsearch Homepage (Doc ID 2205540.2).

For more information about using Elasticsearch, see the updated Search Technology PeopleBook on the Installation and Implementation tab on the PeopleTools Elasticsearch Homepage (Doc ID 2205540.2) or the PeopleSoft Online Help.

Improved Search User Interface

Global Search and Component Search now provide an improved results page that enables users to drill in to search items and return to the search result set. This enables users to explore among many items in a search result set. When users drill into a search result, the detail is shown in the transaction page. This new two-panel Search page makes it easier to use on small form factor devices. The results panel slides off when an item is chosen displaying the transaction page. The results page can then slide back enabling users to choose other items in the list.

In Component Search, both master-detail and keyword, search criteria can be pre-defined, which enables users to view the search results on launching the component. For easy access of component search, tiles for the required components can be created on the homepage. These features make searching a more effective means of exploration and navigation.

Note: In PeopleTools 8.55, persistent search is not available in Global Search.

See Also

Product documentation for *PeopleTools 8.55: Search Technology*, “Working with PeopleSoft Search”

PeopleSoft Search Activity Guides

PeopleSoft's Search capability is a powerful and important aspect of the user experience. Setting up the Search appliance is a process that requires many administrative steps. To streamline the processes of administration and development, two activity guides have been created that guide administrators and developers through these processes, a Search Administrator activity guide and a Search Developer activity guide.

Search Administrator Activity Guide

The Search Administrator activity guide provides guidance on three main areas:

1. **Configuration:** This covers setting up the search appliance including node setup, Integration Broker setup and so on.
2. **Administration:** This covers deploying and deleting search definitions and categories, scheduling search definitions, defining and viewing search contexts, adding or modifying permission lists for search groups, and more.
3. **Testing:** This provides a Search test page for evaluating results, diagnostics for round trip tests, and downloading search data.

Search Developer Activity Guide

The Search Developer activity guide facilitates the processes of adding and modifying search definitions, adding and modifying search categories, and viewing search attributes.

See Also

Product documentation for *PeopleTools 8.55: Search Technology*, "Administering PeopleSoft Search Framework"

Custom Namespace

PeopleTools 8.55 allows overriding search namespace which is handy when you need to clone environments or when the middle-tier components of an environment change and do not want to re-index data. The namespace aliasing feature enables a cloned or modified environment to re-use the indices deployed from the original environment. The use of the Namespace Alias Settings page allows users to map the database name, node name and URI of a new environment to the original indexed environment and thereby avoid the need to re-index data.

Note: The custom namespace feature is supported for SES; the feature is not available for the Elasticsearch search engine in PeopleTools 8.55.

See Also

Product documentation for *PeopleTools 8.55: Search Technology*, "Administering PeopleSoft Search Framework," Working With Search Instances

Other Search Improvements

In PeopleTools 8.55, the following improvements are provided:

- Ability to copy or clone a search definition or search category.
- Ability to log search-engine request and response for a particular user.
- Ability to log search-engine query performance metrics for a particular user.
- Additional validations for service operations configurations.

See Also

Product documentation for *PeopleTools 8.55: Search Technology*, "Creating Query and Connected Query Search Definitions," Specifying General Settings

Product documentation for *PeopleTools 8.55: Search Technology*, "Creating Search Categories," Specifying General Search Category Settings

Product documentation for *PeopleTools 8.55: Search Technology*, "Administering PeopleSoft Search Framework," Managing General Search Options

Enhanced Back Button on Search Page

In PeopleTools 8.54, on a search page, the Back button did not reference the search page; instead it referenced the component prior to the search page. Users had to use the Return to List option in the Actions List to access the search results page.

In PeopleTools 8.55, in the fluid user interface, the Back button functionality has been enhanced such that on the search results page, when you drill into results and navigate away from the search results page, you can click the Back button to return to the search results page. However, on a classic search page, the Back button does not reference the search results page.

In PeopleTools 8.55, the Back button is the default delivered mechanism for back navigation. Breadcrumbs are not available as a means of navigation, but if users need breadcrumbs, they have to revert to breadcrumbs, which is a global setting.

Note: Using the back button on a browser or using the back button on an android device can corrupt the Back button functionality in PeopleTools.

Boosting Search Result Scores

When end users search for content, the listing of search results is based on the score of a match. A match with the highest score is displayed at the top of the search-results list. In PeopleTools 8.55, application developers can programmatically boost the score of a result so that the most relevant results are displayed to an end user.

See Also

Product documentation for *PeopleTools 8.55: Search Technology*, "Administering PeopleSoft Search Framework," Boosting Score of Search Results

PeopleTools Portal Technology

PeopleTools portal technology includes these enhancements in PeopleTools 8.55:

- Fluid activity guides and other activity guide enhancements.
- Fluid dashboards.
- Fluid related content and other related content enhancements.
- Content reference and tile enhancements.
- Tile Wizard.
- Branding enhancements.
- Conditional navigation enhancements.
- Homepage enhancements.
- Navigation collections.
- OBIEE enhancements.
- Web profiles and CORS authorized sites.
- Deprecated features.

Fluid Activity Guides and Other Activity Guide Enhancements

Guided processes are a popular and powerful feature in PeopleSoft systems. PeopleTools 8.55 now provides a framework to deliver guided processes in the PeopleSoft Fluid User Interface. This means that activity guides can be developed and delivered that scale across all supported devices.

PeopleTools 8.55 supports multiple activity guide formats including:

- Horizontal and vertical presentation of steps.
- Sequential processes that must be completed by the user in strict step order as well as non-sequential processes.
- Guided activity guides that include Next, Previous, and custom buttons for navigation as well as non-guided processes.
- Activity guides with all fluid tasks, all classic tasks, or a combination of both.
- Activity guides defined as a single unit of work and activity guides based on the pages of a single component.

Payment Request

1 Summary — 2 Supplier — 3 Invoice Details — 4 Review and Submit

Summary

Instructions Attachments (0)

*Business Unit US001

Invoice Number

*Invoice Date 11/05/2015

Entered Datetime 11/05/15 12:50PM

Request ID

*Cost Sub-Total

Other Cost

Total Amount 0.00

*Currency USD

Description

Notes/Comments

A horizontal, sequential, guided fluid activity guide

In addition, activity guide templates provide a mechanism to associate a questionnaire that is invoked prior to the generation of an activity guide instance. Finally, action items can be linked to the Approval Workflow Engine (AWE) to enable approvals before subsequent steps are enabled for action.

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, “Developing and Deploying Activity Guides”

Fluid Dashboards

PeopleTools 8.55 introduces fluid dashboards, the PeopleSoft Fluid User Interface counterpart to classic dashboards. Fluid dashboards can be defined to provide important information for a variety of roles. Similar to other fluid components, fluid dashboards scale gracefully across supported devices. Fluid dashboards, similar to fluid homepages, allow you to take advantage of tile enhancements introduced in PeopleTools 8.55 such as new tile sizes, interactivity, and so on.

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, “Administering Homepages and Dashboard Pages,” Managing Dashboard Pages

Fluid Related Content and Other Related Content Enhancements

In PeopleTools 8.55, the PeopleSoft Related Content Framework has been enhanced to:

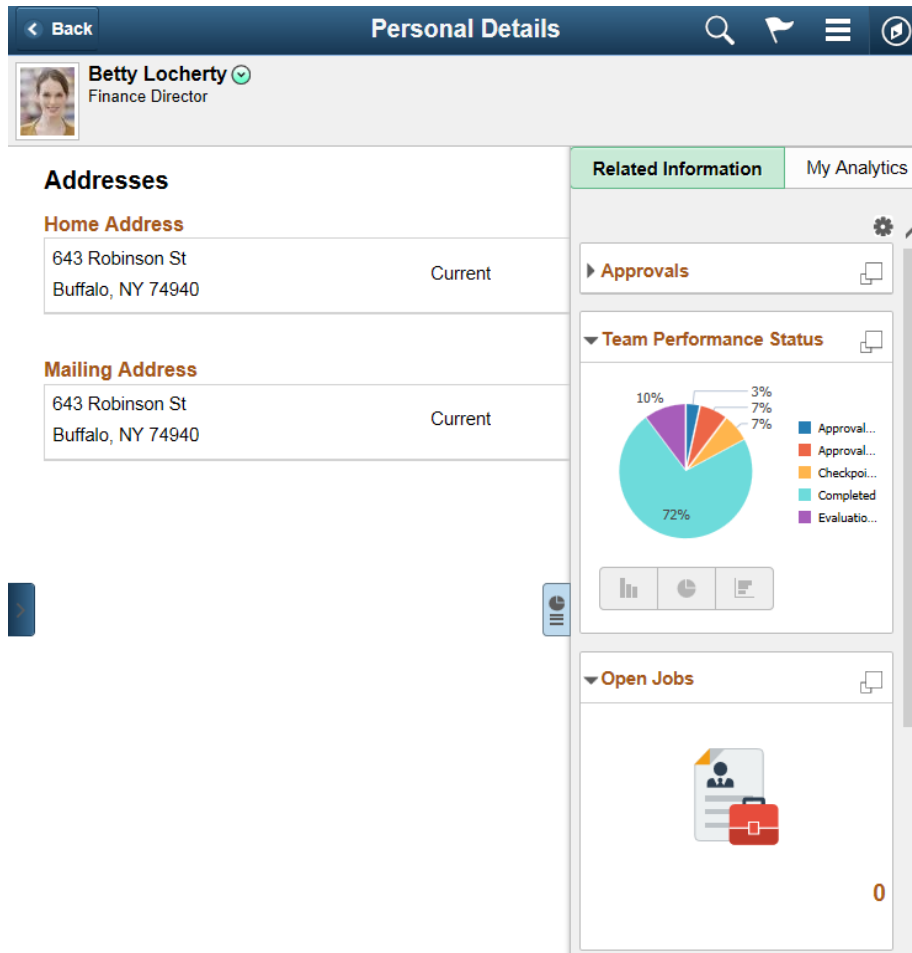
- Allow related content in fluid pages.
- Add related actions to Mobile Application Platform (MAP) applications.

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, “Understanding the PeopleSoft Related Content Framework”

Related Content in Fluid Pages

Fluid pages can now be configured with related information displayed in the right frame or as embedded related content within the page itself. (This is in addition to related actions, which have been allowed on fluid pages since PeopleTools 8.54.)



A fluid page showing the related information in the frame at the right

Related Actions in Mobile Application Platform (MAP) Applications

Mobile Application Platform (MAP) applications can be configured with related actions.

Event Mapping Page

In addition, the PeopleSoft Related Content Framework can also be used to map application class PeopleCode programs to component and component record events. This allows custom PeopleCode programs to be defined for a component without customizing the component definition in Application Designer.

Content Reference and Tile Enhancements

PeopleTools 8.55 provides enhancements to how content references are used in fluid applications as tiles, as embedded related content, or as related information. The Fluid Attributes tab of content reference definitions provides the mechanism for selecting many of these new and enhanced options:

- Interactive content.
- External content.
- Tile sizing.
- Push notifications.
- Tile repository.

Interactive Content

Prior to PeopleTools 8.55, tiles displayed small amounts of live content (order counts, approval request counts, and so on) while serving primarily as a navigation mechanism to the underlying component. With PeopleTools 8.55, interactive content enables users to take actions directly within a tile for example, giving tiles greater power and versatility (more like traditional PeopleSoft pagelets). For example, users are able to update data directly within a tile on the fluid homepage or dashboard. In addition, embedded related content and related information can also display interactive content.

In addition, you can disable the main hotspot for a tile so that users are forced to interact with any elements within the tile itself.

External Content

With PeopleTools 8.55, tiles, embedded related content, and related information can now display external content, not just PeopleSoft content. External content is always set to be interactive.

Tile Sizing

Tiles can now be presented to users in a greater variety of sizes (from 1 tile unit by 1 tile unit up to 8x8) to suit different purposes. Tiles can be set to size themselves automatically depending on the size of the content, the browser size, and the device size and orientation. However, tiles are never rendered larger than the device or its orientation. Tiles can also be defined as resizable to a specific alternate size that can be used to show more detailed information. Tiles can be set for either auto-sizing or manual resizing, but not both.

Push Notifications

Tiles can be designed to reflect updated content based on actions taken elsewhere in the PeopleSoft system. Using push notifications, when data is updated by a different transaction or process or even in another tile, the change can be reflected in the data shown in a tile configured to receive these notifications.

Tile Repository

The first level of subfolders under Fluid Structure Content > Fluid Pages comprise the *tile repository*. This tile repository contains tile definitions as well as definitions for other fluid components used for embedded related content or related information. Definitions are created in the tile repository by registering components there using Application Designer, by using Tile Wizard, or by manually setting the fluid attributes of existing content reference definitions.

