

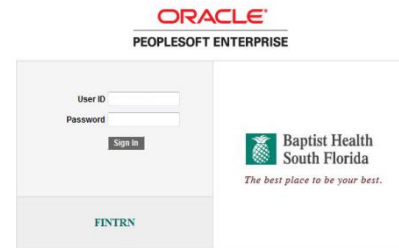
PeopleSoft Basics and Navigation Quick Reference

The PeopleSoft Internet Architecture is similar to browsing web pages and software is not installed on your computer. To access PeopleSoft, open your Internet browser from any computer connected to the BHSF Intranet.

Should you need help, every page in PeopleSoft will have a **Help** link. This link opens PeopleBooks which provides you with online access to all documentation related to PeopleSoft 9.1 applications.

Signing In

1. Access the PeopleSoft URL / link.
The URL/Link determines the PeopleSoft Database you want to access.
Example: FINTRN
2. Enter your BHSF **User ID** and **Password**.
Your User ID and Password are case sensitive.
3. Click the **Sign In** button.
The PeopleSoft online system will validate your User ID and Password. If invalid, the system will display an error message below the Sign In button. You'll need to reenter both the User ID and Password.

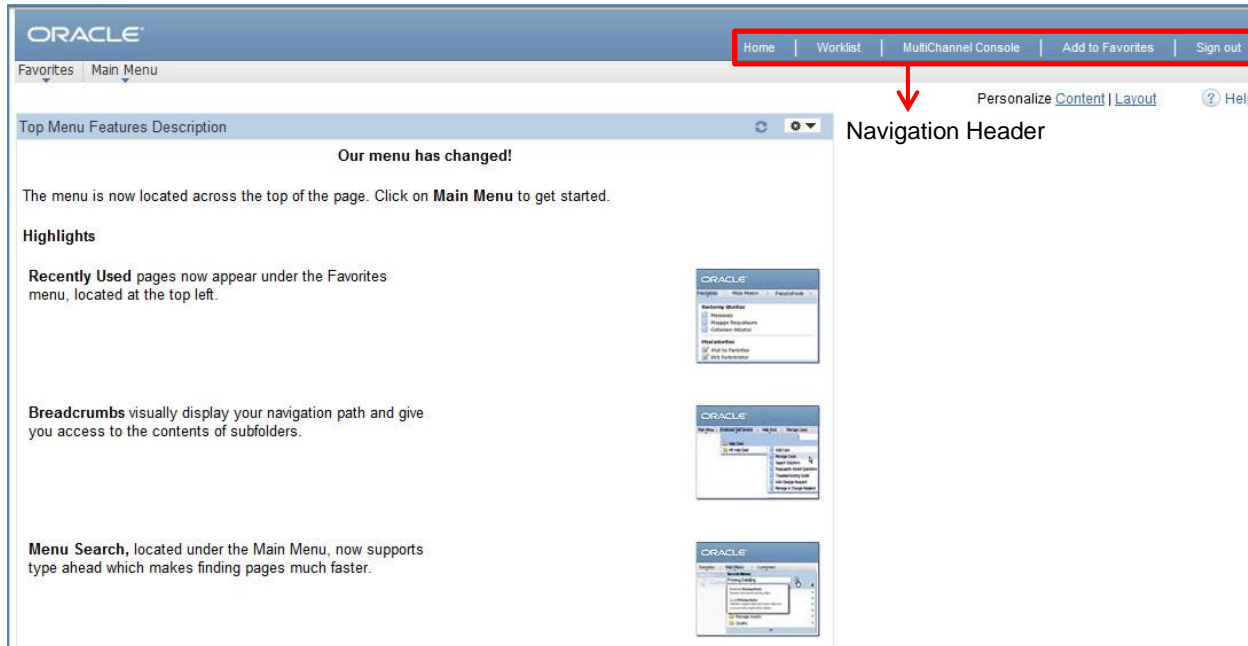


* For security purposes, the system automatically logs you off after **20** minutes of inactivity. Any data entered that is not saved after you have been logged off will be lost. Therefore, save your work on a regular basis.

Signing Out

Signing out when you are finished working disconnects you from the system and prevents unauthorized access. Always use the **Sign Out** link to log off of PeopleSoft. Do not use the close button in your browser to end your session.

