
New Menu Look

When you open PeopleSoft, you will notice right away that the menu looks different. Instead of opening across the page, the submenus open under the higher level menu.

Notice that there are two types of menu options: links and folders. A folder is preceded by an arrow ‹. When you click on a folder name, the folder is expanded to show its contents.

A link is underlined, and preceded by a hyphen. Notice that links can appear at two levels at the same time. The links for a folder usually appear after all the other contents of the folder.

When you click on a link, the search page for that page group is displayed in the area to the right of the menu.

Navigation Pages

When you click on a folder in the menu, a navigation page for that folder appears, in addition to the menu folders, with the path at the top of the page. Navigation pages group the available processes in sections, with a brief explanation of each section, and one or more links to either folders or page groups.

Icons at each level indicate whether a link will open a new folder or a page.

If there are more than 4 links in a section, the last link will indicate how many more links there are. Click that link to open the section folder and see all the links.

As with the menu links, when you open a page group, the appropriate search page is displayed. The path is not displayed, but the menu is.

Hiding the Menu

If you find the menu gets in your way by taking up valuable space on your screen, you can hide the menu by clicking the minimize button at the top right of the menu pagelet. The menu is replaced by an icon ‹ which appears above and to the left of your page.

You can always expand the menu again when you need it by clicking the Expand menu icon.

Searching for a Menu Option

If you cannot remember where a particular page is located, you can use the Search field at the top of the main menu to locate any component (page group) by name.

Simply type some key words of the page group name into the search box, and click the search arrow.

The search results will be displayed on a new page. Each component that matches your search criteria will be listed, with a brief explanation and the navigation path. Scroll through the list to locate the page you want, and click the link to open the search page associated with that menu item.

If the search results list is too long, you can filter the results by searching within the list:
1. Click the Search Within Results radio button.
2. Leave your original criteria, and type and followed by the additional criteria.
3. Click the Find button.
4. Click the link for the page you want.

Adding Favorites to the Menu

If you find that you use a page group often, you can add it to your favorites in PeopleSoft, which makes accessing the page group much simpler—you don’t need to remember where to find the page, just open your favorites and click the link!

To add a page to your favorites:
1. Click the Add to Favorites link in the banner at the top right of your PeopleSoft window, or under My Favorites in the menu.
2. Make sure the description of the page makes sense to you, and will be clear in your favorites list. If it is not, type a new description that makes sense.
3. Click OK.

To change your favorites:
1. Under My Favorites, click the Edit Favorites link.
2. To change the name displayed for the page in your My Favorites menu, type your preferred name over the existing one.
3. To change the order of the links in your My Favorites menu, type the rank order number for each favorite in the Sequence Number field.
4. To delete a page you no longer need, locate the page, and click the Delete button in that row. You will be prompted to verify the deletion. Click OK.
5. When your changes are complete, click Save.
What’s New in PeopleSoft 9? Help and Search

PeopleSoft has some new features that make searching easier.

Flexible Search Criteria

Flexible search criteria allow you to specify how you want PeopleSoft to match the criteria you enter to the values in the field. For example, you can specify that the criteria you enter must appear at the beginning of the field, or must match it exactly.

You specify how you want PeopleSoft to match your criteria by selecting an operator in the field between the field name and the field where you enter your criteria.

Default operators are provided for each search key.

You can select any of the following operators:

- **begins with**
  - Returns records where your text matches the beginning of the field.
- **contains**
  - Returns records where your text matches a value anywhere in the field.
- **=**
  - Returns records where the field value matches your text exactly.
- **not=**
  - Returns records where the field value does not match your text.
- **<**
  - Returns records where the field value is less than the value you specified.
- **<=**
  - Returns records where the field value is less than or equal to the value you specified.
- **>**
  - Returns records where the field value is greater than the value you specified.
- **>=**
  - Returns records where the field value is greater than or equal to your value.
- **between**
  - Returns records where the field value is between the two values you enter. (A second field is opened on the search page so you can enter a second value.
- **in**
  - Returns records where the field value is one of the values listed in your criteria. Separate your values with commas.

Sorting Search Results

When a search returns a long list of records, you can sort the records by clicking on any underlined column header you want to sort by. You can sort only in ascending order. All of the returned records are sorted, not just the ones visible on the first page of results. However, if more than 300 records matched your criteria, only the first 300 can be displayed and sorted.

Getting Help from a PeopleSoft Page

If you need help while you are working in a PeopleSoft page, you can click the Help link at the top right of the page to open online help or a demo that shows you how to use the page. When you click the Help link, a new window opens. Click the Online help and demos in the UPK link on the displayed page to open the help player.

If multiple topics pertain to your page, they will all be listed in the Outline pane on the left side of the page. Click on the topic you want.

Notice that the steps of the procedure are listed in the Concepts pane. You can scroll through the steps to find the information you need, or you can play a demo of the procedure by clicking one of the playback mode buttons at the top of the page. Playback modes include:

- **See It!**
  - To play a demo that shows you what to do.
- **Try It!**
  - To play a demo that allows you to try it for yourself.
- **Know It!**
  - To test your understanding of what you need to do.
- **Do It!**
  - To coach you through the process in the production system, using your own data.

The Know It! and Do It! modes may not be available for every topic.

If you know the beginning of a process, but aren’t sure about a later step, you may be able to jump into the demo at a particular step. To jump into a demo, click the Jump directly to a selected step button next to the playback mode you want. If jump-in points have been defined, a list will be displayed. Click the link for the step closest to the one where you want to begin.

