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CAMPUS SOLUTIONS

PeopleSoft Campus Solutions 9.2
Forms and Approval Builder

Enabling functional users to create forms for Campus
Solutions Self Service

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Overview

Forms and Approval Builder is an Enterprise Components solution that is delivered as part of Campus Solutions 9.2 General Availability. This feature enables you:

» to design an online form quickly and accurately by using the delivered Design a Form component (a step-by-step guided process, complete with the ability to include instructions and a means to support attachments as part of your newly designed form).
» to assign the necessary Forms security to both:
 » the administrative users creating and managing the form, as well as
 » the consumers of the form, meaning your students
» to establish the appropriate approval levels, including context-sensitive approvals
» to activate (publish) the form*.

* = Even though you can design forms for consumption by any of your users (be they administrative staff or students), this document will focus on your functional staff's ability to design and publish forms for consumption by your student population in PeopleSoft Campus Solutions 9.2 Self Service.

The beauty of utilizing the Design a Form component to design forms is that it allows your functional staff to create forms without the need for technical staff; however, it should be noted that a firm understanding of key structure is required of your functional staff to utilize features like the form's field prompts.

Examples of Campus Solutions forms you may wish to create include:

» Admissions: Applicant Program addition/switch
» Admissions: Applicant Residency Appeal request
» Campus Community: Student Residency change
» Contributor Relations: Staff Bio/Demo Information Update
» Financial Aid: Scholarship Application
» Financial Aid: Work Study Application
» Student Financials: Credit balance refund request
» Student Financials: Due date extension request
» Student Financials: Tuition refund appeal request
» Student Financials: Tuition waiver Request
» Student Records/Academic Advising: Change in major/adding a minor program
» Student Records/Academic Advising: Course selection approval
» Student Records/Academic Advising: Program Enrollment – Program transfer
» Student Records/Financial Aid: Withdrawal Request and Return to Title IV Worksheet initiation

» Student Records: Permission (Student Agreement) to take a class at another institution
» Student Records: Permission request to enter a class
» Student Records: Request for a waiver or class substitution

This document is divided into two sections:

» The main part of the document covers building a form and the ancillary activities associated with making that form available for your students to complete.
» The appendices provide additional considerations that will enhance your Forms-building solution, and may require technical resource experience and assistance for deployment.

Note: This document was written based on the Enterprise Component Forms and Approval Builder and PeopleTools 8.54.

Aspects of Forms and Approval Builder

Before you begin, you should map out your form both in terms of data and layout – what kind of information are you trying to collect from your students and how do you want to render that on your form:
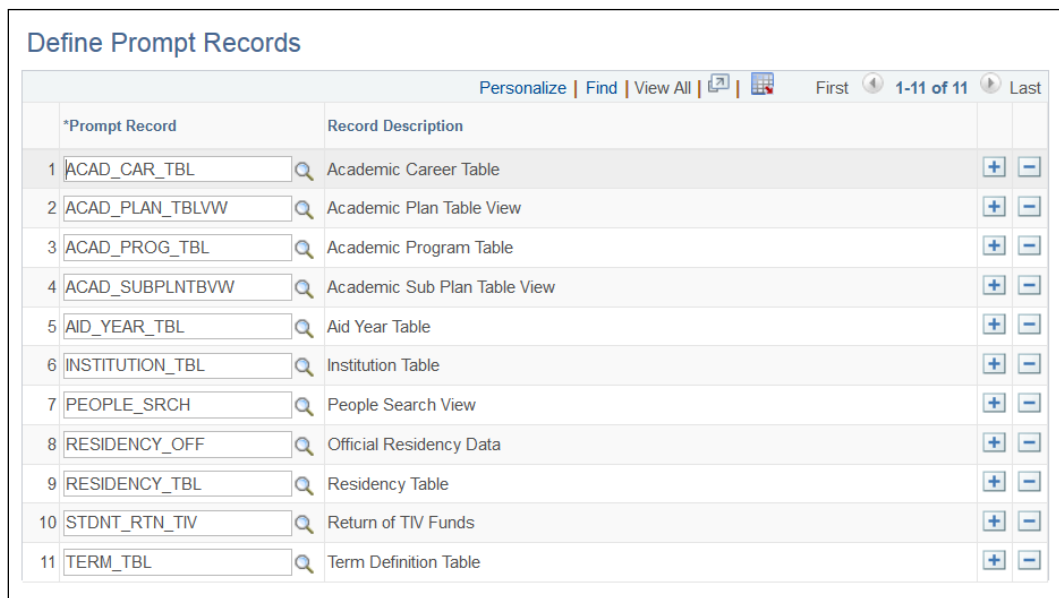
» List all of the data you're trying to solicit from the student:
  » List in which records these data reside – it may mean that the data spans multiple records.
  » Identify all of the keys on each of these tables. This is important as you start building your form because you will may need to list some or all of those keys as part of the form field definition (form details) if you intend to prompt against those tables on your form.
» What do you want your form to look like (field placement, left and right columns values, vertical spacing, etc.)?

Setup

Define prompt records

Navigation: Main Menu > Enterprise Components > Forms > Define Prompt Records

List the tables that you need for prompting purposes on your form based on their keys (the relationship that joins these tables together). You may want to leverage Campus Solutions 9.2 Entity Relationship Diagrams to help facilitate this setup.

Define Prompt Records

Personalize | Find | View All | 🗗 | 🖩   First ◀ 1-11 of 11 ▶ Last

	*Prompt Record	Record Description		
1	ACAD_CAR_TBL	Academic Career Table	+	−
2	ACAD_PLAN_TBLVW	Academic Plan Table View	+	−
3	ACAD_PROG_TBL	Academic Program Table	+	−
4	ACAD_SUBPLNTBVW	Academic Sub Plan Table View	+	−
5	AID_YEAR_TBL	Aid Year Table	+	−
6	INSTITUTION_TBL	Institution Table	+	−
7	PEOPLE_SRCH	People Search View	+	−
8	RESIDENCY_OFF	Official Residency Data	+	−
9	RESIDENCY_TBL	Residency Table	+	−
10	STDNT_RTN_TIV	Return of TIV Funds	+	−
11	TERM_TBL	Term Definition Table	+	−

Figure 1. Define prompt records setup.

Despite the many different forms you may create, all of those defined records will reside in this single Define Prompt Records setup – in other words, each form will not have a separate Define Prompt Records. Note: Forms do not require you to establish Define Prompt Records when creating free form fields. The prompt records limit the form values based on the values available in Campus Solutions.

Approval Setup

NOTE: When you embark on using the step-by-step guided process utilizing the Design a Form component, one of the steps (Step 6: Approval Process) gives you an opportunity to assign an approver to your form. In order for you to accomplish that step, you first need to establish the various aspects of Approval setup. This section walks you through that, and as part of these Approval setup instructions, it will reference the Design a Form - Step 6: Approval Process. Make note of it for use in the Design a Form section.

Approval Process – User List

Navigation: Main Menu > Enterprise Components > Approvals > Approvals > User List Setup

Forms and Approval Builder leverages the Enterprise Components Approval Workflow Engine to manage your approval process. Forms and Approval Builder provides the capability to create a single approval, multi-level approvals, and dynamic approval based on values entered in the form.

Prior to creating the form, you must create a User List. The User List identifies the PeopleSoft Operator IDs eligible for approving the form. For this example, we will use the Role type. The Role type User List identifies the approval based on a designated Role. Figure 2 defines the approval list by any Operator ID with the Role of RES_CHANG_APPR_1st.

Figure 2. User List Definition setup.

Approval Process – Primary/Secondary Approval

Navigation: Main Menu > Enterprise Components > Forms > Design a Form – Step 6

Once you have defined the User List, you may now assign the list to the approval step of the form. Step 6: Approval Process insert rows to assign a single- or multi-step approval. Enter Approver User List to identify the approver. When inserting multiple rows, note that the approval path is sequential.