Page Layout and Terminology

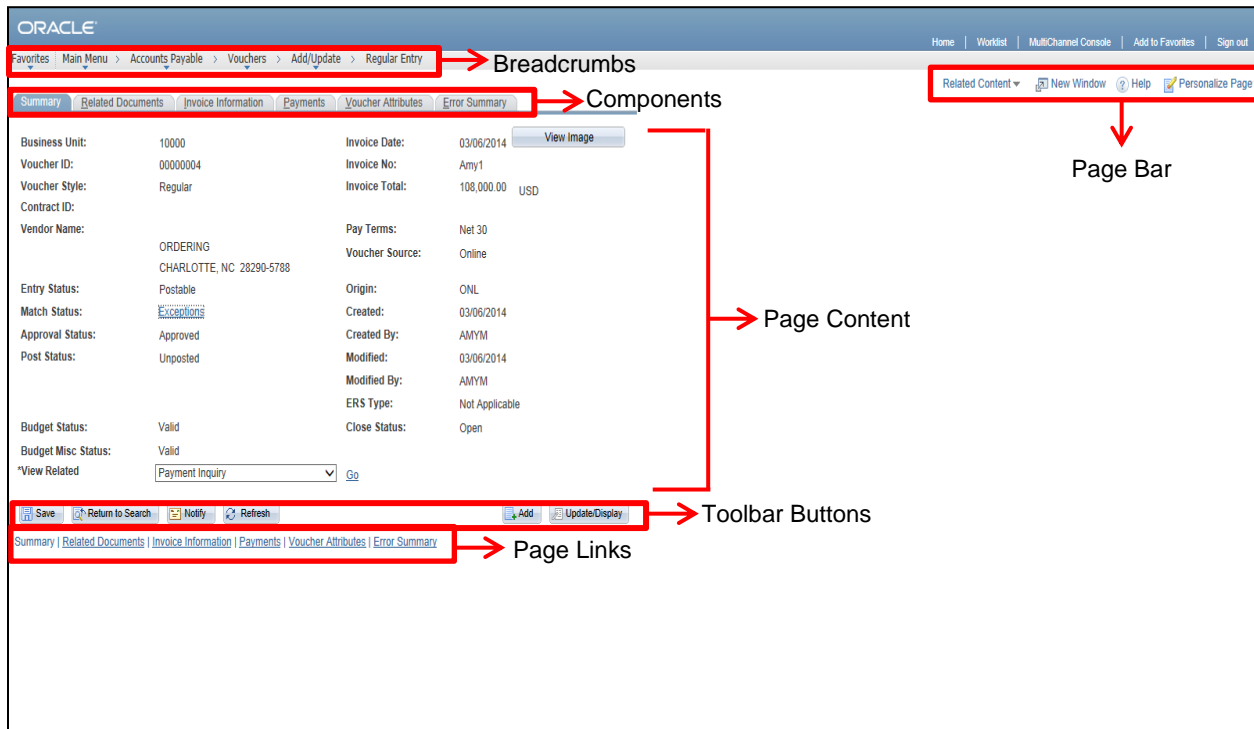


The **Navigation Header** is found at the top right of every page and includes several links:

- **Home** – Returns you to your home page.
- **Worklist** – Shows your workflow items, if any, with summary information. Also provides links to get more details about each item.

- **MultiChannel Console** – enables users defined as agents in PeopleSoft Multichannel Framework to access and manage tasks assigned to them.
- **Add to Favorites** – Allows you to bookmark the current component.
- **Sign Out** – Logs you out of PeopleSoft.

Main Menu - The Main Menu is located on the left side of your screen. It contains links to content references, enabling access to transaction pages. Links display in a hierarchical format.



Breadcrumbs - The navigation path that appears at the top of the page which lets you know where you are in the system.

Components - Related pages within the same window that need to be completed together. Some components contain only one page.

Page Content - Page content contains data entry fields, buttons, and other elements which display or permit update to table rows.