To close a demo without completing it, press the ESC key.

To see Try It demos of all the new features of PeopleSoft 9, click the What’s New link on the www.princeton.edu/pshelp page.
Customizing a Page

You can customize individual pages in PeopleSoft to reflect how you prefer to use them. For example, you can save the view settings for any multiple-row areas, or change the tab sequence of the fields. These settings do not affect how anyone else sees the page.

Changing the Default Page

You can change the page that is displayed first when you open the page group by clicking Customize Page link at the top right of the page, and selecting the Put this page in front (the current tab) when I come into this component checkbox.

Saving View All Settings

To save the view settings for any row grids on the page, make sure the grids are set the way you want them, and then click the Customize Page link. Select the Save the state of the View All settings on this page checkbox.

Changing the Tab Sequence

You can remove a field, button, link, or icon from the tab sequence, include it again, or move it up or down in the sequence.

Each field, button, link, and icon on the page is associated with a tab sequence number. These numbers are displayed above and to the left of the item on the customize page.

If a tab has been removed from the sequence, an X is substituted for the tab sequence number.

If, after changing the tab sequence, you want to restore the default, click the Restore Default button.

To change the tab sequence:

1. On the page you want to customize, click the Customize Page link.
2. To remove a tab stop:
   a) Make sure the Remove from Order radio button is selected.
   b) Click on the tab sequence number for each tab stop you want to remove.
3. To add an item to the tab sequence:
   a) Click the Include in Tabbing Order radio button.
   b) Click on the tab sequence place holder (the x) for the item you want to add. The sequence number will be the next number after the last number on the page.
4. To change a tab sequence:
   a) Select the direction in which you want to move the tab stop:
      Æ To tab to an item sooner in the sequence, click the Move Up In Order radio button.
      Æ To tab to an item later in the sequence, click the Move Down In Order radio button.
   b) Click the tab sequence number for the field you want to move up, continuing to click until the number reflects the appropriate position in the tab sequence.
5. Click OK to save your customizations.

Personalizations

In addition to customizing individual pages, you can personalize your navigation settings for all pages. For example, you can set PeopleSoft to skip over the calendar button, grid tabs, and lookup button (to name a few) by default when you are tabbing through the fields on a page.

Personalizations are organized into four categories:

- General Options, which include accessibility features, Excel grid download, and the time a page is held in cache.
- Regional designators, which control how the data is displayed for you. For example, the date is displayed in MMDDYY format by default, but you can display it in YYMMDD format on your pages, if you prefer. The display format does not affect how the data is actually stored.
- System and Application Messages, which allow you to turn off the Save warning displayed when you try to leave a page without saving your changes.
- Navigation Personalizations, which allow you to control the default tab stops on all PeopleSoft pages, rather than customizing individual pages.

To personalize PeopleSoft:

1. Click the My Personalizations link at the bottom of the main menu.
2. On the Personalizations page, locate the group of options you want to change, and click the Personalize Option button.
3. When the selected page is displayed, review the current settings, and select the desired Override Value for each setting you want to change.

   Note: For a brief explanation of each option, click the Explain link next to the Override Value field.

4. When you have selected all the overrides you want, click the OK button, and then the Return button.

5. To continue with your work, navigate to the desired page.

If you want to restore the defaults, you can click the Restore Defaults button on the Personalizations page to restore all defaults, or on a personalization category page to restore the category defaults.
Other Changes

Easier Printing from Your Screen

PeopleSoft 9 allows you to send a report directly to your screen without navigating through the Report Manager.

To send a report to your screen:
1. In the Process Scheduler, select a Type of Window and a Format of PDF.
2. Click the Run button to run the report or process. A small new browser window will open, with the report status displayed as the header.

The window is updated as the status changes. When the report has run successfully, it is displayed in Acrobat Reader in that same window. You can review the report online, or print it using the Acrobat Reader controls in the toolbar immediately above the report.

Working with PeopleSoft Grids

When a record includes multiple rows of the same fields, PeopleSoft displays those rows in a grid format. You can display a single row, a set number of rows, or all the rows (up to 300), and navigate through the rows using either the navigation header or the scroll bar.

Downloading to Excel

If you have personalized your PeopleSoft General Options to allow downloading to Excel, you can export a grid to an Excel spreadsheet by clicking the Download button in the navigation header for the grid.

Using Tabbed Grids

Sometimes, if a row includes more fields than will fit across a normal screen width, the row is broken into multiple tabbed sections. You can see each set of fields by clicking the appropriate tab. If you want to show all of the fields at once, you can click the Show all columns button.

You will then be able to scroll horizontally to see all the fields on one row. To return to the tabbed format, click the Show tabs button above the grid.

The Name Field

In previous releases of PeopleSoft, the Name field presented a person’s name in LastName, FirstName format. If you wanted to search for a person by name, you had to enter the name in this format, or use the First Name and Last Name fields, if they were available.

Now, when you use the Name field on the Find an Existing Value page, you must enter the value as FirstName LastName. If the person also has a middle initial, that, too, might be required.

To eliminate all question of the correct format, you can use the two fields, Name and Last Name, to search for a person:
1. Make sure the search operator is Begins with.
2. In the Name field, type all or part of the first name.
3. In the Last Name field, type all or part of the last name.