



Basic Navigation for Financials 9_2

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Training Guide
Basic Navigation for Financials 9_2

Table of Contents

Basic Navigation for Financials 9_2	1
Logon Procedures	2
Logon to PeopleSoft 9.2 via Citrix	2
Navigating the PeopleSoft 9.1 Home Page and Applications	7
PeopleSoft 9.2 and the Internet Browser	7
Navigating Basics for PeopleSoft 9.2	9
Navigating Page Buttons and Hyperlinks in 9.2	66
Sign Out and Log Off Procedures.....	91
Sign Out of PeopleSoft and Log Off of Citrix Web	91
Appendix.....	97
Clear Browser Cache.....	97
Session Time Out	100
Print PeopleSoft 9.2 Pages.....	103

Basic Navigation for Financials 9_2

Welcome to the **PeopleSoft Financials 9.2 Basic Navigation** module! This module contains the information and tools needed to learn the basic concepts, terminology and procedures involved in accessing the PeopleSoft Release 9.2 databases and navigating the pages.

Goal

To have the skills and knowledge to navigate to the PeopleSoft Release 9.2 databases, navigate the pages and perform the objectives listed below.

Participant Objectives

At the end of this module you will be able to...

1. Logon to PS Desktop via Citrix.
2. Open the PS9.1 Launcher to select a PeopleSoft Database.
3. Navigate PeopleSoft 9.2 menu pagelet and pages.
4. Use page components and elements including, methods to move between pages, buttons and hyperlinks, view multiple rows of data on a page, open a New Window, add and delete rows of data on a page and save data.
5. Search for records in PeopleSoft 9.2 using the Search page and Action Types.
6. Properly Sign out of PeopleSoft 9.2 and Log off Citrix.
7. Clear Browser Cache to improve computer response time.
8. Print PeopleSoft 9.2 Pages.
9. Handle Session Time Outs.

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Basic Navigation for Financials 9_2

Logon Procedures

Logon to PeopleSoft 9.2 via Citrix

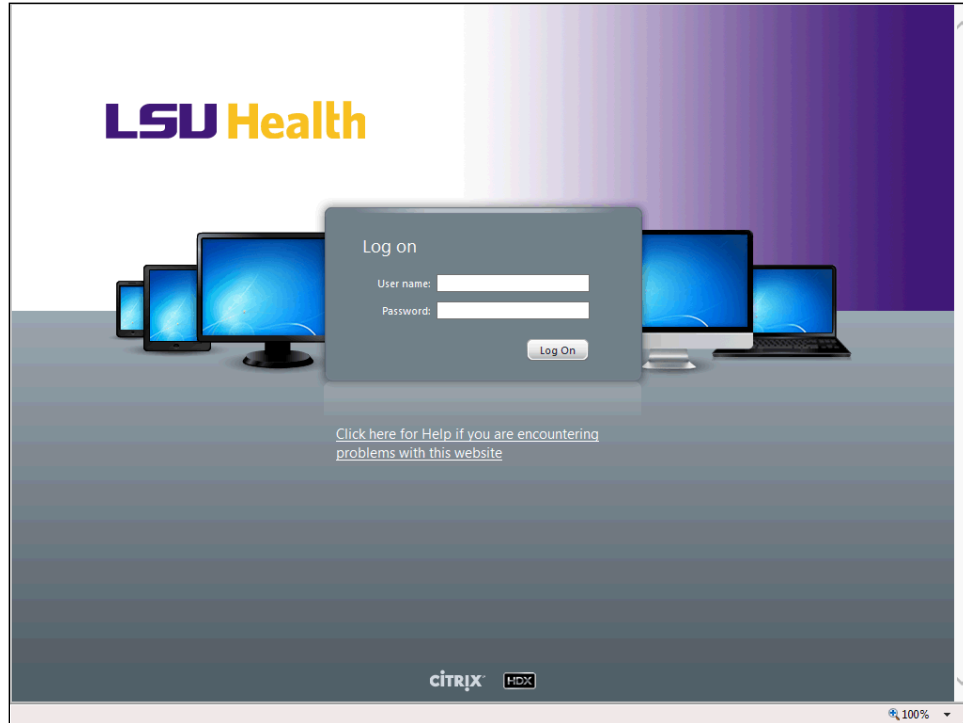
Procedure

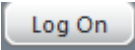
In this topic you will learn how to:

- **Log on to Citrix Web (LSU Health Sciences Logon);**
- **Access PS Desktop via Citrix;**
- **Open the PS9.1 Launcher to access PeopleSoft;**
- **Select a PeopleSoft Application, Database and Domain;** and
- **Access the PeopleSoft 9.2 Home page.**



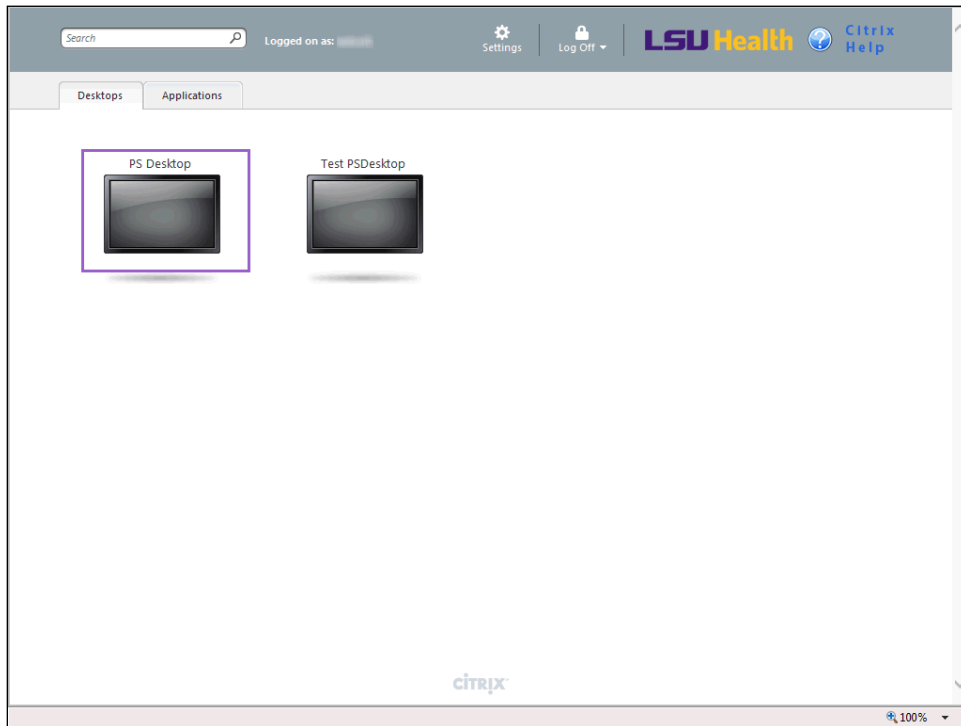
Step	Action
1.	Double-click the LSU Health Sciences Center - Logon button.



Step	Action
2.	Enter the desired information into the User name: field. Enter " Your LSUHSC User Name ". <i>NOTE: The User name field is not case sensitive.</i>
3.	Enter the desired information into the Password: field. Enter " Your LSUHSC Password ". <i>NOTE: The Password field <u>is</u> case sensitive and must be entered the way the user created it.</i>
4.	Click the Log On link. 

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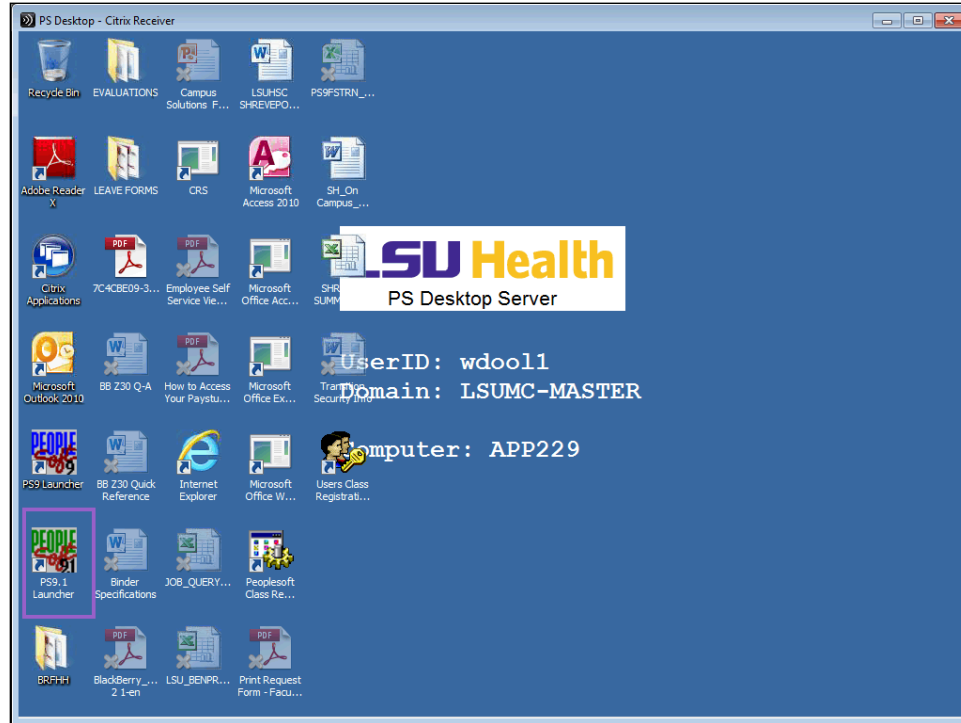
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Step	Action
5.	<p>Click the PS Desktop button.</p> 

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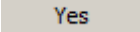
Basic Navigation for Financials 9_2



Step	Action
6.	<p>Double-click the PS9.1 Launcher button.</p> 
7.	<p>From the LSUHSC PeopleSoft 9.1 Launcher, you will need to select the following:</p> <p>PeopleSoft System: Financials</p> <p>Database:</p> <ul style="list-style-type: none"> • PS9.2 Financials Production (PS9FSPRD) to enter data; • PS9.2 Financials Reports (PS9FSRPT) to view data and run reports or queries; • PS9.2 Financials Sandbox (PS9FSSND) to practice using the system. <p><i>NOTE: Anything entered into the Sandbox Database <u>will not</u> transfer to another database.</i></p> <p>Application: PeopleSoft</p>
8.	<p><i>NOTE: In this exercise the PS 9.2 Financials Training (PS9FSTRN) database will be used for training purposes only. Users will access the PS 9.2 Financials Production (PS9FSPRD) database when entering information into the system.</i></p>

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Basic Navigation for Financials 9_2

Step	Action
9.	Click the Start button. 
10.	A Warning Message displays when accessing any database other than Production to remind users any information entered into the database will be lost and not transfer over to Production. Click the Yes button. 
11.	This completes <i>Logon to PeopleSoft via Citrix and the PS9.1 Launcher</i> . End of Procedure.

Navigating the PeopleSoft 9.1 Home Page and Applications

PeopleSoft 9.2 and the Internet Browser

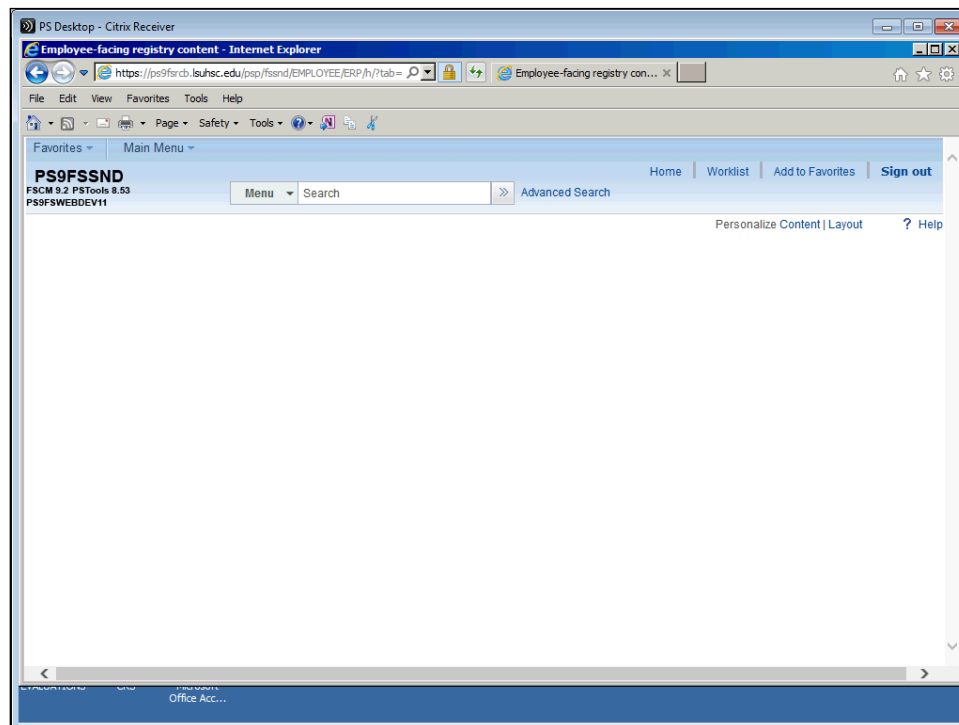
Procedure

In this topic you will learn how to:

- Expand the PeopleSoft 9.2 Workspace and
- Use the Internet browser buttons while in PeopleSoft 9.2 pages.



The navigational structure of PeopleSoft 9.2 consists of menus, components (or groups of pages) and pages. You will use Menu Pagelets and Breadcrumbs to navigate. Using these elements, you will be able to enter new data, change, delete and modify existing data, depending on your security access. The new terminology is in keeping with web pages on the internet. PeopleSoft 9.2 is a web-based application. Users who have done any browsing of web pages on the internet may find that the new PeopleSoft Internet Architecture is a simple, intuitive way of working with the database.



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Basic Navigation for Financials 9_2

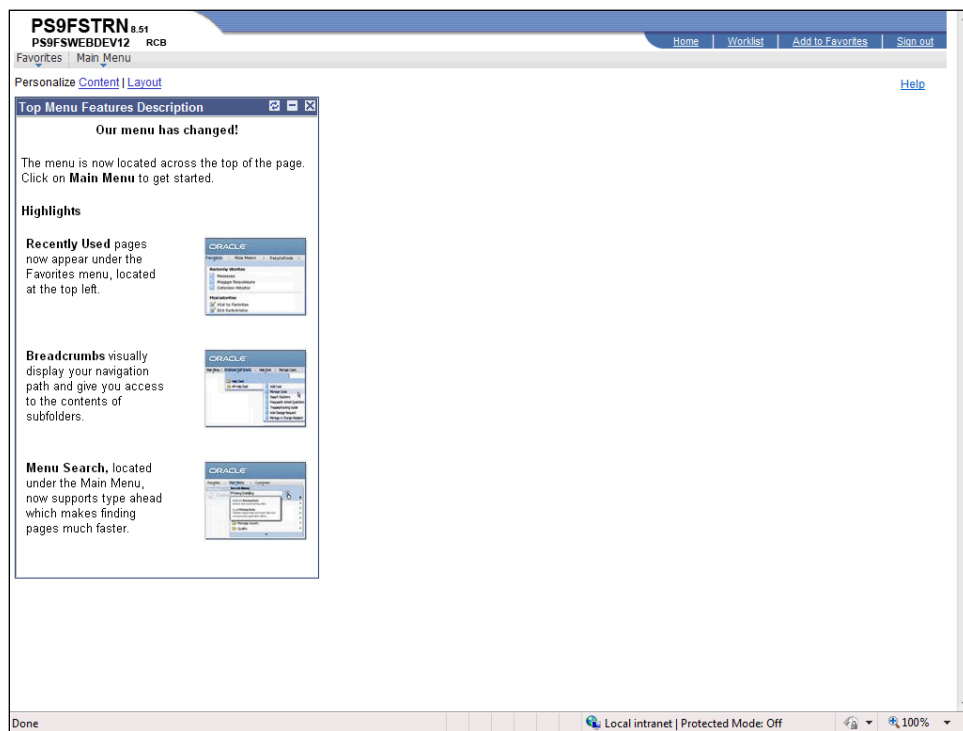
Step	Action
1.	<p>You can press the [F11] function key on your keyboard to expand your workspace. This will hide the browser (the Back and Forward Buttons, the Address bar, and the Command Bar).</p> <p>Press [F11].</p>
2.	<p>Point to the top of the page view any of the hidden browser features. This is optional.</p>
3.	<p>View the Back and Forward Buttons, the Address Bar and the Command Bar.</p> <p><i>NOTE: The Back and Forward buttons on the browser should <u>NEVER</u> be used in PeopleSoft.</i></p>
4.	<p>Internet Browser Buttons:</p> <p>Refresh Button: The Refresh button reloads PeopleSoft in its default state (i.e. returns you to the Home list of menus).</p> <p>Stop Button: The Stop button will not cancel the loading of PeopleSoft pages.</p> <p>Print Button: The Print button can be used to print PeopleSoft pages. Pages can also be printed by selecting File, Print on the browser menu bar.</p>
5.	<p>Press the [F11] function key on your computer keyboard to restore your workspace to the original view.</p> <p>Press [F11].</p>
6.	<p>This completes <i>The PeopleSoft 9.2 Home Page and Internet Browser</i>. End of Procedure.</p>

