

Understanding PeopleSoft 8.9 Navigation and Functionality

Using Menus	2
The Menu Bar	3
The Main Menu.....	4
Searching for Pages.....	5
Using Favorites	6
Adding Favorites.....	6
Editing Favorites.....	6
The Navigation Header	7
The Pagebar	8
Personalizations	9
Changing Your Password	10
Entering and Saving Search Criteria.....	11
Using Operators	11
Saving Search Criteria	12
Add a New Value.....	12
Understanding Buttons and Links.....	13
Buttons That Process Transactions.....	14
Toolbar Buttons	15
Pop-up Menu Buttons Next To Fields	16
Buttons and Links That Appear On A Grid Or Scroll Area	17

Using Menus

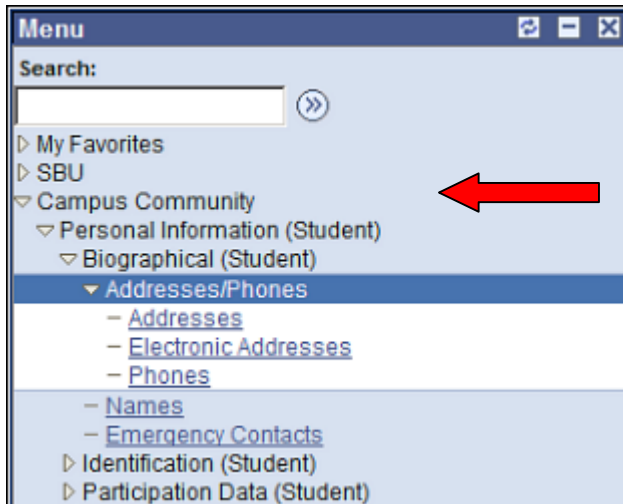
Your PeopleSoft 8.9 **Homepage** includes two ways to navigate. It's very similar to Windows Explorer.



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.



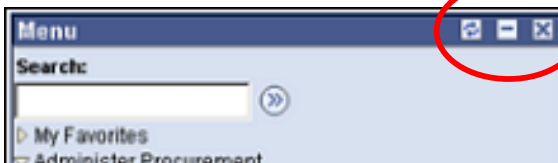
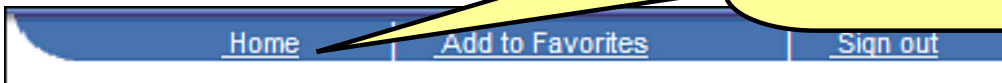
Click the arrow next to the folder to expand it and see additional folders or pages.

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.

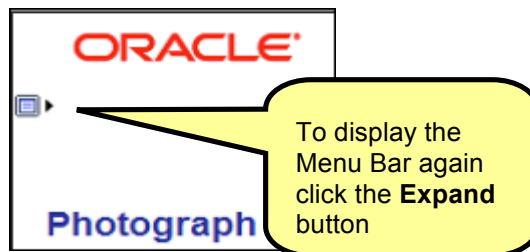
DO NOT click the **Back** button on the browser toolbar!



Refresh
Minimize
Close

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.



To display the Menu Bar again click the **Expand** button

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.

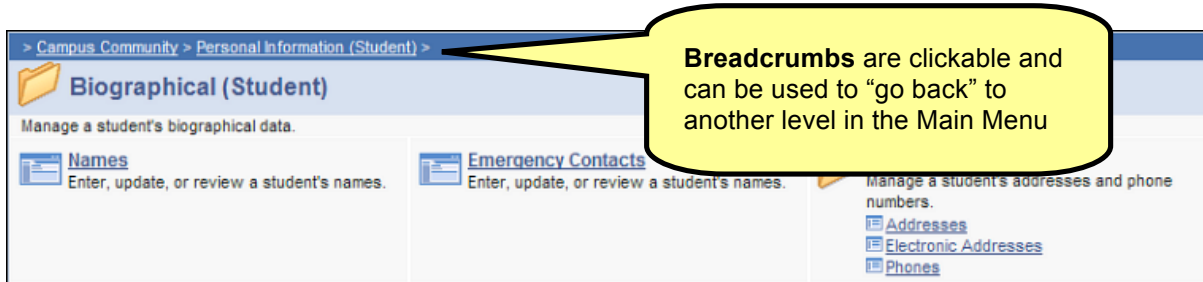
The Main Menu

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.