General Security **Fluid Attributes**

Root > [Fluid Structure Content](#) > [Fluid Pages](#) > [PeopleSoft Applications](#) >

Title Information

Image Name

Display In

Modal Parameters

Height Autosize

Width Resizable

Refresh Timer Event Name

Interactive

Disable Main Hotspot

Dynamic Tile Content

URL Type

Title Repository

Select a folder below to create a link to the Tile Repository. If the folder selection is disabled, this Tile is already available in the Tile Repository.

Folder PTFL_PEOPLETOOLS

Folder Label PeopleSoft Applications

Include In Repository

- Homepage
- Dashboard
- NavBar

Fluid Attributes tab of a content reference definition

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, “Administering Portals,” Administering Content References

Tile Wizard

Building on the popularity of Pagelet Wizard, PeopleTools 8.55 introduces Tile Wizard to facilitate the creation of tiles for display on fluid homepages, fluid dashboards, and in the NavBar. Tile Wizard walks subject matter experts through the tile creation process, prompting them for important information such as the data source, target page, and tile attributes such as size, interactivity, and so on. Tile Wizard supports creating tiles for the following data types:

- Application classes.
- Free text.
- Navigation collections.
- OBIEE reports and OBIEE dashboards.
- Pivot grids.

Tile Layout Properties

1 2 3 4 5
 Tile Basic Information Data Source Information Target Page Information **Tile Display Prope...** Review and Submit

Previous Save Next

Tile Layout Properties

Tile Height

Tile Width

Image

Tile Refresh Timer (Seconds)

Disable Main Hotspot No

Event Name

Display In ▾

Interactive No

Tile Autosize No

Tile Resizable No

Tile Repository

Homepage Yes

NavBar Yes

Dashboard Yes

Step 4 of Tile Wizard for configuring a tile's fluid attributes

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, "Creating and Managing Tiles"

Branding Enhancements

PeopleTools 8.55 expands on the branding framework introduced in PeopleTools 8.54. Branding enhancements include:

- `DEFAULT_THEME_FLUID` as the default branding theme for PeopleTools 8.55.

This fluid theme includes the `DEFAULT_THEME_FLUID` style sheet and the `DEFAULT_HEADER_FLUID` header definition for classic homepages and classic pages to replicate the features of the fluid banner displayed on fluid pages.

Note that drop-down menu navigation is not available with this new theme for PeopleSoft 9.2 applications.

- A macro repository, including the ability to manage macros and macro sets.

By changing macro values, you can easily and simultaneously change the colors, logos, and other images used in the fluid banner, the fluid-like header for classic homepages and classic pages, and certain attributes of fluid homepages. Behind the scenes, delivered template style sheets include the macro placeholders that are substituted with the actual macro values to generate the theme style sheets.

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, “Using PeopleTools Branding Features”

Conditional Navigation Enhancements

In PeopleTools 8.55, the introduction of the `OverrideConditionalNav` built-in PeopleCode function (which replaces the now deprecated `OverrideCNavDisplayMode` function) provides greater specificity for ignoring certain attributes or all conditional navigation settings than was possible in PeopleTools 8.54.

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, “Working with Conditional Navigation”

Homepage Enhancements

Beginning in PeopleTools 8.55 fluid homepages are the default system setting.

Homepage enhancements this release include:

- Fluid homepages, similar to fluid dashboards, allow you to take advantage of tile enhancements introduced in PeopleTools 8.55 such as new tile sizes, interactivity, and so on.
- Personalized fluid homepages can be published by administrators as new homepages available to other users.

- The Tile Publish page can be used to publish additional tiles to users who have already personalized fluid homepages or fluid dashboards.
- The PeopleSoft Guest role and the PTPT1400 (PeopleSoft Guest) permission list to assist with creating guest user access and guest user homepages (fluid, classic, or both).

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, “Administering Homepages and Dashboard Pages”

Fluid Navigation Collections

PeopleTools provides several features that combined together allow you to display what are referred to as “fluid navigation collections.” These features allow you to launch navigation collections in a fluid activity guide wrapper. You can choose to re-present existing navigation collections consisting entirely of classic content references as well as add fluid content references to new or existing navigation collections. Navigation collections are created and maintained exactly the same way that they always have been. After a navigation collection has been defined, you can determine whether to launch that navigation collection inside a fluid wrapper as a “fluid navigation collection.”

See Also

- Product documentation for *PeopleTools 8.55: Portal Technology*, “Understanding Navigation Collections”
- Product documentation for *PeopleTools 8.55: Portal Technology*, “Creating and Managing Tiles”

OBIEE Enhancements

In PeopleTools 8.55, OBIEE integration now includes the ability to select and publish an OBIEE dashboard as a definition within PeopleSoft systems. Once published, an OBIEE dashboard can be selected as a data source for a tile definition using Tile Wizard.

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, “Managing OBIEE Reports and Dashboards”

Web Profiles and CORS Authorized Sites

The Web Profile Configuration - Authorized Site page has been introduced to maintain sites that are authorized to request resources from a specific web server using the Cross-Origin Resource Sharing (CORS) standard.

See Also

Product documentation for *PeopleTools 8.55: Portal Technology*, “Configuring Web Profiles,”
Configuring Authorized Sites for CORS

Deprecated Features

The following features have been deprecated as of PeopleTools 8.55:

- The SmartNavigation feature has been deprecated.
- Related content service filters are deprecated and are retained for backward compatibility only. On related content service definitions, the App Class Required option has been retained for backward compatibility only and should not be selected for new service definitions.

Application Engine

Application Engine features these enhancements:

- Log Analyzer for Application Engine.
- Provide Process Instance IDs for online AE programs.

Log Analyzer for Application Engine

Log Analyzer for application engine is a GUI tool that helps you format the application engine log file to easily get log information about:

- Application Engine call structure.
- SQL information.
- PeopleCode information.
- Filter.

See Also

Product documentation for *PeopleTools 8.55: Application Engine*, “Using Log Analyzer”

Providing Process Instance IDs for Online AE Programs

This enhancement extends support to automatically generate a new process instance ID if no value is specified for the process instance used by the Application Engine runtime.

See Also

Product documentation for *PeopleTools 8.55: PeopleCode Language Reference*, “PeopleCode Built-in Functions and Language Constructs: C,” CallAppEngine

Global Technology

PeopleTools 8.55 includes the following updates to the global system:

- 17 new locale codes
- 8 new currency codes
- 7 updated currency codes
- 30 inactivated currency codes

PeopleTools 8.55 includes the following new and updated translation pages:

- MAP Template.
- Composite Query Headings.
- MAP Store.
- Integration Group.

See Also

Product Documentation for *PeopleTools 8.55: Global Technology*, “Translating Applications Definitions,” Translating Definitions

System Administration Tools Enhancements

This section discusses enhancements made to system administration tools in the following areas:

- PeopleSoft Cloud Architecture.
- Server Administration and Data Management..
- Security Administration.
- Performance Monitor.
- Automated Configuration Management.
- Enterprise Manager Plug-In.

PeopleSoft Cloud Architecture

In PeopleSoft PeopleTools 8.55, Oracle recommends that you use the PeopleSoft Deployment Packages (DPKs) to install and configure your PeopleSoft environment. DPKs offer out-of-the-box functionality that greatly enhances the installation and configuration of your PeopleSoft environment, which is not available via the standard VCD installation.

Note.

The PeopleSoft PeopleTools DPKs for Linux and Microsoft Windows operating systems are supported for customers on Oracle database platforms beginning with the PeopleTools 8.55.01 patch.

The PeopleSoft PeopleTools DPKs for Linux and Microsoft Windows operating systems will be available at a later time for customers on DB2 for z/OS, DB2 for Linux, UNIX, and Windows, and Microsoft SQL Server database.

DPKs allow fast deployment of a PeopleSoft environment on any hardware platform—physical hardware (“bare metal”) or virtual. The DPKs allow you to skip the manual steps associated with the following:

- Gathering the necessary installation programs
- Installing third-party products such as Oracle Tuxedo and WebLogic and the latest patches (CPUs)
- Installing Application Home (PS_APP_HOME)
- Installing both PeopleTools and the PeopleTools patch binaries
- Configuring the PeopleSoft domains

The DPKs can be installed on any Linux and Microsoft Windows platforms supported by Oracle for PeopleSoft systems.

The DPKs include a bootstrap script that deploys a default instance of each of the PeopleSoft mid-tier domains—PeopleSoft Pure Internet Architecture (PIA), Application Server, and Process Scheduler domains. These domains are fully functional out-of-the-box. However, it is assumed that you will need to make changes to these deployments. These changes will be required to reflect your organizational standards, preferences, and customizations. DPKs set up your infrastructure for you—“infrastructure as a code,” which allows you to customize the environments to produce various topologies to serve different functionality, such as test environments, environments for performance testing or development environments, and so on. Notably, these customizations can be retained across maintenance application (upgrades, patches, and updates).

Using DPKs to create a PeopleTools middle-tier (Application Server, Process Scheduler, and PIA) typically takes less than 15 minutes. This allows for dynamic scaling and quick patching. With such fast creation of the middle-tier components, you can optimize hardware resources by creating middle-tier virtual machines (VMs) on demand. These VMs can be removed to release the resources when not in use, yet be quickly recreated as needed.

DPKs are integrated with PeopleSoft Automated Configuration Management (ACM) to provide PeopleSoft application configuration using plug-ins delivered by the PeopleSoft Application. For example, for all deployed environments, the Integration Broker and Gateway are set with ACM plug-ins, as is Oracle SES for demo environments.

DPKs allow for fast environment cloning. After creating an environment clone, you can use PeopleSoft ACM plug-ins to modify the configuration settings, such as those for Integration Broker, from those used in the original environment, to those required for the cloned environment, during the deployment of the middle-tier using PeopleTools DPK. DPKs can be used, to easily and effectively, create a fresh clone from your existing environments. Using database snap cloning, an environment clone can be achieved in less than 30 minutes.

See Also

PeopleSoft PeopleTools Patches Home Page, My Oracle Support, Doc ID 2062712.2.

Server Administration and Data Management

This section describes server administration and data management enhancements, including:

- Push notifications.
- Log correlation.
- PSAdmin improvements.
- Oracle Policy Automation integration with PeopleSoft.
- Support for WITH and MERGE statements in SQL Access Manager.
- Support for Oracle 12c In-Memory.
- Materialized Views for SQL Server and DB2 z/OS.

Push Notification

Push Notification was first delivered in PeopleTools 8.54. It provided the ability for an end user to subscribe to events that occur on the server, and receive real time notifications in the browser when those events happen on the server. This was achieved via the Tuxedo Event Broker passing events

from the application server to the PeopleSoft web server, where WebSockets then delivered the notification of the event to the end user's browser.

With PeopleTools 8.55, the Push Notification feature is being extended. In addition to notifications being sent to the browser, end users may subscribe to events and have notifications directed to their Android or iOS mobile devices. Notifications will show up as *native* notifications for these devices. Additionally, monitoring support is improved with enhanced diagnostics using JMX clients. Push Notifications will also support dynamic tile updates, when the data changes in real time.

Log Correlation

Prior to PeopleTools 8.55, for debugging issues that span both the application and web servers, log files were correlated based on the common field - timestamp. Additionally, the timestamp could vary between servers if the time is not synchronized, which made the debugging activity difficult and error prone.

In PeopleTools 8.55, new fields are added to the application and web server domain logs that help easily correlate log entries on the middle tiers. These new fields also help easily identify transactions as well as user information so that debugging issues will be significantly easier.

See Also

Product documentation for *PeopleTools 8.55: System and Server Administration*, "Tracing, Logging, and Debugging"

PSAdmin Improvements

In PeopleTools 8.55, PSAdmin has been enhanced to minimize the down time associated with the application of maintenance and reduce the chance of a misconfigured PeopleTools environment. The PSAdmin enhancements are in the following areas:

- Capability to create a PIA domain directly from the PSAdmin command line, which is similar to the existing capability of creating application server and process scheduler domains.
- Capability to replicate web domain directly from the command line.
- Capability to import web domains directly from the command line.
- Capability to refresh PS_CFG_HOME from PSAdmin menu and command line.
- Support to encrypt passwords in command line.
- Support to encrypt passwords in Quick Configure Menu.