Navigating Basics for PeopleSoft 9.2

Procedure

In this topic you will learn how to:

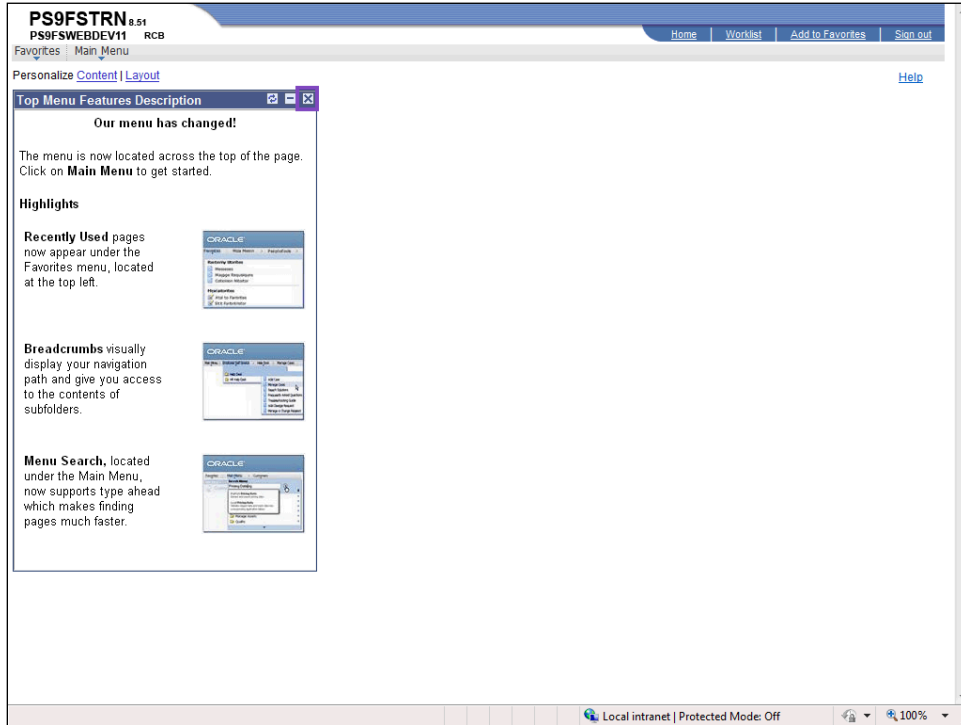
1. Remove the Top Menu Features Description pagelet.
2. Navigate using the Main Menu and Breadcrumbs.
3. Turn features on and off, such as the Type Ahead feature, using My Personalizations.
4. Arrange menu options in Descending, Process or Alphabetical order using Sort.
5. Utilize the Personalize Content and Search options.
6. Add pages to and delete pages from My Favorites, and navigate using Recently Used options.
7. Personalize your home page using the Layout link.



Step	Action
1.	The Top Menu Features Description box will display when you enter the 9.2 database. It outlines basic changes made within the system and will remain on the page until removed.

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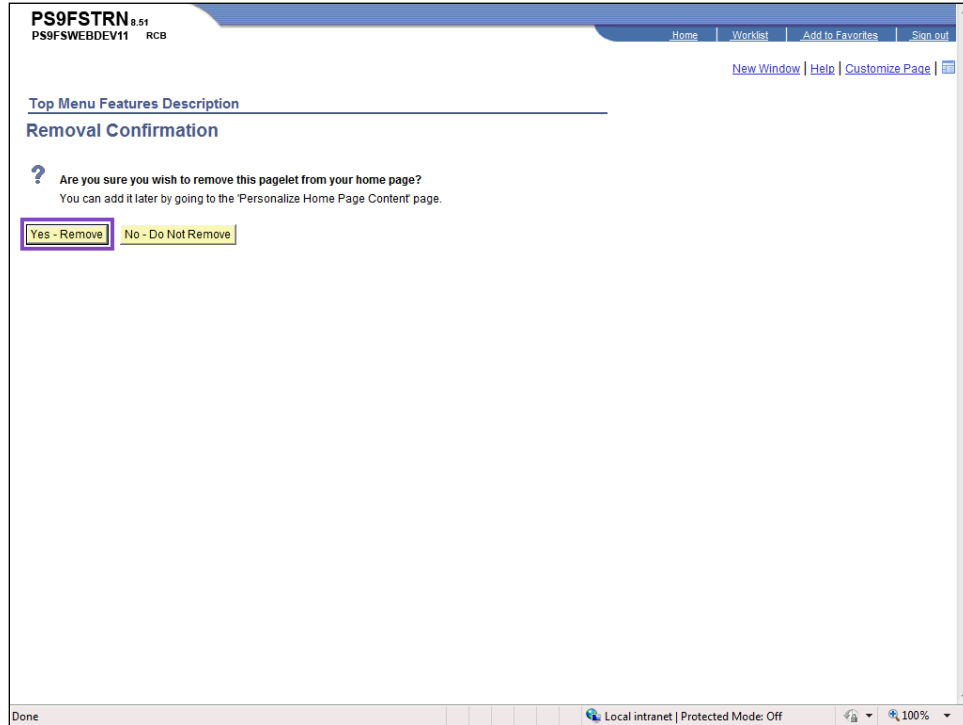
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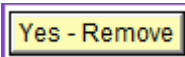


Step	Action
2.	Click the Remove Top Menu Feature Description button. 

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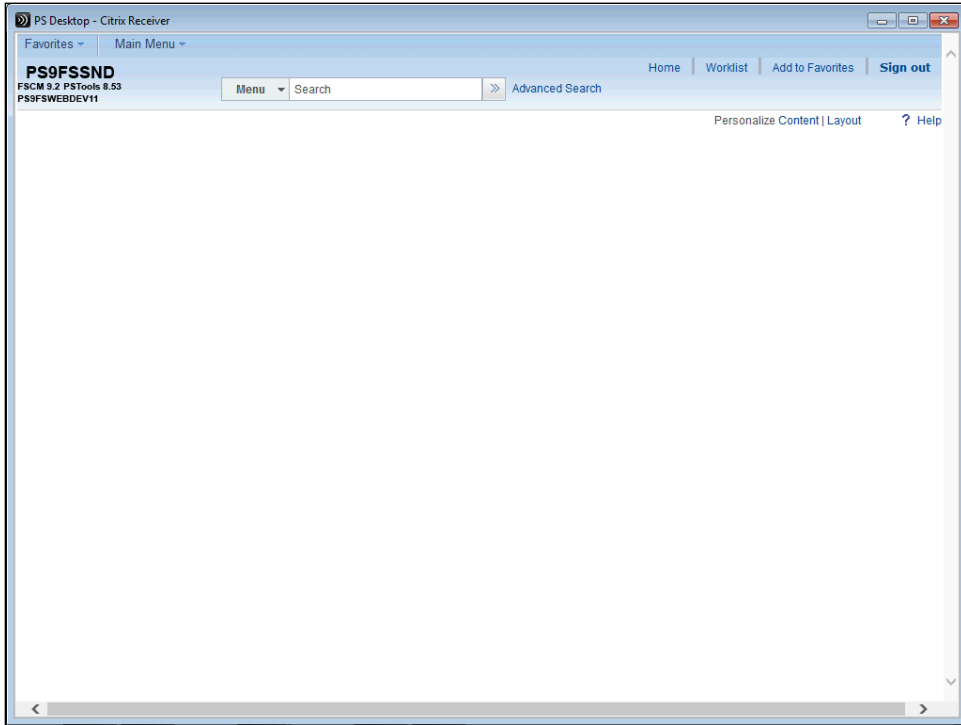
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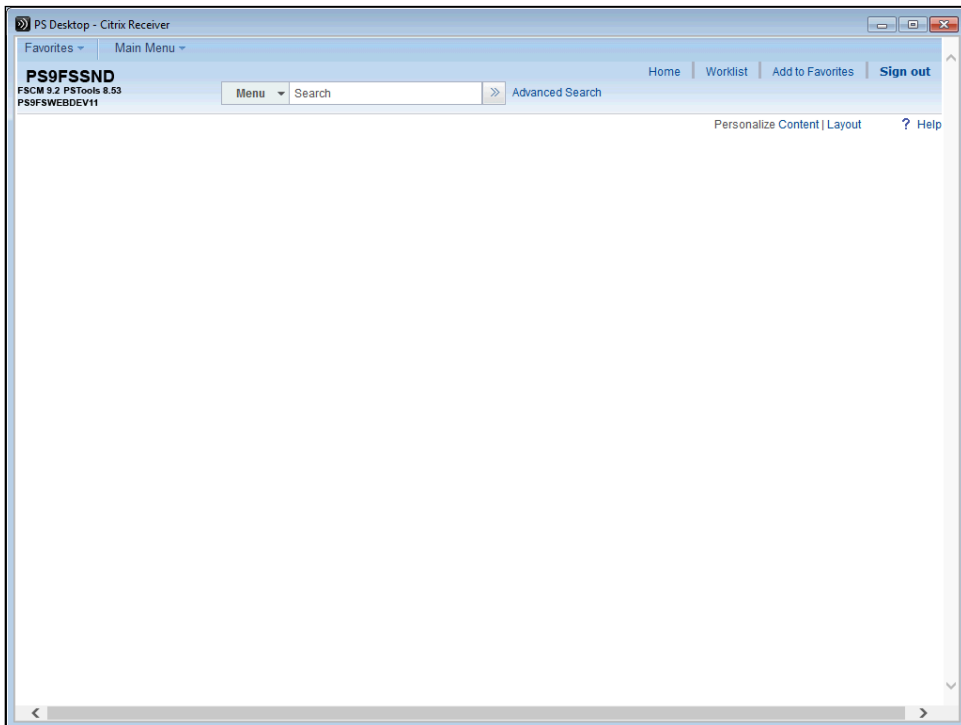
Step	Action
3.	Click the Yes - Remove button. 

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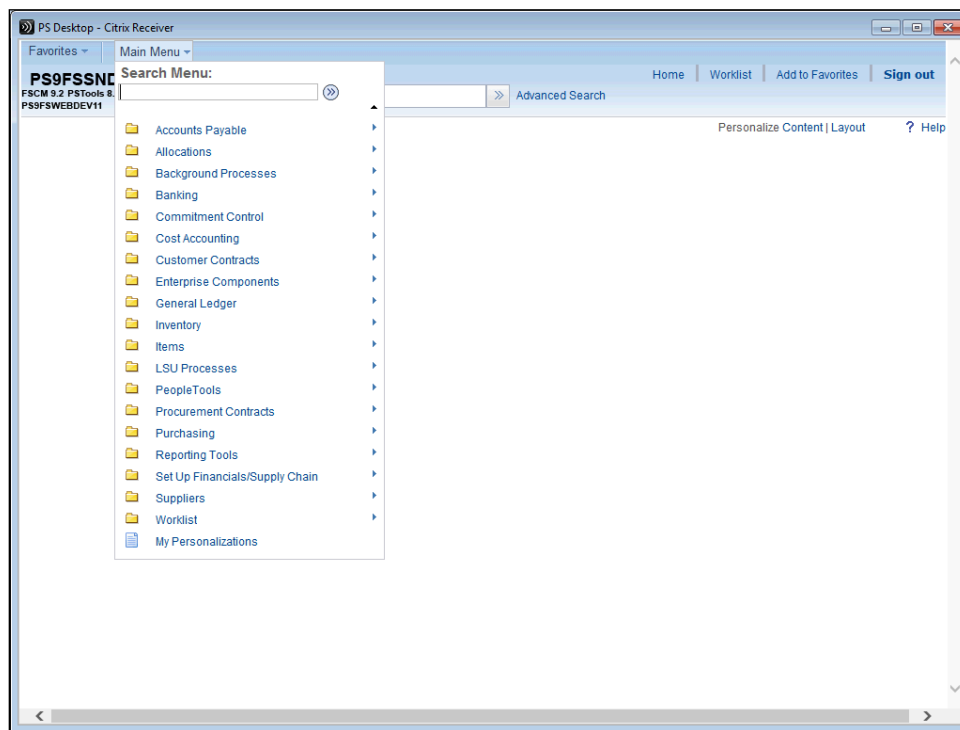
Basic Navigation for Financials 9_2



Step	Action
4.	The Top Features Menu Description box has been removed from the Home page.



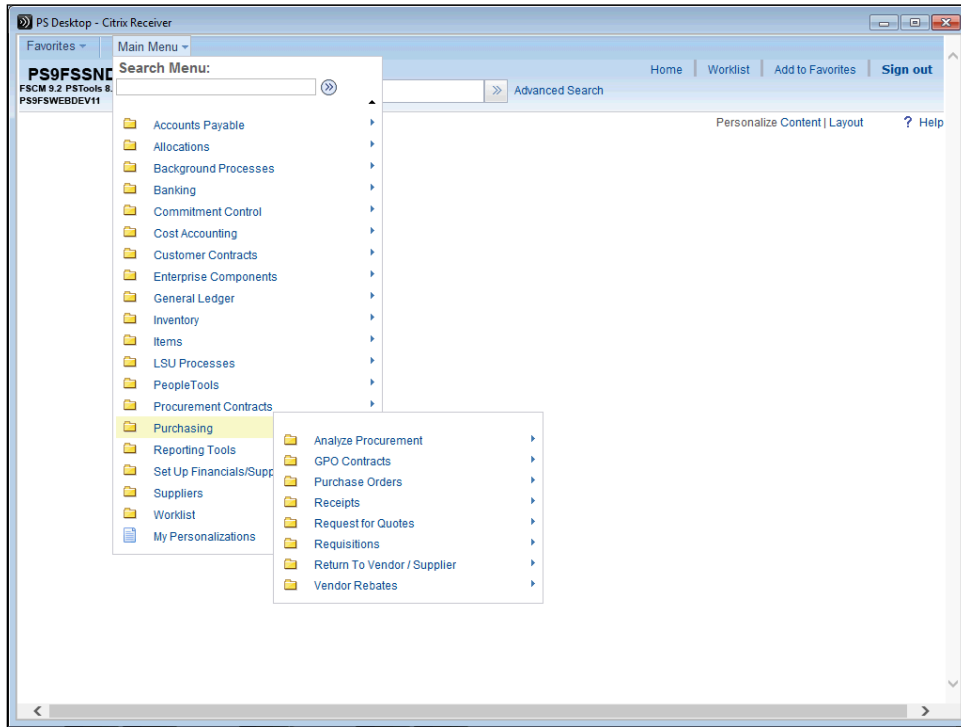
Step	Action
5.	<p>Navigating in 9.2</p> <p>The menu navigation for 9.2 has changed to drop-down navigation menus. The drop-down navigation is a more intuitive way of accessing information in the database. Users will click the Main Menu option to open a series of cascading menus.</p> <p>Click the Main Menu button.</p> <p style="text-align: center;">Main Menu</p>



Step	Action
6.	<p>The drop-down menus contain folders that provide access to submenus and cascade to the side, or direct links to pages. Whenever you see a menu item with a yellow folder next to it, clicking on a menu item name next to the folder will open another cascading menu list.</p> <p><i>NOTE: Clicking on the folder to the left of a menu item name will open the standard navigation page that displays folder options in a graphical format. This will be demonstrated later in this section.</i></p> <p>Click the Purchasing menu item name.</p> <p style="text-align: center;">Purchasing ▶</p>

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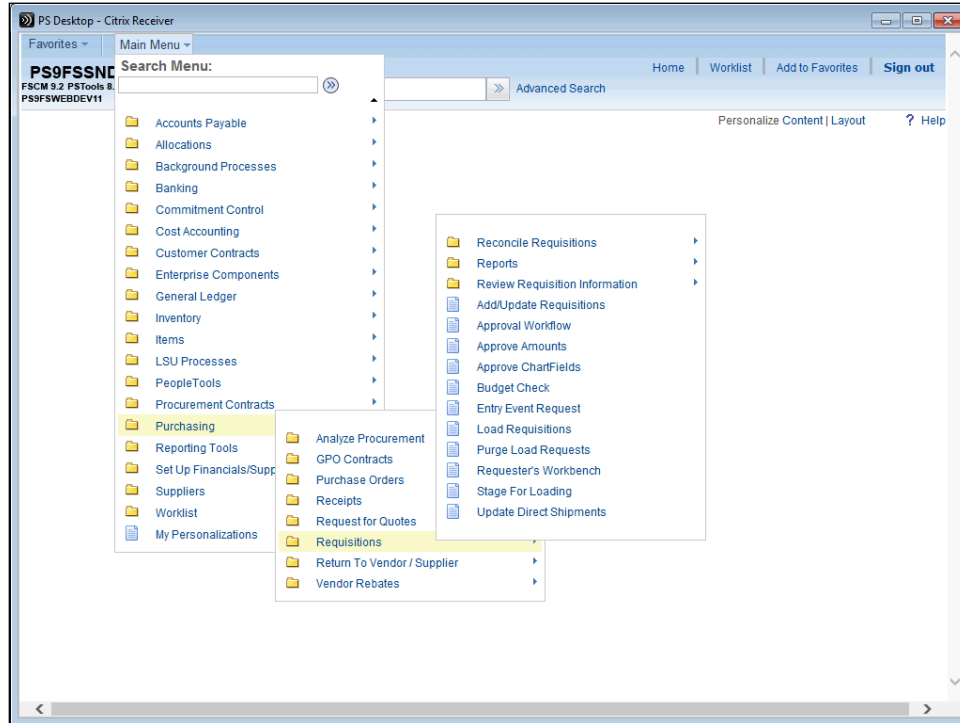
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Step	Action
7.	<p>Another cascading menu displays.</p> <p>Click the Requisitions menu item name.</p> <p>Requisitions ▶</p>