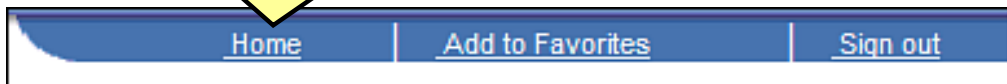
This icon identifies a PeopleSoft page

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



Breadcrumbs are clickable and can be used to "go back" to another level in the Main Menu

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




Searching for Pages

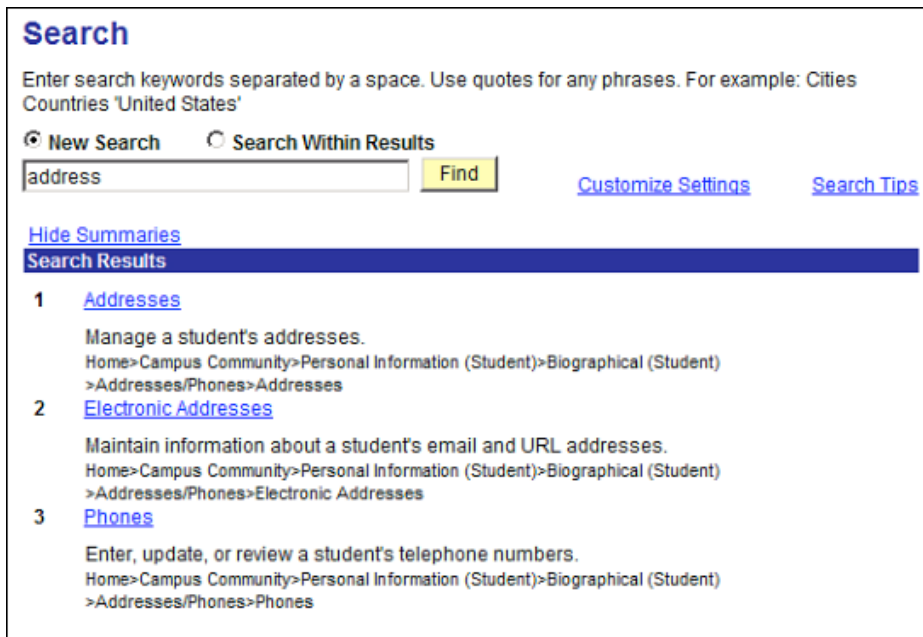
Use the **Search** field in the Menu Bar to search for a specific page.



The screenshot shows a 'Menu' bar with a search field. The search field contains the text 'address' and a magnifying glass icon. Below the search field is a list of menu items: 'My Favorites', 'SBU', 'SBU Campus Community', 'SBU Student Records', 'Self Service', and 'Campus Community'.

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

The Search page opens displaying the results:



The screenshot shows the 'Search' page. At the top, it says 'Search' and provides instructions: 'Enter search keywords separated by a space. Use quotes for any phrases. For example: Cities Countries 'United States''. Below this is a search field with 'address' entered and a 'Find' button. There are also links for 'Customize Settings' and 'Search Tips'. Below the search field, there are radio buttons for 'New Search' (selected) and 'Search Within Results'. A 'Hide Summaries' link is also present. The search results are displayed in a list:

- 1 [Addresses](#)
Manage a student's addresses.
Home>Campus Community>Personal Information (Student)>Biographical (Student)
>Addresses/Phones>Addresses
- 2 [Electronic Addresses](#)
Maintain information about a student's email and URL addresses.
Home>Campus Community>Personal Information (Student)>Biographical (Student)
>Addresses/Phones>Electronic Addresses
- 3 [Phones](#)
Enter, update, or review a student's telephone numbers.
Home>Campus Community>Personal Information (Student)>Biographical (Student)
>Addresses/Phones>Phones

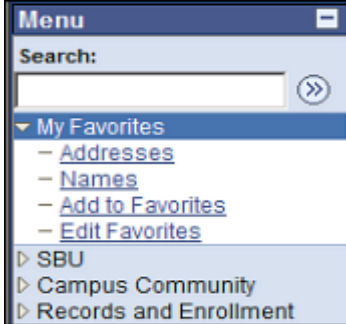
Click one of the links in the list to go to that page.

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

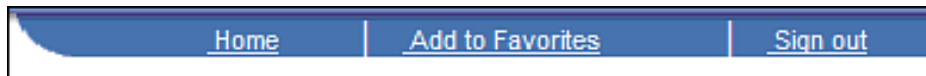
The **Favorites** list is like your own list of bookmarks to PeopleSoft pages that you use frequently. This is completely separate from the Favorites (or Bookmarks) in your browser. Once you add a Favorite, it appears in the PeopleSoft Menu Bar under **My Favorites**.