Figure 3. Design a Form – Step 6: Approval Process

Approval Process – Routing Control

Navigation: Main Menu > Enterprise Components > Approvals > Approvals > Approval Process Setup

Setup Process Definitions allows you to define the number of stages, paths, and steps required for approval to create a dynamic approval based on values entered in the form. In this example, the form includes Academic Career and will assign a different approval routing based on the value selected in the Academic Career field (GRAD vs. UGRD). The Process Definition is created through the Design a Form process and can only be updated once the form is completed.
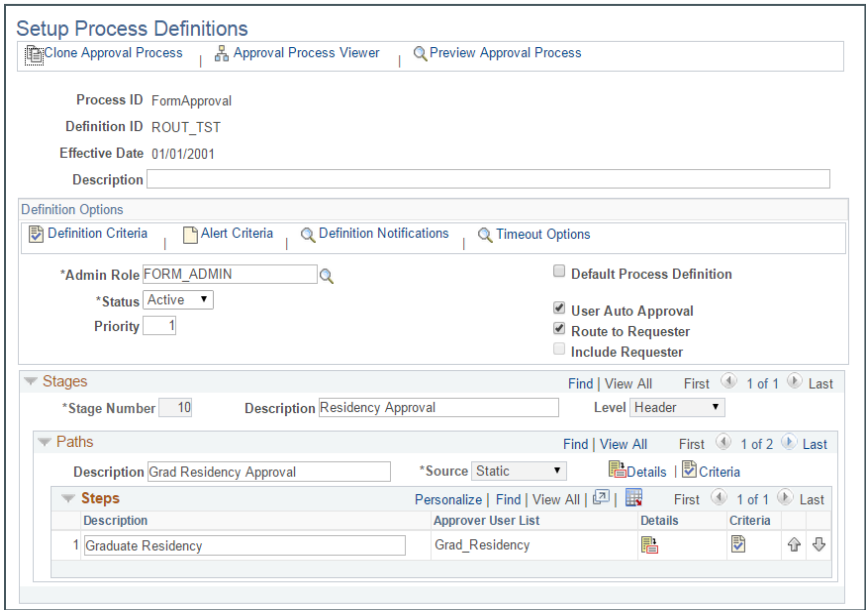
Figure 4. Process Definitions setup
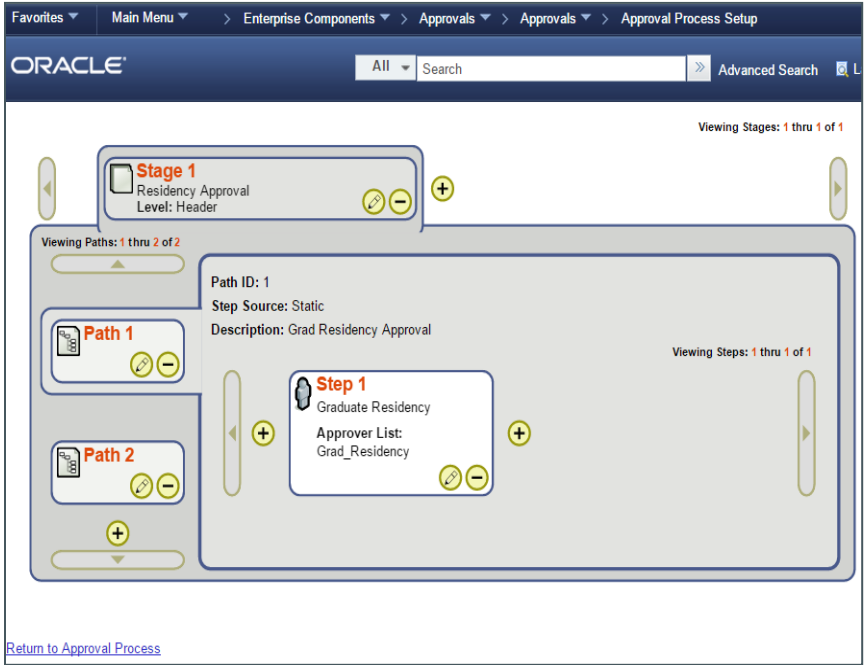
Figure 5. Dynamic Approval routing with multiple paths

The path is defined by the criteria configured for each path. The criteria definition identifies the field from the form and the value associated to the defined path. Figures 6 and 7 illustrate how a residency approval is defined by the Graduate Academic Career value.
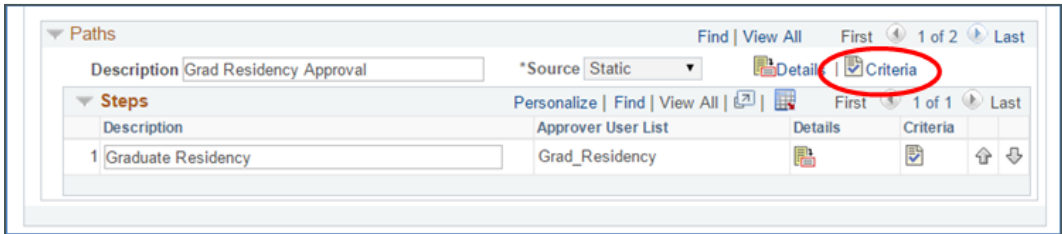
Figure 6. Graduate Career path setup – Criteria enabled
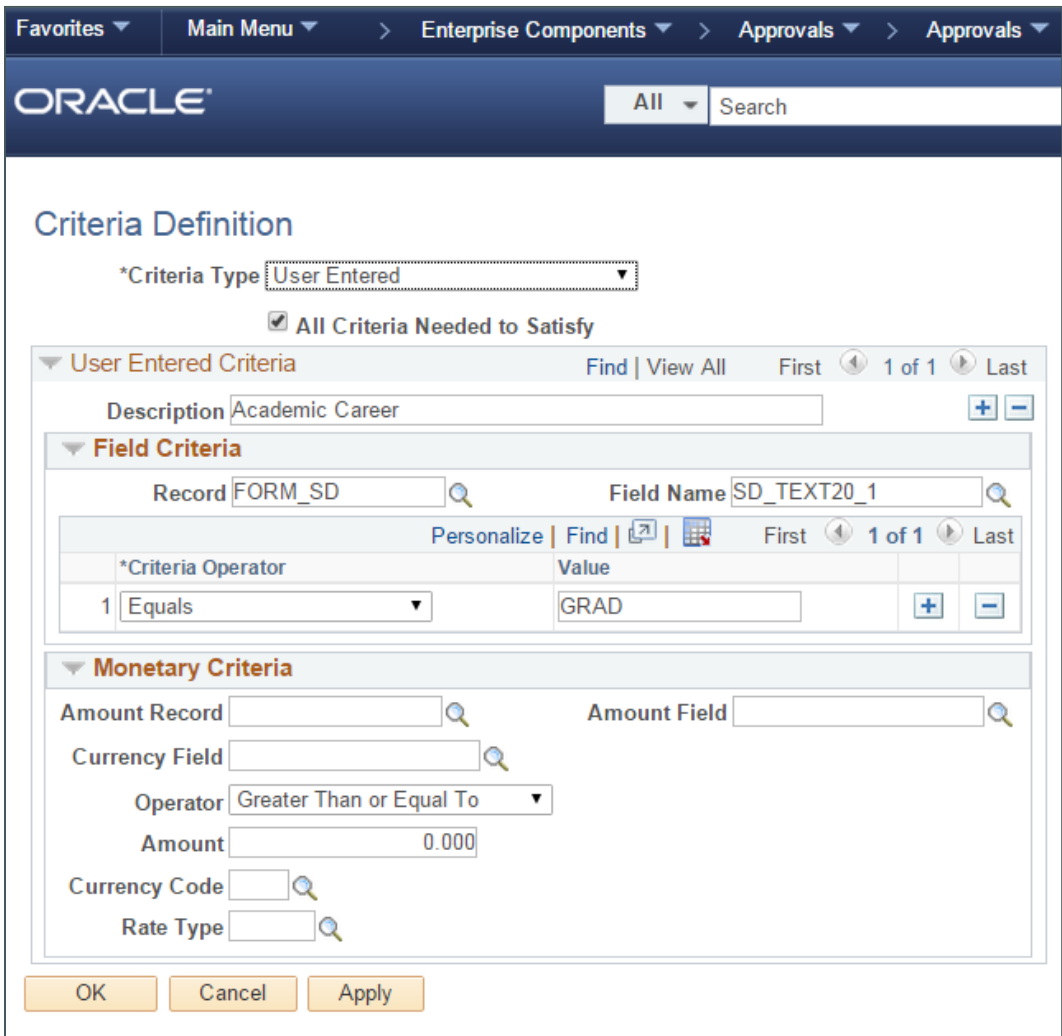
Figure 7. Graduate Career path – Criteria definition setup

Figures 8 and 9 illustrate how a residency approval is defined by the Undergraduate Academic Career value.