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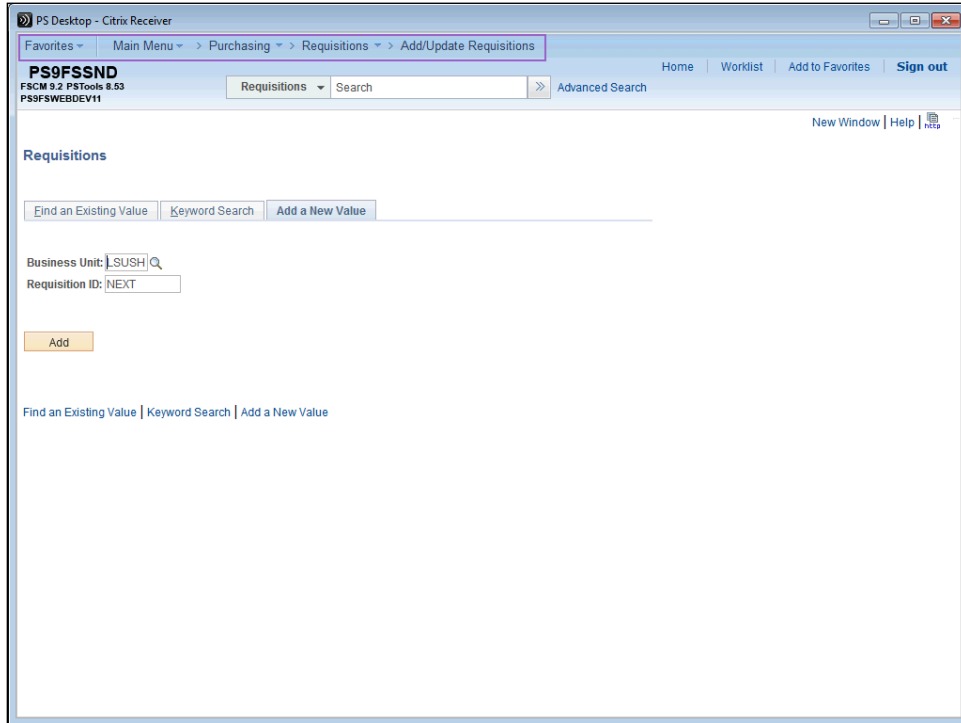
Basic Navigation for Financials 9_2



Step	Action
8.	<p>Whenever you see the icon that looks like a sheet of paper, clicking on the menu item name next to it will open a search or transaction page. The search or transaction page is where you would start your process. In this example it would be the search or transaction page for the Add/Update Requisitions process.</p> <p>Click the Add/Update Requisitions menu.</p> <p>Add/Update Requisitions</p>

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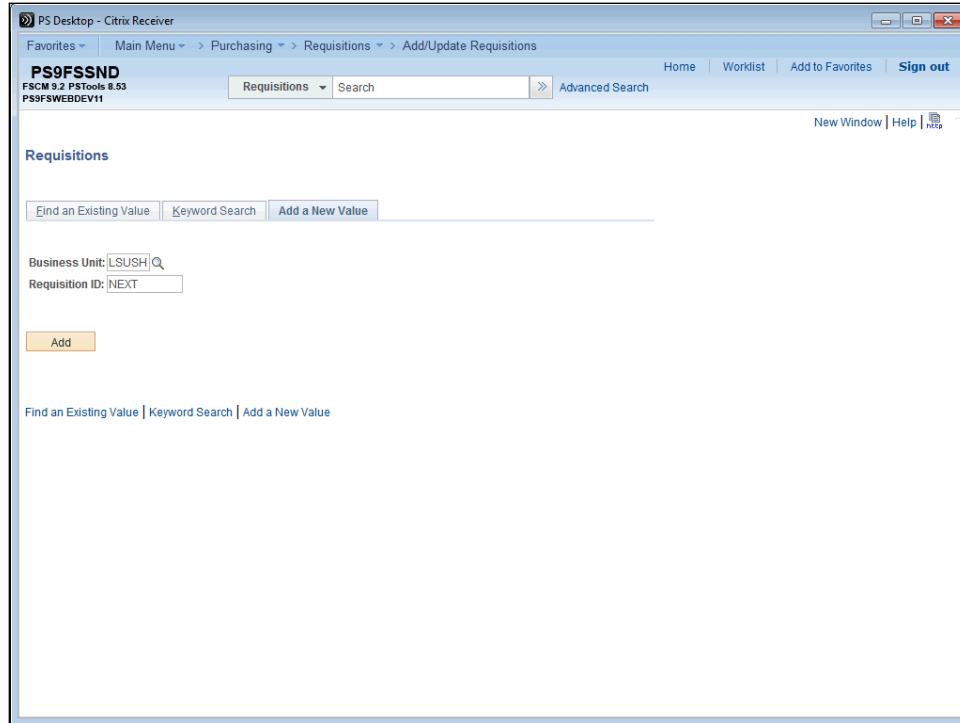
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Step	Action
9.	Breadcrumbs As you navigate, your navigation path appears across the top of the page. The navigation path is referred to as breadcrumbs and let you know where you are in the system.

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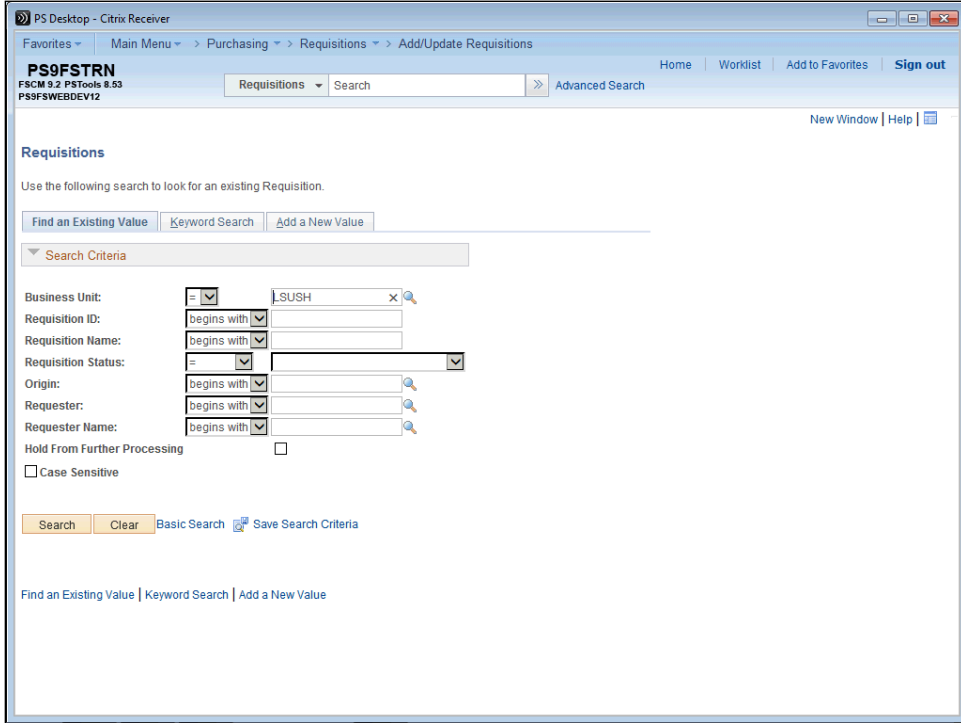
Basic Navigation for Financials 9_2



Step	Action
10.	<p>Click on any breadcrumb option to view additional navigational choices.</p> <p>Click the Requisitions button.</p> <p>Requisitions</p>
11.	<p>The Requisitions drop-down menu displays. Simply click on the menu item option to which you choose to navigate.</p>

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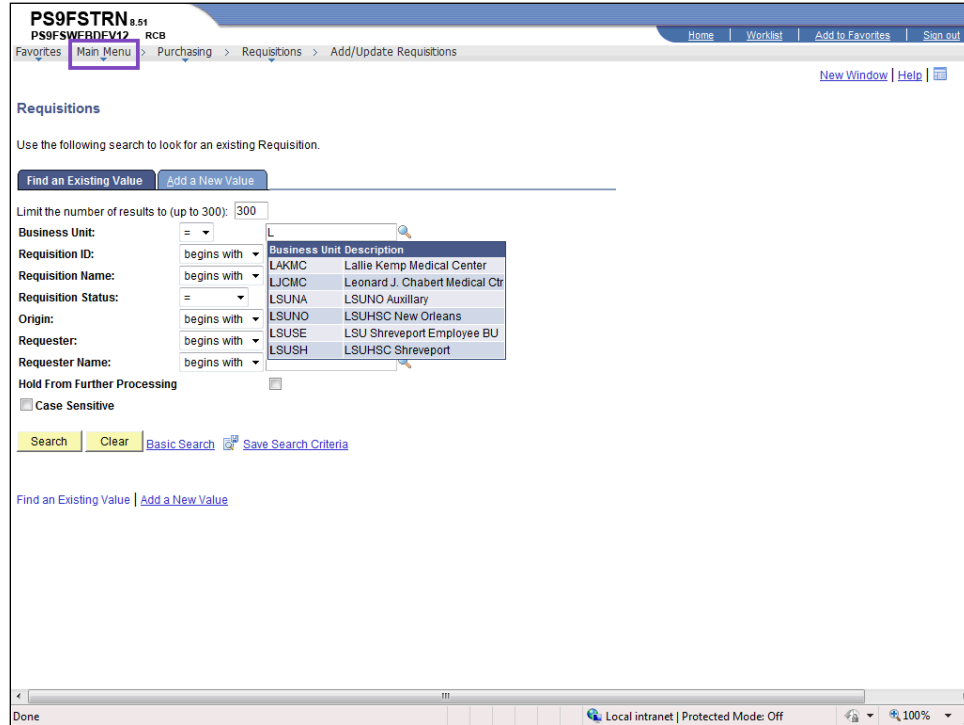
Basic Navigation for Financials 9_2



Step	Action
12.	<p>The Type Ahead Feature</p> <p>The Type Ahead feature provides a list of suggestions to help narrow your search as you enter information into various prompt or lookup fields. If the Type Ahead feature is turned on, as you enter data into a field, related options will display automatically.</p> <p><i>NOTE: The Type Ahead feature is defaulted to off when accessing the system. Users will have to turn the Type Ahead feature on if they wish to use it.</i></p> <p>Enter the desired information into the Business Unit field. Enter "L".</p>

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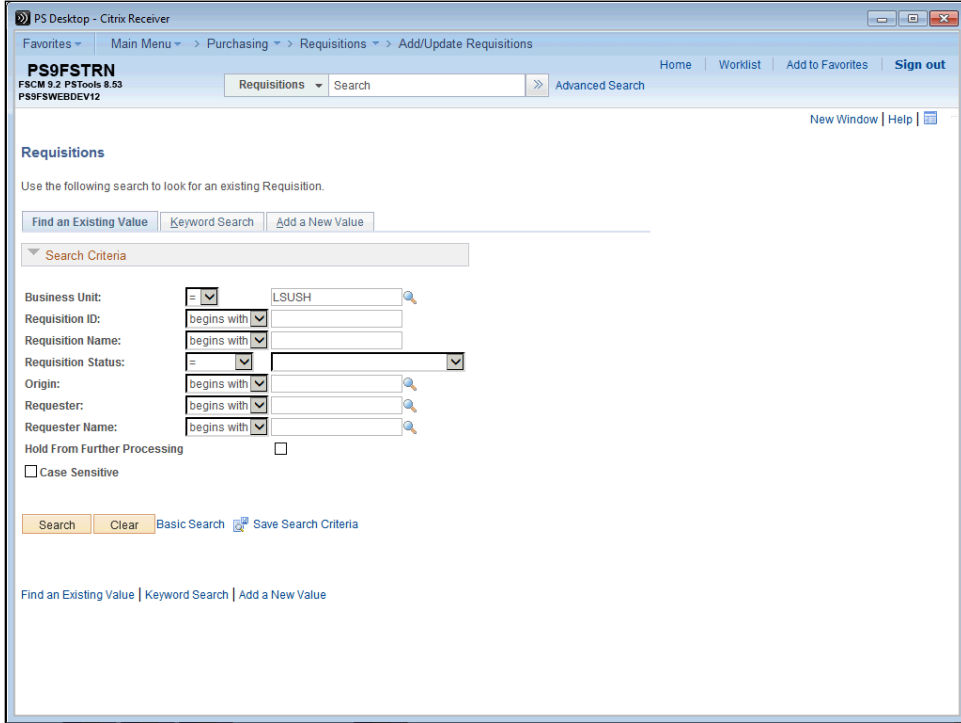
Basic Navigation for Financials 9_2



Step	Action
13.	<p>A list of options displays.</p> <p>If the option you need displays in the list, simply click on it and the system will default it into the field.</p>

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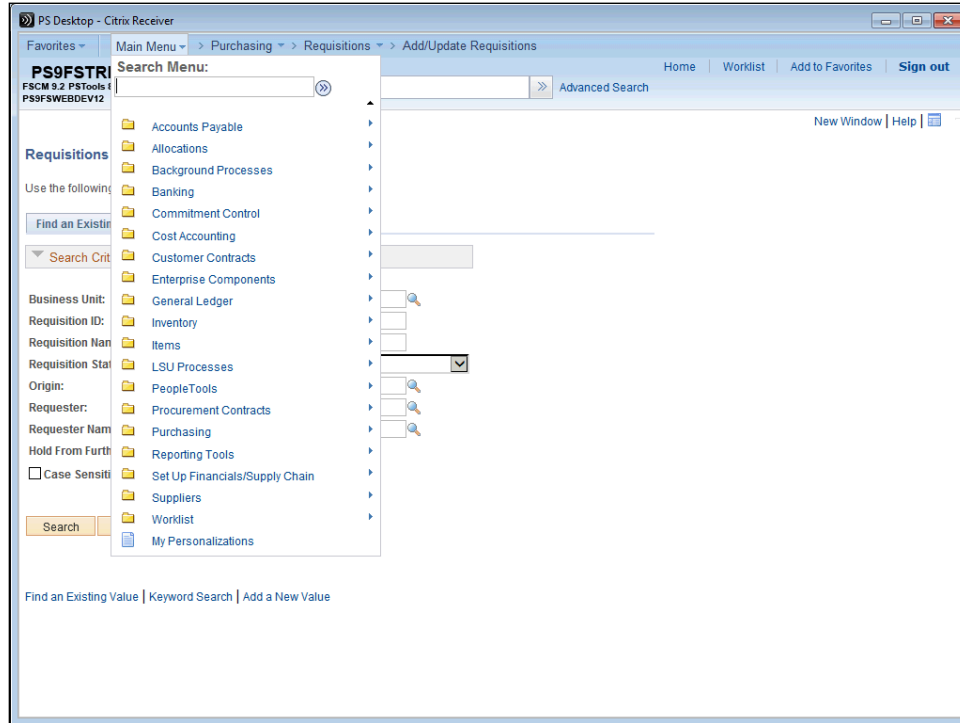
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Step	Action
14.	<p>Turning the Type Ahead Feature On and/or Off</p> <p>Users can turn the Type Ahead feature on and/or off using the My Personalization option.</p> <p>Click the Main Menu button.</p> <p>Main Menu</p>