See Also

Product documentation for *PeopleTools 8.55: System and Server Administration*, "Using the PSADMIN Utility," Using the PSADMIN Command-Line Interface

Product documentation for *PeopleTools 8.55: System and Server Administration*, "Using PSADMIN Menus," Refreshing Configuration Home (PS_CFG_HOME)

Oracle Policy Automation Integration with PeopleSoft

Oracle Policy Automation is an application that focuses on modeling, automating, and optimizing the implementation of policy, legislation, and complex business rules. In PeopleTools 8.55, PeopleSoft is integrated with Oracle Policy Automation to leverage the following benefits:

- Enable business analysts to author rules in Oracle Policy Modeling (OPM) using natural language sentences written either in MS Word or MS Excel.
- Enable business analysts to build and process complex rules on Oracle Determinations Server outside of PeopleSoft components.

See Also

Product documentation for *PeopleTools 8.55: System and Server Administration*, "Working with Oracle Policy Automation"

Support for WITH and MERGE Statements in SQL Access Manager

In PeopleTools 8.55, SQL Access Manager (SAM) has been enhanced to support WITH and MERGE statements, which are powerful SQL constructs that allow users to combine multiple DML queries into a single query thus improving performance significantly.

SAM supports these statements for the Oracle, MSS, DB2LUW, and DB2 zOS platforms, however, the use of the WITH and MERGE statements are dependent on the support by each platform. Application developers should write and verify their platform specific WITH and MERGE statements before sending to SAM for execution. Note the following when using the WITH and MERGE statements:

- SAM supports WITH statement only for SELECT and INSERT statements; not the UPDATE and DELETE statements.
- SAM does not modify or verify the syntax of the WITH and MERGE queries; it passes the queries as is to the database for execution.

Support for Oracle 12c In-Memory

The Oracle 12c database has introduced the capability to mark a table or column to be stored in memory. This in-memory functionality has been shown to dramatically improve performance in certain use cases. In PeopleTools 8.55, PeopleTools provides the ability to setup and utilize the in-memory functionality for PeopleSoft. Using careful design analysis of tables and indexes prior to implementation, customers are able to substantially improve performance for instances which utilize large tables that are primarily used for read only purposes.

See Also

Product Documentation for *PeopleTools 8.55: Data Management*, "Administering PeopleSoft Databases on Oracle," Working With Oracle Database In-Memory

Materialized Views for SQL Server and DB2 z/OS

Materialized views take the results of complex SELECT statements and save the datasets to disk. The results are then readily available without the need to execute the SQL each time. The SELECT statements typically defining materialized views often contain sizable tables, complex joins and summary functions that may take some time and compute resources to complete. By running the SQL once and saving the results to be used and re-used, a significant savings of CPU and memory

consumption can be achieved. Materialized views provide significant improvements in performance when used in Pivot Grids that don't use data-sets that are updated frequently. The data is refreshed on a time frame defined in the materialized view.

Support for Materialized Views was first provided on the Oracle database platform in PeopleTools 8.54. In PeopleTools 8.55 we are extending the scope of Materialized Views to include the Microsoft SQL Server and IBM DB2 z/OS database platforms. Additionally, PeopleTools 8.55 will provide the ability to create indexes on materialized views for Oracle, SQL Server, and DB2 z/OS databases.

See Also

Product Documentation for *PeopleTools 8.55: Data Management*, "Administering PeopleSoft Databases on Microsoft SQL Server," Working With Indexed Views

Product Documentation for *PeopleTools 8.55: Data Management*, "Administering PeopleSoft Databases on DB2 UDB for z/OS Working," Working With Materialized Query Tables

Security Administration

This section describes changes and enhancements in the area of Security Administration, including:

- Extending the Secure by Default initiative.
- Forgotten password functionality.
- Access ID and Connect ID password length extended.
- SHA-2 hash algorithm and 4096 key size support.
- Open SSL.
- My Preferences personalizations.
- Application-delivered security validation.
- TLS replaces SSL encryption protocol support.
- Prohibiting unregistered content.
- Enabling Tuxedo encryption.

Extending the Secure by Default Initiative

In line with an overall [Oracle Secure Configuration Initiative](#), PeopleTools 8.55 continues to expand on its Secure by Default installation. Secure by Default is an approach to ensure that the application configuration settings adhere to system hardening recommendations.

This release features enhancements in password controls.

Password Controls

PeopleTools delivers the following default values for passwords on the Control Passwords page:

Parameter	Default Value
Minimum Length	8. (Characters.)
Signon PeopleCode	<i>Enabled.</i>
Password Expiration	<ul style="list-style-type: none"> • 180 (Days.) • Without warning.
Account Lockout	5. (After five failed login attempts.)

When you perform a standard database installation the default values are set. The default values are not automatically set during an upgrade.

See Also

Product documentation for *PeopleTools 8.55: Security Administration*, “Managing User Profiles,” Working with Passwords, Setting Password Controls

Forgotten Password Functionality

When a user attempts to generate a new system password using the Forgot My Password page, he or she must enter a user ID and answer a security question.

In the interest of security, the system does not provide feedback if a correct user ID is entered or if the correct response is entered to the password question.

The system displays a message indicating that a new password has been sent to the user’s email address and also provides several steps to take if a new password isn’t received.

See Also

Product documentation for *PeopleTools 8.55: Security Administration*, “Managing User Profiles,” Working with Passwords, Setting Password Controls, Requesting New Passwords

Access ID and Connect ID Password Length Extended

The maximum length for the database access ID password and for the connect ID password has been extended to 32 characters.

The PSACCESSPRFL table has been replaced by the PSACCESSPROFILE table to accommodate the longer passwords.

SHA-2 Hash Algorithm and 4096 Key size Support

Beginning this release PeopleTools supports:

- SHA-256 hash with salt algorithm.
- 4096 key size.

When generating private keys for application server-based digital certificates, by default PeopleTools uses the SHA-256 with RSA encryption algorithm and the 4096 key size.

When using PSKeyManager to generate private keys for web server-based digital certificates, the default signing algorithm is SHA-256 with RSA encryption.

In addition, the PSOPRDEFN table features a new column for SHA-2 hashed passwords.

See Also

Product documentation for *PeopleTools 8.55: Integration Broker Administration*, “Securing Integration Environments,” Installing Application Server-Based Digital Certificates, Install Signed Public Key Certificates for Application Server-Based Digital Certificates

Product documentation for *PeopleTools 8.55: Integration Broker Administration*, Securing Integration Environments, Installing Web Server Based Certificates, Installing Digital Certificates for SSL/TLS Encryption on Oracle WebLogic

Open SSL

PeopleSoft will continue to uptake the latest OpenSSL patches.

Refer to the certification database on the Certifications tab on My Oracle Support for the current and most comprehensive support information.

My Preferences Framework

In this release the My Preferences framework has replaced the My Personalization framework.

The My Preferences framework provides a WorkCenter-like interface for end-users to view and configure system-level preference items, such as time format, date format, default dictionary language, and so on.

Developers can also create custom preference items.

This section describes:

- My Preferences user interface.
- My Preferences and clustered environments.
- My Preferences Fluid User Interface tile.

My Preferences User Interface

End users now set system-level PeopleTools preferences using the Fluid-based My Preferences page. PeopleTools continues to deliver General Settings preference item that features a set of default preferences. The following example illustrates the default General Settings preference item:

General Settings

Save

▼ General Options

Display Keyword Search Help Yes

Multi Language Entry No

Accessibility Features Accessibility features off

Spell Check Dictionary Use session language

▶ Regional Settings

▶ System & Application Messages

▶ Navigation Personalizations

▶ Pop-up Notification

▶ Advanced Settings

My Preferences page and the default General Settings preferences

Developers and administrators continue to use the Personalization component to develop, maintain and administer preferences.

Developers can create custom preferences and add them to the My Preferences component. As custom category items are added, a navigation panel appears displaying the multiple preference items, as illustrated in the following example: as illustrated by the following example:

The screenshot shows the 'General Settings' page. On the left is a navigation sidebar with the following items: 'General Settings' (selected), 'Procurement', 'Project Management', and 'Treasury'. The main content area is titled 'General Settings' and includes a 'Save' button. Under the 'General Options' section, the settings are: 'Accessibility Features' (Accessibility features off), 'Display Keyword Search Help' (Yes), 'Multi Language Entry' (No), and 'Spell Check Dictionary' (Use session language). Below this are expandable sections for 'Regional Settings', 'System & Application Messages', 'Navigation Personalizations', 'Pop-up Notification', and 'Advanced Settings'.

My Preferences page with the default General Settings preference item and several custom preference items added to the page

My Preferences in Clustered Environments

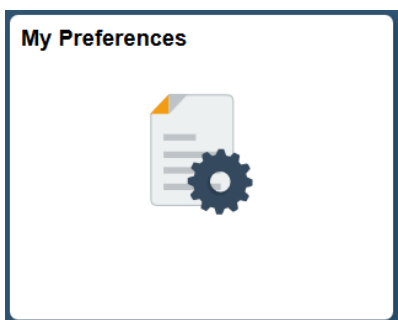
A cluster is a collection of PeopleSoft applications, which contains one gateway system, and one or more application systems.

The My Preferences page displays preference items from all systems in the same cluster and allows users to change settings in those systems from within the same My Preferences page. The system automatically synchronizes changes made to the General Settings preferences to all systems in the cluster.

My Preferences Fluid User Interface Tile

PeopleTools delivers a My Preferences Fluid User Interface Tile that can be added to homepages. Note that the tile is not added to the Fluid homepage or NavBar by default.

The following example illustrates the My Preference Fluid User Interface tile:



My Preferences tile

See Also

Product documentation for *PeopleTools 8.55: Application User's Guide*, "Setting User Preferences"

Product documentation for *PeopleTools 8:55: Security Administration*, "Managing My Preferences Personalizations"

Application-Delivered Security Validation

Among other potential uses, the Event Mapping page of the PeopleSoft Related Content Framework can be used to configure application class PeopleCode delivered with your PeopleSoft application to perform security validation including authorizations performed by third-party validation services. See the documentation provided with your PeopleSoft application for specific information on any application class PeopleCode delivered for this purpose.

See Also

[Event Mapping Page](#)

TLS Replaces SSL Encryption Protocol Support

PeopleSoft has discontinued support for SSL (Secure Socket Layer) protocol, including SSL V1, SSL V2, and SSL V3.

Customers should adopt the TLS (Transport Layer Security) protocol as a replacement.

The term "SSL" remains an industry-standard generic reference for SSL and TLS-protected communication like HTTPS.

Unless noted otherwise, references in PeopleBooks to SSL should be interpreted as TLS.

Prohibiting Unregistered Content

Unregistered content is web content which is referenced from a PeopleSoft system, but is not listed in the portal registry or that originates from a registered portal node.

By registering the content that interacts with your PeopleSoft application, you can prevent your resources from being redirected to unknown and potentially malicious sites.

See Also

"Securing Your PeopleSoft Application Environment" Red Paper (Doc ID 747524.1)

Enabling TUXEDO Encryption

Currently, Link Level Encryption (LLE) is the default encryption for Java server listener (JSL) connections to the WebLogic Java container to the Tuxedo application server. LLE is being deprecated. While LLE is still supported, you should upgrade to SSL.

"Securing Your PeopleSoft Application Environment" Red Paper (Doc ID 747524.1)

Performance Monitor

PeopleTools Health Center

The PeopleSoft Health Center feature represents significant enhancements to the PeopleSoft Performance Monitor (PPM). It provides:

- Dashboards for monitoring health, load, and performance in real time.
- Alerts for potential availability or performance problems.
- Integrated logs.