Figure 8. Undergraduate Career path setup – Criteria enabled

Figure 9. Undergraduate Career path – Criteria definition setup

Form Field Lookup

Navigation: Main Menu > Enterprise Components > Supplemental Data > Define Record

Use Define Record to look up the field name from the form to define criteria. From the Fields Summary, you can drill into the detail of each field to identify the field mapping.
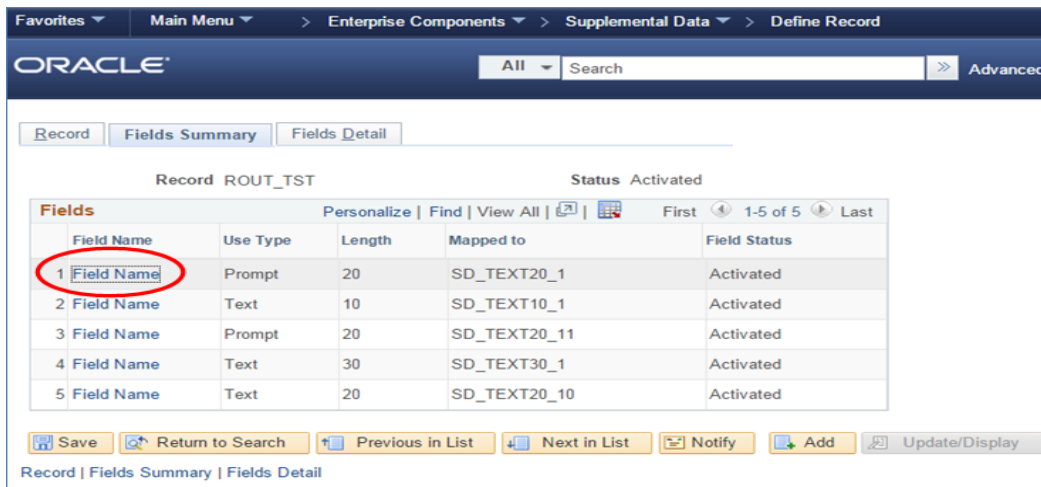
Figure 10. Field Summary – Field Name setup
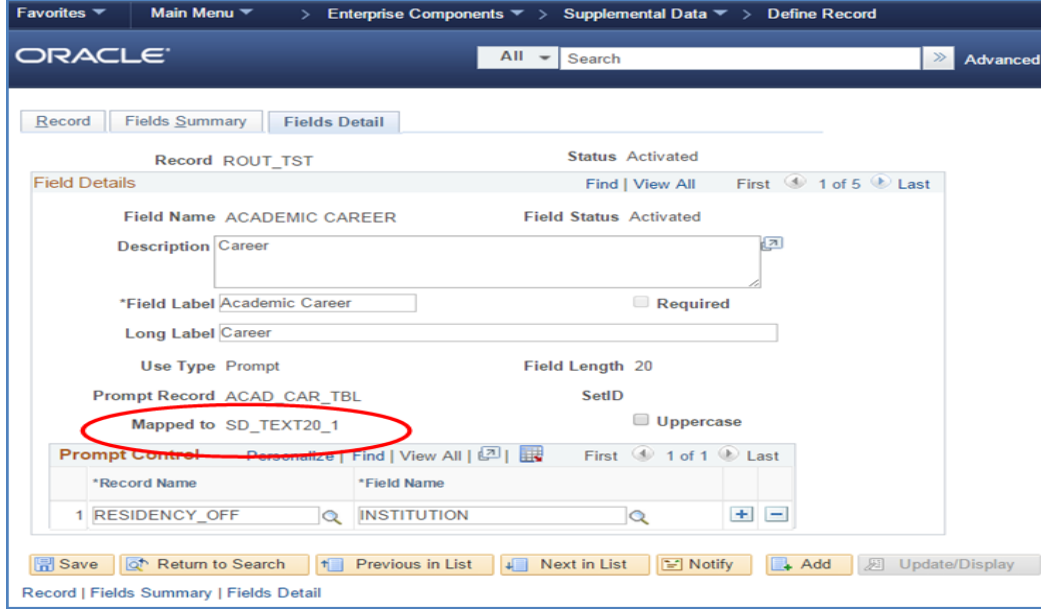
Figure 11. Field Detail – Mapping setup

Security – Forms Roles and Permission Lists

Navigation: Main Menu > PeopleTools > Security > Permission Lists and Roles

User roles determine who has permission to access, design, and administer forms. The following table lists the delivered roles and associated permission lists for Form and Approval Builder.

FORMS SECURITY:

Role	Tasks	Permission Lists	Access rights
FORM_USER* * = Your students need this (or similar) role	» *can complete and submit the form [your students needs this (or similar) role]*	EOFM1000	» *has add/update/ display access to forms that have been created with the Design a Form component (form instances)*
FORM_DESIGNER	» *can create and manage own your forms (not everyone else's forms);* » *can complete and submit the form (functional user needs this role)*	EOFM1000 EOFM2000	» *has add/update/display access to forms that have been created with the Design a Form component* » *has add/update/display access to the Design a Form component* » *has update/display access to only their forms when using the Manage Forms (FORM_ RPT) component*
FORM_ADMIN	» *can create forms* » *can manage everyone's forms;* » *can complete and submit the form*	EOFM1000 EOFM2000 EOFM3000 EOSD2000	» *has add/update/display access to forms that have been created with the Design a Form component* » *has add/update/display access to the Design a Form component* » *has update/display access to all forms when using the Manage Forms (FORM_RPT) component.*
FORM_CI_DEVELOPERS** ** = See Appendix A	» *can create forms* » *can manage everyone's forms;* » *can complete and submit the form* » *can map forms to component interfaces (needs access to Application Designer activities)*	EOFM1000 EOFM2000 EOFM3000 EOFM4000 EOSD2000	» *has add/update/display access to forms that have been created with the Design a Form component* » *has add/update/display access to the Design a Form component* » *has update/display access to all forms when using the Manage Forms (FORM_RPT) component.* » *can set up form integration by mapping forms to component interfaces using the Forms to CI Mapping page*

Note: A security administrator will need to update existing User IDs and/or create new User IDs to include the appropriate roles before those users begin working with Form and Approval Builder.

Design a form

Designing a form consists of several main and/or sub-steps.

Define the form's basic information (Step 1)

You will establish some identifying characteristics of your form. Fields include:

Form	This represents the name or unique identifier of your form. You specify this ID when you add a new form.
Status	Lists the current status of the form. The value for this field is automatically assigned. Values are: *In Design*: Indicates the form is being designed and has not yet been published.

Activated: Indicates the form's design is complete, and the form has been published.

Inactive: Indicates a form that has been inactivated by either the form's owner or a form administrator.

Effective Date From   Enter the date the form is first available for use.

Effective Date To   Enter the date the form expires. Leave this field blank if you intend to use the form indefinitely.

Label   Enter a label for the menu item that users will select to access the form.

Names must contain only alphanumeric and underscore characters.

Long Description   Enter a description for the form. The description appears below the form's label when students access the published form.

Owner Id   Enter the User ID of the person who is the responsible for the form. Only this person can modify the form design..

Figure 12. Design Form Step 1 – Basic Information

Provide user instructions (Step 2)

You will include any instructions related to the completion of this form that you wish to communicate to the student. Note that the Instructions page uses HTML editor where you will have access to the traditional Toolbar support options including Copy, Paste, Formatting, and Graphics and/or Hyperlink inserts.
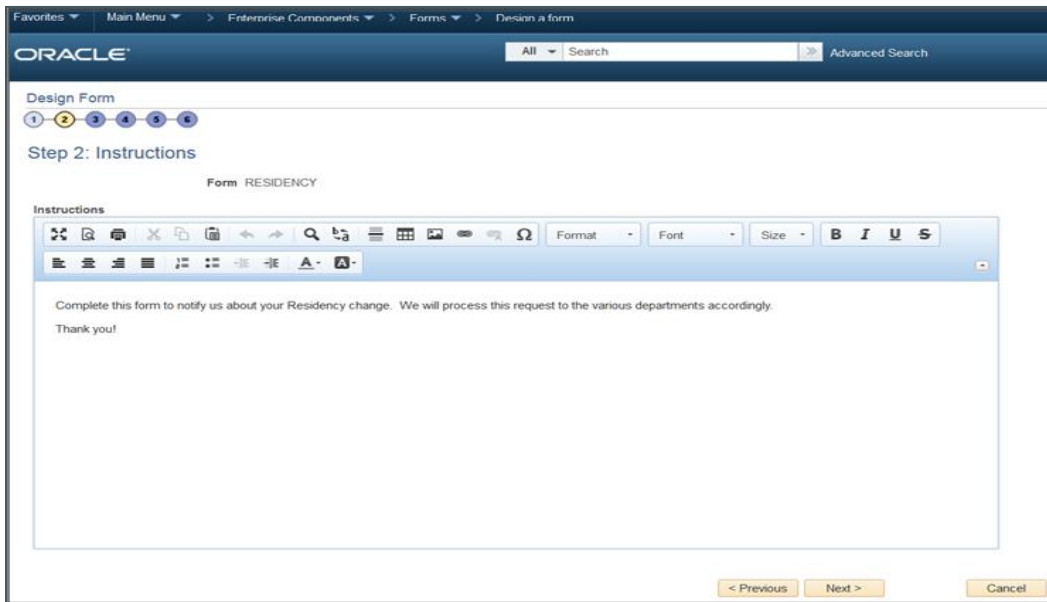
Figure 13. Design Form Step 2 – Instructions

Specify form fields (Step 3)

You will identify all of the fields that you want to appear on the form, their various characteristics, and their field placement (e.g., layout).

