



Functional Course Agenda

PeopleSoft 9.2 “Get Current Series” Focus on De-Customization Forms and Approval Builder

This custom training class has been developed for functional users with intermediate technical capabilities. In this section of the “Get Current Series”, the focus is on De-customization of PeopleSoft pages using Forms and Approval Builder.

Through lecture, demonstrations, scenarios, and real-world experiences from implementers, students will learn how to leverage existing functional tools to migrate technically invasive customizations to delivered functionality ready for the next PUM update. By reducing customizations, PeopleSoft customers will not only have an easier time getting current, but staying current as well.

Forms and Approval Builder Overview

- Understand Forms and Approval Builder
- Security

Design Forms

- Basic Info and Instructions
- Form Fields
- Attachments
- Publishing
- Approval Processing
- Working with Prompts

Managing Forms

- Activating/Inactivating
- Ownership

Integration with Applications

- Component Interface Overview
- Form to CI Mapping

Forms in Fluid

- Form Designer
- My Forms
- Approver/Review