PEOPLESOFT SERVERS DIRECTORY VIEWER

Project definition: CY2_DIRECTORY_VIEWER_002

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Version: 2.0
Date: 15-01-2023

CY2

CONTENTS

1. VERSION CONTROL

1.1. CHANGE HISTORY

Date	Author	Version	Changes made
20-02-2020	E. La Haye	1	
24-02-2020	E. La Haye	1.1	Supporting new version of project. Note: project contains deleted record which will show up as not imported if you did not install the initial version of the project.
15-01-2023	E. La Haye	2.0	New version of project.

2. PREFACE

This document describes the installation procedure and options for the PeopleSoft Servers directory viewer functionality.

2.1. NAVIGATION

This functionality can (by default) be found through navigation: **Root > CY2 Projects > PeopleSoft servers directory.**

2.2. DOCUMENTATION

The documentation of the PeopleSoft Servers directory viewer can be found on Github (https://github.com/cy2hq/PeopleSoft-Directory-Viewer) and in the Documentation folder which is part of the Change Assistant Zip package.

3. GLOBAL DESIGN

3.1. GLOBAL DESIGN

The 'PeopleSoft Directory Viewer' functionality delivers front-end functionality to manage files and directories on PeopleSoft servers for end users.

The functionality consists of:

1. Installation component where administrators can define the installation options available for different directories on the PeopleSoft Servers for end users.
2. Setup component where administrators can define the permissions available for different directories on the PeopleSoft Servers for end users.
3. Preferences component where users can define their personal preferences for the PeopleSoft server directory viewer.
4. Viewer component where end users can manage files and directories on the PeopleSoft Servers.

Common uses:
The functionality is commonly used to:

1. Allow developers access to log files on the application server and web server for debugging errors and viewing integration logs.
2. Allow end users the ability to upload and delete files to / from specific directories that can be used as upload directories for business transactions that require external files (csv / excel / etc.).
3. Allow admins easy access for server directories while using the front-end application.

A word of caution: working with PeopleSoft servers means working with the real server directories that are necessary to keep the PeopleSoft environment running. Any file transaction that end users can perform cannot be undone. <u>Delete is Delete!</u>
The functionality can safely be used in a production environment if and when you have clearly defined which end users can perform which file transactions in which directories.

4. TECHNICAL DESCRIPTION

4.1. INSTALLATION INSTRUCTIONS

For the installation of the 'PeopleSoft Directory Viewer' functionality the following steps need to be taken:

4.1.1. Change Assistant approach

Load the change package updCY2_DIRECTORY_VIEWER_002 into the database using Change Assistant.
Note: project contains deleted objects that will show up as not imported if you did not install the initial version of the project.

4.1.2. Traditional approach

In case you don't want to use the change assistant to load the project:

1. Open the updCY2_DIRECTORY_VIEWER_002 package and compare and then load the project located in the folder "CY2_DIRECTORY_VIEWER_002" into the database.
   Note: project contains deleted objects that will show up as not imported if you did not install the initial version of the project.
2. Build the tables and views contained in the project (create tables, create views).
3. Optional (if you are on PeopleTools 8.57 or below): Open the updCY2_DIRECTORY_VIEWER_002 batch folder located in the updCY2_DIRECTORY_VIEWER_002 package and load the message catalog entries through data mover using the .DAT files in the "data" folder and the DMS script in the "scripts" folder.

4.1.3. Upgrading from CY2_DIRECTORY_VIEWER_001

When you are currently using the directory viewer functionality, please note the following extra notions in regards to the upgrade to the new version of the directory viewer:

1. Compare and report project CY2_DIRECTORY_VIEWER_002 to your database of choice.

2. Check the upgrade boxes for the deletion of the following items in the project:

2 fields and 1 field label need to be deleted as part of the upgrade. The compare will untick the upgrade boxes so please tick them again.

	Fields Key		View Custom Filter	View Upgrade = No			
	Field Name	Label Name	Source	Target	Action	Upgrade	Done
19	CY2_DIR_FILE_ACT	CY2_FILE_DIR_ACT	Absent	*Changed	Delete	☐	☐
23	CY2_DWNL_CASCAD		Absent	*Changed	Delete	☐	☐
24	CY2_DWNL_DIRECT		Absent	*Changed	Delete	☐	☐

Check the upgrade boxes for the deletion of the following 3 record fields, and if applicable delete the record CY2_PSS-DIR_DHD. The compare will untick the upgrade boxes so please tick them again.