Insert rows within the Left Column and Right Column grids to define fields that appear on the left and right columns of the form. For each row, specify values for the following parameters to define the requirements for that field.

<u>Types of fields</u>

Label   Enter the label to use for this field.

Use Type   Select the field type, and field length, if required (depends on the Use Type). Values
                            are:

          Code: Use to define a code field that allows the form user to select a response from a list of codes.

          Date: Use for dates.

          Number: Use for numeric entries (only positive values are allowed).

          Prompt: Defines a prompt field that allows the user to select data from existing PeopleSoft database tables.

          Section: Use to separate a form into sections. The section can include a header with instructive text, and an HTML editor is provided for you to define the section

          Signed: Use for signed numeric entries (values can be positive or negative).

Text:	Use for text entries.
Time:	Use for time entries.
Y/N:	Use for yes/no responses.
Length	Select the field length. You can modify this field only for Number, Prompt, Signed, and Text fields; the remaining field types use a preset length. The syntax for numeric fields is X.Y, where the value before the decimal (X) is the number of integer digits allowed, the value after the decimal (Y) is the number of decimal places allowed.
Field Status	Indicates the status of the field, either Activated or In Design.
Details	Click to access the Form Fields Details page, where you define additional requirements for the field, including whether the field is required, and edits for the field when a user completes the form. See Form Field Edits Page.
⬆ and ⬇	Click the arrow icons to reposition a field.
Move to Right Column	Click to move selected fields to the right column.
Move to Left Column	Click to move selected fields to the left column.
Single column style	Select to create a form that contains a single column. Any fields that are defined in the right column will appear under the left column fields when you view the form.
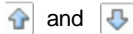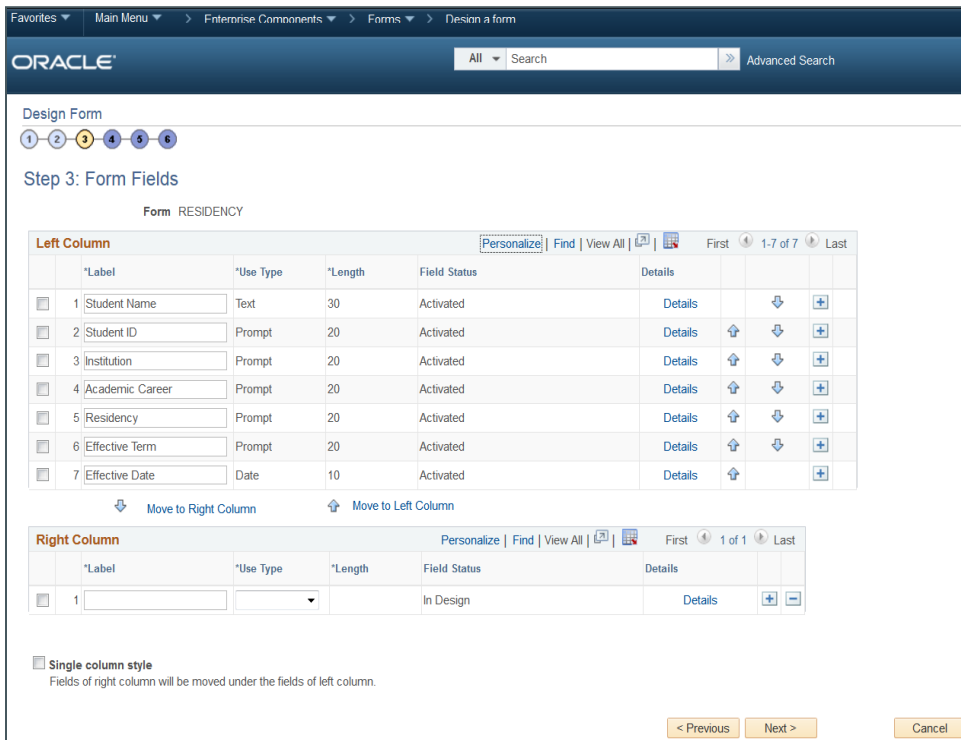
Figure 14. Design Form Step 3 – Form Fields

Define field edit (still Step 3)

When you click the Details hyperlink for a given field on the Step 3: Form Fields page, the next step includes your identifying keys which requires you to possess record structure knowledge. The fields that appear on this Form Field Edits page differ depending on the field's Use Type. The examples provided show how the page appears for a Prompt field and a Code field. The following information lists all of the possible fields that can appear on this page.

Required	Requires the student enter a value in this field in order to save the form.
Uppercase (available only when the Use Type is set to Prompt or Text)	Select to have the system convert the field value to uppercase when the form is saved. Available for use only with Prompt and Text fields. Use this option for Code values, such as Department ID, for which it does not matter whether the user enters the value in uppercase or lowercase.
Long Label	Enter up to 100 characters as an alternate label for this field. If you enter a long label, it will be appear on the form instead of the short label (value specified in the Label field on the Design Form - Step 3: Form Fields page).
Prompt Record and SetID (available only when the Use Type is set to Prompt)	Select the record that contains the values to use for this field. For SetID-based tables, specify the SetID from which to retrieve the values. To complete this field type, a form user can select one of the values from the prompt list, or she can enter a value by typing it into the field. The records that are available for selection are established by form administrators using the Define Prompt Records page - see Defining Prompt Records (Step 1a above).
Prompt Control (available for all Use Types except Section)	To use the value that a form user enters for this field as the key by which to filter the list of available values in one or more prompt fields elsewhere on this form, insert rows in the Prompt Control grid, and select the Record Name and Field Name for each of the form fields that will reference this field.
	The Prompt Control is used to drive the prompt values of any subsequent (subordinate) records in the form's picklist. The Prompt Control is necessary in order to ensure referential integrity by utilizing the shared keys between the records.
	Carefully review all of the fields that you want to render on the form and consider their relationship to each other where prompts are concerned. Walking through a use case, if you want to render 11 fields on your form and they all have INSTITUTION as a Key (not an Alternate Key), then you must list them as part of the Prompt Control for the INSTITUTION field's Prompt Edit with each table's Field Name pointing to INSTITUTION.
	For example, to limit the Academic Careers available in a prompt field to only those that are associated with the Institution that the student has already selected while completing the form, when designing the form, you would:

» Add a row to the Institution field's Prompt Control grid and specify the record name that equates to the project record, and the field name in that record that equates to Academic Career.

» Define the Academic Career field as a Prompt field, and specify the same record name that was used for the Institution Prompt Control record name as the prompt record for Academic Career.

The records that are available for selection are established by form administrators (role) using the Define Prompt Records page – see Defining Prompt Records (Step 1a above).

Field Value and Translate Long Name (appear only when the Use Type is set to Code)	Use to define the codes and their associated translate values that are valid for this field. The translate values appear in the dropdown list when the student completes the field.

Figure 15. Form Field Edits – Prompt Control INSTITUTION

Figure 16. Form Field Edits – Codes

NOTE: Forms Builder has inherent logic built into it to handle MAX EFFDT (maximum Effective Dating) where the Effective Status equal Active. In other words, only active maximum effective dated rows are selected.

Warning! If you pick the wrong sized length for your fields and that does not match the length that has been defined in Application Designer, you will get an invalid value when testing your form.

Associate file attachments (Step 4)

The form supports both (a) your including documents as attachments to the form and (b) the student uploading necessary documentation as part of completing and submitting the form.

Attach	Click to attach a file. In the window that appears, click the Browse button to navigate to and select the file, then click the Upload button.
Description	Enter a description for the file. If you leave this blank, the file name is used.
Attached File	Displays the file name of the attached file.
Open	Click to open the attached file.

Figure 17. Design Form Step 4 – Attachments

Specify menu location (Step 5)

This controls the publishing of the form to the Campus Solutions Self Service menu (e.g., CREF location) for the student to access and complete.