Dashboards for Monitoring Health, Load, and Performance in Real Time

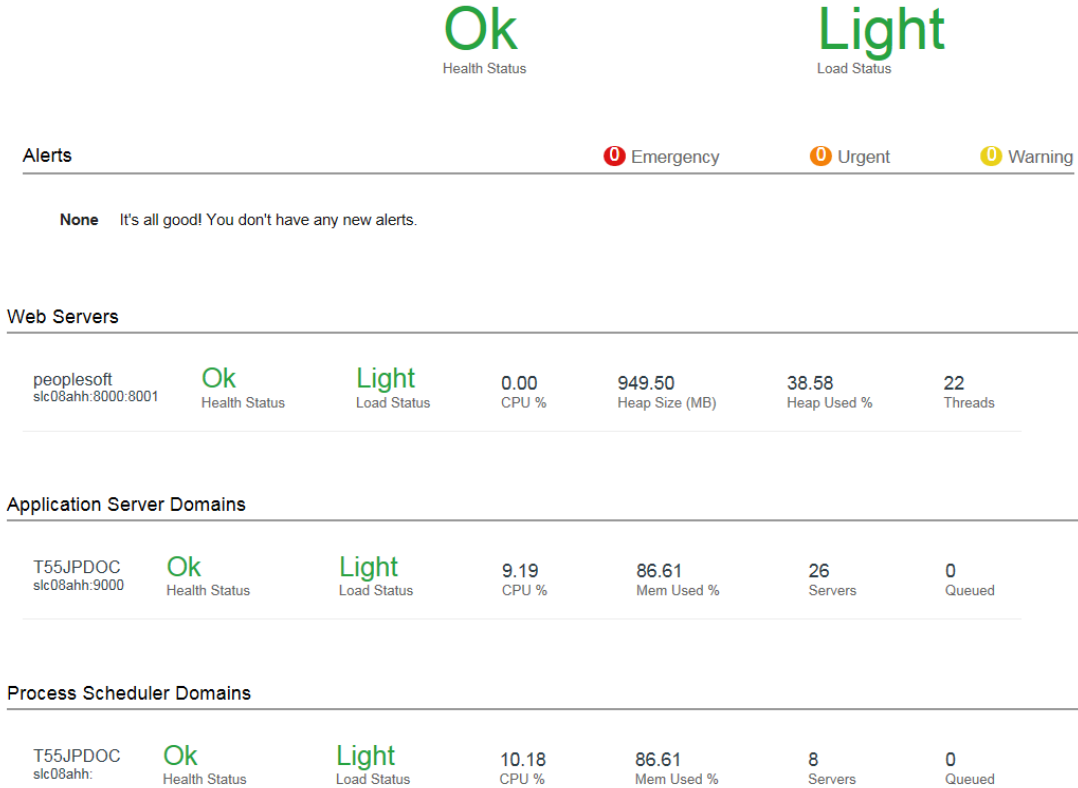
The Application dashboard provides a view of the overall health of each system in the environment. However, the status will be more accurately determined by analyzing a wide array of "vital signs." Accessible from the Application dashboard is a collection of dashboards that provide drill down to real-time monitoring of components and their resources.

Alerts for Potential Availability or Performance Problems

The monitoring and diagnostics framework includes self health monitoring and a notification framework. When conditions that alter the health status of a component or otherwise indicate potential for performance problems, alerts are generated and displayed in the user interface.

Integrated Logs

The Health Center includes in-browser viewing of all log files involved in the application.



Application dashboard that shows general health of an application

See Also

Product documentation for *PeopleTools 8.55: Performance Monitor*, "Working with PeopleSoft Health Center"

Automated Configuration Management

PeopleTools continues to invest in options to improve the process of installing, configuring, and deploying PeopleSoft systems. With PeopleTools 8.55, these new features are provided with PeopleSoft Automated Configuration Manager (ACM), including:

- New configuration plug-ins.
- Error handling.
- Exporting configuration snapshots.
- Applying configuration properties selectively.
- Validating configuration elements.
- Resolving plug-in dependencies dynamically.
- Importing template variables.

See Also

Product documentation for *PeopleTools 8.55 Automated Configuration Management: "Getting Started with Automated Configuration Management,"* Understanding Automated Configuration Management

New Configuration Plug-Ins

This table lists the new configuration plug-ins available with PeopleTools 8.55:

Plug-In	Description
PTIBActivateLocalServices	Activates local services for Integration Broker.
PTIBCleanUpNetworkData	Manage node information for Integration networks.
PTIBIntrospectionDeployment	Performs introspection and deployment of specified services for Integration Broker.
PTIBApprovalSvcInstall	Invokes an Application Engine program to perform service installation.
PTIBRoutingDefinition	Configures Integration Broker routing definitions.
PTMapLayoutEnableSSL	Enables SSL for the specified MAP layouts.

PTPNSystemConfig	Configures settings related to the Push Notification Framework.
PTSFCleanupDeploymentData	Deletes from the database deployment data related to the Search Framework.
PTWebProfileConfig	Enables you to configure web profile settings.

Error Handling

You can now define preconditions and post-conditions for the configuration plug-ins invoked during a configuration template execution. This enables you to verify required items before a configuration plug-in runs and specify how the system should respond, and you can also set post-conditions if a template execution should continue or not based on the status of the status of the current plug-in. Setting these pre and post-conditions provide you more control and insight into a configuration template execution.

Exporting Configuration Snapshots

When working with configuration templates, you can now export an existing template using the Download Current Config option, which enables you to export a configuration template file populated with any specific configuration property values you have set all while keeping the template variables in place so that the template is not dependent on a host. For example, the host variable would remain unresolved so the system picks up the host value from the next host the template runs on. However, if a list of search definitions has been set for the system to deploy, that list appears in the exported template file for reuse on other hosts. This enables you to configure a desired environment and replicate more efficiently, and it also provides backup/failover protection in case the current host configuration needs to be refreshed.

Applying Configuration Properties Selectively

When configuring environments with Automated Configuration Manager, you can apply dozens of configuration properties per template, depending on the amount of plug-ins the template invokes. In some scenarios, you may find that you need to update a small subset of the plug-in properties due to preferences or changes in the overall environment. Rather than running an entire template script again and updating configuration settings that are fine as they are, you can choose to apply only a subset of properties that need to be updated for a particular plug-in (in addition to any properties that are required for that plug-in).

Validating Configuration Elements

With many ACM configuration templates, the system configures multiple elements of products. In most cases, it is not only required that these elements be configured, but it is also important that these elements are performing successfully over time. Running the functional validation test ensures that a product element is not only configured, but operational too. With each configuration template run, you can view the status of the elements configured, but now you can also click the Functional Validation button on the Configuration Template Definition page at any time to check the status of any previously configured elements.

Resolving Plug-In Dependencies Dynamically

Numerous elements in the PeopleSoft system depend on other elements in the system to provide critical functionality. For example, Search Framework cannot operate unless the basic elements of Integration Broker have been configured. As such, various plug-ins within a configuration template need to reflect these dependencies in the system.

While adding a plug-in to a configuration template, the plug-ins on which the newly added plugin depends can be added automatically to the template by clicking Resolve Dependency on the Configuration Template Definition page. Resolving dependency of a plug-in dynamically becomes possible by defining the plug-in dependency meta data in advance using the features described in this topic. Resolving plug-in dependency dynamically, involves:

- Adding the plug-in to a plug-in group.
- Managing plug-ins within a plug-in group.
- Managing dependencies between plug-in groups.

Importing Template Variables

When creating new templates, it can be helpful to import existing template variables from an existing template if you require them in your new template. In this case, you are copying established and tested template variables from one template to another, saving you time when creating new templates. To use this new feature, click the Import Variables link on the Template Variables page.

Enterprise Manager Plug-In

Certification of PeopleSoft Plug-in for Enterprise Manager 13.1

This will leverage out-of-the-box features that come with Enterprise Manager 13.1 release including new responsive UI to adapt automatically to different form-factors such as mobile/tablet clients.

Enterprise Manager 13.1 Repository DB and Plug-in schema objects will use Edition Based Re-definition (EBR), reducing down-time for Enterprise Manager and Plug-in upgrades.

See <http://www.oracle.com/technetwork/articles/oEnterprise Manager/ebr-455513.html>

Alternate PeopleSoft Target discovery mechanisms available in PeopleSoft Plug-in

Bulk discovery of PeopleSoft targets are now possible with implementation of Auto-Discovery and EMCLI verb based discovery mechanisms. The administrator can schedule automatic discovery to happen from the Enterprise Manager console at periodic intervals such as once a day. PeopleSoft Plug-in will sweep thru all the hosts and discover PeopleSoft Targets automatically.

EMCLI verb based discovery can be manually run from the command line to enable bulk discovery of PeopleSoft Targets on each host.

Auto Discover Environment Variables for Effective PeopleSoft Domain Administration

This feature intends to make the PeopleSoft Plug-in smarter by automatically detecting the required environment variables needed for running PeopleSoft utilities such as psadmin and psae to monitor the

PeopleSoft domains. This will reduce the need do complex configuration steps like setting right ".profile" script or psemenv.sh script (as psoft user) with environment variables needed for running the PeopleSoft Plug-in.

As soon as the PeopleSoft Plug-in is deployed on the Enterprise Manager Agent, it is ready to administer and monitor the PeopleSoft Domains without any pre-requisite setups needed to make the plug-in to work as a "psoft" user.

Reporting and Analytic Tools Enhancements

This section covers changes made to the PeopleSoft reporting and analytic tools, including:

- PeopleSoft Pivot Grid.
- PeopleSoft Simplified Analytics.
- BI Publisher for PeopleSoft.
- PeopleSoft Query.
- PeopleSoft Composite Query.
- nVision.
- Process Scheduler.
- Reporting Web Services.
- PeopleSoft SQR.

PeopleSoft Pivot Grids

PeopleTools 8.55 introduces a number of important enhancements to the Pivot Grid functionality, beginning with the Fluid UI adoption of PeopleSoft Related Content framework described previously. Our strategy is to enhance Pivot Grids so that users can access a wide variety of transactional and analytic content online, in context with their daily work, rather than requiring them to produce static reports. Pivot Grids content will be available to users within dynamic Fluid Tiles, on the Related Content pane, on Fluid Dashboards as well as a number of other easily accessible uses within the PeopleSoft applications.

New Pivot Grid enhancements in this release of PeopleTools span multiple aspects of this important functional area. We have addressed concerns for performance as well as the ease of use of Pivot Grids for developers and business analysts to design, construct and publish Pivot Grids. In PeopleTools 8.55, we have added the Composite Query as a source for Pivot Grid content, a feature that greatly extends the reusability of a portfolio of underlying modular query sources. Pivot Grids also provides the option for users to “Save As,” so that individuals can name and save a Pivot Grid definition for their own future use.

This section describes the new features for Pivot Grid, including:

- Using composite queries as data source for Pivot Grid models.
- Drilling URLs in the fluid view.
- Displaying facets as mini charts.
- Defining aggregate labels.
- Displaying currency symbols.

- Viewing PeopleSoft Tree hierarchy in fluid mode.
- Applying thresholds.
- Sorting in Pivot Grids.
- Enabling operators for prompts or facets.
- Dragging and dropping for chart-only views in fluid viewer.
- Displaying multiple Y-axes as Series for chart-only views.
- Displaying dual Y-axis on charts.
- Count Distinct aggregate option.
- Copying Pivot Grid Models.
- Setting the format of date fields.
- Display Mode section is no longer supported.

Using Composite Queries as Data Source for Pivot Grid Models

Composite Query enables you to combine data from existing queries and then to apply filters, aggregates, and so on before presenting the report results, which show the combined data set. Composite Query retrieves multiple levels of related information about existing queries and presents the combined data as a single, flattened query result.

Beginning from PeopleTools 8.55, you are able to associate composite queries as the data sources when you create Pivot Grid models. The steps used to create composite query Pivot Grid models are similar to the steps used to create PSQuery or component Pivot Grid models.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Using Query as a Data Source for Pivot Grid,” Creating Composite Query Pivot Grid Models Using the Pivot Grid Wizard

Drilling URLs in the Fluid View

Use the Specify Data Model Options page, Fluid Mode Options section, Drilling URL Options region to define how mapped drilling URLs will appear in fluid view. The available options are *Full Page Modal*, *Modal Window*, *New Window*, and *Replace Window*.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Using Query as a Data Source for Pivot Grid,” Using Query Drilling URLs in Pivot Grid Models, Drilling URLs in the Fluid View

Displaying Facets as Mini Charts

Use the Specify Data Model Options page, Fluid Mode Options section, Facet Selection region to set the facet display options to display the single-select and multi-select facets as charts and as lists in fluid views. In the chart facets, you can drill down by clicking the chart data point in the facets.

Note that you can use the Update Filters option in the Options Menu list to add or remove existing facets in the model. You can also sort data in facets and filters using the Facet Sort icon at the top-right of each facet.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Creating Pivot Grid Models Specifying Data Model Options

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Creating Pivot Grid Models,” Working with Available Features in the Pivot Grid Wizard, Configuring Facets as Mini Charts

Defining Aggregate Labels

You are able to define the aggregate labels for the columns. These aggregate labels will be displayed as:

- The Y-axis field in the Specify Data Model Values page, Chart Options section.
- The Y-axis field in the User Charting Options page.
- The titles of the columns in the grid.
- The title of the Y-axis in the chart.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Creating Pivot Grid Models,” Specifying Data Model Values, General Options

Displaying Currency Symbols

You are able to display the currency symbol for the columns that are set to *Value*. If you select to display the currency symbol:

- The *Value* column is appended by the currency symbol, such as \$, £, and so on.
- The Y-axis columns will display the currency symbols next to the label of the axis.
- When users hover over the charts, the symbols appear in the embedded labels to show the data points plotted on the chart.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Creating Pivot Grid Models,” Specifying Data Model Values, Formatting Options

Viewing PeopleSoft Tree Hierarchy in Fluid Mode

In the previous PeopleTools releases, each dimension in the Pivot Grid model can be associated with a PeopleSoft Summer Tree. When you view the Pivot Grid model in the classic mode, all filters, grid rows, and grid columns that are attached to Trees are shown in hierarchical order. However, in the Fluid mode, the filters do not show the hierarchy information and the hierarchy information is restricted to grid row and column only.