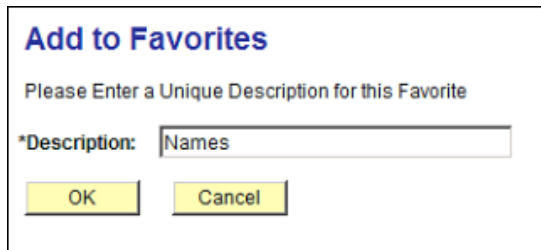
You can navigate to the page easily by expanding the **My Favorites** folder and clicking the link for the page that you want to view.

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.

A screenshot of the 'Add to Favorites' dialog box. The title is 'Add to Favorites'. Below the title is the instruction 'Please Enter a Unique Description for this Favorite'. There is a text input field labeled '*Description:' with the value 'Names'. At the bottom are two buttons: 'OK' and 'Cancel'.

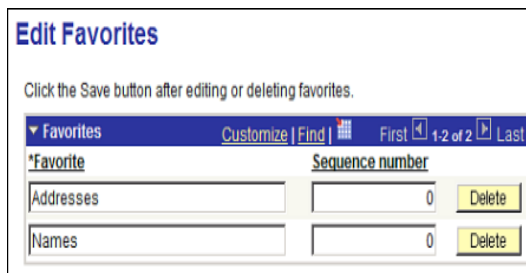
If you like, update the Description for the favorite.

Click **OK**.

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

Editing Favorites

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

A screenshot of the 'Edit Favorites' page. The title is 'Edit Favorites'. Below the title is the instruction 'Click the Save button after editing or deleting favorites.' There is a table with two columns: 'Favorite' and 'Sequence number'. The table has two rows: 'Addresses' and 'Names'. Each row has a 'Delete' button next to the 'Sequence number' field. The 'Sequence number' for both is 0. There are also navigation buttons: 'First', '1-2 of 2', and 'Last'.

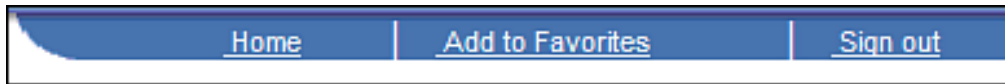
To **rename** a Favorite, type a new name in the text box.

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**

Personalizations

ROLE Coordinator (Dept)

Standard settings are in effect.

Changes to Personalization settings require you to log off and log back on in order to take effect.

Personalization Categories	
Description	Personalize Option
General Options	<input type="button" value="Personalize Option"/>
Navigation Personalizations	<input type="button" value="Personalize Option"/>

Click the Personalize Option button next to **General Options** or **Navigation Personalizations**

You will see the default value for that option.

Option Category: General Options

Personalization Option	Default Value	Override Value
Accessibility Features	Accessibility features off	<input type="text"/>

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

Click the **Explain** link for an explanation of the option.

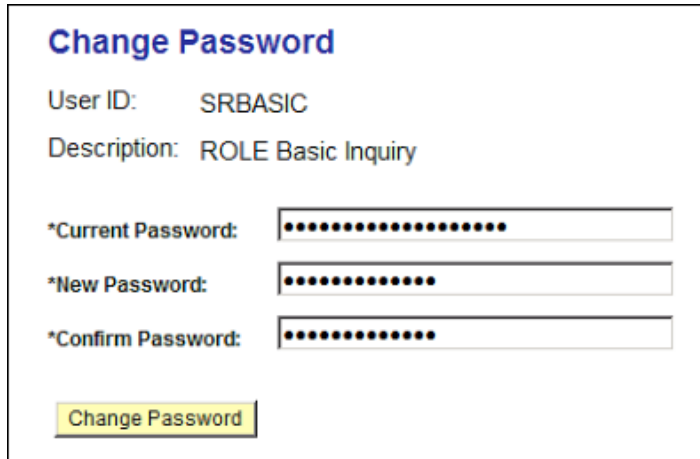
Click **OK**

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**



Change Password

User ID: SRBASIC

Description: ROLE Basic Inquiry

*Current Password:

*New Password:

*Confirm Password:

Change 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.

Enter the search criteria

Click **Search**

Search fields are not case sensitive but you can speed up your search by entering mixed characters and selecting the **Case Sensitive** option before you click Search.