The menu hierarchy appears near the top of the page, below the form name. The highest level, Root, is equivalent to Main Menu in the menu hierarchy. Click the links to navigate to the level of the menu hierarchy in which you want the form to appear. Then, enter a value in the Sequence number to control the order in which it appears in the menu. In the example shown, the form will appear as the last item.
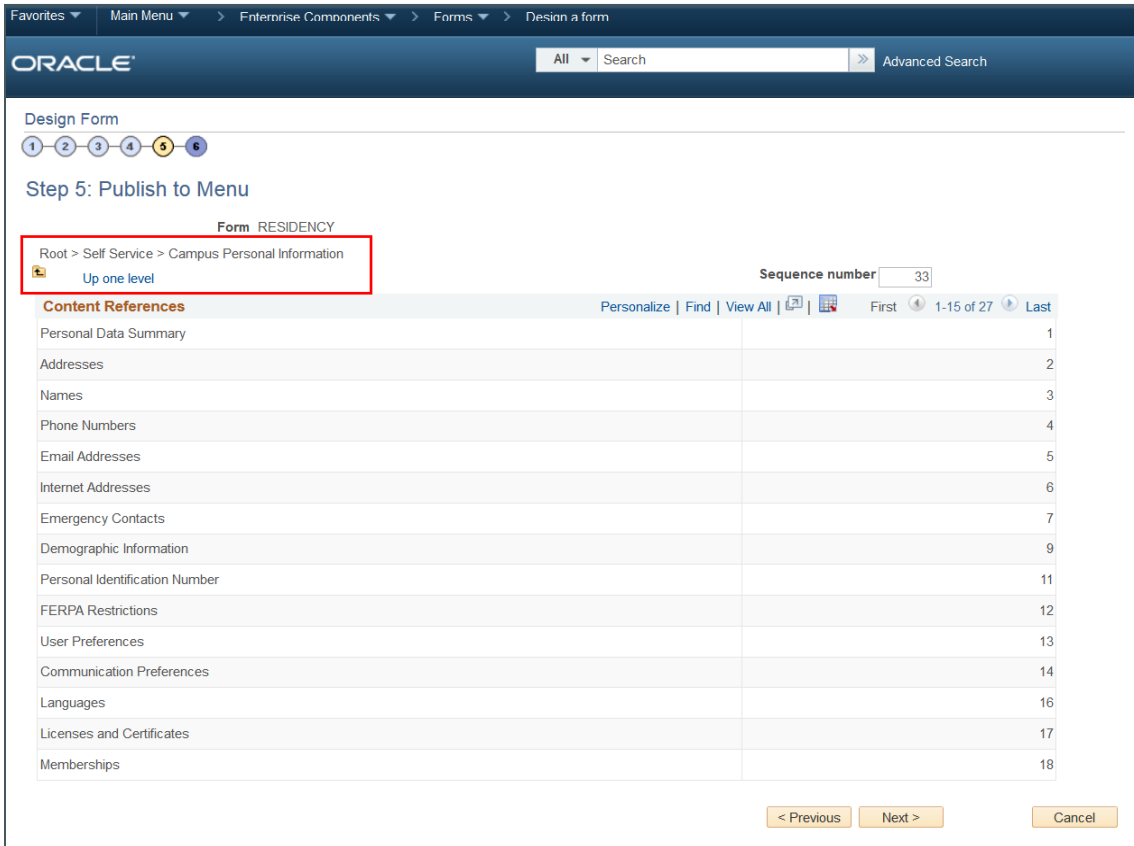
Figure 18. Design Form Step 5 – Publish to Menu

Assign Approval User List (Step 6)

See Setup > Approval Process – Primary/Secondary Approval for details.
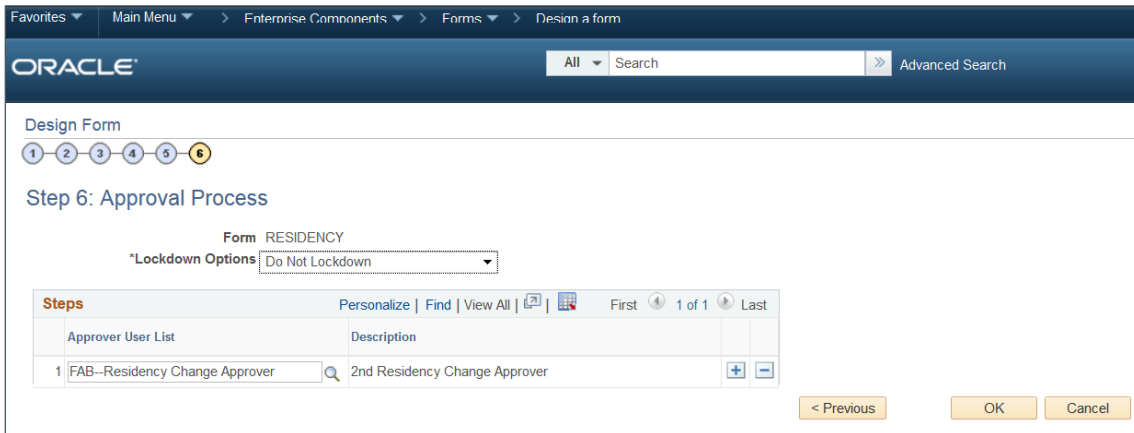
Figure 19. Design Form Step 6 – Approval Process

Preview the form

Once you've created the form, you will want to preview the form and its layout to ensure all of the fields have been captured and placed appropriately. Be sure to preview not only the form itself, but the instructions and attachments tabs as well.
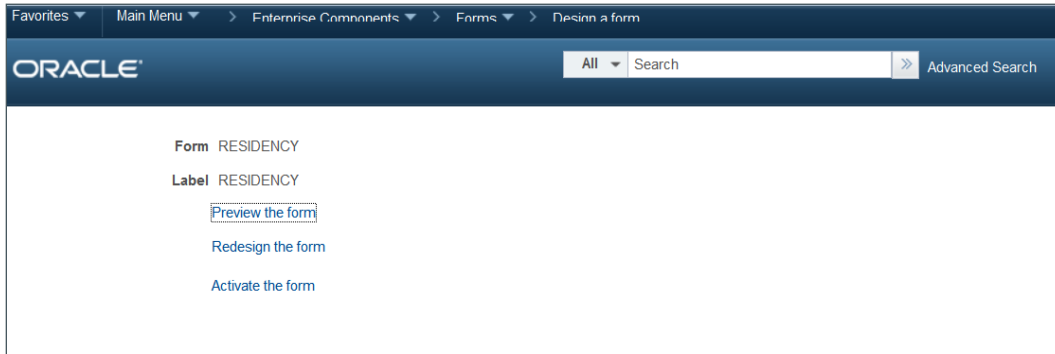
Figure 20. Design Form – Preview the form
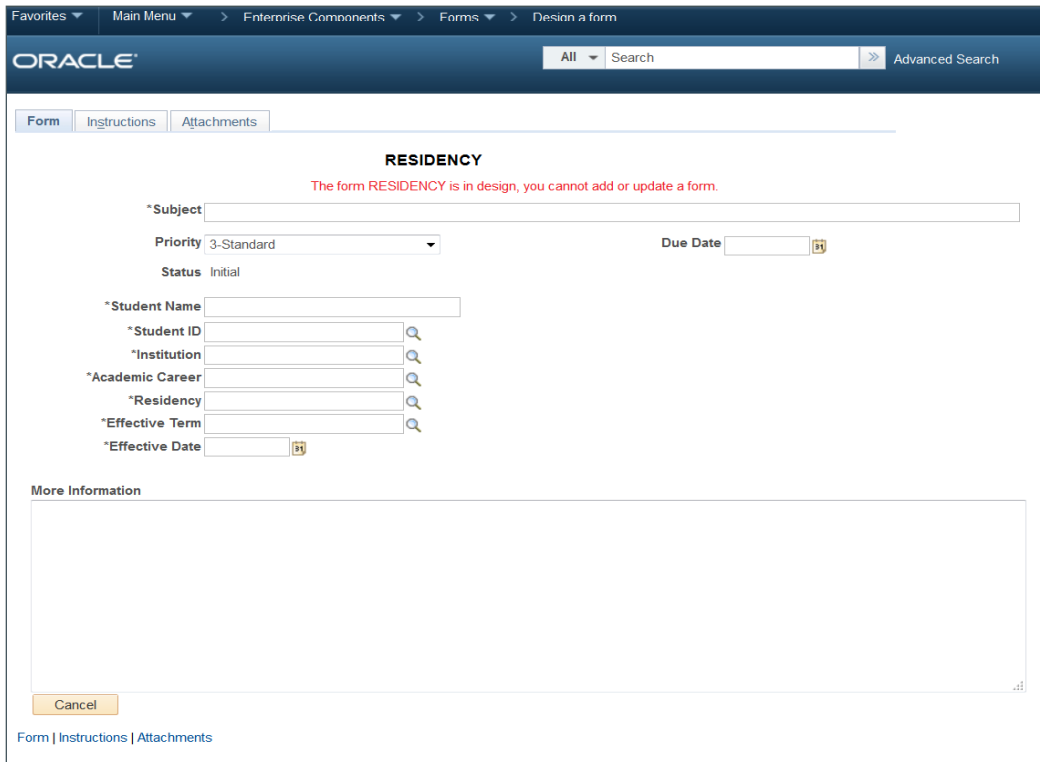
Figure 21. Design Form – Previewing shell of the form
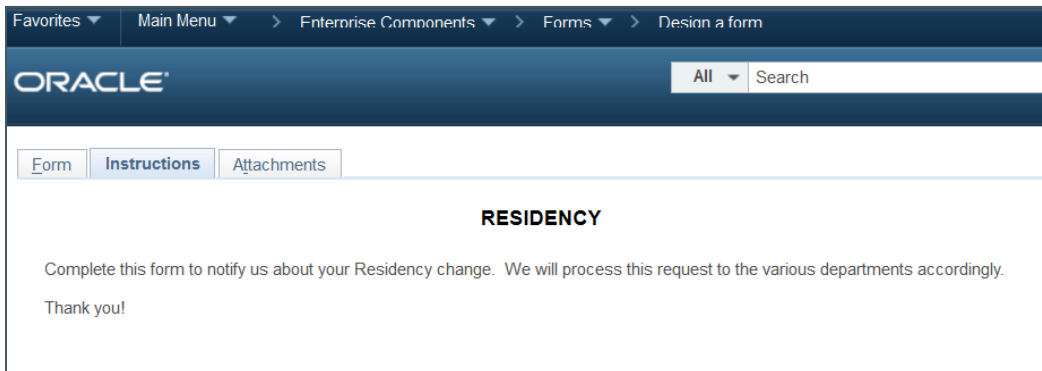
Figure 22. Design Form – Previewing Instructions