Beginning in PeopleTools 8.55:

- In fluid view, all filters, facets, grid rows, and grid columns that are attached to Trees are shown in hierarchical order.
- Users can select multiple tree filtering options (nodes or leafs) in fluid view. If partial or full nodes are selected, the colored toggle icons indicate the selection.
- Parent nodes are marked as selected if all of their descendents are selected. Parent nodes are marked as partially selected if any child node is selected.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, "Creating Pivot Grid Models," Specifying Data Model Values, Tree Options

Product documentation for *PeopleTools 8.55: Pivot Grid*, "Creating Pivot Grid Models,"

Applying Thresholds

Use the Configure Thresholds page to configure the basic threshold settings for the grids and the charts.

- For the grids, the thresholds will appear as colored cells if the cell values are over the threshold values that you have specified.
- For the charts, the values in the Reference Areas and Reference Lines fields from the subproduct PeopleSoft Charting are applied.

Note that all threshold settings are applied for both classic and fluid views.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, "Creating Pivot Grid Models," Working with Available Features in the Pivot Grid Wizard, Configuring Thresholds

Sorting in Pivot Grids

You are able to sort the data in four areas of the Pivot Grid fluid views:

- Detailed view.
- Facets or filters.
- Chart.
- Grid. (sorting facts only)

This table summarizes the sorting features and their exceptions:

Feature	View Mode	Available	Exception
Sorting in Detailed View	Fluid	Yes	Sorting of formatted fields is not available.
Sorting in facets or filters	Fluid	Yes	Sorting of facets with tree values is not available.
Sorting in chart	Fluid	Yes	None
Sorting in grid – grid facts	Fluid	Yes	None
Sorting in grid – grid dimensions	Fluid	No	Not available

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Viewing Pivot Grid Models,” Sorting Data in the Pivot Grid Viewer Fluid Mode

Enabling Operators for Prompts or Facets

Use the Editable Facet field in Pivot Grid Wizard to enable the data source columns as editable facets (prompts) in fluid view. Note that you can enable this option for the columns that are set as *Axis* or *Value* in the column type. Columns that are set as *Display* in the column type cannot be defined as editable facets.

Different operators are available for different type of fields:

- Character fields have these operators: *Contains* (Default.), *Does Not Contain*, *Equal To*, *Not Equal To*, *In List*, and *Not In List*.
- Date and number fields have these operators: *Equal To* (Default.), *Not Equal To*, *Between*, *Not Between*, *Greater Than*, *Not Greater Than*, *Equal To*, and *Not Equal To*.

Editable facets are valid only when you view the Pivot Grid models in fluid view. If you view the Pivot Grid models in the classic view, the editable facets are not applied.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Creating Pivot Grid Models,” Specifying Data Model Values

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Viewing Pivot Grid Models,” Using Facets in the Pivot Grid Viewer Fluid Mode

Dragging and Dropping for Chart-Only Views in Fluid Viewer

You are able to drag-and-drop for the chart-only views in fluid viewer. You can drag dimensions from facet area and drop to rows to change the X-axes and series. The Column section in fluid viewer lists all the facts for the Pivot Grid model and you can select these facts to change the Y-axis for the chart.

However, row and facet dimension cannot be dropped to columns; this means that you cannot add a new fact in the Pivot Grid viewer.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Viewing Pivot Grid Models,” [Performing Actions on the Chart View on the Fluid Mode](#), , [Using Drag and Drop for Chart-Only View](#)

Displaying Multiple Y axes as Series for Chart-Only Models

When you use Pivot Grid Wizard to specify axis information, you can set multiple columns as Y axes, and these Y axes will be plotted as series on the charts. This feature has these limitations:

- Multiple Y-axes are solely available for the *Chart-only* models.
- If multiple Y axes are set for a *Pivot Grid and Chart* model, only the first Y axis is plotted on the chart.
- If two or more Y axes are selected on the chart, all Series values will not be applied because both X axis Series and multiple Y axes cannot be plotted simultaneously on the chart.
- A maximum of 10 Y axes can be simultaneously plotted on a chart.

The behavior of the Multiple Y axes feature applies to both classic and fluid views.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Creating Pivot Grid Models,” , [Specifying Data Model Values](#)

Displaying Dual Y-axis on Charts

The Dual Y-axis column in Pivot Grid Wizard is available only for the columns that are set to Y axis. You use this column to set the corresponding Y axis column as a dual Y axis on the Pivot Grid charts; this means that the system will display a second Y axis on the chart. The values for the second Y axis will be plotted like a Series on the chart.

Note that:

- Only one column can be set and plotted as the dual Y axis on the chart.
- If a dual Y axis is selected to be plotted on the chart, other Series and axis values cannot be plotted on the chart.
- You can select multiple Y axes for a chart, and you can mark one of the selected Y axes (that belongs to the multiple Y axes) as dual Y axis for the chart. However, you cannot apply both Dual Y axis feature and Multiple Y axes feature on the same chart.

- Dual Y axis is solely available for the Chart-only models.
- The title of the dual Y axis is populated based on the name of the axis column.

The behavior of the Dual Y axis feature applies to both classic and fluid views.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, "Creating Pivot Grid Models," Specifying Data Model Values

Count Distinct Aggregate Option

In the previous PeopleTools releases, you were able to define the aggregate functions for the data source column with the column type set to *Value*. The available options are *Average*, *Count*, *Maximum*, *Minimum*, *Sum*, and *None*.

Beginning from PeopleTools 8.55, additional option *Count Distinct* is available for you to define the aggregate functions.

Note that *Count* or *Count Distinct* aggregates are available for the fact fields that are set to *character*.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, "Creating Pivot Grid Models," Specifying Data Model Values

Copying Pivot Grid Models

In the previous PeopleTools releases, end users cannot copy an existing Pivot Grid models while viewing the models in Pivot Grid Viewer. Only Pivot Grid administrators can copy or clone existing Pivot Grid models.

Beginning from PeopleTools 8.55, all users can use the Save As option in the Options Menu list to copy the current Pivot Grid model and save it as a different one. If personalizations are defined for the current Pivot Grid model, then personalization are also copied and included in the new model.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, "Viewing Pivot Grid Models," Using the Options Menu

Setting the Format of Date Fields

Use the Date Format field on the My Preferences page (Main Homepage, My Reference, Regional Settings) to set the format of the date fields in Pivot Grid charts and Pivot Grid grids.

The format settings at this page are applied for all date values in fluid and classic views, including in:

- Chart axes
- Grid axes
- Filters or facets
- Fields in the Detailed Grid View

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, "Creating Pivot Grid Models," Setting the Format of Date Fields

Display Mode Section is No Longer Supported

Beginning from PeopleTools 8.55, the Display Mode section is no longer available in Pivot Grid Wizard, Specifying Data Model Options page. You can use the Pivot Grid Viewer search page to open and view the Pivot Grid models in either fluid view or classic view.

Note: The content structure of PeopleTools 8.55 Pivot Grid documentation is altered to refine and to remove duplication.

PeopleSoft Simplified Analytics

PeopleTools 8.55 introduces a significant new group of features called PeopleSoft Simplified Analytics. These features enable end users to access application content in the context of their normal flow of work, rather than requiring them to navigate to a separate part of the system to retrieve or produce an analytic report.

The first element of Simplified Analytics is the inclusion of an Analytics tab on the PeopleSoft Related Content panel, which itself has been enhanced for use in the Fluid User Experience. PeopleSoft application developers can publish content to the Related Content panel's Analytics tab. Customers can add to this catalog of Related Analytics with their own published content. These published analytics are directly associated in transactional context to the application component and will be available to all users who access the component.

The Analytics tab includes an Add New feature that enables users to launch a Pivot Grid wizard, which guides them through the process of creating their own personalized versions of Pivot Grid analytics for use whenever they access the application component. Users are also able to add an associated analytic to one of their fluid homepages for simple and quick access to the information in the future. The added tile will launch the saved Pivot Grid through the Fluid Pivot Grid viewer.

Simplified Analytics enables:

- End users of a fluid application page to create contextual analytic reports.

They can create their own reports based on the pre-defined templates by selecting the fields, filling the prompt fields, defining the layout, and selecting different types of visualizations.

- Pivot Grid administrators or Pivot Grid super users can create and publish reports (based on the configured base templates) to all users of the component.

To enable Simplified Analytics for a component, application developers or business administrators have to associate one or more Pivot Grid models (or base templates) to a component. They can also map page fields to the prompts that are associated with the template model and define the required context.

Note: The Simplified Analytics feature is only available for fluid components, and this feature must be enabled for fluid components before users can use the Simplified Analytics wizard to create and view analytic reports.

See Also

Product documentation for *PeopleTools 8.55: Pivot Grid*, “Using Simplified Analytics”

BI Publisher for PeopleSoft

BI Publisher for PeopleSoft enhancements in this release include:

- Changing report definition data sources.
- Copying report definitions.
- Deleting report definitions.
- Emailing reports to external users
- Including external attachments with reports.
- Using submittable PDF reports.
- BI Publisher Report User role.
- **Sharing private BI Publisher reports.**

Changing Report Definition Data Sources

Beginning this release you can change the data source of an existing report definition.

The Report Definition – Definition page features a Change Data Source control. When a user clicks the link the Data Source Type and Data Source ID field become editable.

An option to cancel data source changes is available, allowing a report developer to revert back to initial state.

See Also

Product documentation for *PeopleTools 8.55: BI Publisher for PeopleSoft*, “Creating Report Definitions,” Defining Reports

Copying Report Definitions

PeopleTools delivers a Copy Report Definition page that simplifies report development, by enabling report developers to copy report definitions.

See Also

Product documentation for *PeopleTools 8.55: BI Publisher for PeopleSoft*, “Copying Report Definitions”

Deleting Report Definition

Report developers can delete report definitions from the results grid of the Report Definition search page.

See Also

Product documentation for *PeopleTools 8.55: BI Publisher for PeopleSoft*, “Deleting Report Definitions”

Emailing Reports to External Users

PeopleTools enables you to distribute reports using email to recipients that do not have PeopleSoft user profiles. This feature enables you to distribute bursted and non-bursted BI Publisher reports to external users whose email addresses are stored in the database, file server, or other location.

See Also

Product documentation for *PeopleTools 8.55: BI Publisher for PeopleSoft*, “Emailing BI Publisher Reports to External Users”

Including External Attachments with Reports

PeopleTools enables you to include attachments from external sources with BI Publisher PDF report output.

The source attachments are converted to PDF format and then merged with the main report. The report is then displayed to the end users or delivered to Report Manager.

To convert attachments to PDF output, BI Publisher utilizes Oracle’s Outside In Technology (OIT), a product that enables the transformation and control of more than 600 file formats, including documents from office suites, specialty formats, and legacy files

This feature is available for any BI Publisher report with PDF output. The following template types are supported: RTF templates, PDF templates, and XSL templates.

See Also

Product documentation for *PeopleTools 8.55: BI Publisher for PeopleSoft*, “Including External Attachments with BI Publisher Reports”

Using Submittable PDF Reports

BI Publisher for PeopleSoft enables you to develop PDF reports that users can edit and then submit the changes to be saved in a database.

The submittable PDF report functionality is available for delivered self-service reports and for customer-created reports. Only reports generated from PDF templates can be used as submittable reports.

See Also

Product documentation for *PeopleTools 8.55: BI Publisher for PeopleSoft*, “Creating Report Templates,” Using PDF Templates

BI Publisher Report User Role

PeopleTools has created a BI Publisher report user role, XMLP Report User, that allows users to schedule and run reports. Users with this role can also open a majority of BI Publisher report definitions in read-only mode. A new permission list, PTPT5300, is assigned to this new role.

See Also

Product documentation for *PeopleTools 8.55: BI Publisher for PeopleSoft*, “Setting Up BI Publisher,” Assigning BIP Permissions to Users

Sharing Private BI Publisher Reports

A new BI Publisher property, `psxp_private_report_access`, has been introduced to allow the sharing of a private report, so that it may be run by other users who have a private query that shares the same name as the private query data source associated with the report.

Note that Report Category permissions are enforced so that only those users who have at least read-only permissions to the report can share it.