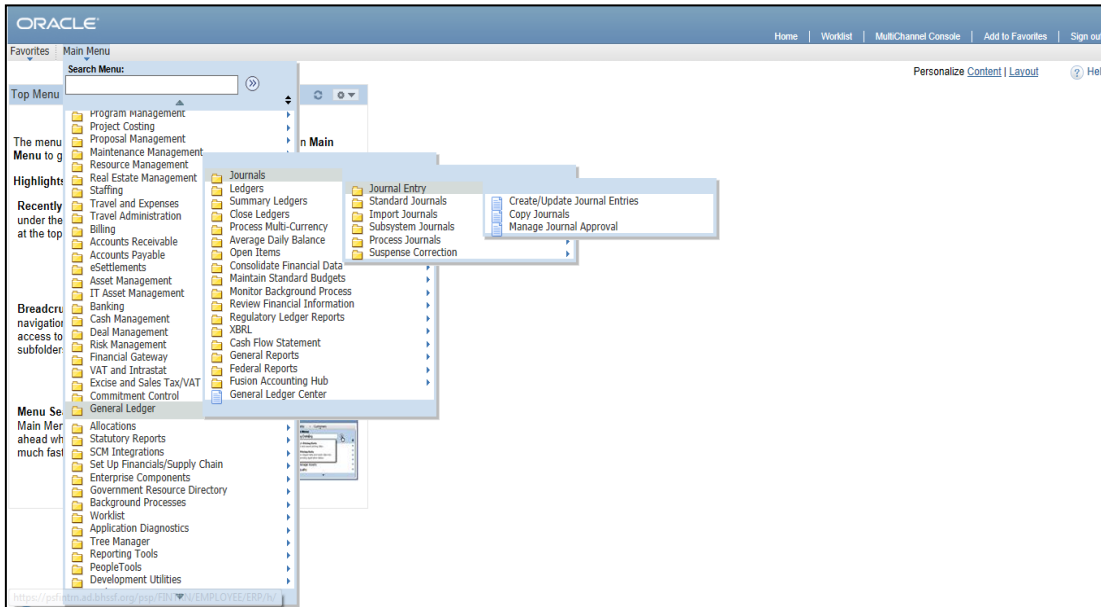
Toolbar Buttons - Toolbar buttons can include navigation buttons (to return to or view other records from a Search Results List), page navigation buttons (shortcuts for the currently displayed page), and page action buttons (to save or update data). If a button is greyed out, it is not available for selection.

Page Links - Links open windows and pages. You can click the links at the bottom of the page instead of selecting the page tabs to navigate between page components.

Page Bar - Series of links and buttons that appear when you are on a transaction page.

Navigating the Main Menu

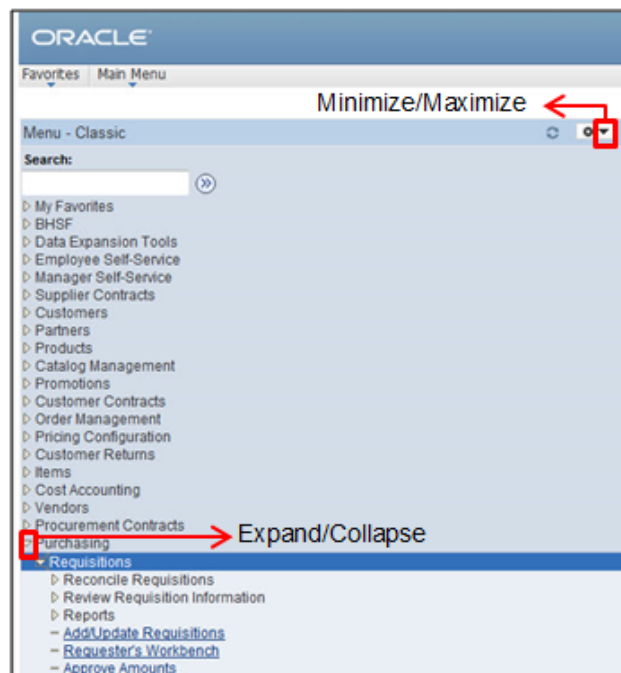
The main menu features drop-down navigation menus which are organized by business function. The drop-down menus contain folders that provide access to submenus and cascade to the side or direct links to pages. Your PeopleSoft security role will determine the menu options you can access.



Navigation using the main menu consists of a hierarchy of folders and content references.

You can click the arrow to expand or the arrow to collapse the folders.

Click the **Minimize/Maximize** button to hide the main menu. To view the menu again, click the **Minimize/Maximize** button.