Test your form!!

Take the time to test the form while in Preview mode. Ensure that all of the Prompt fields have been specified correctly by trying to select sample responses – it will be apparent if the prompting is not working because when you attempt to select a value, the system will return a "No values found" error message. Note: You will not be able to test whether you have published the form to the correct Campus Solutions Self Service menu location. You will need to conduct this testing after the form has been activated and you log on as a "test" student.

In Figure 23, notice that the previous prompt value [Institution PeopleSoft University (PSUNV)] is carried forward in successive prompt lookups (Academic Career prompt).
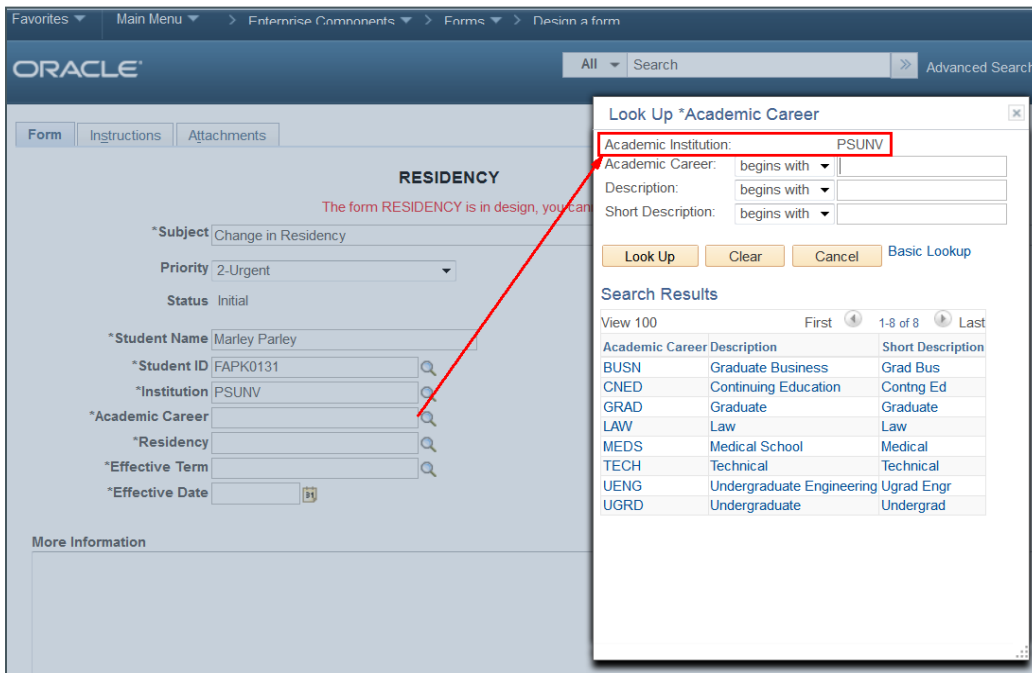
Figure 23. Design Form – Testing the Prompt Controls

ORACLE'   All ▾ Search   »

| **Form** | Instructions | Attachments |

RESIDENCY

The form RESIDENCY is in design, you cannot add or update a form.

*Subject Change in Residency

Priority 2-Urgent ▾   Due Date [   ] 📅

Status Initial

*Student Name Marley Parley

*Student ID FAPK0131 🔍

*Institution PSUNV 🔍

*Academic Career UGRD 🔍

*Residency OVS 🔍

*Effective Term 0760 🔍

*Effective Date 01/05/2016 📅

More Information

My family is moving to Japan as my dad's job got transferred to Kyoto starting in January 2016.

Please advise as to what additional information you need to process my residency change request.

Thank you.

Marley

[Cancel]

Form | Instructions | Attachments

Figure 24. Design Form – Testing: Populating all of the fields

ORACLE'   All ▾ Search   » Advanced Search

| Form | Instructions | **Attachments** |

RESIDENCY

The form RESIDENCY is in design, you cannot add or update a form.

*Subject Change in Residency

Download Templates   Personalize | Find | View All | 🔲 | 🔲   First ◀ 1 of 1 ▶ Last

	Description	Attached File	Open
1			Open

Upload your attachments   Personalize | Find | View All | 🔲 | 🔲   First ◀ 1 of 1 ▶ Last

	*Description	Attached File	Attach	Open		
1	Proof_of_job_relocation_to_Jap	Proof_of_job_relocation_to_Japan_-_Nov_2015.doc	[Attach]	Open	➕	➖

Form | Instructions | Attachments

Figure 25. Design Form – Testing: Uploading attachments

Activate your form

Once you're satisfied with the form, activate it. Warning: Once you activate the form, you will not be able to change certain form field attributes (e.g., field length, etc.).
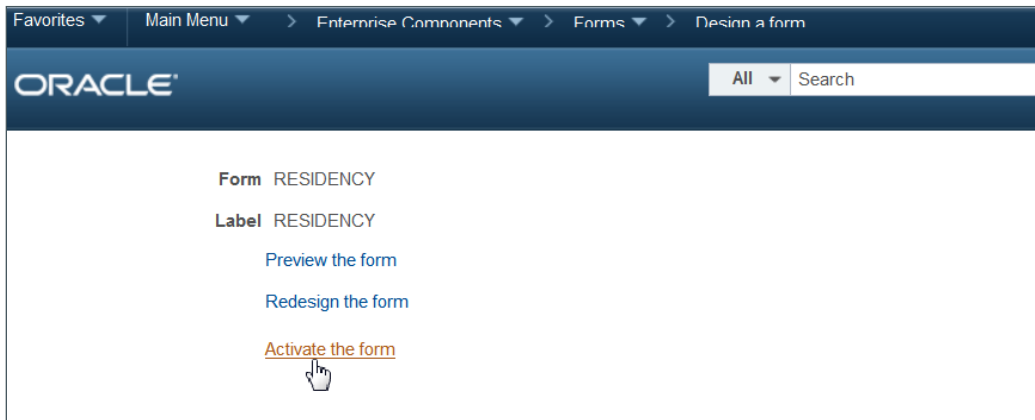
Figure 26. Design Form – Activate the form
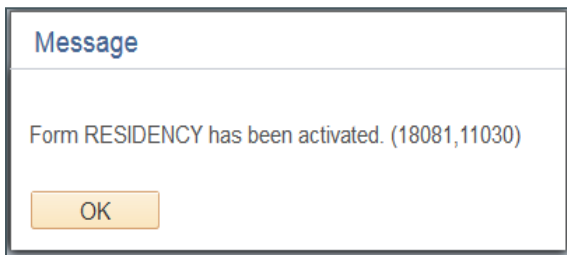
Figure 27. Design Form – Activated message

Note: Only form administrators or form owners can inactivate forms by using the Manage Forms page. When a form is inactive, form users are not permitted to complete the form.

For more in-depth details on setup and processing activities related to Form and Approval Builder, see also PeopleBooks > PeopleSoft 9.1 Peoplebook: Enterprise Components > Working with PeopleSoft Forms and Approval Builder

Example in Campus Solutions Self Service

1.   Student logs into Self Service and completes a new form.

Figure 28. Residency Form in Self Service

1.   Student saves the form: Once saved, the Preview Approval and Submit buttons are enabled. In either case, the form is routed to the appropriate approvers for them to take action.