Users can set the property at both the global and report definition level.

See Also

Product documentation for *PeopleTools 8.55: BI Publisher for PeopleSoft*, “Setting Up BI Publisher,” Defining Global Properties.

PeopleSoft Query

This section describes the new features for PeopleSoft Query, including:

- REST drilling URLs.
- Count Distinct aggregate option.

REST Drilling URLs

Report developers may use a REST (REpresentational State Transfer) drilling URL to allow users to drill down from the query result set, or a report based on the query, into a PeopleSoft defined Rest Web Service URL. This feature and the newly introduced BI Publisher REST Web Service would allow users to drill down from a query, or even a formatted query-based report, directly into another formatted (BIP) report.

In general, you are able to drill down from the query results or a formatted query-based report into another query using the Query drilling URL feature. However, if the parent query containing the drilling URL is used as a data source for a formatted report (such as an nVision report, BI Publisher report, or Pivot Grid chart), Oracle PeopleSoft recommends that you use the REST drilling URL feature and the BIP Web Service so that the drilling URLs can drill into a formatted report. When defining a drilling URL to the BIP Rest Service, all supported report output parameters, such as the report definition ID, output format, template ID, and language code, can be defined as a part of the drilling URL. In addition, the required query prompt values for the drilling report can be mapped to field values in the parent query.

See Also

Product documentation for *PeopleTools 8.55 Query*, “Drilling URLs in PeopleSoft Query,” Defining REST Drilling URLs

Count Distinct Aggregate Option

In the previous PeopleTools releases, you were able to define the aggregate functions for query fields using these options: *Average*, *Count*, *Maximum*, *Minimum*, *Sum*, and *None*.

Beginning from PeopleTools 8.55, additional option *Count Distinct* is available for you to define the aggregate functions for query fields.

See Also

Product documentation for *PeopleTools 8.55 Query*, “Working with Advanced Query Options,” Working with Aggregate Functions

PeopleSoft Composite Query

This section describes the new features for PeopleSoft Composite Query, including:

- Selecting and clearing all fields while building composite queries.
- Defining drilling URLs in composite queries.
- Adding unique names and labels for expression fields in composite queries.
- Adding fields to expressions in composite queries.
- Managing expressions in composite queries.
- Applying derived formula using expressions in composite queries.
- Count Distinct aggregate option.
- Including expression fields in the Group By clause.
- Editing field properties.
- *In List* and *Not In List* condition types and *Constant* criteria type.
- Viewing composite query properties.

Selecting and Clearing All Fields While Building Composite Queries

You use the Select Output Fields page to select the output fields for the composite query. This page displays all fields that are available from the base queries that you selected. Beginning from PeopleTools 8.55, this page has options that enable you to select all fields or clear all fields while building the composite queries.

In addition, you can also use the Menu icon in the Composite Query Manager page to:

- Remove the corresponding query and all of its fields from the output field list.
- Add all fields of the corresponding query to the output field list.
- Remove all fields of the corresponding query from the output field list.

See Also

Product documentation for *PeopleTools 8.55 Query*, “Using Composite Query,” Creating Composite Query Definitions, Selecting Output Fields

Product documentation for *PeopleTools 8.55 Query*, “Using Composite Query,” Creating Composite Query Definitions, Using the Composite Query Manager Page

Defining Drilling URLs in Composite Queries

You can define drilling URLs for composite queries using Composite Query Manager. Depending on the drilling URL type you select, different pages and fields are available for you to build drilling URLs for the composite queries. The available drilling URL types are:

- Query URL
- Component URL
- External URL

If the output field of the base query is a drilling URL field or is mapped to the drilling URLs and you add this drilling URL field to the composite query output field list, then you must add all query fields that are used to build the drilling URLs to the composite query output field list.

If the base query includes the drilling URL fields, only the drilling URL fields that have the drilling URL type set to *Query*, *Component*, or *External* are listed in the Select Output Fields page.

See Also

Product documentation for *PeopleTools 8.55 Query*, “Using Composite Query,” Defining Drilling URLs in Composite Queries

Product documentation for *PeopleTools 8.55 Query*, “Using Composite Query,” Creating Composite Query Definitions, Selecting Output Fields

Adding Unique Names and Labels for Expression Fields

In the Composite Query Manager page, the Fields section displays the output fields of the composite query when you first access this page. You can use the Fields section to view, define, and maintain the output fields that are selected for the output column results.

Initially, the headings of the fields use the field headings from the base query. If the field is an expression created within the composite query, then this column displays the heading of the expression. You can use the Edit Field option from the Action icon to edit the headings and field properties.

See Also

Product documentation for *PeopleTools 8.55 Query*, “Using Composite Query,” Creating Composite Query Definitions, Using the Composite Query Manager Page

Adding Fields to Expressions in Composite Queries

You use the Edit Expression Properties page to add and modify expressions in the composite queries. Beginning from PeopleTools 8.55, this page include the Add Field link that enables you to access the Select a Field page, where you can select and add a composite query output field or a query field to the composite query expressions.

See Also

Product documentation for *PeopleTools 8.55: Query*, “Using Composite Query,” Defining Expressions in Composite Queries, Page Used to Define Expressions in Composite Queries

Managing Expressions in Composite Queries

Using the Expressions section in the Composite Query Manager page, you are able to:

- Add the expressions to the output field list in the Fields section.
- Add the expression as a left operand in filter criteria.
- Edit the current expression properties.
- Delete the expression from the composite query.

See Also

Product documentation for *PeopleTools 8.55: Query*, “Using Composite Query,” Defining Expressions in Composite Queries, Page Used to Define Expressions in Composite Queries

Applying Derived Formula Using Expressions in Composite Query

Composite Query can expand the aggregate of fields in expressions using the aggregate function that is specified for the selected fields.

If a composite query has field F1, field F2, and expression field $F1+F2$, then Composite Query expands the expression field as $SUM(F1) + AVG(F2)$ when field F1 has aggregate function SUM and field F2 has aggregate function AVG.

Instead of users specifying the field names as shown in SQL to satisfy this requirement, Composite Query can parse the expression for the fields using the following syntax:
`#{<QueryAlias>.<QueryUniqueFieldName>}`.

To display distinct output results that do not list the same field more than once, add the column number to the previous syntax: `#{<QueryAlias>.<QueryUniqueFieldName>:<column number>}`.

See Also

Product documentation for *PeopleTools 8.55: Query*, “Using Composite Query,” Defining Expressions in Composite Queries, Derived Formula Using Expressions in Composite Query

Count Distinct Aggregate Option

In the previous PeopleTools releases, you were able to define the aggregate functions for composite query fields using these options: *Average*, *Count*, *Maximum*, *Minimum*, *Sum*, and *None*.

Beginning in PeopleTools 8.55, additional option *Count Distinct* is available for you to define the aggregate functions for composite query fields.

See Also

Product documentation for *PeopleTools 8.55 Query*, “Using Composite Query,” Applying Aggregate Functions in Composite Queries

Including Expression Fields in the Group By Clause

The Group By clause in Composite Query Manager page is added automatically when you apply the first aggregate function to the output field. By default, all non-aggregate output fields are included in the initial Group By clause in the same order as in the output field list.

You can use the Edit Group By page to edit the order of the Group By fields. You also have the option to exclude the selected fields from the Group By clause.

See Also

Product documentation for *PeopleTools 8.55 Query*, “Using Composite Query,” Applying Group By Clause in Composite Queries

Editing Field Properties

Use the Edit Field Properties page to add or edit the field properties in composite queries, including the unique field names and field headings.

- Use the Unique Name field to change the default unique name for a field or an expression.
By default, the format of a unique field name is `<query alias>.<query unique field name>` and the format of a unique expression name is `EXPR<SELNum>_<colnum>_<exprNum>`.
- Use the Heading field to enter new heading text for the field heading.
By default, this field is blank for all fields from the base query. If the field is an expression created within the composite query, then this field displays the expression heading.

See Also

Product documentation for *PeopleTools 8.55 Query*, “Using Composite Query,” Editing Field Properties

In List and Not In List Condition Types and Constant Criteria Type

You use the Composite Query Manager page - Filters section and the Add / Edit Filter page to view, define, and maintain query filters for the selected output fields in the composite queries.

- In the previous PeopleTools releases, these values are available from the Condition Type drop-down list: *greater than*, *not greater than*, *less than*, *not less than*, *equal to*, and *not equal to*.

Beginning in PeopleTools 8.55, these options are also available from the Condition Type drop-down list: *in list* and *not in list*.

- In the previous PeopleTools releases, these values are available from the Criteria Type drop-down list: *Expression*, *Field*, and *Prompt*.

Beginning in PeopleTools 8.55, the *Constant* criteria type is also available for your selection. If you select this option, the Expression 2 Text section displays a constant text box.

See Also

Product documentation for *PeopleTools 8.55 Query*, "Using Composite Query," Defining Filters in Composite Queries

Viewing Composite Query Properties

In the previous PeopleTools releases, you use the Properties page to view and edit the property settings of the composite query, including the owner ID and comments options.

Beginning from PeopleTools 8.55, you can select the Distinct option on this page to eliminate duplicate rows in the composite query result.

See Also

Product documentation for *PeopleTools 8.55 Query*, "Previewing Composite Query Results and Viewing Composite Query Properties," Viewing Composite Query Properties

nVision

This section covers changes to the nVision reporting tool, including:

- PeopleCode APIs for Excel.
- Multiple chart-field nPlosion.

PeopleCode APIs for Excel

PeopleCode APIs for Excel is a framework solution for easier interaction with Excel files or spreadsheets within PeopleCode. This feature provides the user the ability to interact with Excel spreadsheets by using PeopleCode APIs across multiple platforms (including Windows, UNIX and Linux).

See Also

Product documentation for *PeopleTools 8.55: PS/nVision*, "Using PeopleCode APIs for Excel"

Product documentation for *PeopleTools 8.55: PeopleCode API Reference*, "PSSpreadsheet Class"

Multiple Chart-field nPlosion

The Multiple Chart-field nPlosion feature is an extension of the existing nPlosion feature. Multiple Chart-field nPlosion is used to provide functionality for data in financial reports to show detailed data values when there are multiple chart fields specified in the report.

See Also

Product documentation for *PeopleTools 8.55: PS/nVision*, "Using Multiple Chart-field nPlosion"

Process Scheduler

PeopleTools 8.55 enhances the report notification system using the Push Notification framework with the Process Scheduler. Configurations at different levels for different states of scheduled processes allow generation of notifications using the following channels:

- Email.
- Popup Notification.
- Notification Window.

Configurations for the notifications can be modified at the following levels:

- System Level: The configurations at system level are applicable to all processes. At system level, the user can opt to enable or disable notifications on a particular state.

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- **Process Level:** The configurations at process level are applicable to a specific process. The user can also opt to send notifications to a single user or to a group.
- **My Preference page:** Configuration in the Pop-up Notification cluster overrides the system level configurations.

See Also

Product documentation for *PeopleTools 8.55: Process Scheduler*, “Defining PeopleSoft Process Scheduler Support Information,” Defining System Settings, Defining Notification Configuration.

Product documentation for *PeopleTools 8.55: Process Scheduler*, “Defining PeopleSoft Process Scheduler Support Information,” Defining Process Definitions, Setting Notification Options.

Reporting Web Services

PeopleTools 8.55 introduces the ability for QAS REST Services to return a JSON-formatted response, rather than the standard XML response.

PeopleSoft SQR

This sections describes the new feature of PeopleSoft SQR called Transparent Application Failover (TAF).

Oracle Transparent Application Failover for SQR

PeopleTools 8.55 enhances SQR to support Transparent Application Failover (TAF). TAF is a feature supported by Oracle Call Interface driver (OCI). SQR reports which are mostly read-only can take advantage of the TAF configuration. This enables the SQR reports to use failover and connect to the next available DB node to re-execute SQL queries automatically when there is a node failure.

The SQR engine code is modified to reconnect to the available DB nodes in the event of a DB node failure and execute the SQR Reports session specific variables, which would have been otherwise lost in the case of a DB node failure.

In addition, the SQR Engine writes informational messages to the SQR report log files to indicate the TAF fail over details for the SQR report.

See Also

Product documentation for *PeopleTools 8.55: SQR for PeopleSoft Developers*, “Getting Started with SQR for PeopleSoft”, Understanding Transparent Application Failover for SQR.

Lifecycle Management Tools Enhancements

This section discusses the changes to PeopleSoft lifecycle management technology, including:

- PeopleSoft Update Manager.
- Change Assistant.
- PeopleSoft Test Framework.
- Application Data Sets.
- Application Designer Upgrade.