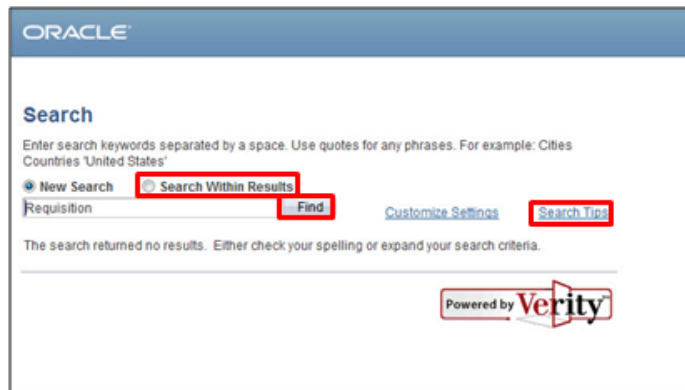


Menu Search Function

The search menu can be used to locate specific pages within the system. To narrow your search results, select the **Search Within Results** radio button option, then click the **Find** button.

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

Click the **Search Tips** link to see how to refine your search keywords.



Set personal preferences

With the PeopleSoft Portal and other licensed PeopleSoft portals, you can define and store your own portal homepages and specify preferences for layout and content.

The first time you log in to a PeopleSoft portal, you will see the default homepage for that portal until you define a personal homepage. You can do this by clicking on the **Personalize** links highlighted below.



Your PeopleSoft administrator determines which options you can modify on the Personalizations page. The personalization categories include:

- **General Options** – You can change the accessibility and multi-language settings.
- **Regional Settings** – You can personalize your date, time, and number formats.
- **System & Application Messages** – You can control the display of various system messages. You can choose whether or not you receive messages when confirming a save action and when you attempt to leave a transaction page without saving it first.
- **Navigation Personalizations** – You can set the default values for tabs and how the menu collapses. Icons and a drop-down list box with values are also included in the description.

Managing Favorites

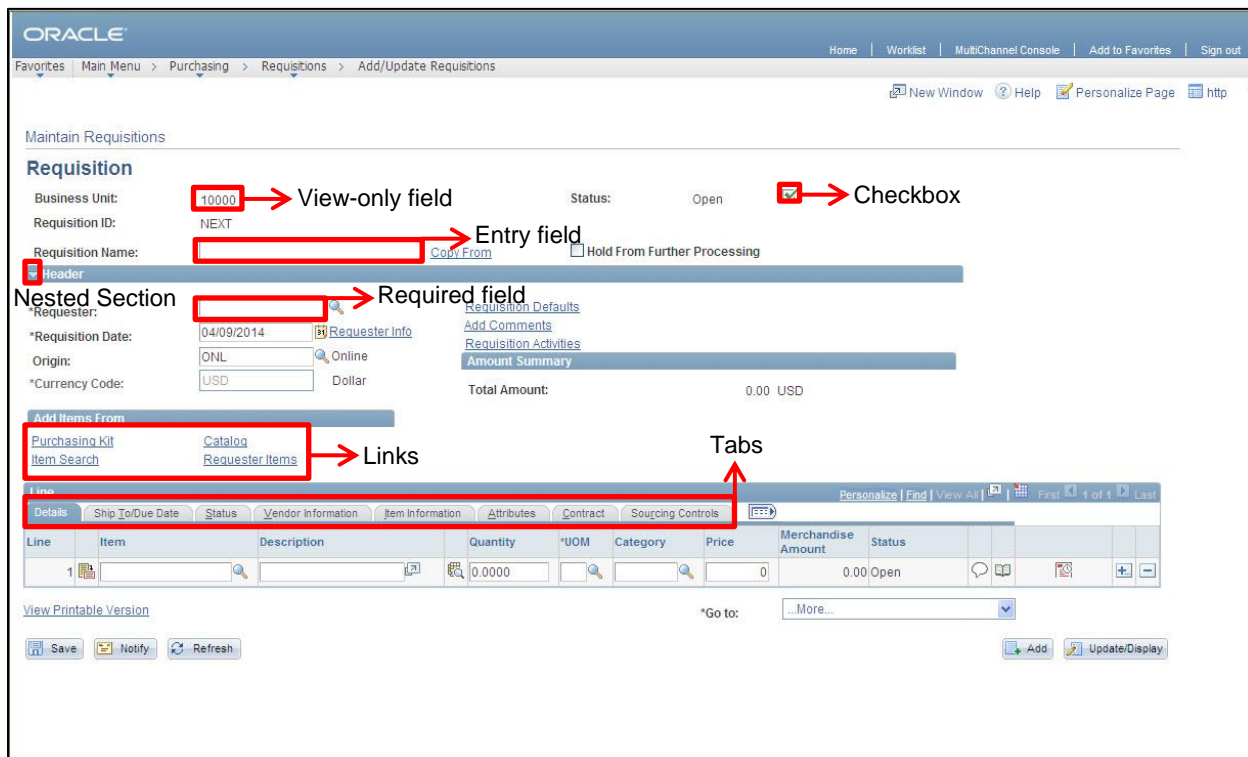
Favorites in a PeopleSoft application are like bookmarks in your regular browser. Because the Favorites link takes you directly to the destination, you save time navigating between components or pages.

