Understanding PeopleSoft 8.9 Navigation and Functionality

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Using Menus

Your PeopleSoft 8.9 Homepage includes two ways to navigate. It’s very similar to Windows Explorer.

And, you have the added capability of searching for pages (by page name or description). This is especially helpful after a system upgrade when menu items are moved or renamed.
**The Menu Bar**

The main level of the **Menu Bar**, also known as Home, contains a general list of the folders that you have access to. The **Menu Bar** remains displayed when you are viewing PeopleSoft pages.

Click the arrow next to the folder to expand it and see additional folders or pages.

A downward arrow indicates that the menu is expanded.

Pages appear as clickable links. They do not have arrows next to them.

Click **Home** in the Navigation Header to go back to the homepage with all menus collapsed.

**DO NOT** click the **Back** button on the browser toolbar!

The **Refresh** button returns the menu to its default state (all menus collapsed).

You can **Minimize** the Menu Bar to give you a larger page viewing area when you are on a PeopleSoft page.

**BE CAREFUL** not to **Close** the Menu Bar. If you do, you can only display it again by going to the **Personalize** **Content | Layout** page.
**The Main Menu**

Folders and pages are displayed as clickable icons in the **Main Menu** located to the right of the Menu Bar. You may prefer to use this method of navigation as an alternative to using the Menu Bar.

DO NOT click the Back button on the browser toolbar to go back!

Click **Home** in the Navigation Header to go back to the homepage with all menus collapsed.

**Breadcrumbs** are clickable and can be used to “go back” to another level in the Main Menu.

This icon identifies a PeopleSoft page.
Searching for Pages

Use the Search field in the Menu Bar to search for a specific page.

Enter the name of the page (or a keyword) and press ENTER or click the Search button.

The Search page opens displaying the results:

Click one of the links in the list to go to that page.

If your search produces a large number of results, you can narrow it down further by selecting the Search Within Results option.

Use the Customize Settings link to hide or show summaries of each search result and to control the number of search results that appear on each page.
Using Favorites

The **Favorites** list is like your own list of bookmarks to PeopleSoft pages that you use frequently. This is completely separate from the Favorites (or Bookmarks) in your browser. Once you add a Favorite, it appears in the PeopleSoft Menu Bar under **My Favorites**.

You can navigate to the page easily by expanding the **My Favorites** folder and clicking the link for the page that you want to view.

### Adding Favorites

- Open the page that you want to designate as a favorite.
- Click **Add to Favorites** in the navigation header.
- The **Add to Favorites** page appears, with the page name as the default in the Description field.

If you like, update the Description for the favorite.

Click **OK**.

The favorite is saved in **My Favorites**.

### Editing Favorites

- Expand the **My Favorites** in the Menu Bar.
- Click **Edit Favorites**.

To rename a Favorite, type a new name in the text box.

To delete a Favorite, press the **Delete** button associated with it.

To reorder Favorites, type an appropriate number in the **Sequence** number box.

Click **Save**.
The Navigation Header

The navigation header remains at the top of your window as you navigate through PeopleSoft pages.

**Home**
Click to return to your homepage (all menus collapsed).

**Add to Favorites**
Click to add the current page to your favorites list for easy accessibility.

**Sign out**
Click to sign out of PeopleSoft.

**Important!** For security purposes it is important that you sign out when you are finished with your PeopleSoft session rather than simply closing the browser window. Other users could potentially access your cached homepage from another portal if you do not sign out properly.
The Pagebar

Just below the navigation header sits the Pagebar. The Pagebar buttons or links are displayed when you are on a PeopleSoft page.

New Window
Opens a new browser window that displays the search page for the current page.

You can open as many windows as needed.

Do not select File, New, Window from the browser menu.

Important! When you click Sign Out while in one window you will be logged out of PeopleSoft (all windows). If you want to close a specific window, and remain logged into PeopleSoft, click the X in the upper right corner of that window.

Help
Opens the online PeopleBooks help for the PeopleSoft page that you are currently viewing.

This Help does not include Stony Brook specific examples or customizations.

Copies the current page URL to the clipboard so that it is available for pasting in emails or other applications. The copied URL includes page, action, and search key information.
Personalizations

Go to My Personalizations to set certain accessibility and navigation options. This includes options to tab over certain unused fields on a page. For instance, if you select the Tab over Calendar Button option, your cursor will skip over the calendar button when you press the TAB key to go from field to field on a PeopleSoft page.

- Click My Personalizations

You will see the default value for that option.

To select a new value click the Override Value drop-down arrow.

Click the Explain link for an explanation of the option.

Click OK

Note. You must log off and log back on for changes to Personalization settings to take effect.
Changing Your Password

If you suspect that someone knows your PeopleSoft password you should change it immediately. Your PeopleSoft password is case sensitive and should be fairly complex to make it harder for someone to figure it out. For instance, make your password a combination of upper and lower case letters along with numbers and special characters.

• Click Change My Password

Enter Current Password
Enter the New Password
Enter the new password again in the Confirm Password field
Click Change Password

If you forget your PeopleSoft password click the Report a Problem link in SOLAR and submit a trouble ticket. An account manager will reset your password and inform you of the new one.
Entering and Saving Search Criteria

There are two searches on the Find an Existing Value page – Basic Search and Advanced Search. Basic Search gives you one or two key fields as the criteria to search by. With Advanced Search you can narrow down your search by using multiple search fields and a variety of search operators. You can change from Basic Search to Advanced Search by clicking the respective link on the Find an Existing Value page.