PeopleSoft Update Manager

PeopleTools 8.55 represents a significant advancement with the technology that makes Selective Adoption a reality. This section discusses the following enhancements to PeopleSoft Update Manager, including:

- New delivery format.
- PUM Dashboard.
- Improved selection process.
- Update Manager Utilities.
- Change package definitions.

New Delivery Format

With PeopleTools 8.55 PeopleSoft delivers software resources with instructions of how the resources work together. Then, using open source configuration tools as well as PeopleSoft configuration management tools, the downloaded software can be configured to run on any platform, including popular virtual platforms.

The net result means that once you have installed an update image, the next time all you have to download and install are the resources that have changed.

See Also

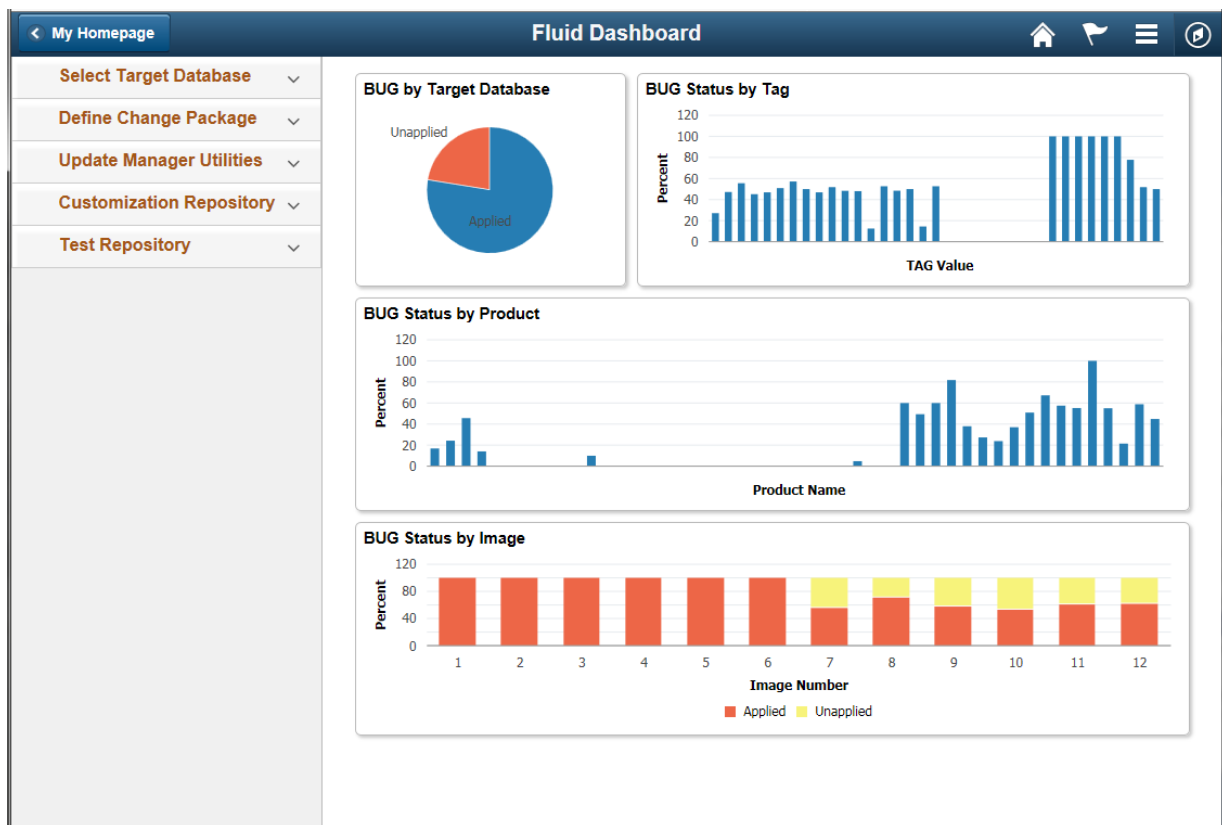
Product documentation for *PeopleSoft Deployment Packages Installation (PeopleSoft PeopleTools 8.55)*

PUM Dashboard

It is important for customers to have insight into the level of maintenance and new features that have been applied to their system. To help provide this, there is a new PeopleSoft Update Manager

Dashboard that is available as part of the PeopleSoft Update Image (PI). After the customer connects to the PI through Change Assistant and uploads their information, they can use the PUM Dashboard to view useful analytics. Some of the analytics that are available in the first release are:

- BUG by Target Database shows the percentage of fixes applied relative to the total number of fixes in an image to give an idea of how current their system is.
- BUG Status by Tag shows the percentage of fixes applied for a tag value relative to the total percentage of fixes available for the tag to give an idea of how current a single tag is.
- BUG Status by Product shows the percentage of updates applied to all products relative to updates available for a single product to show how current a single product is compared to other products.
- BUG Status by Image shows the total percentage of fixes applied relative to when the fixes were first available to give an idea when the fixes were available that have been applied.



Update Manager Dashboard

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, "Using Update Manager Dashboard," Using PeopleSoft Update Manager (PUM) Analytics

Improved Selection Process

One of the primary features of PeopleSoft Update Manager (PUM) is allowing users to search for bugs and new features. Several key enhancements are added to the search feature including:

- **Iterative Search** - Users can now create change package definitions from multiple searches. Searches by different criteria such as object and bug can now be consolidated into a single change package for easier maintenance.
- **New Search Options** - Now users can do direct searches for new features and for tax updates.
- **Customization Impact** - There is an option within search to provide the user with customization impact information during search. This provides more insight to the impact the bug will have when being applied to the system.
- **Test Coverage** - Information will be provided that gives the general test coverage of applying a change. Now users will have a more clear understanding of the test coverage when applying maintenance.

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, "Using PeopleSoft Update Manager PIA Applications," Defining Custom Change Packages

Update Manager Utilities

Update Manager Utilities include:

- **Review Change Package**
Provides information on the status of the change package, as well as search scope, bugs included in the change package, and modified objects.
- **Delete Change Package**
You now have the ability to delete a change package definition.
- **About PeopleSoft Image**
The About PeopleSoft Image page has been enhanced to display the PI Version.

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, "Using Update Manager Dashboard," Using Update Manager Utilities

Change Package Definitions

There are now four separate change package wizards to create a change package definition:

- Change Package

The Define Change Package component is a wizard that will lead you through the process of selecting updates and defining a custom change package for your environment. It provides a wide array of search options for selecting the updates to apply to your environment.

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Using PeopleSoft Update Manager PIA Applications,” “Defining Custom Change Packages

- Upgrade Package

The Define Upgrade Package component is a wizard that has three options:

- Create an Application Upgrade package (UPG) based on the upgrade path specified.
- Create a Required for Upgrade package (RFU).
- Create both the Application Upgrade package (UPG) and the Required for Upgrade package (RFU).

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Configuring Change Assistant for Upgrades,” “Defining an Upgrade Package

- Tools Delta Package

The Define Tools Delta Package component is a wizard that is used after a PeopleTools upgrade to create a Tools delta change package that contains attributes or objects that were stripped away when the updates were applied in the old release.

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Upgrading PeopleTools,” “Creating and Applying Tools Delta Package

- Translation Delta Package

The Define Translations Delta Package component is a wizard that will lead you through the process of selecting the languages and translation fixes and create a translation delta package.

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Defining and Applying Translation Fixes”

Change Assistant

This section describes Change Assistant enhancements, including:

- Uploading customer data to images.
- Data persistence.
- Change Assistant installation and setting retention.
- Application Upgrade
- Enhanced logging
- Ability to run Change Assistant from the command line using a configuration file

Uploading Customer Data to Images

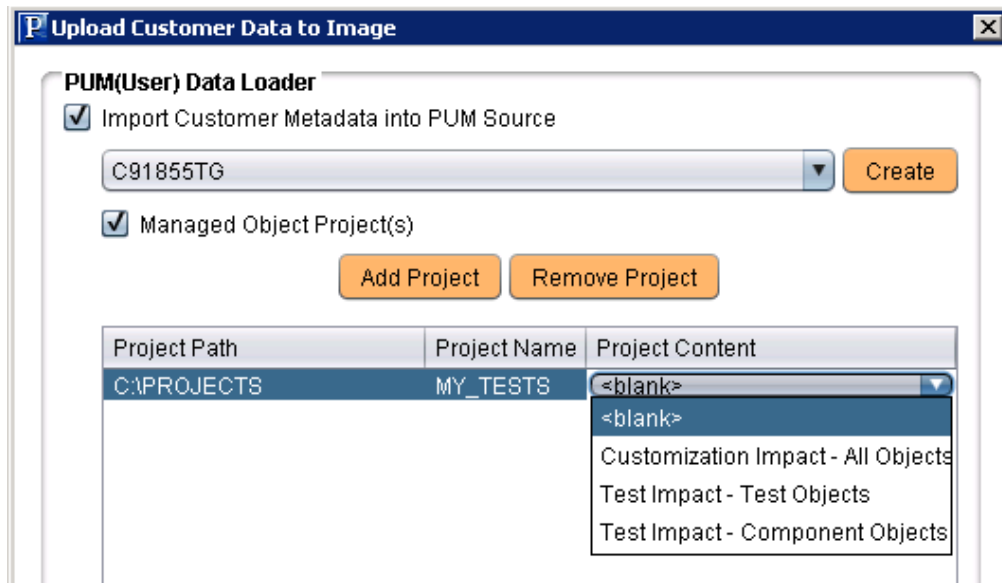
Change Assistant provides the ability to upload projects containing customer data (object names only) to the PeopleSoft Update Image. Customer data includes:

- Customization Impact

Create a project or projects that include Managed Objects that have been customized. Metadata about the objects in the project is uploaded to the Customization Repository. When you search for bugs, if a bug contains objects are identified in the Customization Repository, it will be flagged as having a customization impact.
- Test Impact – Test Objects

For customers using PTF, create a project or projects that include PTF tests. Metadata about the tests in the projects is uploaded to the Test Repository. When you search for bugs, if a bug contains components that are identified in the Test Repository, it will be flagged as having test coverage.
- Test Impact – Component Objects

Create a project or projects that include components that have an effect on testing. Metadata about the components in the project is uploaded to the Test Repository. When you search for bugs, if a bug contains components that are identified in the Test Repository, it will be flagged as having test coverage.



Upload Customer Data to Image page

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Managing Customization Repository”

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Managing Test Repository”

Data Persistence

Starting with PeopleTools 8.55, Change Assistant provides the ability to export PUM Data from your old PeopleSoft Update Image to your new PeopleSoft Update Image. PUM data includes:

- Customization Repository
- Test Repository
- Change Package Definitions

PUM Data Migration

PUM(User) Metadata from Existing PUM Source

Export PUM(User) Metadata from existing PUM Source

C92TGTCO

Data Type

Customization Repository

Test Repository

Package Definitions

Export To:

Import PUM(User) Metadata to New PUM Source

CR920UPV

Data Type

Customization Repository

Test Repository

Package Definitions

Overwrite if exists Ignore duplicate

File Type

Same As Export Specify

Import From:

PUM Data Migration page

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Migrating PUM Data”

Change Assistant Installation and Setting Retention

PeopleSoft Change Assistant installation includes the following features:

- You can install multiple instances of PeopleSoft Change Assistant from the current release on one physical machine.
 - Note:** You cannot run more than one instance at a time. That is, you cannot run multiple instances in parallel.
- You must remove installations of PeopleSoft Change Assistant from PeopleSoft PeopleTools 8.54 or earlier before installing from the current release. PeopleSoft Change Assistant from PeopleSoft PeopleTools 8.55 cannot co-exist with that from earlier releases.
- You must install each PeopleSoft Change Assistant instance in a separate installation location.
- You can remove or upgrade each PeopleSoft Change Assistant instance separately.

- When you remove an installation instance, you have the option to save the existing configuration information in a group of files gathered in a zip archive. You can configure Change Assistant at a later time by importing the zip file.

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Managing Customization Repository”

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Exporting and Importing Change Assistant Settings”

Application Upgrade

The process for upgrading an older application release to application release 9.2 has changed. Customers will use the Define Upgrade Package option in PUM application to create 2 change package definitions, one that contains the upgrade template for the selected path and one that includes all the Required for Upgrade bugs. In Change Assistant, there is a new option to Upgrade Application.

All customers using Change Assistant on PeopleTools 8.55 for application upgrades will use the Upgrade Application option in Change Assistant. Customers upgrading to an application release prior to 9.2 (for example, upgrading to 9.1), will download the template from the upgrade home page and RFU fixes from MOS. Customers upgrading to application release 9.2 will use the Define Upgrade Package component in PUM to create the upgrade change package and the RFU change package.