	Records Key		View Custom Filter	View Upgrade = No			
	Record Name	Field Name	Source	Target	Action	Upgrade	Done
8	CY2_PSS_DIR_DDT	CY2_DWNL_CASCAD	Absent	*Unchanged	Delete	☐	☐
9	CY2_PSS_DIR_DDT	CY2_DWNL_DIRECT	Absent	*Unchanged	Delete	☐	☐
30	CY2_PSS_DIR_DHD		Absent	Absent	None	☐	☐
36	CY2_PSS_DIR_FLE	CY2_FILEEXTN	Absent	*Changed	Delete	☐	☐

When building the tables in the project you may encounter warnings that correspond to the fields you have deleted as part of the upgrade. Those are expected.

```
SQL Build process began on 1/15/2023 at 8:57:41 AM for database PSDEV.
Warning: CY2_PSS_DIR_DHD - Record definition does not exist. Record not processed. (76,73)
Warning: PS_CY2_PSS_DIR_DDT - Field CY2_DWNL_CASCADE to be deleted has data present. Record processed. (76,23)
```

4.1.4. Note about images in the project

We have included 3 PeopleTools images in the project to support customers who are on lower tools versions (< PeopleTools version 8.59). We use these images in the actions buttons on the viewer page. These images will be delivered by Oracle as part of the tools upgrade but by loading them as part of this project you can already use them. If images are already present in your database you don't have to load them again.

4	PTIAAU_SELECT_S_FL	Unknown	Unknown	Copy	☑	☑
5	PTIAAU_UNSELECT_S_FL	Unknown	Unknown	Copy	☑	☑
6	PTNC_EXT_LINK_S_FL	Unknown	Unknown	Copy	☑	☑

4.2. (OPTIONAL) ADD PERMISSIONS TO NEW PERMISSION LIST

Optionally you can add the following menu items to a relevant permission list:

1. CY2_PSS_DIR_MENU

Maintain permission lists through navigation: **PeopleTools > Security > Permissions & Roles > Permission Lists.**

The permission list as shown below is delivered with the project but does not have to be used.

The following menu is defined in the permission list.

The following components are autorised in the menu.

Component Permissions

CY2 Server Directory Menu

Components

Authorized?	Component Name	Item Label	Edit Pages	View Content References for this Component
☑	CY2_PSS_DIR_INSTAL	PS Serves dir installation	Edit Pages	View
☑	CY2_PSS_DIR_PRF_FL	PS servers dir preferences	Edit Pages	View
☑	CY2_PSS_DIR_SETUP	PS servers directory setup	Edit Pages	View
☑	CY2_PSS_DIR_VW_FL	PS servers directory view	Edit Pages	View

1-4 of 4

Select All   Deselect All

OK   Cancel

4.3. (OPTIONAL) CHANGE THE DELIVERED MENU ITEM NAVIGATION

By default the 'PeopleSoft Directory Viewer' functionality can be reached through navigation: **Root > CY2 Projects > PeopleSoft servers directory .**

If needed these menu items can be moved elsewhere by altering the 'structure and content' portal registry that can be reached through navigation: **PeopleTools > Portal > Structure and content**

Root > CY2 projects > PeopleSoft servers directory

Structure and Content

* Click the folder label to view the child folders and content references for that folder
* Click the "Edit" link to edit the folder definition

▼ **Folders**

1-1 of 1   View All

Add Folder

* Click the "Edit" link to edit the content reference definition

▼ **Content References**

Link	Node Name	Label	Edit	Sequence number	Create Link	Number of links	
☐	LOCAL_NODE	PS Servers dir Installation	Edit	1	Create Link	1	—
☐	LOCAL_NODE	PS servers directory setup	Edit	1	Create Link	1	—
☐	LOCAL_NODE	PS servers directory view	Edit	1	Create Link	1	—

1-3 of 3   View All

Add Content Reference   Add Content Reference Link

The preferences page is located in the "My preferences" folder in Fluid structure and content.

Root > Fluid Structure Content > My Preferences

Structure and Content

* Click the folder label to view the child folders and content references for that folder
* Click the "Edit" link to edit the folder definition

▼ Folders

| | | | | | 1-1 of 1 ∨ | | | View All |

Add Folder

* Click the "Edit" link to edit the content reference definition

▼ Content References

1-5 of 5 ∨   View All

Link	Node Name	Label	Edit	Sequence number	Create Link	Number of links	
☐	LOCAL_NODE	General Settings	Edit	0	Create Link	0	—
☐	LOCAL_NODE	Notifications	Edit	1	Create Link	0	—
☐	SA	Campus Preferences	Edit	10	Create Link	0	—
☐	LOCAL_NODE	PS Servers viewer preferences	Edit	99	Create Link	0	—

4.4. (OPTIONAL) CHANGE THE DELIVERED MESSAGE CATALOG ENTRIES

There are 94 message catalog entries delivered with the project, all using message catalog: 25301.

Those can be altered through the following navigation: **PeopleTools > Utilities > Administration > Message Catalog**.

Or alternatively can be altered by changing the DAT file delivered as part of the project.

5. MISCELLANEOUS

5.1. OTHER RELEVANT INFORMATION

Functional and technical documentation for this project is described in two other documents that are delivered as part of the change package (Documentation folder) and available on Github (https://github.com/cy2hq/PeopleSoft-Directory-Viewer).

" / "

That's all folks, good luck using the functionality, hope you enjoy it as much as we do!