Figure 29. Saved (but not submitted) Residency form in Self Service

Figure 30. Residency form Approval invocation in Self Service

2. Submitted form: Once the student clicks Submit, the buttons change to Approver Status and Cancel Approval.

Figure 31. Residency form submitted in Self Service

Note: Forms and Approval Builder utilizes Notification Framework when the form has been submitted and approved.

Appendices

The contents documented in these appendices may require technical resources; nevertheless, these additional items will enhance your Forms solution.

Appendix A: Forms to Component Interface Mapping

Instead of requiring your support staff to manually populate the administrative (target) application table(s) based on the data collected from your form, the Forms to Component Interface Mapping feature allows you integrate forms to your PeopleSoft application component by automating the "Add/Insert" process. To achieve this, you identify the administrative component that you want populated with form data and you integrate the form to that component by utilizing the Forms to Component Interface mapping of the form fields.

Note: With this version of Forms to Component Interface Mapping (PeopleTools 8.54), you can only add new records into your tables – you will not be able to update existing records in the database.

1. Identify the application component that will be associated with the Component Interface to which the form will be mapped:

Figure 32. Application Component

2. Identify its component:

Figure 33. Component name

3. Create the Component Interface in Application Designer:

Figure 34. Creating the Component Interface

4. Map the form fields through the "Get CI Properties" attribute:

Navigation: Main Menu > Enterprise Components > Forms > Form to CI Mapping

Figure 35. Form to Component Interface Mapping Setup

5. When the student submits the form in Self Service, it automatically creates the record in the database thereby relieving your administrative staff from having to input the data captured on the form manually.

Figure 36. Submitted Withdrawal Request Form in Self Service

Figure 37. Administrative component that's been populated by the submitted Withdrawal Request Form

For more in-depth details on setup and processing activities related to Forms to Component Interface Mapping, see also PeopleBooks > PeopleSoft 9.1 Peoplebook: Enterprise Components > Working with PeopleSoft Forms and Approval Builder > Integrating Forms with PeopleSoft Applications

Appendix B: Creating Student Forms Pagelet

This section describes how to create a pagelet (using Pagelet Wizard) with quick links to the Student Forms you created. The Pagelet Wizard walks you through the steps required to create a user-friendly pagelet to access forms without using menu navigation.
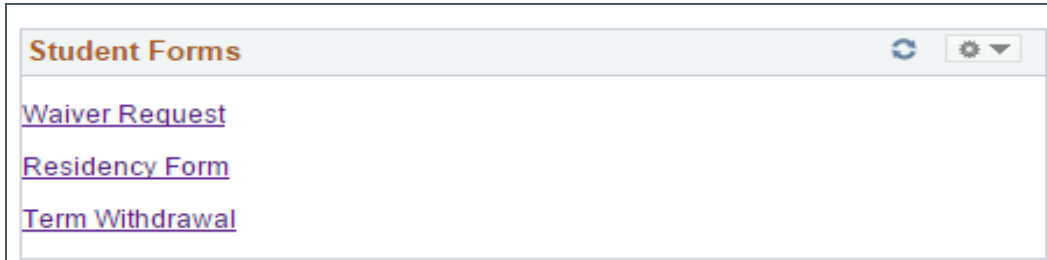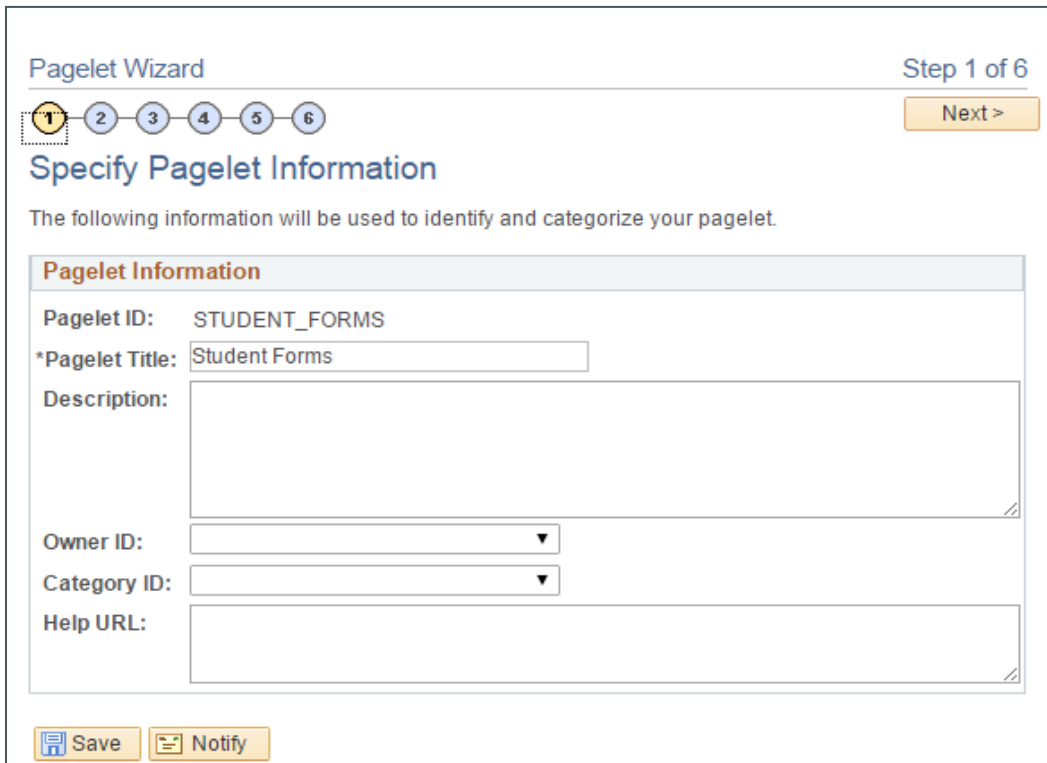
Figure 38. Sample Student Forms Pagelet

1. Specify pagelet information such as the pagelet title and description.

    Navigation: Main Menu > PeopleTools > Portal > Pagelet Wizard > Pagelet Wizard

Figure 39. Pagelet Wizard Step 1 – Specify Pagelet Information

2. Select the Data Type of HTML. Then enter the title of the forms to be displayed in the forms pagelet.

3. Link the title to the form using hyperlink. Highlight the title and select the hyperlink icon. This will open the link detail edit box. Select the Link type URL and enter the URL.

    URL example:

    //server:port/psc/appserver/EMPLOYEE/HRMS/c/MANAGE_FORM.FORM_ADD.GBL?FORM_TYPE=**Form**&ACTION=A

    Note: The URL may be different based on your environment configuration. The Form represents the form created using the Design a Form component.

Figure 40. Pagelet Wizard Step 2 – Select Data Source
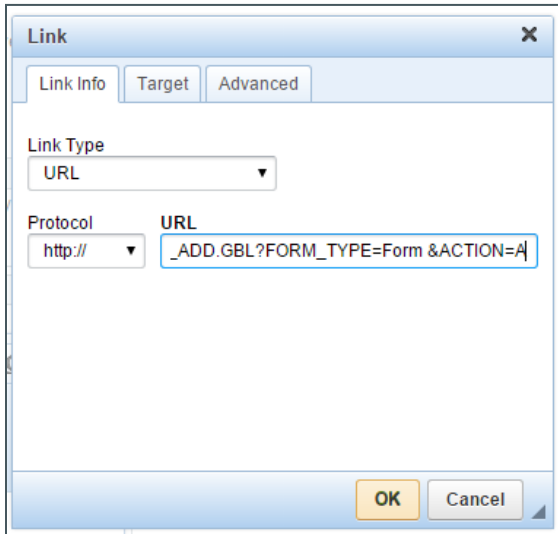
Figure 41. Link: Specifying Link Type and URL

4. After adding the forms to the HTML editor, click the Next pushbutton. In Step 4: Select Display Format, select the Display Option of Passthru. This should default to Passthru.

