

# The Basic Data Entry Elements of a PeopleSoft 8.0 Page

## Signing In to PeopleSoft...


- Open a browser window.
 

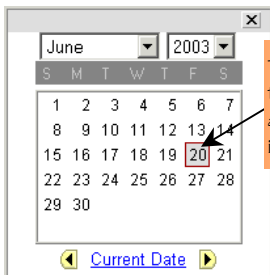
**Note:** For PCs, use the Microsoft Internet Explorer browser (version 5.5 or higher); for the Macintosh use the Netscape browser (version 4.79 or higher).
- Navigate to the Princeton University PeopleSoft home page:  
[www.princeton.edu/hrsa](http://www.princeton.edu/hrsa).
- Click the **Log In** menu option. The PeopleSoft Administrative Systems Sign In page is displayed.
- Type your User ID and LDAP password (e-mail password) in the *User ID* and *Password* fields, respectively.
- Click the **Sign In** button to log in to the PeopleSoft system.

## Required Fields



An asterisk (\*) preceding a field name indicates the field is required. You must enter a value in these fields before you can move to the next field or save the record.

## Entering Dates

- To enter a date, you can:
- Type the date in **mmddy** format; the system automatically converts the date to **mm/dd/yyyy** format.
  - Click the Calendar  button to select the date from a calendar page.









To select a date in the displayed month and year, click the day in the calendar area.

To choose a different month and/or year, select the new month/year from the drop-down list, or use the Previous  or Next  button to advance to that month/year, and then click the appropriate day in that month.

## Toolbar Buttons...

Navigation buttons are displayed at the bottom of every PeopleSoft application page.

	Alt+1 + Enter	<b>Save</b> saves data on all pages in the page group. All required data on all pages in the page group must be entered to perform a Save.
	Alt+2 + Enter	<b>Return to Search</b> redisplay the Search page.
	Alt+3 + Enter	<b>Next in List</b> displays the next record in the search results list.
	Alt+4 + Enter	<b>Previous in List</b> displays the previous record in the search results list.
	Alt + (the underlined tab letter) + Enter	<b>Next Tab</b> displays the next page in the current page group.
		<b>Previous Tab</b> displays the previous page in the current page group.

## Navigation Controls

Scrollable areas are framed and have navigational headers similar to:

[Find](#) | [View All](#)    [First](#) ◀ 1 of 6 ▶ [Last](#)

Click [Find](#) (or press Alt+/) to search for a text string in the record text.



[View All](#) and [View 1](#) links toggle:

- Click [View All](#) (or press Alt+) to display all rows of data, one after the other.
- Click [View 1](#) to display a record at a time; use the navigation controls to move through the data rows.

Records are stacked in order, usually either chronologically (for data tracked by effective date) or alphabetically. Click [First](#) to display the first (or *top-of-stack*) record in the order. Click [Last](#) to display the last record in the order.

The ◀ and ▶ buttons advance one record backward and forward, respectively.

## Adding and Deleting Rows

Click Add  to add a blank row to the current record. Click Delete  to delete the current row of data.

When your cursor is in a field in a section, you can also press Alt+7 to add a row to that section or press Alt+8 to delete the row your cursor is on.

## Optimizing Browser Performance...

To optimize the performance of your browser, it is recommended that you regularly delete your cache by performing the following steps. From within Internet Explorer:

- Select **Tools, Internet Options...** from the menu.
- Under Temporary Internet Files, click **Delete Files...**
- When prompted, select  **Delete all offline content** and click OK.
- Click **Settings...** and then click **View Files...**
- Select **Edit, Select All** from the menu.
- Press the Delete key to delete the selected files.
- Click **Yes** to "Are you sure you want to delete the selected Cookie(s)?"
- Close the Temporary Internet Files window, then click OK.
- Under History, click **Clear History** and click **Yes** to delete the history of visited web sites.
- Click OK to close the Internet Options window.

For similar instructions on maintaining optimum Netscape browser performance on a Macintosh, refer to [kb.princeton.edu/5893](http://kb.princeton.edu/5893).