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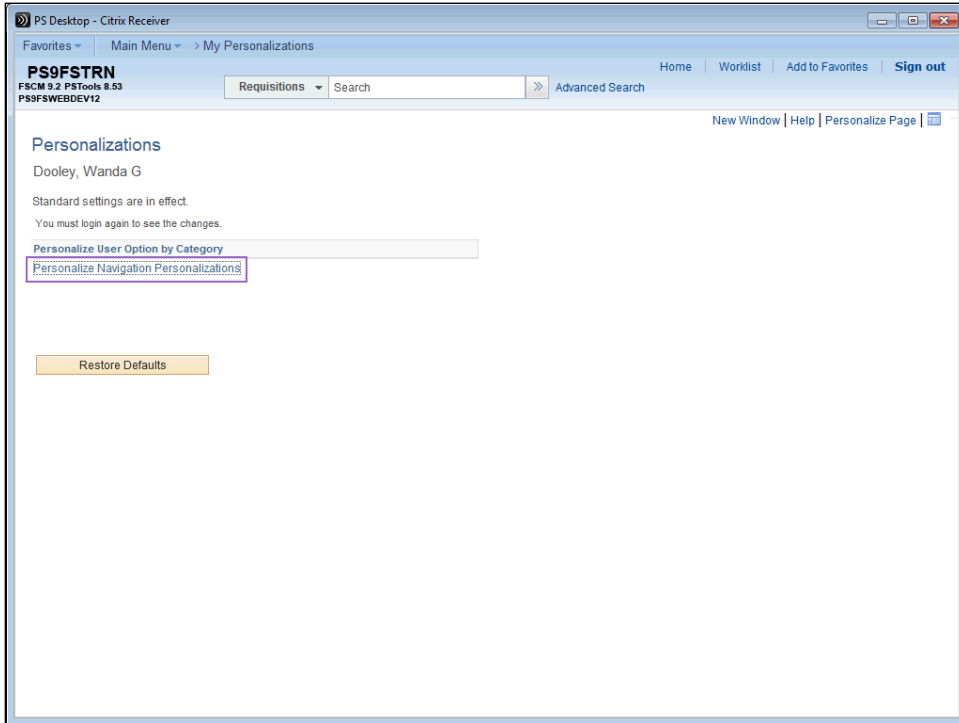
Basic Navigation for Financials 9_2



Step	Action
15.	Click the My Personalizations menu. My Personalizations

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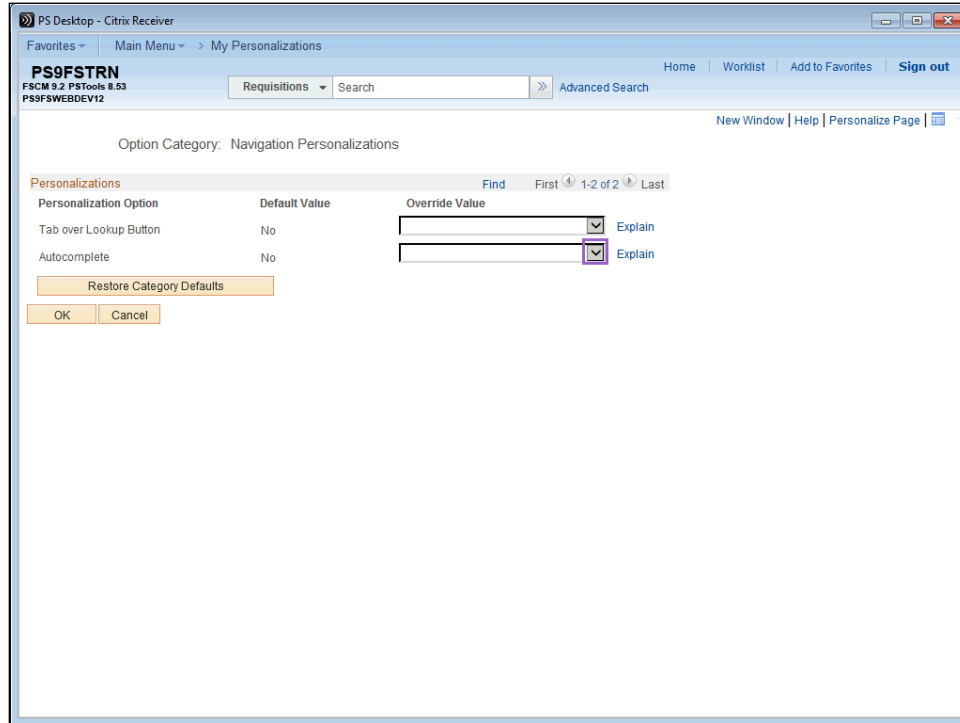
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Step	Action
16.	Click the Personalize Navigation Personalizations link. Personalize Navigation Personalizations

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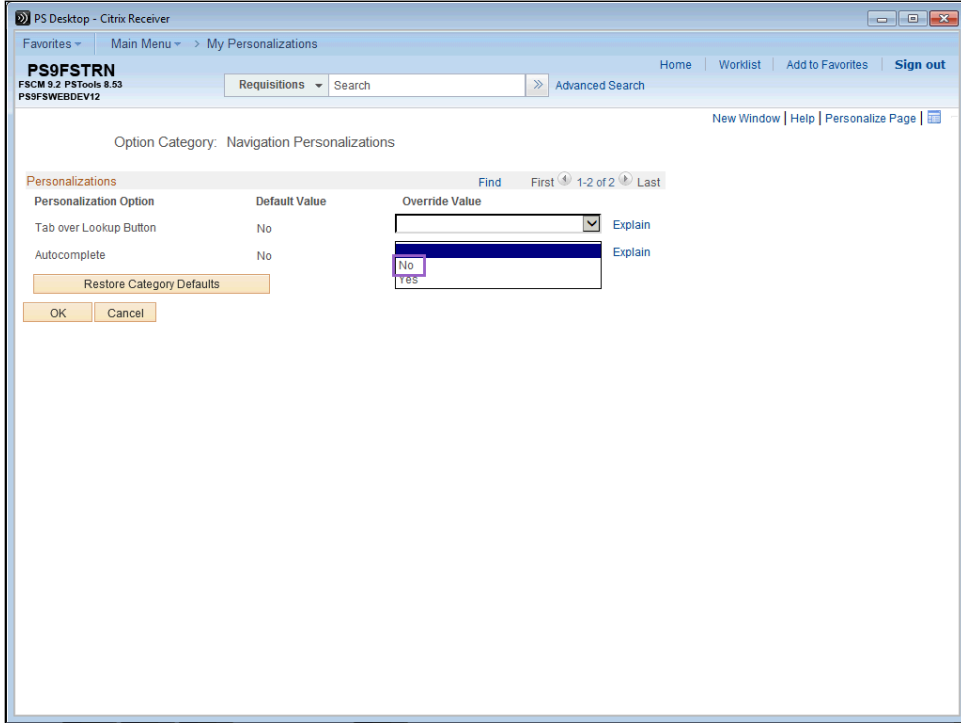
Basic Navigation for Financials 9_2



Step	Action
17.	Click the button to the right of the Autocomplete Override Value field. 

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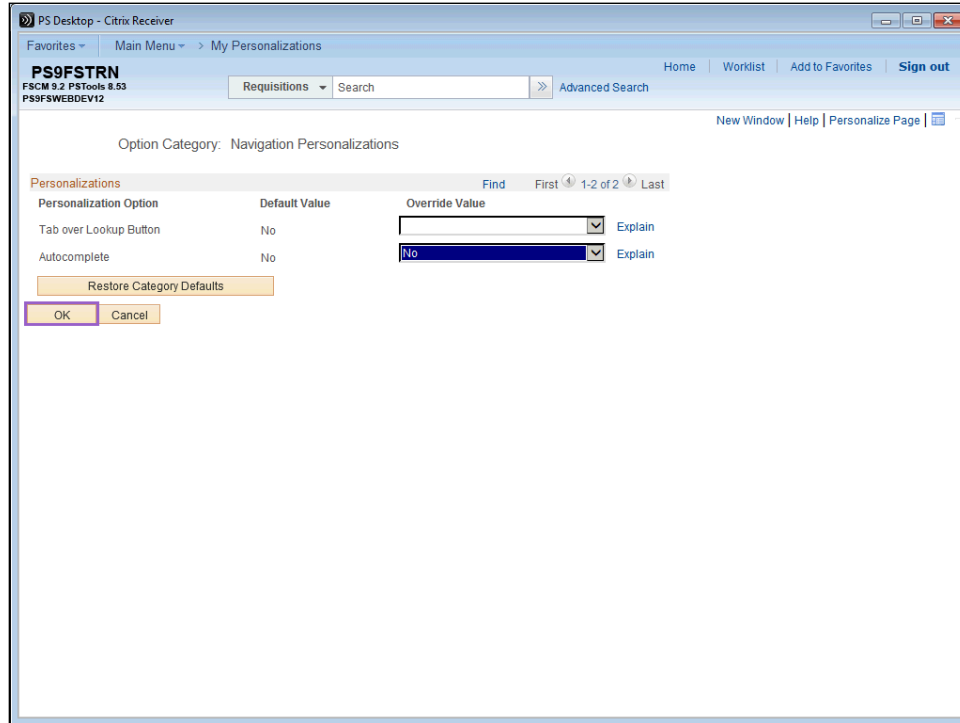
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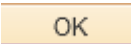


Step	Action
18.	<p>In this example, the Type Ahead feature is already turned on, so you will turn it off.</p> <p>Click the No list item.</p> <p>NOTE: <i>The system defaults the Type Ahead feature to off, so users must turn it on if they wish to use it. If you wish to turn the Type Ahead feature on, click the Yes option from the Autocomplete Override Value drop-down list.</i></p> <p><u>No</u></p>

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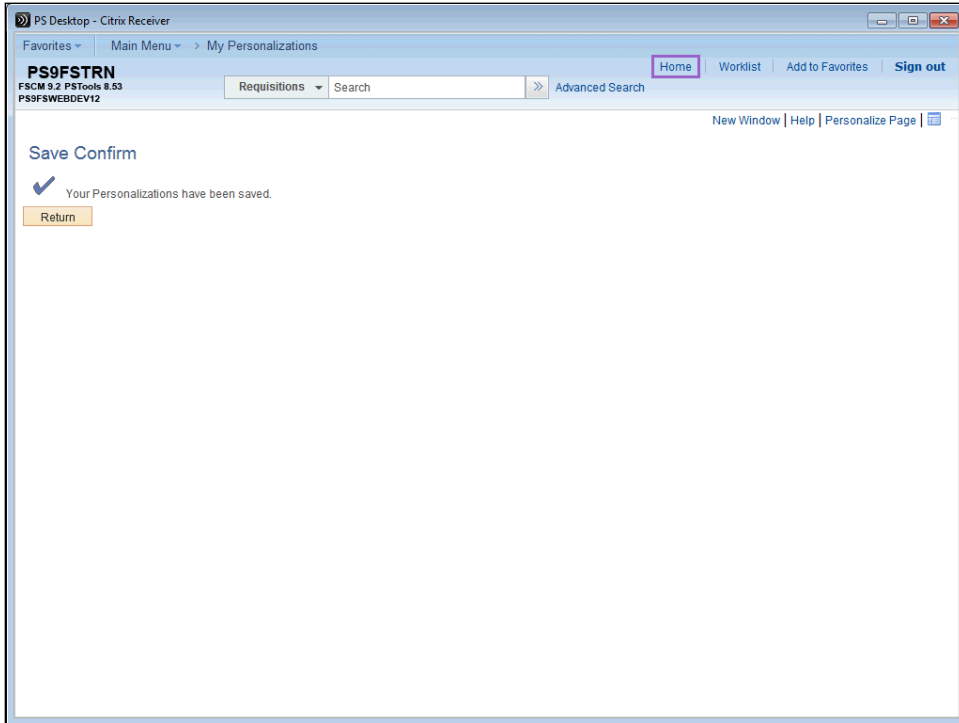
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Step	Action
19.	Click the OK button. 

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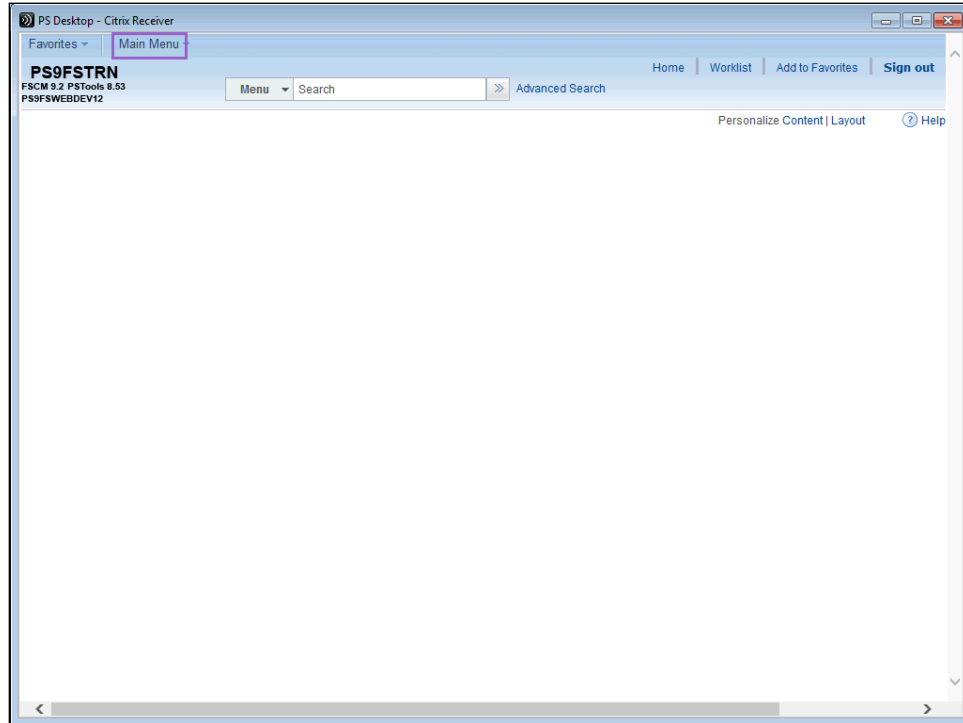
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Step	Action
20.	Click the Home link. Home

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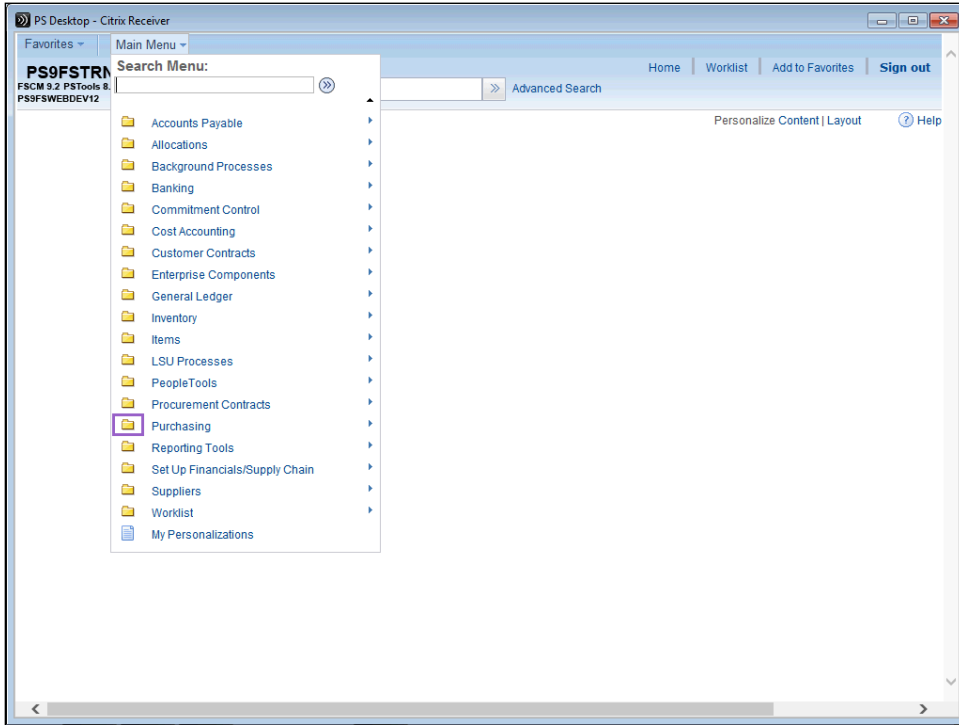
Basic Navigation for Financials 9_2




Step	Action
21.	<p>Accessing the Standard Navigation Page in 9.2</p> <p>Users can access the Standard Navigation page instead of using the cascading menu option. The Standard Navigation page displays the folders and links seen in the cascading menu on one page. However, users must first click on the menu item folder (i.e. Purchasing folder) to display the Standard Navigation page.</p> <p>Click the Main Menu button.</p> <p>Main Menu</p>

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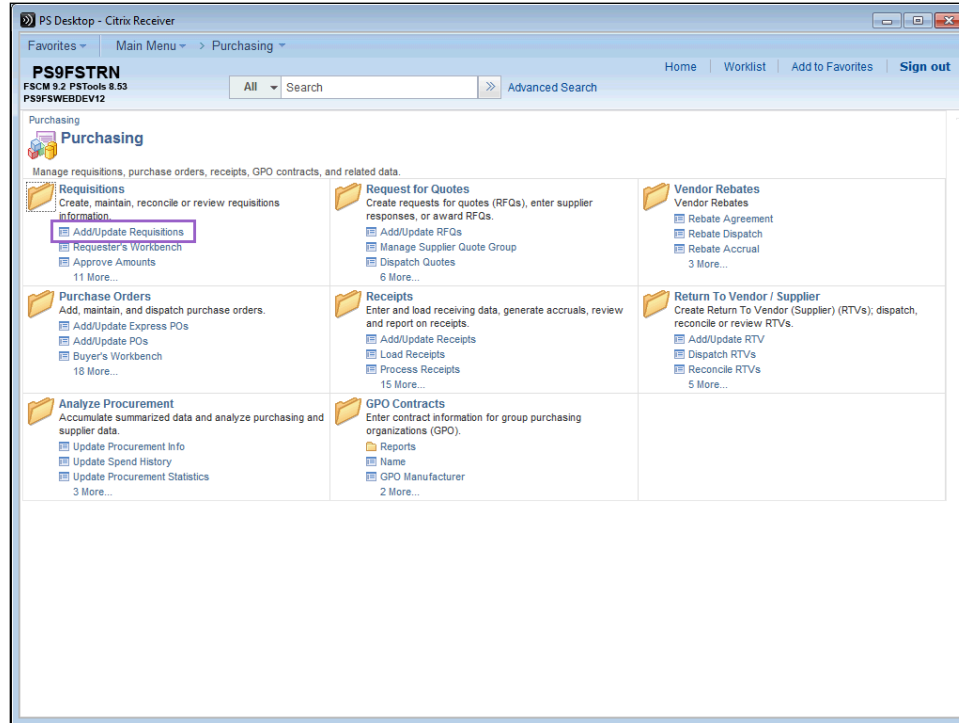
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Step	Action
22.	Click the Purchasing folder menu. 