Once you add a favorite, it is maintained under the **My Favorites** folder. You can view a list of recently accessed pages through the Recently Used list located on the Favorites menu.

To create a favorite, navigate to the component or page you want to add. Click the **Add to Favorites** link in the Navigation header. The link you have added is now under My Favorites.



Working with Data



The screenshot shows the Oracle Requisition system interface. Key elements are annotated as follows:

- View-only field:** A red box highlights the value '10000' in the Business Unit field.
- Entry field:** A red box highlights the 'NEXT' value in the Requisition ID field.
- Checkbox:** A red box highlights a checked checkbox in the Status field.
- Required field:** A red box highlights the 'Requester' field, which has an asterisk (*) indicating it is required.
- Links:** A red box highlights the 'Purchasing Kit' and 'Item Search' links in the 'Add Items From' section.
- Tabs:** A red box highlights the horizontal bar containing various tabs like 'Details', 'Ship To/Due Date', 'Status', etc.

Nested Section – Expandable/collapsible section on a page containing related information

Tabs – Transaction information segmented into smaller displayed areas containing information related to a specific topic/category

Links – Shortcuts to other pages related to a transaction

Entry field(s) – Open fields on a page used to enter specific transaction data

Required field(s) – An asterisk (*) in front of a data entry field indicates that the field is a required data entry field. Data must be entered into a required field to save. If you try to save the page before entering data into a required field, the field will turn red and an error message will appear on the page.

Default field(s) – View only fields displaying specific data associated with a user's security and permissions

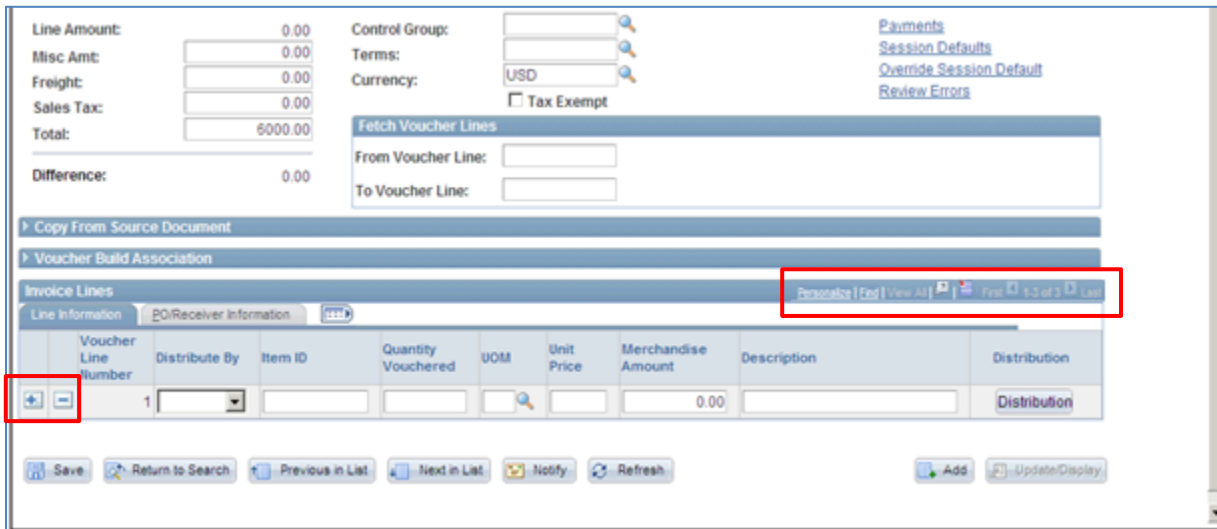
View-only field(s) – Data that cannot be changed on the current page

Checkbox – A small square box that enables an option. Click the box to add a check mark and enable the option.