# PeopleSoft Data Entry Guidelines

## Entering Names

Since PeopleSoft records are shared between all PeopleSoft applications, it is important to follow data entry standards both to simplify person record searches and to avoid accidental creation of duplicate records.

In PeopleSoft 8.0, First Name, Middle Name, and Name Suffix (Jr., Sr., II, etc.) name parts are entered in separate fields.

The two most common types of name records created in PeopleSoft are Primary and Preferred name records. The Primary name record is the default record.

Names with...	Data Entry Rules	Examples
<b>General names</b>	Mixed case is supported. Capitalize the first letter of each name part: First, Middle and Last.	David Lee Locke Celeste Ann Jones
<b>Multi-part names</b>	Separate the name parts with a space and capitalize according to the individual's preference.	Ann Marie Van der Camp
<b>Special-case names</b> (Mac, Mc, St.)	For names that begin with Mac, Mc, etc., initial capitalize both name parts and do not include spaces. For names that begin with 'St.', enter a capital S, followed by a lowercase t, followed by a period.	MacNeill McArthur St. Claire
<b>Apostrophes</b>	Do not enter spaces before or after the apostrophe.	O'Hara D'Mitri
<b>Hyphens</b>	Do not enter spaces before or after the hyphen. Initial capitalize each part of the name.	Staats-Westover Nan-Ping
<b>Multiple initials</b>	Enter initials in upper case and separate initials with a period, and no spaces.	J.R. Jones J.D. Patterson
<b>Suffixes (Jr., Sr., II)</b>	Choose the name suffix from the Name Suffix drop-down list. <b>DO NOT</b> enter the suffix as part of the last name in the Last Name field, as was the standard in previous PeopleSoft releases; always select the suffix from the Name Suffix drop-down list, instead.	
<b>Accented characters</b> (é, ã)	Names entered in a Primary name record cannot include accented characters. To record an affiliate's name with accented characters, create a Preferred name record, where accented characters are permitted.  To create a Preferred name record, navigate to either <b>Administer Workforce &gt; Administer Workforce (GBL) &gt; Use &gt; Names</b> , or <b>Build Community &gt; Maintain People Data &gt; Use L-Z &gt; Names</b> .	

## Entering Addresses

Enter addresses on the Addresses page. To add an address from this page, click the Add or Add Add button to insert a blank address record, and complete the address fields, accordingly.

You may define two types of addresses:

HOME	home address
MAIL	alternate address, P.O. Box

**Note:** Address types CAMP, OL1 and OL2 are automatically generated from other data sources.

To enter a phone number, click the [Phone](#) link at the bottom of the Addresses page. To enter an e-mail address, click the [Email Address](#) link.

In PeopleSoft, the format for addresses varies depending on the country associated with the address. United States addresses typically include Street Address, City, County, State, and Postal zip code information. When entering address details, avoid abbreviations (except for 'St.' as in Saint) and spell out common components, such as Apartment, Street, and Building.

United States Address Format			
<b>Country</b>	Use Lookup  to specify a Country code. The country determines the type and number of address fields that display.		
<b>US Address Fields</b>	<b>Data Entry Rules</b>	<b>Examples</b>	
	<i>(Avoid abbreviations, when possible)</i>	<b>Correct</b>	<b>Incorrect</b>
	<b>Street Address 1</b>	Enter up to 55 characters.	23 Daisy Court    23 Daisy Ct.
<b>Street Address 2</b>		Apartment 3B    Apt. 3B	
<b>Street Address 3</b>		Third Floor    3 <sup>rd</sup> Floor	
<b>Postal (zip code)</b>	For US addresses, the Postal code is the zip code. Entering a zip code automatically populates the City, County, and State fields for US addresses.		
<b>City</b>	City is automatically populated if a zip code is entered first. You may optionally overtype the automatic value and enter up to 30 characters. Avoid abbreviations, except enter 'St.' when entering cities that begin with 'St.', as in Saint.		
<b>County</b>	County is automatically populated if a zip code is entered first. You may optionally overtype the automatic value and enter up to 30 characters.		
<b>State</b>	State is automatically populated if a zip code is entered first. You may optionally use Lookup  to select a State code.		