Using Operators

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

begins with	Used for Character fields only.
contains	Used for Character fields only.
= (equals)	Used for all field types.
not= (not equal to)	Used for all field types.
< (less than)	Used for all field types.
<= (less than or equal to)	Used for all field types.
> (greater than)	Used for all field types.
>= (greater than or equal to)	Used for all field types.

between	Used for all field types.
in	Used for all field types.

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.

The screenshot shows a search form titled "Find an Existing Value". At the top, there is a "Use Saved Search:" dropdown menu with "mus 101" selected. Below this are several search criteria fields: "Academic Institution:" (USBNY), "Term:" (1078), "Subject Area:" (MUS), "Catalog Nbr:" (begins with 101), "Academic Career:" (Undergraduate), "Campus:" (begins with), "Description:" (begins with), "Course ID:" (begins with), and "Course Offering Nbr:" (=). At the bottom, there are buttons for "Search", "Clear", "Basic Search", "Save Search Criteria", and "Delete Saved Search". The "Use Saved Search:" dropdown and the "Save Search Criteria" link are circled in red.

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.

The screenshot shows a form titled "Modify Employee Personal Data". There are two tabs: "Find an Existing Value" and "Add a New Value", with the latter selected. Below the tabs is a text input field labeled "EmplID:" containing the text "NEW". At the bottom of the form is a yellow "Add" button.

Understanding Buttons and Links

The screenshot shows a 'Work Location' page in PeopleSoft. The page contains various fields for job information, including 'Effective Date', 'Job Status', 'Position Number', and 'Termination Date'. A yellow callout bubble points to the 'Override Position Data' button, stating: 'In general, if the action is related to navigation, it appears as a link on a Peoplesoft page'. Another yellow callout bubble points to the 'Save' button, stating: 'If the action is truly an action, such as *save* or *process*, it appears as a button.' Below the main form, there is a navigation bar with buttons for 'Save', 'Return to Search', 'Previous tab', 'Next tab', 'Refresh', 'Update/Display', and 'Include History'. A horizontal menu below the main form contains links for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'.

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

Buttons That Process Transactions

Edit Name

English Name Format

Prefix:

First Name: Mic

Last Name:

Suffix:

Display Name:

Formal Name:

Name.

OK Cancel Refresh

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

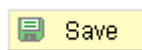
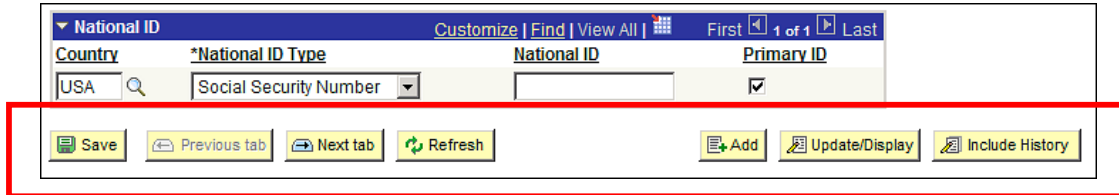
Click to accept the data input made on an auxiliary page and return to the main page.

Cancel

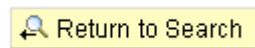
Click to clear the page and any data that you may have entered or changed without saving. **When you click Cancel, the system does not warn you to save changes.** Click Cancel if you entered data incorrectly and want to begin again.

Toolbar Buttons

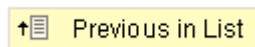
The toolbar appears at the bottom of most pages. It can include search list navigation buttons, page navigation buttons, and page action buttons; it changes depending on the type of page that is active.



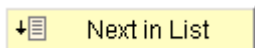
Click to save the information that you have entered on the page (group of pages) to the database. When activated, the system displays the **Saved** message in the upper-right corner of the page (sometimes it flashes by very quickly and you may miss it).



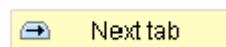
Click to return to the search page.



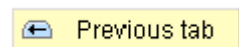
Displays the information for the previous data row in your search results (when there's more than one match in the list).



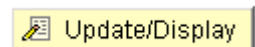
Displays the information for the next data row in your search results (when there's more than one match in the list).



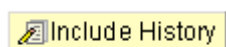
Displays the next page in the current component (group of pages).



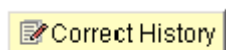
Displays the previous page in the current component (group of pages).



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

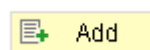


Click to display all effective dated rows of data in the database: current, future, and history.

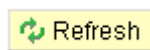


Click to display all effective-dated rows of data in the database and to update all rows, including history rows.

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











Biographic Information	
Date of Birth:	<input type="text"/> 
Birth Country:	<input type="text"/> 

-  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.

- 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.