    Note: In Step 2, because you selected Data Type of HTML, the Pagelet Wizard automatically skips Step 3: Specify Data Source Parameters. If you select any other Data Type value in Step 2, you will be presented with Step 3.
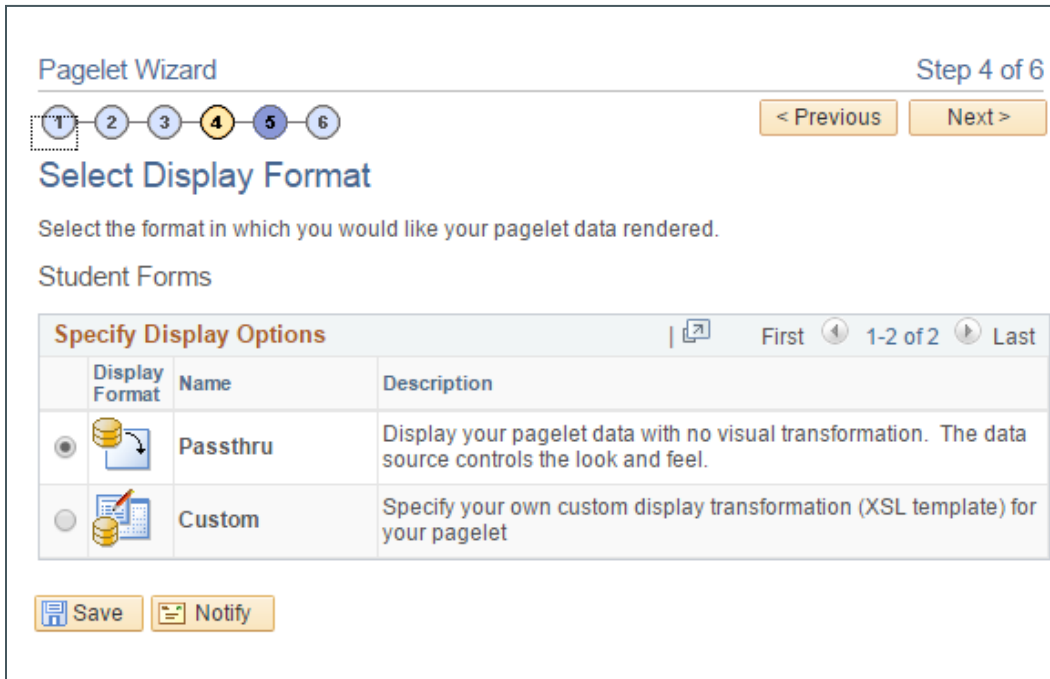
Figure 42. Pagelet Wizard Step 4 – Select Display Format

5. Click through to preview the pagelet.

Pagelet Wizard   Step 5 of 6

① ② ③ ④ ⑤ ⑥   [< Previous]   [Next >]

Specify Display Options

Specify the visual options related to the display format for your pagelet.

Student Forms

▼ **Additional Text**   ▼ **Pagelet Preview**

Header   ▼   Waiver Request

Opening Text   ▼   Residency Form

Closing Text   ▼   Term Withdrawal

Footer   ▼

▼ **Search Options**

Search is supported for homepage pagelets and
embeddable pagelets only.

*Search Box | No Search Box   ▼ |

▶ **Custom Search Class**

[🖫 Save]   [🖃 Notify]

Figure 43. Pagelet Wizard Step 5 – Select Display Options

6. Publish the pagelet as a homepage pagelet. Pagelet security is also defined here.

Figure 44. Pagelet Wizard Step 6 – Specify Publishing Options

For more detailed information related to the Pagelet Wizard, see also PeopleSoft PeopleTools 8.54 > Portal Technology > Understanding Pagelet Wizard

Appendix C: Incorporating Forms into Activity Guides

This section describes how to embed a form into an Activity Guide. Using Related Content Service, institutions can include a form as a task within an Activity Guide.
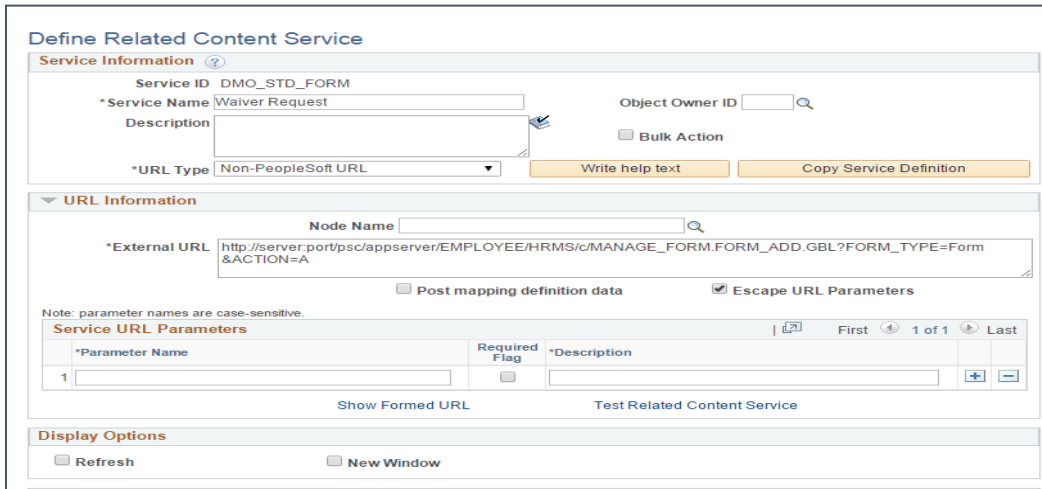
Figure 45. Embedded Waiver Request Form in the Financial Agreement Activity Guide

Navigation: Main Menu > PeopleTools > Portal > Related Content Service > Define Related Content Service

1. Create the Related Content Service. Complete the Service information with Service Name and URL Type of Non-PeopleSoft URL. Then add the forms URL to the External URL.

Figure 46. Creating the Related Content Service

URL example:

//server:port/psc/appserver/EMPLOYEE/HRMS/c/MANAGE_FORM.FORM_ADD.GBL?FORM_TYPE=**Form**&ACTION=A

2. Through the Task Management Workcenter, add the Related Content Service as a task within your Activity Guide.
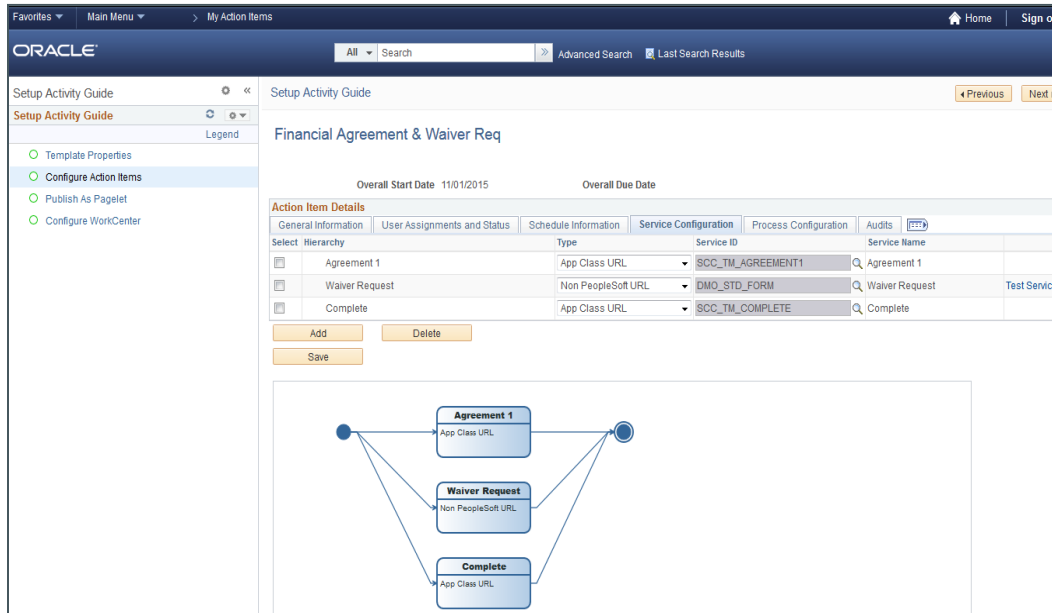

Figure 47. Task Management Workcenter – Adding Related Content Service as an Activity Guide task

For more information related to activity guides, see also PeopleSoft PeopleTools 8.54 > Portal Technology > Understanding Activity Guides

Conclusion

Forms and Approval Builder is a powerful yet simple tool that enables your functional staff to:

» design an online form quickly and accurately, by using the delivered Design a Form component (a step-by-step guided process, complete with the ability to include instructions and a means to support attachments as part of your newly designed form).
» assign the necessary Forms security to both:
    » the administrative users creating and managing the form, as well as
    » the consumers of the form, meaning your students
» establish the appropriate approval levels, including context-sensitive approvals
» activate (publish) the form.

Together with the additional features documented in the Appendices section of this document, you can implement a robust and efficient data-gathering solution in PeopleSoft Campus Solutions 9.2 for the Self Service module utilizing Enterprise Component's Forms and Approval Builder.

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Integrated Cloud Applications & Platform Services

Peoplesoft Campus Solutions 9.2 Forms And Approval Builder
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