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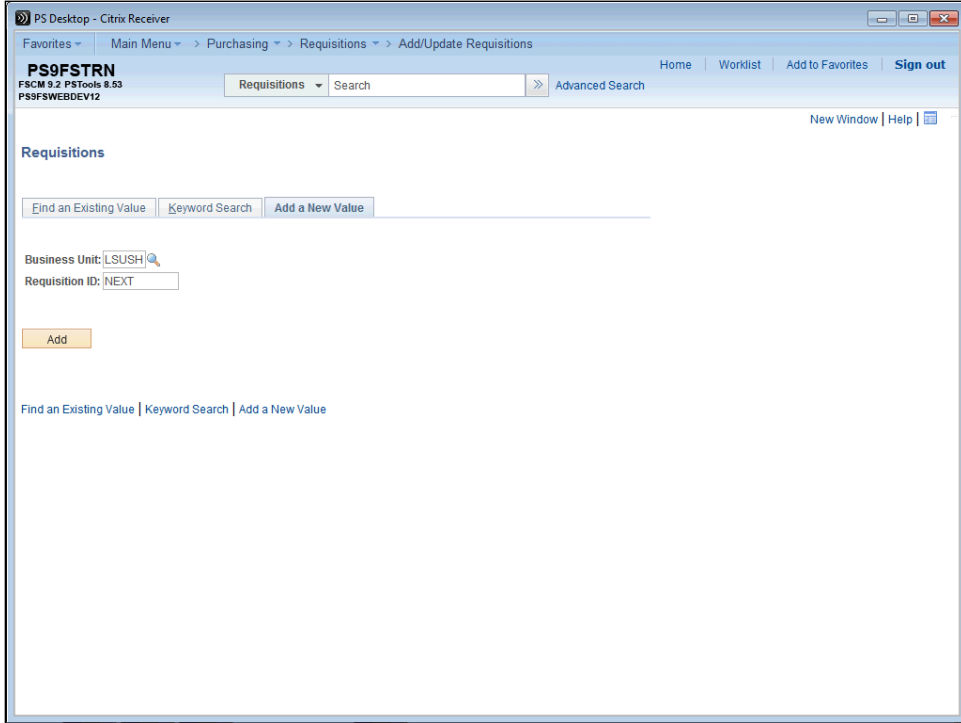
Basic Navigation for Financials 9_2



Step	Action
23.	<p>The Standard Navigation Page displays from which a page can be selected to view.</p> <p>Click the Add/Update Requisitions link.</p> <p>Add/Update Requisitions</p>
24.	The Requisitions page displays.

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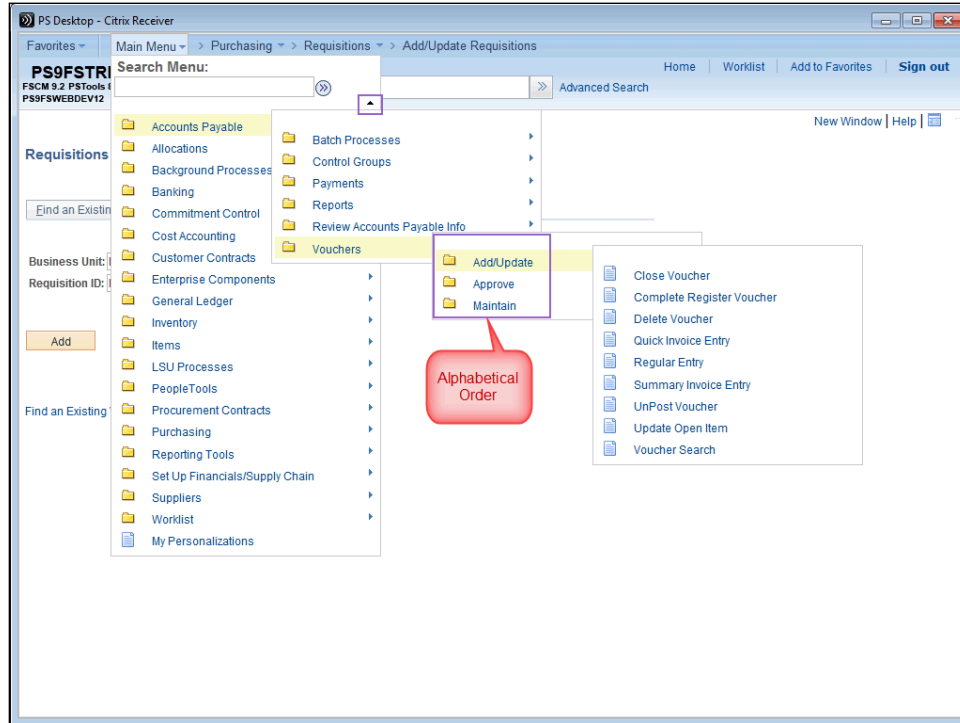
Basic Navigation for Financials 9_2




Step	Action
25.	<p>Using Sort in 9.2</p> <p>Click the Main Menu button.</p> <p>Main Menu</p>
26.	<p>Menu item folders are organized by default in alphabetical order in 9.2, rather than in process order, as are all cascading menus. Users can click the Sort Menu to reorder the folders. However, menu items will revert to alphabetical order when the user navigates away from the page.</p>

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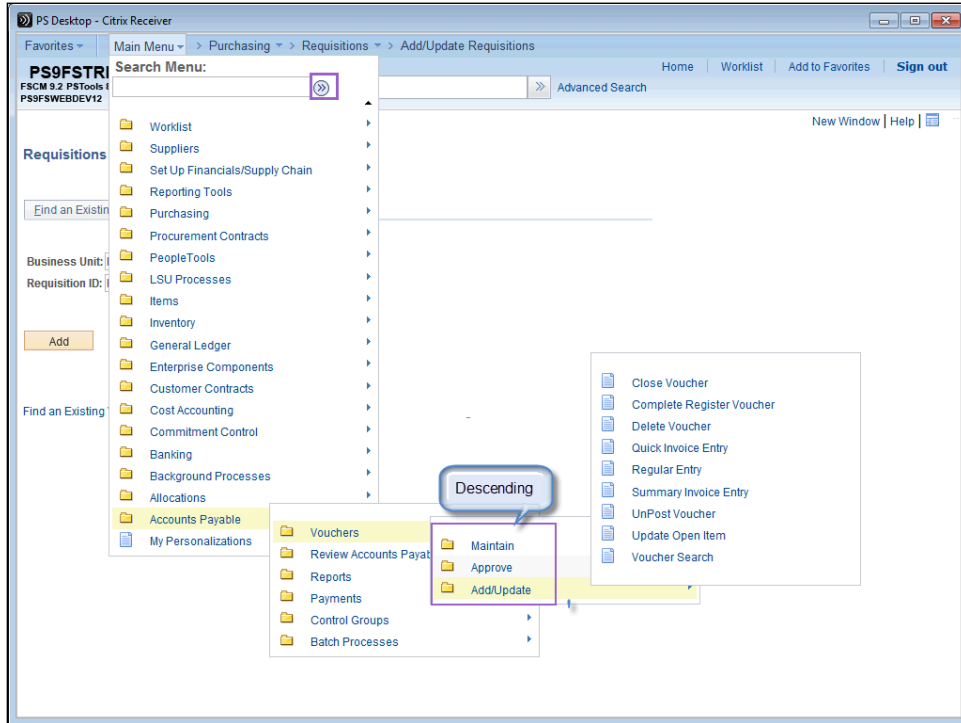
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Step	Action
27.	Click the Menu sorted in ascending order . Click to sort in descending order button. 

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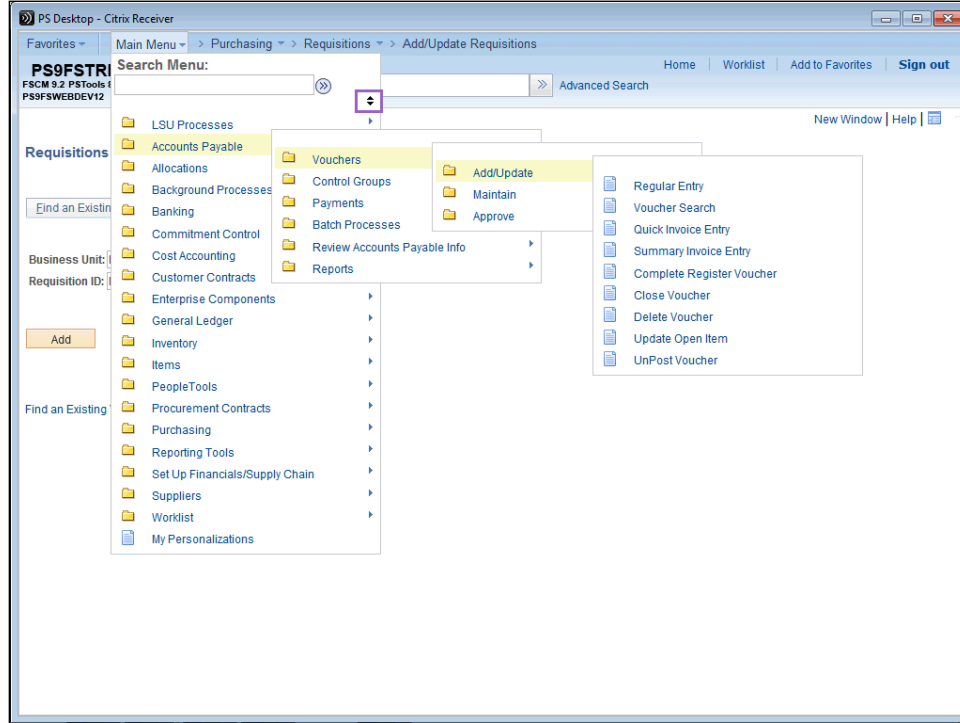
Basic Navigation for Financials 9_2




Step	Action
28.	<p>The menu is now sorted in descending order.</p> <p>Click the Menu sorted in descending order. Click to sort menu in process order button.</p> 

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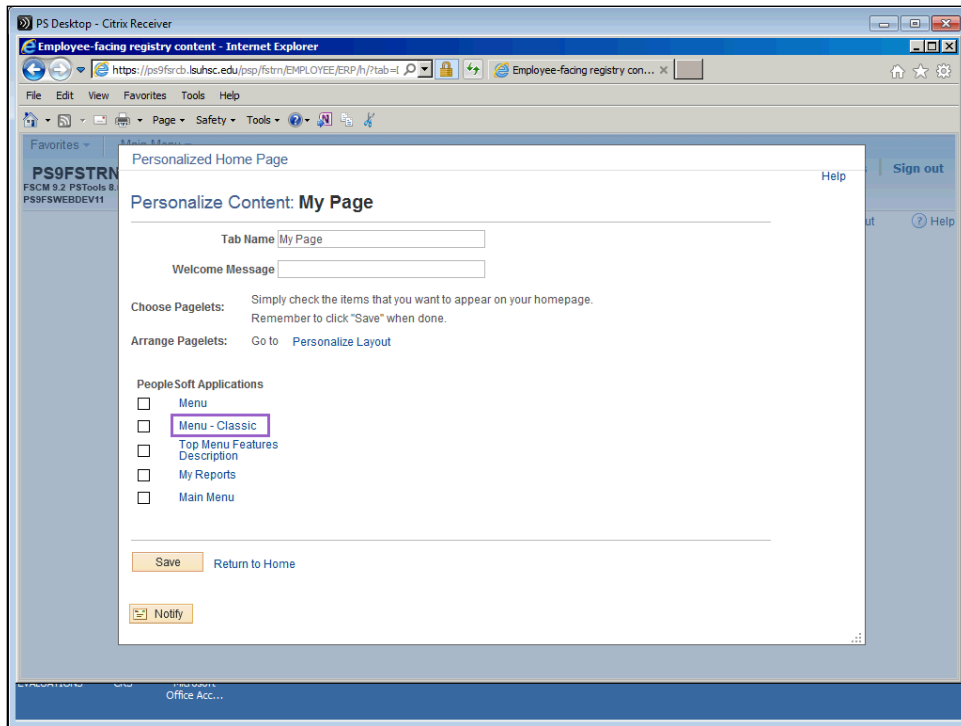
Basic Navigation for Financials 9_2



Step	Action
29.	Click the Menu sorted in process order . Click to revert back to original button. 
30.	The menu is returned to its default view in alphabetical order.
31.	Users who would prefer to use a static entry menu rather than the cascading menus can add it to their Home page. <i>NOTE: If you add the static entry menu to your Home page, it will not display once you navigate away from the page. However, it will always display on your Home page even if you sign out of the system.</i> Click the Content link to add the static entry menu to your Home page. Content

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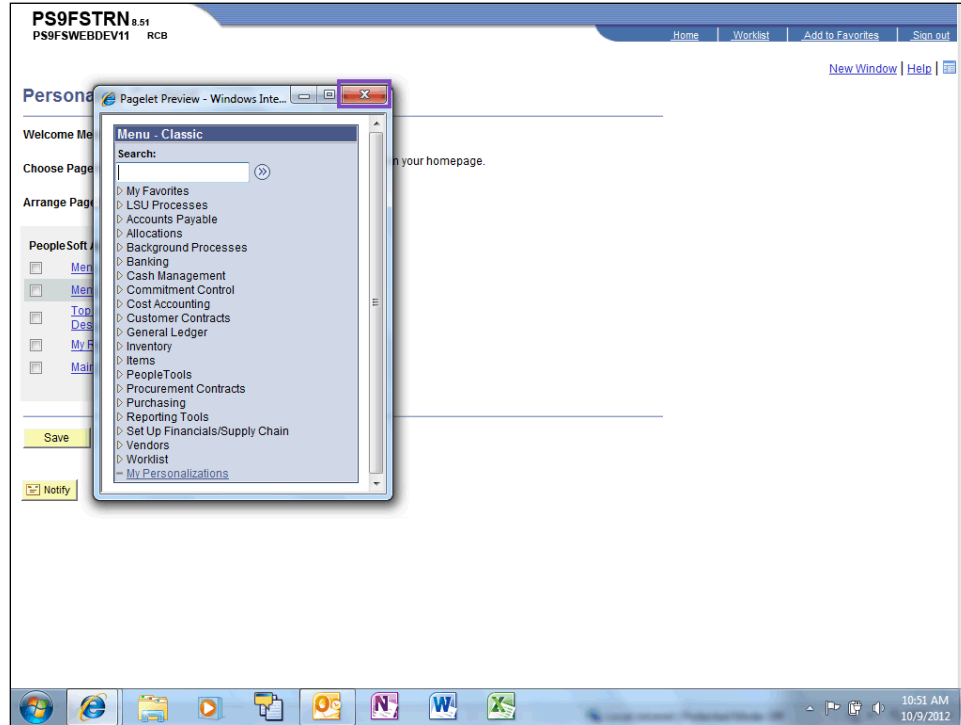
Basic Navigation for Financials 9_2




Step	Action
32.	<p>Users can select either than the Menu or Menu - Classic option. You can click the link to preview how each will display.</p> <p>Click the Menu - Classic link.</p> <p>Menu - Classic</p>