When specifying search criteria, you can enter a full or partial value for any key field. Based on what you enter, the system presents a list of possible matches or, if there is only one match, the page that you requested.

By default, the search function can display up to 300 matching entries from the database. If your search retrieves more than the maximum 300 entries, you must attempt to narrow your search in another way.

Using Operators

For most of the fields in Advanced Search the default operators are “begins with” or “=”. Below is a complete list of operators:

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>begins with</td>
<td>Used for Character fields only.</td>
</tr>
<tr>
<td>contains</td>
<td>Used for Character fields only.</td>
</tr>
<tr>
<td>= (equals)</td>
<td>Used for all field types.</td>
</tr>
<tr>
<td>not= (not equal to)</td>
<td>Used for all field types.</td>
</tr>
<tr>
<td>&lt; (less than)</td>
<td>Used for all field types.</td>
</tr>
<tr>
<td>&lt;= (less than or equal to)</td>
<td>Used for all field types.</td>
</tr>
<tr>
<td>&gt; (greater than)</td>
<td>Used for all field types.</td>
</tr>
<tr>
<td>&gt;= (greater than or equal to)</td>
<td>Used for all field types.</td>
</tr>
</tbody>
</table>
### Saving Search Criteria

If you plan to use the same search criteria over and over again, click the **Save Search Criteria** link to name and save the search.

![Diagram of search criteria](image)

To use the saved search criteria, click the **Use Saved Search** drop-down list box and select the search name.

To remove any saved searches, click the **Delete Saved Search** link.

### Add a New Value

Use **Add A New Value** when you enter a new high level key to the database. For instance, in the example below, a new person is being added to the database and a new EmplID will be automatically assigned after the information is entered and saved.

![Modify Employee Personal Data](image)
Understanding Buttons and Links

The following is a list of possible buttons and links that you may see in PeopleSoft.

In general, if the action is related to navigation, it appears as a link on a Peoplesoft page.

If the action is truly an action, such as save or process, it appears as a button.
Buttons That Process Transactions

**Edit Name**

**English Name Format**

- **Prefix:**
- **First Name:**
- **Last Name:**
- **Suffix:**
- **Display Name:**
  - **Formal Name:**
  - **Name:**

**Buttons**

- **Apply**
  - Click to apply the data input without returning to the main page, in case you want to perform additional searches. Usually found on a page that you open by clicking a prompt button.

- **OK**
  - Click to accept the data input made on an auxiliary page and return to the main page.

- **Cancel**
  - Click to clear the page and any data that you may have entered or changed without saving. **When you click Cancel, the system does not warn you to save changes.** Click Cancel if you entered data incorrectly and want to begin again.
**Toolbar Buttons**

The toolbar appears at the bottom of most pages. It can include search list navigation buttons, page navigation buttons, and page action buttons; it changes depending on the type of page that is active.

![Toolbar Buttons Image]

- Click to save the information that you have entered on the page (group of pages) to the database. When activated, the system displays the *Saved* message in the upper-right corner of the page (sometimes it flashes by very quickly and you may miss it).

- Click to return to the search page.

- Displays the information for the previous data row in your search results (when there’s more than one match in the list).

- Displays the information for the next data row in your search results (when there’s more than one match in the list).

- Displays the next page in the current component (group of pages).

- Displays the previous page in the current component (group of pages).

- Click to display current and future rows of data in the database.

- Click to display all effective dated rows of data in the database: current, future, and history.

- Click to display all effective-dated rows of data in the database and to update all rows, including history rows.

  **Note.** This button is available only if you have the proper permission.

- Click to add a row of data to the database for the current transaction.

- Click to refresh the database, validating any data that has been entered and processing any deferred programming changes.
**Pop-up Menu Buttons Next To Fields**

<table>
<thead>
<tr>
<th>Biographic Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Birth:</td>
</tr>
<tr>
<td>Birth Country:</td>
</tr>
</tbody>
</table>

- ![ ] Click to access a new page to select among the menu items listed.
  Appears if the pop-up menu contains more than one item.
- ![ ] Click to access the new transaction page directly.
  Appears if the pop-up menu contains only one menu item.
- ![ ] Click to access the Lookup page displaying a list of values for this field.
- ![ ] Click to choose a date from the Calendar popup.
Buttons and Links That Appear On a Grid Or Scroll Area

Many PeopleSoft pages contain grids or scroll areas and a navigation header. There is a numbering system for the rows. For example, if a grid or scroll area were set to view only one row at a time, the navigation header might read 1 of 2 or 1 of 20, depending on how many entries there were. If the grid or scroll area were set to view three rows of data at a time, it might read 1-3 of 20. Click the arrows to view the next or previous series of rows.

Click to insert a new row after the current row.

Click to insert multiple rows. Specify the number of rows (1 to 99).

Click to delete the current row of data.

(Show Next Row) Click to display the next row or set of rows of data.

(Show Previous Row) Click to display the previous row or set of rows of data.

(Show All Columns) In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.

(Show Tabs) In a tabbed grid only, click to return the expanded grid to its tabbed state.

Customize Click to access the customization page for that grid, which enables you to sort by column and reorder, hide, and freeze columns.

(Download) Click to display a new browser window, showing the contents of the grid in a spreadsheet-like format.

View All Click to display the maximum number of rows available to be viewed at once on a page. When this feature is enabled, the link changes to read View 1 so that you can return to the original setting.

Find Click to find a row of data containing a specified search string.

First Click to access the first row or set of rows of data.

Last Click to access the last row or set of rows of data.