See Also

Product documentation for *PeopleTools 8.55: Change Assistant and Update Manager*, “Configuring Change Assistant for Upgrades,” Defining an Upgrade Package

Enhanced Logging

Added a new job log file that contains all of the information entered in the Apply Wizard, as well as execution status of all the tasks and steps in the change package.

See Also

Product documentation for PeopleTools 8.55: Change Assistant and Update Manager, “Troubleshooting Change Assistant and EMF,” Viewing Change Assistant Log Files

Ability to run Change Assistant from the command line using a configuration file

You can create a configuration file that contains the parameters and then run the command line using -INI parameter which contains the path to the ini file.

See Also

Product documentation for PeopleTools 8.55: Change Assistant and Update Manager, “Running Change Assistant Job from the Command Line,” Using a Configuration File with Change Assistant.bat

PeopleSoft Test Framework

The PeopleSoft Test Framework includes enhancements in these areas:

- Test development and execution.
- Test administration.
- Multi browser support.

Test Development and Execution Enhancements

Several notable enhancements are available when developing and executing tests with PeopleSoft Test Framework including:

- Support for custom sign in pages.

In prior releases, PTF was limited to using the delivered PeopleSoft sign in page when using Browser. Start or Browser.Start_Login steps. For customers that used custom pages with SSO, IT shops would have to create dedicated instances for their PeopleSoft tests. This gives more power to the tester, and system administrators won't have to manage as many environments.
- The Message Tools window can be moved and resized.
- You have the option to preserve test case step values when you copy and paste steps within the same or different test case.
- If you attempt to delete a test case that is referenced by another test, a warning message appears.
- You can run a test case from the PTF Explorer view by right-clicking the test and selecting execute.
- New actions and parameters for the Browser step enable toggling between multiple open browser windows, checking if a frame exists, closing all open browser windows, and an option to suppress maximization and keep the existing browser size (needed for form factor testing) when opening a new browser window.
- New Usage Monitor step to start and stop the Usage Monitor so test developers don't have to manually record the steps as part of the test.
- You can test color, font size, and other format-related properties of HTML objects using the new Get_Style action. For example, it is now possible to execute a test and report if a certain field has a bold font or not.
- Added Exists and GetProperty actions for DIV object types. This is important when testing Fluid User Interface pages.
- Provided a new DateTime step type to support date, datetime, and time fields.
- You can now use a hotkey (F4) to access the step builder dialog box when working in the test editor, which provides context sensitive help for completing test step parameters.

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- Added an Expected parameter to these step actions: Scroll.Find, HTMLTable.CellGetIndex.
- Added ValueExists parameter to the ComboBox step action.
- File.Upload now supports uploading a file from a link.

Test Administration Enhancements

Enhancements to PTF administration tools include:

- Several enhancements to the Mass Update utility, to improve search, select, and find/replace, including:
 - Select All and Clear All buttons added to the Find dialog.
 - Added the Parameter field to the Step search criteria.
 - Find Up and Find Down options added to the Find window.
 - The unattended execution log now includes detailed step information for failed steps.
- A new test upgrade utility is provided for the PTF client, to update tests when upgrading from a previous version.

Multi Browser Support

PeopleSoft Test Framework has expanded browser support for test playback. In addition to Microsoft Internet Explorer, you can also execute tests using Google Chrome, Mozilla Firefox, and Microsoft Edge.

Note. Test recording is limited to Internet Explorer.

The following browser versions are certified for PeopleSoft Test Framework for PeopleTools 8.55:

- Internet Explorer 11.
- Chrome: versions 43-47.
- Firefox: versions 34-41.
- Edge: versions 21-23.

The playback browser is specified in the Execution Options page.

Application Data Sets

Application Data Sets features the following enhancements for this release:

- Improved performance.
- Improved data selection for inclusion of ADS projects.
- Improved Application Data Set audits.

- Maintenance reports.
- Preserving changes to configuration data made by customers.
- Including related language record fields in merge groups.
- Data set summary reports.

Improved Performance

Over the past several releases, a lot of application content is built with configuration data. As a result, more and more application maintenance is provided in configuration data. This data is delivered in PeopleSoft Update Images (PI), and ultimately applied with Application Data Sets (ADS). Over time, the data sets that are accumulated can grow rather large and in the past can take a lot of time to complete. Initial runs and delivery statistics showed that performance was a concern.

PeopleSoft evaluated the process and made significant changes to the back end processing to improve performance. The results are excellent. Early runs show that performance has been improved as much as 50 percent. This will be a great benefit to customers that are leveraging some of the new application features that are based on configuration data going forward.

Improved Data Selection for Inclusion in ADS Projects

Flexible selection operators is a great feature of Application Data Sets. It lets users refine sets of instances based on simple criteria that make it easier to define the exact contents of a data set project. Currently, the supported SQL filters are IN, BETWEEN, and LIKE. In release 8.55 additional 'negative' selection options are added. They are NOT IN, NOT BETWEEN and NOT LIKE. Use of these will make the process of selecting instances easier for the users.

See Also

Product documentation for *PeopleTools 8.55: Lifecycle Management Guide*, "Understanding ADS Projects," Defining Data Set Content

Improved Application Data Set Audits

The delivered System Audit process found in Utilities->Audit->Perform System Audit includes the Audit Data Set Integrity option. When that option is selected, the audit process will run checks against the data base that validate Data Sets, Application Data Set Projects and security definitions for Data Sets. These audits validate that data sets definitions and the definitions they rely are synced. These checks are made when data sets and data set projects are created but could be invalidated over time. If the data set and application data set projects are not in sync with underlying data, an error will be displayed.

There are over 30 new audits are delivered with release 8.55. It is important to run these audits regularly, since at any time, underlying data could change.

Maintenance Reports

It is very important for system administrators to have proper insight into Data Sets and their properties. A new collection of reports is delivered to provide detailed information in several different categories. The reports by categories are:

- Extended – a set of reports that shows if customers have customized merge, validation or CopyToFile PeopleCode.

- Groups – Describes data sets and mergeable records in data sets.
- Languages – Show records with related language records in data sets.
- Properties – Show data sets that are managed objects.
- Relations – Describes in detail relationships between data sets.
- Security – A set of reports that shows different several different security views.

See Also

Product documentation for *PeopleTools 8.55: Lifecycle Management Guide*, “Working With Administrator Reports,” Understanding Administrator Reports

Preserving Changes to Configuration Data Made by Customers

With this release, merge groups will allow updates from PeopleSoft if the customer has not modified the instance. Data in a merge group will not be overridden if any part of the Data Set Instance has been modified by the customer. The customer changes will always be preserved. If customers have not made changes to the Data Set Instance, any change delivered by PeopleSoft will be taken. This new ability to manage change gives customers protection from losing changes as well as the benefit of staying current with delivered change.

Merge Groups apply to both configuration and customization data. The ability to configure a given object, is built into the object. ADS doesn't distinguish between configurations and customizations.

Including Related Language Record Fields in Merge Groups

Related language records are automatically added when designing data set definitions but to this point they have not been included in merge sets. With this release, when a field is added to a merge group, the related language record will automatically be added.

Data Set Summary Reports

The Data Set Summary report enables you to produce a report to view all of the information contained in the data set definition pages including general, relationships, groups, and properties. Optionally, you can also include overlapping data sets, referenced data sets, and referencing on the report. The report can also be produced in PDF format.

See Also

Product documentation for *PeopleTools 8.55: Lifecycle Management Guide*, “Running Data Set Summary Reports”

Application Designer Upgrade

Application Designer Upgrade enhancements include:

- Preserving tracking tables for permission lists, roles and menus.
- Printing project reports.

Preserving Tracking Tables for Permission Lists, Roles and Menus

A new option has been added to the Upgrade Options -General Options page for Permission Lists, Roles, Menus. If Roles, Menus or Permission Lists are renamed or cloned, this information is tracked in tables that store the original name. This information is used by PUM Security Automation when change packages are created to apply updates.

See Also

Product documentation for *PeopleTools 8.55: Lifecycle Management Guide*, "Upgrading with PeopleSoft Application Designer," Accessing the Upgrade Options

Printing Project Reports

A new option has been added to the Upgrade Options- Report Options page to generate PrintProject reports. PrintProject produces an HTML report in RTF (rich text) format.

See Also

Product documentation for *PeopleTools 8.55: Lifecycle Management Guide*, "Upgrading with PeopleSoft Application Designer," Accessing the Upgrade Options

Accessibility

Enhancements provided to improve accessibility include:

- User preference settings that control pop-up notifications.
You have the option to turn specific pop-up notifications on or off, and specify the duration for which they appear.
- New navigation-related user preference settings.
These enable keyboard users to skip over various page elements and browser elements when tabbing through a page.
- User preference settings that control various system and application messages, including an option to display a warning in accessibility mode when transferring from a pagelet to another object, and a setting to prevent confirmation messages from automatically closing, so that accessibility users have adequate time to read confirmations.
- The ability to set the Aria attributes on page controls using PeopleCode.
- Modifications to Fluid User Interface elements, such as the NavBar, that provide an improved user experience when working with assistive technology devices, such as screen readers.
- New keyboard commands for chart objects.
- New keyboard commands for drag and drop.

See Also

Product documentation for *PeopleTools 8.55: Using PeopleSoft Applications*, “Defining User Preferences”

Product documentation for *PeopleTools 8.55: Using PeopleSoft Applications*, “Using Keyboard Shortcuts”

Document Change History

This section describes the changes made to this document after the initial posting. Please make a note of these changes if you have downloaded previous versions.

Date	Change to Document
December 4, 2015	Document posted.
December 7, 2015	In the PeopleSoft Fluid User Interface, Mobile Application Framework section of the document, MAF version 2.2 was listed as the supported version for PeopleTools 8.55. MAF version 2.1.3 is the supported version for PeopleTools 8.55. The information in this section has been corrected.
February 29, 2016	Add the PeopleTools 8.55 release number to the Related Resources topic in the Introduction section of this document.
May 6, 2016	Added information indicating the support for MAF 2.2.1 beginning with PeopleTools 8.55.05.
December 6, 2016	<p>Added or modified information about the following PeopleTools technologies and enhancements:</p> <p>Platform Support Enhancements</p> <p><u>Search</u></p> <p>Added support for Elasticsearch 2.3.2 with Bundle Patch 11</p> <p><u>Oracle Policy Automation (OPA)</u></p> <p>Added support for OPA version 12.1.1 and 12.2.4. (Version 12.1.1 is the minimum version supported.)</p> <p>Development Tools Enhancements</p> <p><u>PeopleSoft Fluid User Interface</u></p> <ul style="list-style-type: none"> ○ Back Button Options - Return to Last Page in History ○ Working with Fluid Homepages on Smartphones <p><u>PeopleCode</u></p> <p><i>PeopleCode API Reference</i></p> <ul style="list-style-type: none"> ○ New Classes (Fluid page utilities, Tile Wizard) ○ New Methods (Field class, IntBroker class, Map class, ReportDefn class, SearchFilterGenerator class, MapElement class) ○ New Properties (Field class, Grid class, Map class, MapElement class) ○ New Search Filter Generator examples provided in documentation ○ Updated Methods and Properties (SearchFilterGenerator class) <p><i>PeopleCode Language Reference</i></p> <ul style="list-style-type: none"> ○ New Built-In Functions ○ New Meta-SQL Information

	<ul style="list-style-type: none">○ Updated Built-In Functions○ Limitations for launching modal components in PeopleSoft applications <p><u>PeopleSoft Search Technology</u></p> <ul style="list-style-type: none">○ Elasticsearch Support○ Custom Namespace <p><u>PeopleTools Portal Technology</u></p> <ul style="list-style-type: none">○ Content Reference and Tile Enhancements○ Homepage Enhancements○ Fluid Navigation Collections○ Deprecated Features <p>System Administration Tools Enhancements</p> <p><u>Security Administration</u></p> <ul style="list-style-type: none">○ TLS Replaces SSL Encryption Protocol Support○ Prohibiting Unregistered Content○ Enabling Tuxedo Encryption <p>Reporting Tools Enhancements</p> <p><u>BI Publisher</u></p> <ul style="list-style-type: none">○ Sharing Private BI Publisher Reports <p><u>PeopleSoft SQR</u></p> <ul style="list-style-type: none">○ Oracle Transparent Application Failover <p>Lifecycle Management Tools Enhancements</p> <p><u>Change Assistant</u></p> <ul style="list-style-type: none">○ Enhanced logging○ Running Change Assistant from the command line.
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