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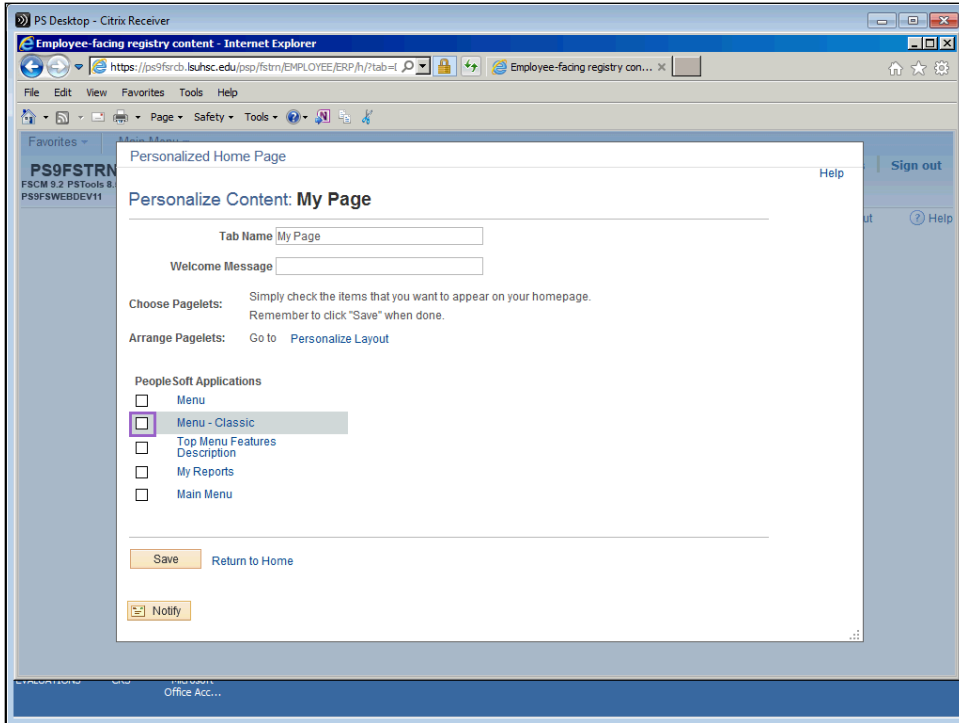
Basic Navigation for Financials 9_2





Step	Action
33.	<p>A pop-up window opens displaying the selected menu option.</p> <p>Click the Close button.</p> 

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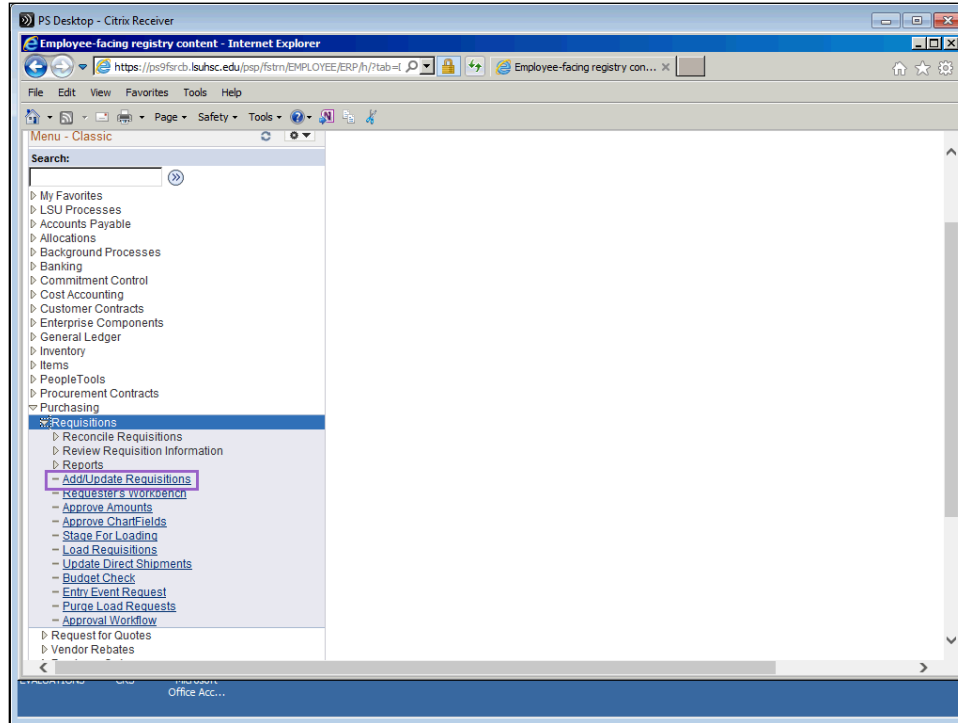
Basic Navigation for Financials 9_2



Step	Action
34.	Click the Menu - Classic option to select it for use. 
35.	Click the Save button. 

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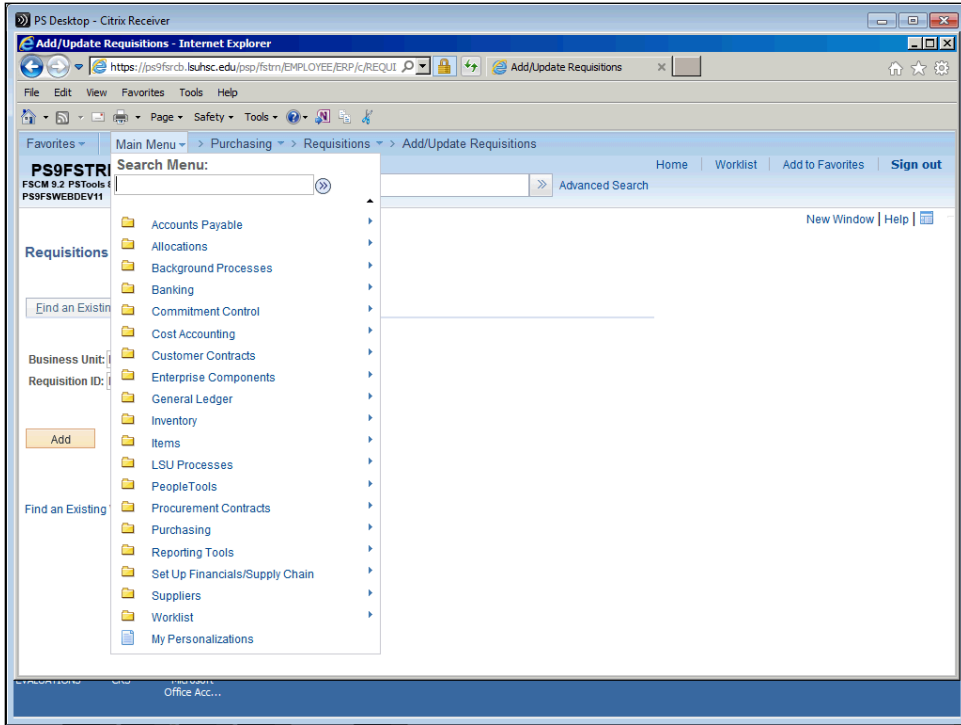
Basic Navigation for Financials 9_2



Step	Action
36.	<p>The static entry menu is added to the Home page. Navigating using this menu is the same as in 9.2.</p> <p>Click the Add/Update Requisitions link.</p> <p>- Add/Update Requisitions</p>
37.	<p>The static entry menu will not display on any other pages in the system but the Home page. Users will have to navigate using breadcrumbs from search or transaction pages, or click the Home link and return to their Home page to navigate.</p>

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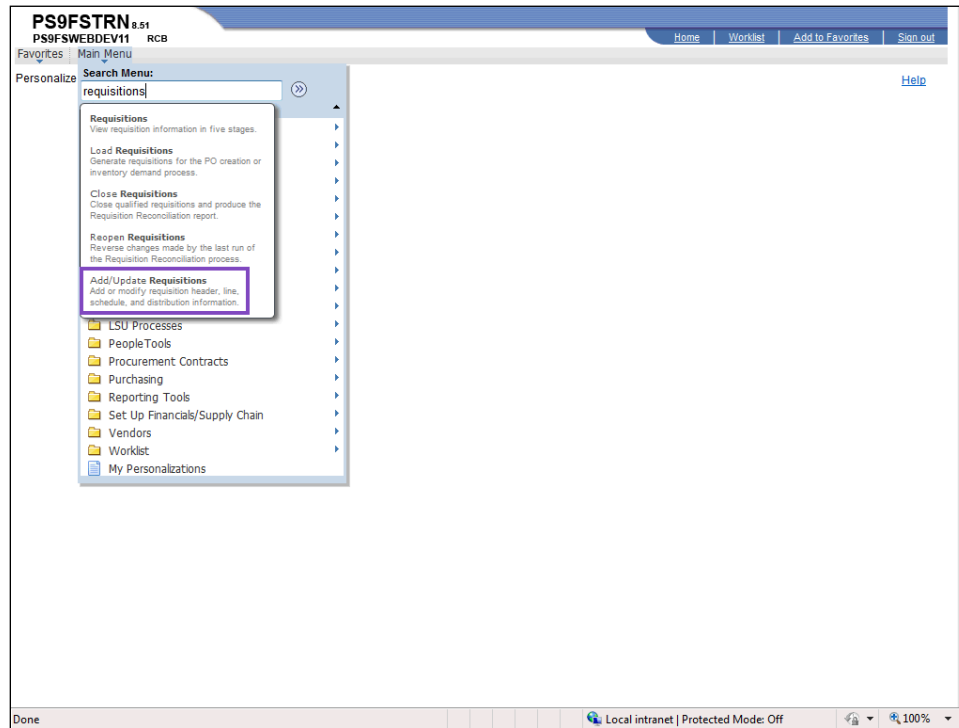
Basic Navigation for Financials 9_2



Step	Action
38.	<p>Using Search in 9.2</p> <p>Another feature found in version 9.2 is the Search Menu option. The Search Menu can be used to locate specific pages within the system.</p> <p>Enter the name of the topic in the Search Menu field to view available options.</p> <p>Enter the desired information into the Search Menu field. Enter "requisitions".</p>

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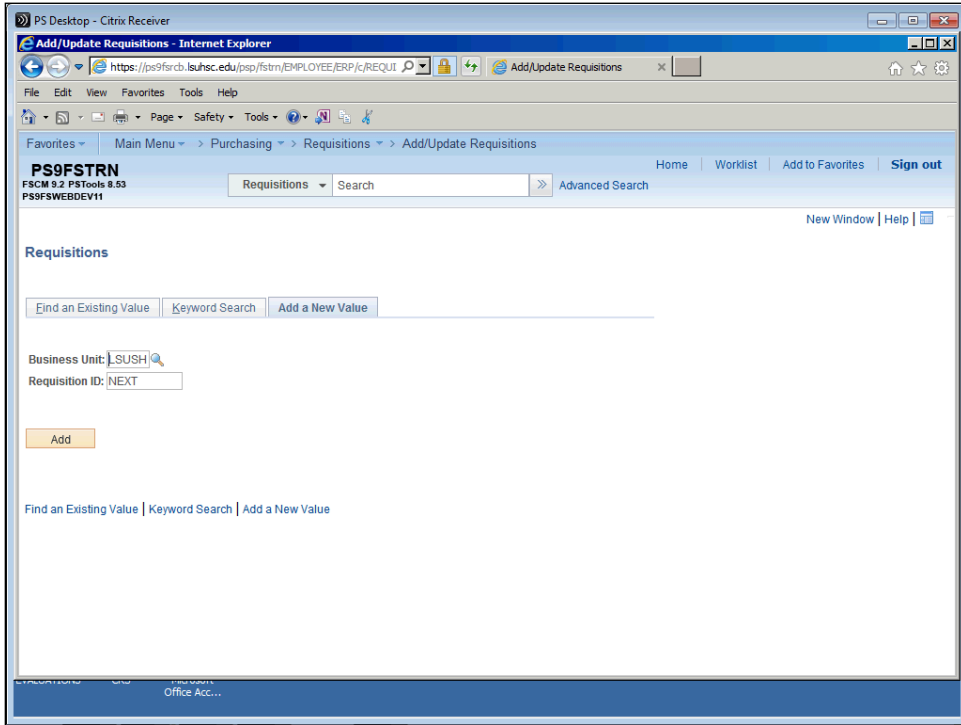
Basic Navigation for Financials 9_2



Step	Action
39.	<p>Regardless of whether the Type Ahead feature is turned on or off, a list of options will display. Simply click on the option from the list you wish to view.</p> <p>Click the Add/Update Requisitions link.</p> <p>Add/Update Requisitions Add or modify requisition header, line, schedule, and distribution information.</p>

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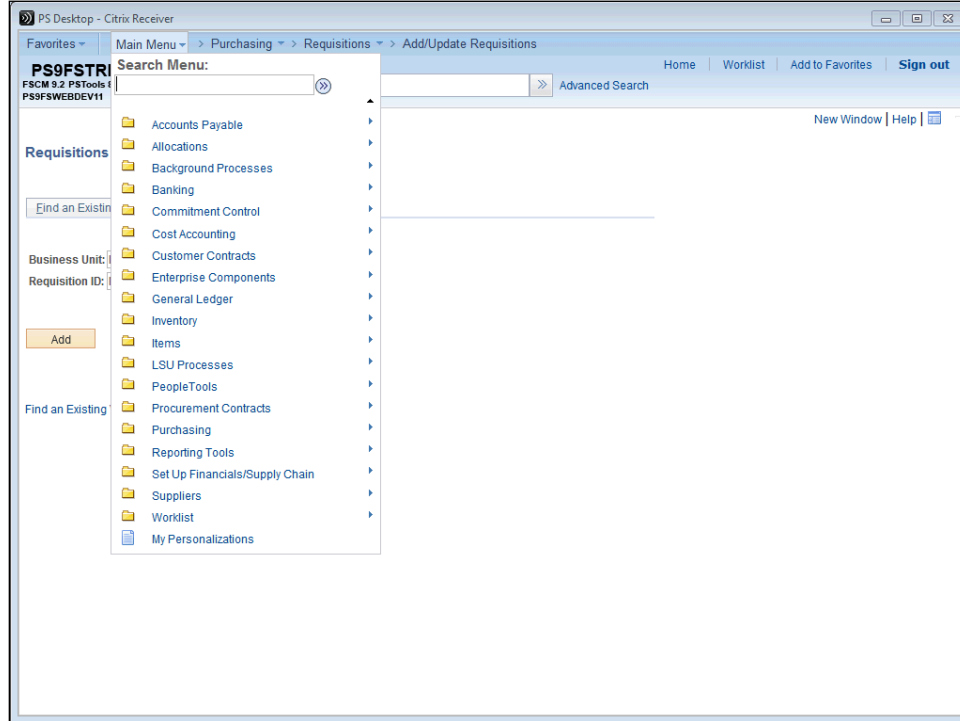
Basic Navigation for Financials 9_2



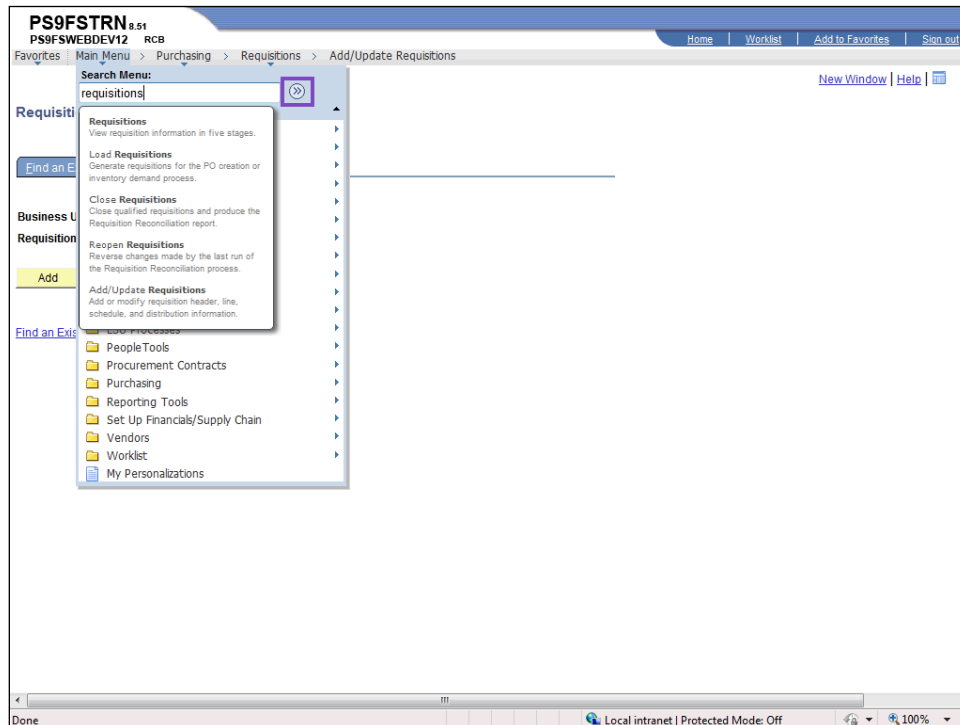
Step	Action
40.	<p>The system will bring you directly to the page.</p> <p>If the option you are looking for did not display in the drop-down list, additional options can be found using the Start your search feature.</p> <p>Click the Main Menu button.</p> <p>Main Menu ▾</p>

Training Guide

Basic Navigation for Financials 9_2




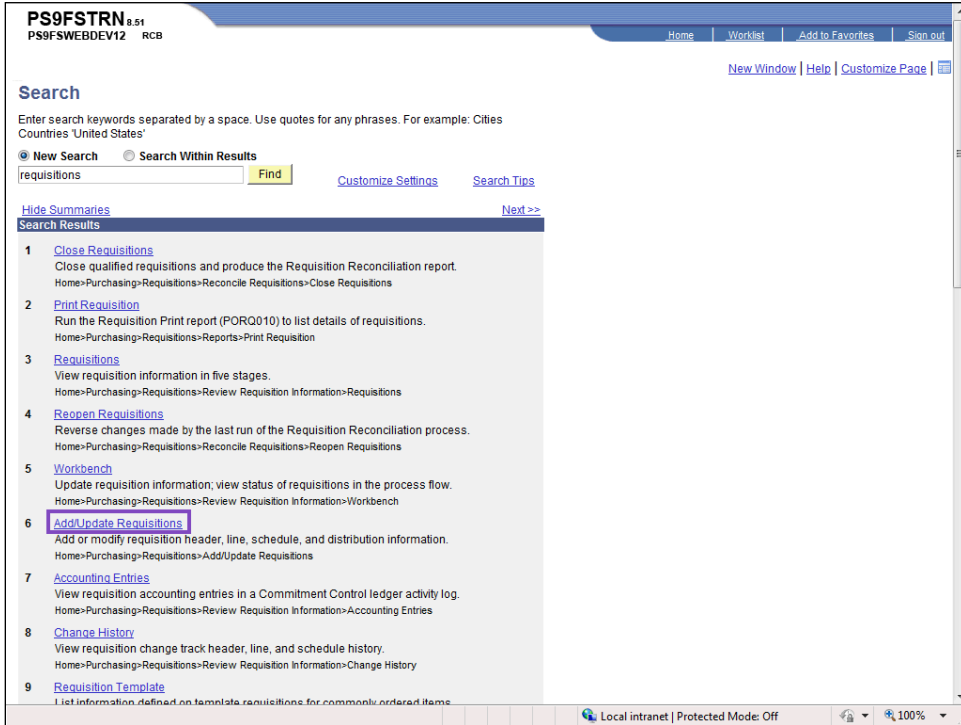
Step	Action
41.	Enter the desired information into the Search Menu field. Enter " requisitions ".