Grids

On some pages, you may want some of the fields to repeat in order to enter multiple rows of data. For this purpose, PeopleSoft uses grids. With grids, you have the ability to add, edit, and view multiple occurrences of data for a group of fields on one page. Grids look similar to a spreadsheet with column headings, rows, and cells. The cells are equivalent to fields. Fields within a grid may be represented as edit boxes, drop-down list boxes, check boxes, and radio or prompt buttons.

Instead of using a traditional scroll bar to scroll through the rows of data in a grid, PeopleSoft uses navigation buttons and hyperlinks. Often, you will find these buttons and hyperlinks in the grid navigation header, with the exception of the **Add Row** and **Delete Row** buttons.



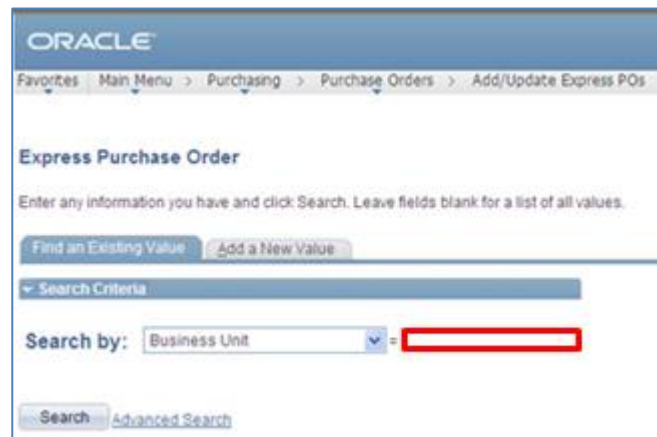
1. **Add Row button** – Inserts a new row of data.
2. **Delete Row button** – Deletes the current row of data.
3. **Personalize** – Takes you to the customization page for that grid, which enables you to sort by column, reorder columns, hide, and freeze columns.
4. **Find link** – Enables you to find a specific row of data.
5. **View All link** – Displays all rows of data on a page. When this feature is enabled, the link changes to View 1 so that you can return to the original setting.
6. **Download button** – Enables you to download the contents of a grid to a Microsoft Excel spreadsheet.
7. **First link** – Takes you to the first row of data. If you are already on the first row of data, the link appears grayed out.
8. **Previous Row arrow** – Navigates to the previous row of data.
9. **Number System for the Rows** – Shows the number of rows you are currently viewing.
10. **Next Row arrow** – Navigates to the next row of data.
11. **Last link** – Takes you to the last row of data.

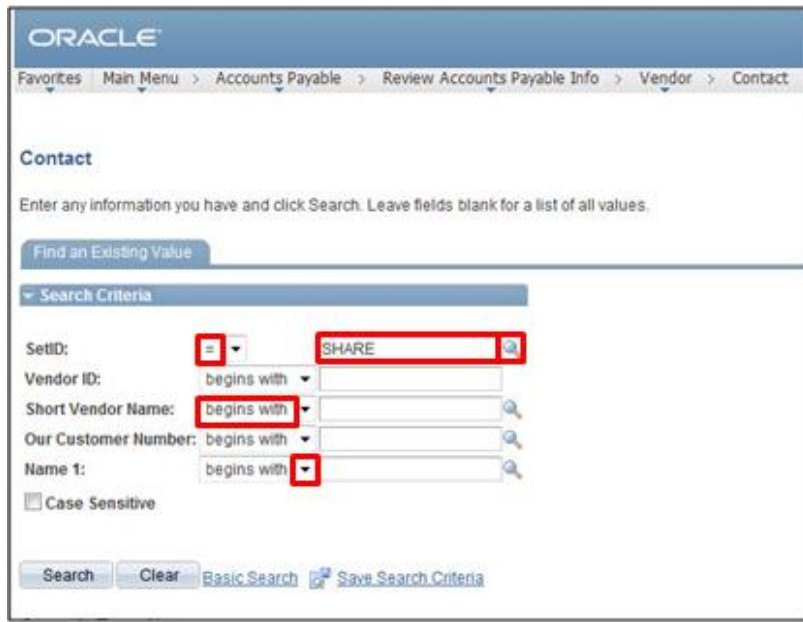
Searching for a Record

When you open a page or component, a search page appears, prompting you for the search keys needed to locate the data. There are two types of search pages: The basic search page and the advanced search page (default search option).