Training Guide

Basic Navigation for Financials 9_2

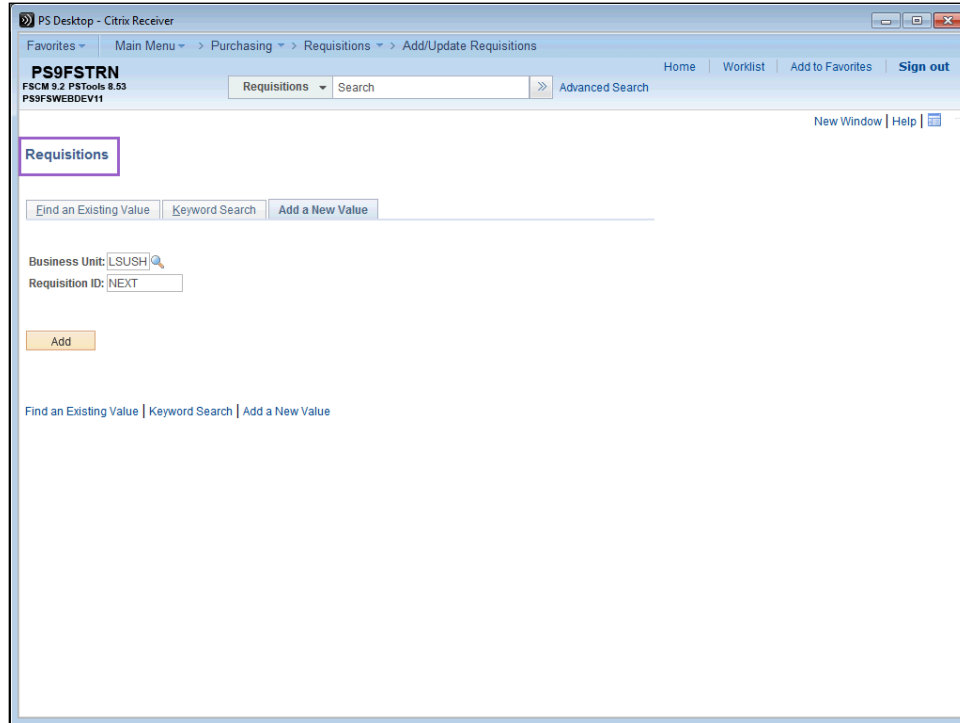
Step	Action
42.	Click the Start your search button. 



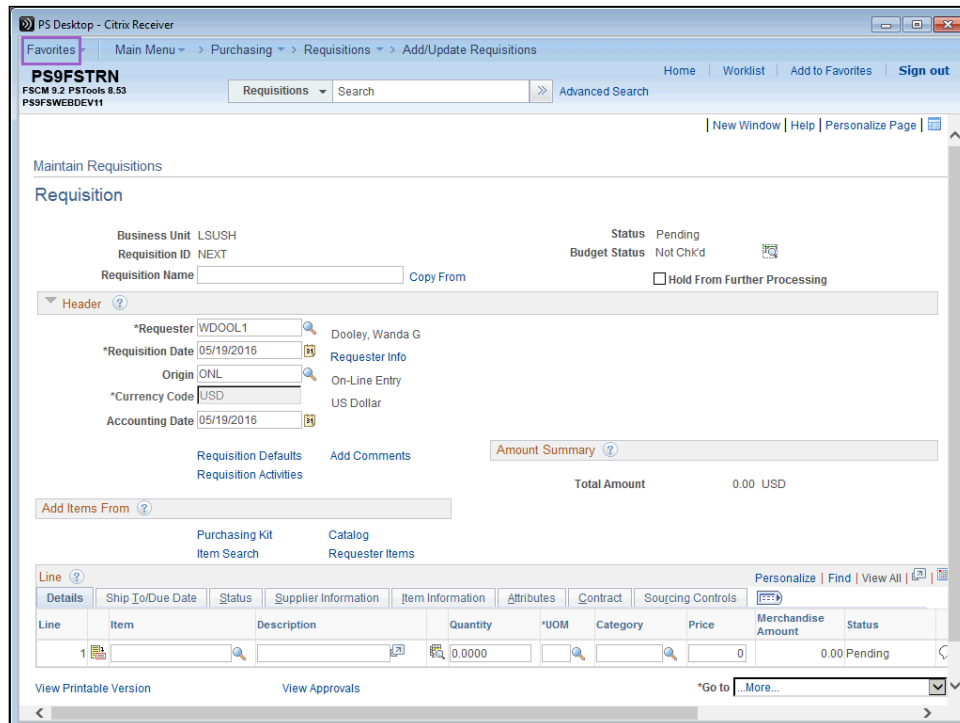
Step	Action
43.	Available options will display on the Search page. Click the link for the page you wish to access. Click the Add/Update Requisitions link. 

Training Guide

Basic Navigation for Financials 9_2



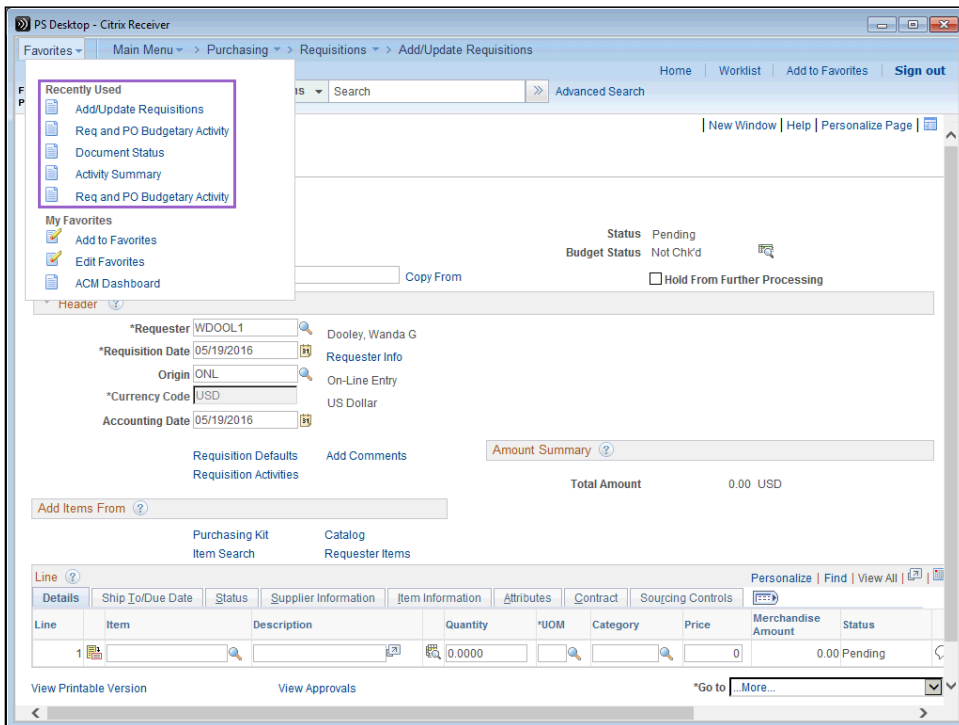
Step	Action
44.	The Requisitions page displays.



Training Guide

Basic Navigation for Financials 9_2

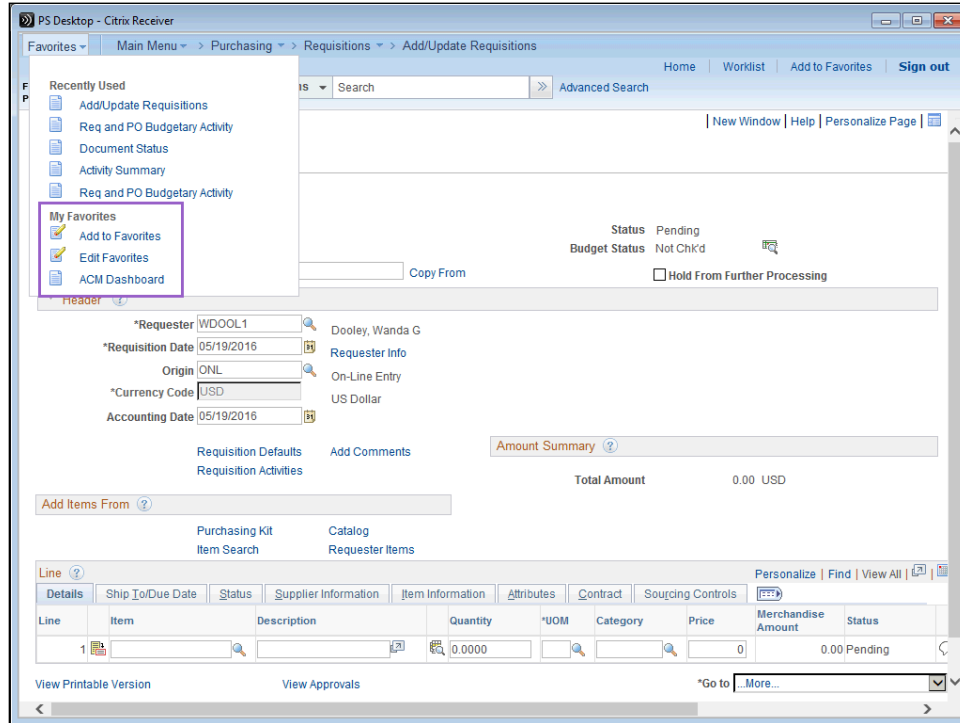
Step	Action
45.	<p>Using Favorites in 9.2</p> <p>Several new features have been added to Favorites:</p> <ol style="list-style-type: none"> 1. A Recently Used section. 2. Adding a specific page to Favorites rather than being directed to a search page. <p>Click the Favorites button.</p> <p>Favorites</p>



Step	Action
46.	<p>Recently Used</p> <p>When you access a page, it is automatically added to the Recently Used list in the Favorites Menu. To access a page from the Recently Used menu, simply click on the page name. The system will automatically redirect you to the selected page.</p> <p>The Recently Used list is limited to the five most recently accessed pages. The system will not update the Recently Used list if the user closes the browser before signing out, or the user's session times out.</p> <p>NOTE: Users should never close their browser without first signing out of PeopleSoft.</p>

Training Guide

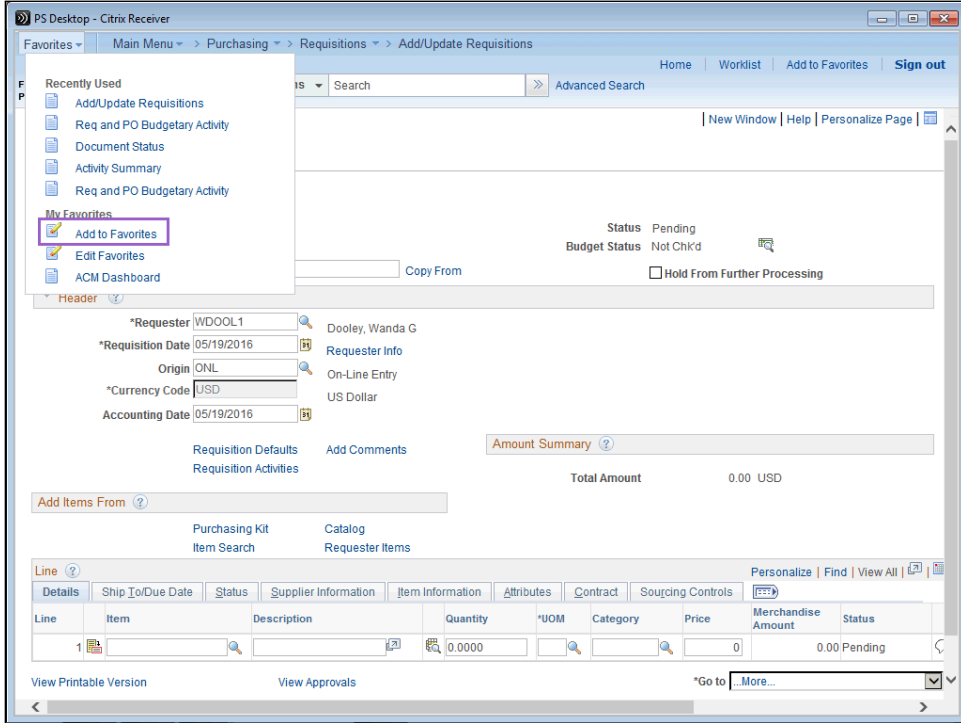
Basic Navigation for Financials 9_2




Step	Action
47.	<p>My Favorites</p> <p>Users can now save a specific page to Favorites in 9.2. A user can add a page by clicking the Add to Favorites option in My Favorites or by clicking the Add to Favorites link located on the top right of the page. In this example, we will utilize the Add to Favorites in My Favorites.</p>