A **basic search** page (on the right) enables you to search by just one field at a time. You can perform a partial search by entering information in the search field (highlighted).

On the **advanced search** page, you can narrow your search by searching based on more than one field at a time and by using a variety of search operators. You can enter full or partial values for the key fields.





The screenshot shows the Oracle PeopleSoft 'Contact' search page. The breadcrumb trail is: Favorites > Main Menu > Accounts Payable > Review Accounts Payable Info > Vendor > Contact. The page title is 'Contact'. Below the title, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button. The 'Search Criteria' section includes:

- SetID: = (dropdown) SHARE (text field with lookup icon)
- Vendor ID: begins with (dropdown) (text field)
- Short Vendor Name: begins with (dropdown) (text field with lookup icon)
- Our Customer Number: begins with (dropdown) (text field with lookup icon)
- Name 1: begins with (dropdown) (text field with lookup icon)
- Case Sensitive

 At the bottom are buttons for Search, Clear, Basic Search, and Save Search Criteria.

The search criteria allow you to specify how you want PeopleSoft to match the criteria you enter to the values in the search field.

Operators are used to narrow search results and are provided for each search field. If you don't know any criteria for your search, you can leave the search fields blank and click the **Search** button to display a list of all records in the database. The search results show all rows matching your search criteria and the information is displayed as links.

Lookup button – Search for a value. You use the look up page to search for values to use in your search criteria.

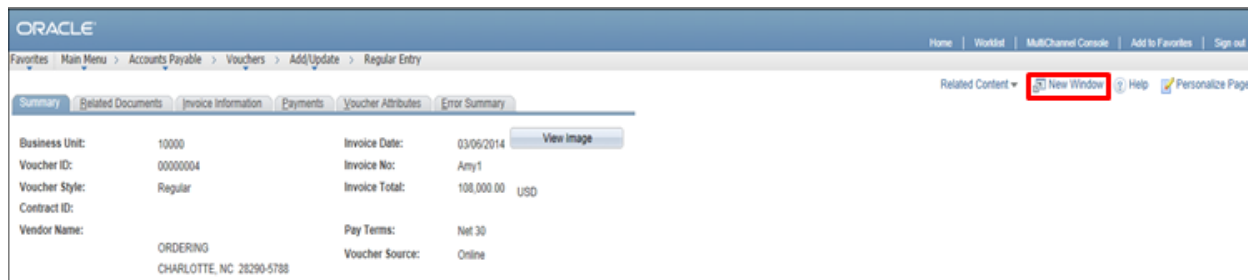
Drop-down arrow – Select values from a list.

Search field – Where you enter the value.

Begins with operator – This means the system searches for records that begin with your search criteria.

Equal sign (=) operator – This means the system searches for records in which the field value matches exactly your criteria.

Opening a Window



The screenshot shows the Oracle PeopleSoft 'Regular Entry' page for a voucher. The breadcrumb trail is: Favorites > Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry. The page title is 'Regular Entry'. The 'Related Content' section includes a 'New Window' link highlighted with a red box. Below this is a 'View Image' button. The main content area displays voucher details:

Business Unit:	10000	Invoice Date:	03/09/2014
Voucher ID:	00000004	Invoice No:	Amy1
Voucher Style:	Regular	Invoice Total:	108,000.00 USD
Contract ID:		Pay Terms:	Net 30
Vendor Name:	ORDERING CHARLOTTE, NC 28290-5788	Voucher Source:	Online

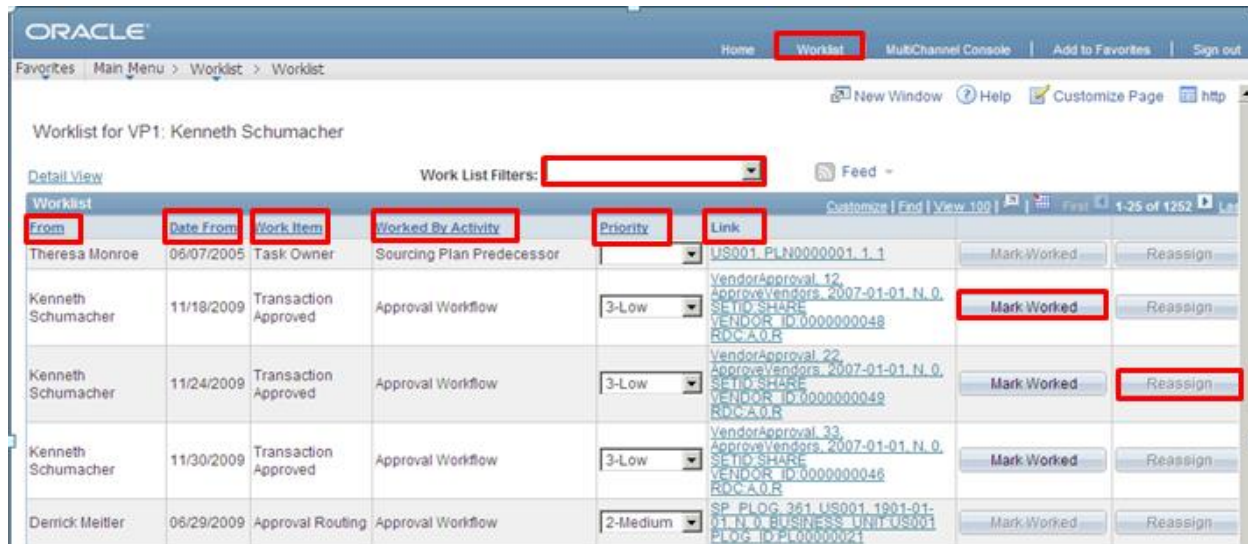
The **New Window** link in the page bar opens a new browser window, or child window. You can open as many windows as needed. From this window, you can view or enter data. The new window shows the current component page as well as the navigation to your current position.

However, before opening a new window, save any changes made in the current window. If the session times out while you are working in a new window, you may lose any unsaved changes.

Worklists

A worklist is an organized list of the work items awaiting your attention. Select items to work on from a worklist, and an item automatically returns the pages you need. This enables you to bypass any other navigational structure and to work directly from the worklist.

You can access the Worklist page by clicking the **Worklist** link in the universal navigation header.



From	Date From	Work Item	Worked By Activity	Priority	Link		
Theresa Monroe	06/07/2005	Task Owner	Sourcing Plan Predecessor		US001_PLN0000001.1.1	Mark Worked	Reassign
Kenneth Schumacher	11/18/2009	Transaction Approved	Approval Workflow	3-Low	VendorApproval_12 ApproveVendors_2007-01-01.N.0. SP_ID:SHARE VENDOR_ID:0000000048 RDC:A.O.B	Mark Worked	Reassign
Kenneth Schumacher	11/24/2009	Transaction Approved	Approval Workflow	3-Low	VendorApproval_22 ApproveVendors_2007-01-01.N.0. SP_ID:SHARE VENDOR_ID:0000000049 RDC:A.O.B	Mark Worked	Reassign
Kenneth Schumacher	11/30/2009	Transaction Approved	Approval Workflow	3-Low	VendorApproval_33 ApproveVendors_2007-01-01.N.0. SP_ID:SHARE VENDOR_ID:0000000046 RDC:A.O.B	Mark Worked	Reassign
Derrick Meitler	06/29/2009	Approval Routing	Approval Workflow	2-Medium	SP_PLOG_361_US001_1901-01-01.N.0.BUSINESS_UNIT:US001 PLOG_ID:PL00000021	Mark Worked	Reassign

Work List Filters – The list filters by work item. You can view only worklists to which you are assigned.

From column – Displays who triggered the work item.

Date From column – Displays when the work item was triggered.

Work Item column – Displays the types of activities that you need to carry out. You can sort to view multiple entries all with the same work item.

Worked By Activity – Shows the activity that needs to be worked by the worklist item.

Priority – Rank each worklist entry by importance by selecting a priority value. Priority values include “1” for high, “2” for medium, and “3” for low

Link – Access the page where you work the item. You cannot sort on the Link column. In addition, the Find and Download to Excel features won't work with this information.

Mark Worked button – You can use the Mark Worked button to remove an item from your worklist without actually accessing the target page. In general, you should not use this option unless the item is a simple notification and needs no follow-up. If you click the Mark Worked button, the item will be removed from your list.

Reassign button – You can use the Reassign button to forward the worklist item to another user and remove it from your list.

When you select an item from the worklist, the system transfers you to the page where you can perform the required task. When you have worked the item, it is automatically removed from your worklist.