Training Guide

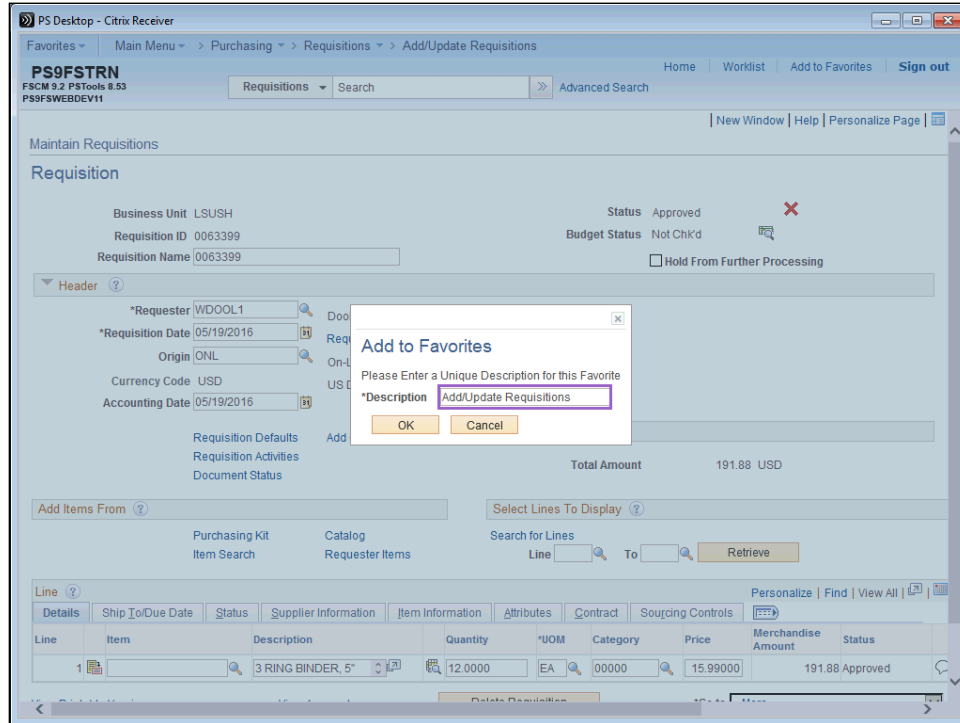
Basic Navigation for Financials 9_2



Step	Action
48.	Click the Add to Favorites menu.  Add to Favorites

Training Guide

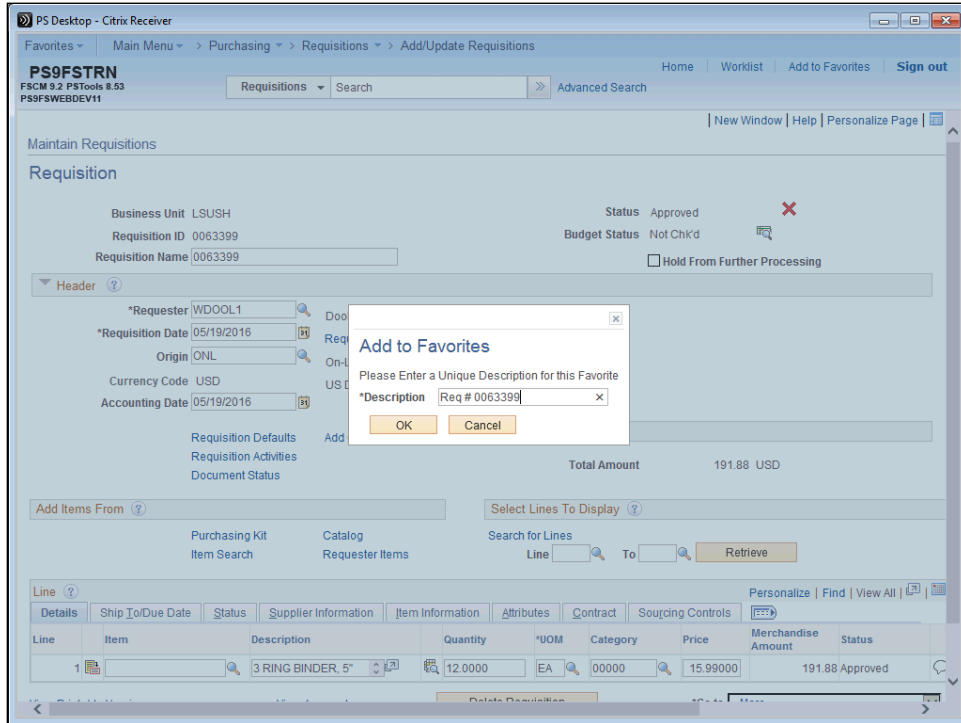
Basic Navigation for Financials 9_2



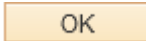
Step	Action
49.	<p>Enter a unique name in the Description field for the page you wish to add.</p> <p>Enter the desired information into the Description field. Enter "Req# 0038198".</p>

Training Guide

Basic Navigation for Financials 9_2

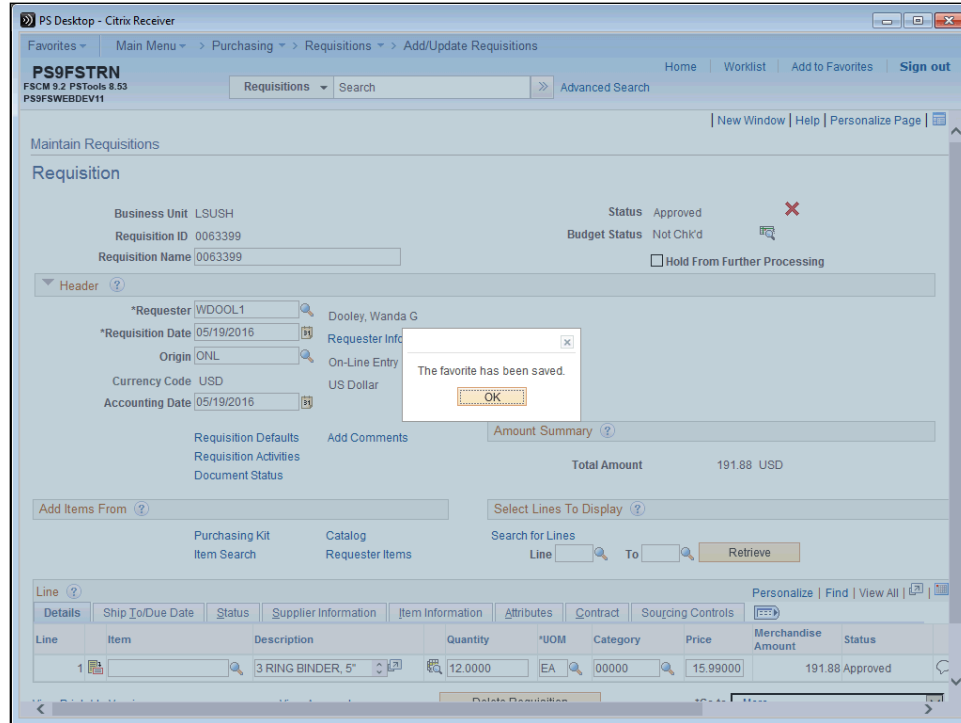



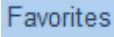
Step	Action
50.	Click the OK button.



Training Guide

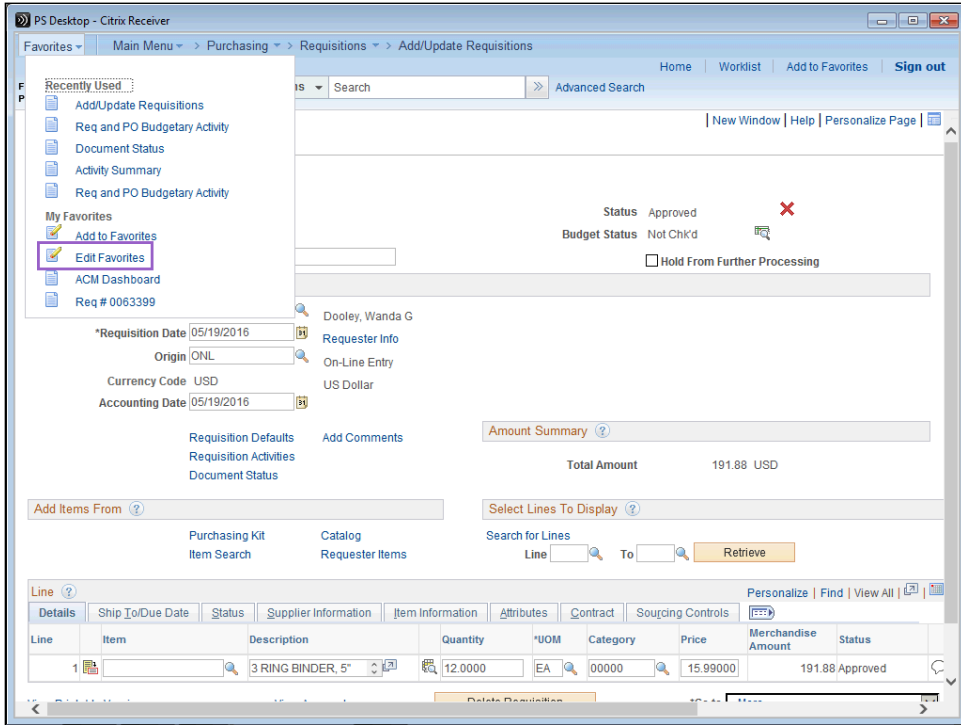
Basic Navigation for Financials 9_2




Step	Action
51.	<p>A message displays stating you favorite has been saved.</p> <p>Click the OK button.</p> 
52.	<p>Click the Favorites button.</p> 
53.	<p>Req # 0063399 displays in the My Favorites menu.</p>

Training Guide

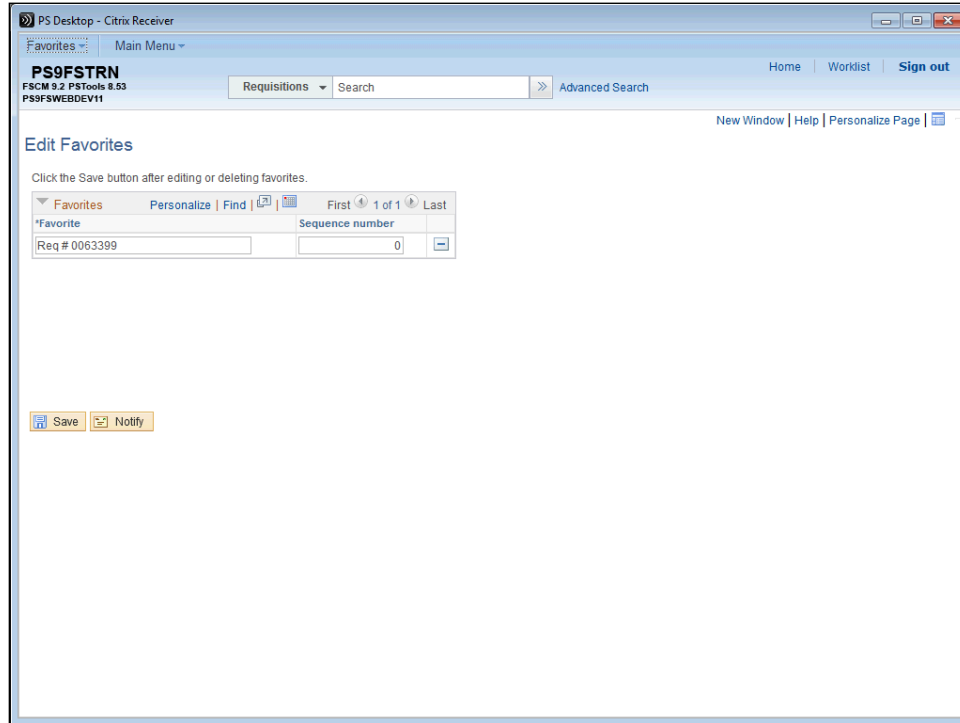
Basic Navigation for Financials 9_2




Step	Action
54.	<p>Editing Favorites</p> <p>Users can edit their Favorites and delete any entries no longer needed.</p> <p>Click the Edit Favorites menu.</p> <p> Edit Favorites</p>

Training Guide

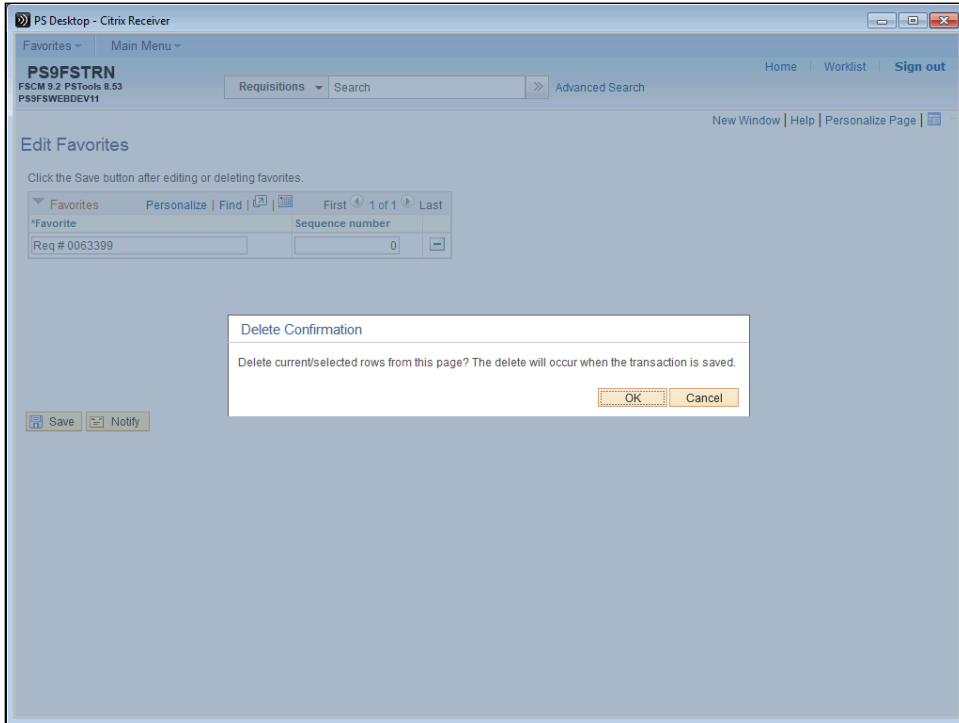
Basic Navigation for Financials 9_2




Step	Action
55.	<p>In this example, the previously saved Req # 0063399 option will be deleted.</p> <p>Click the Delete row 1 button.</p> 

Training Guide

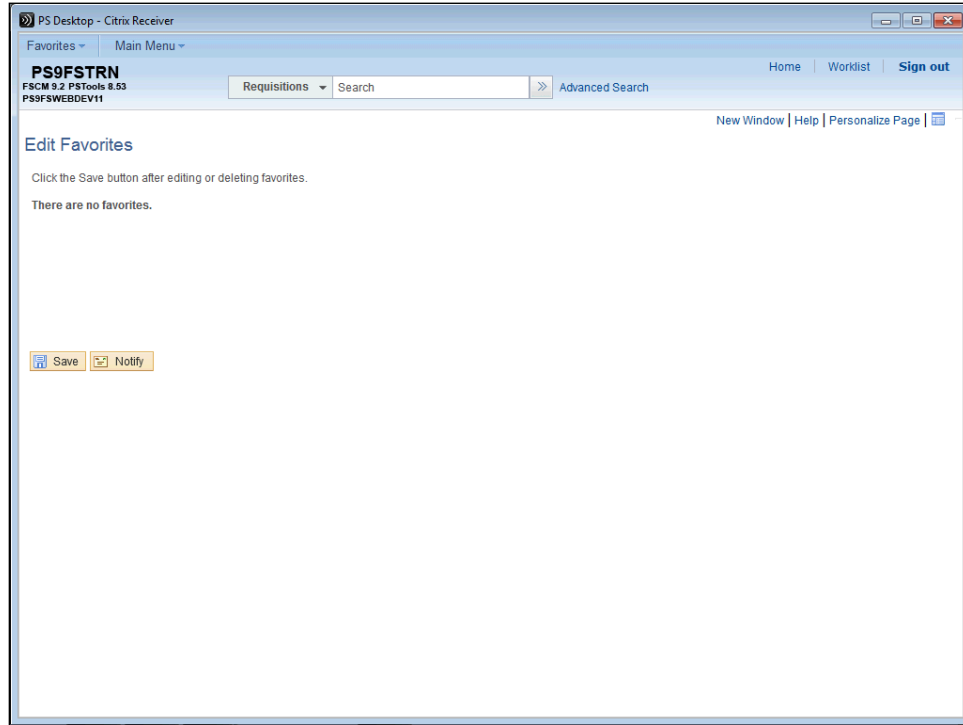
Basic Navigation for Financials 9_2

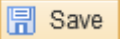


Step	Action
56.	<p>A warning message displays asking you to confirm the delete.</p> <p>Click the OK button.</p> 

Training Guide

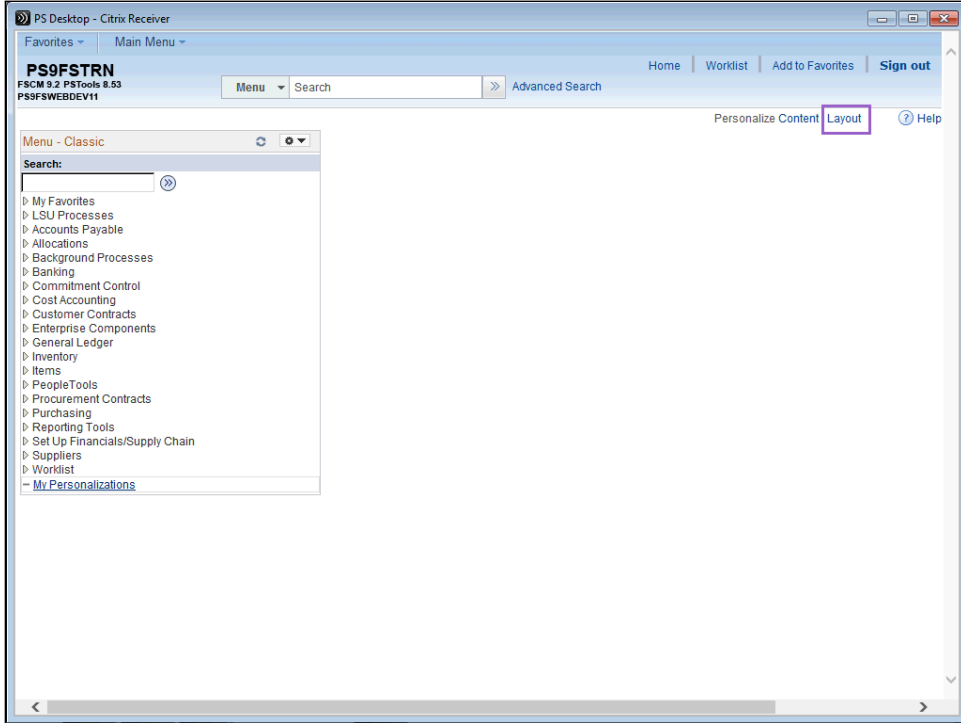
Basic Navigation for Financials 9_2



Step	Action
57.	Click the Save button to complete the process. 

Training Guide

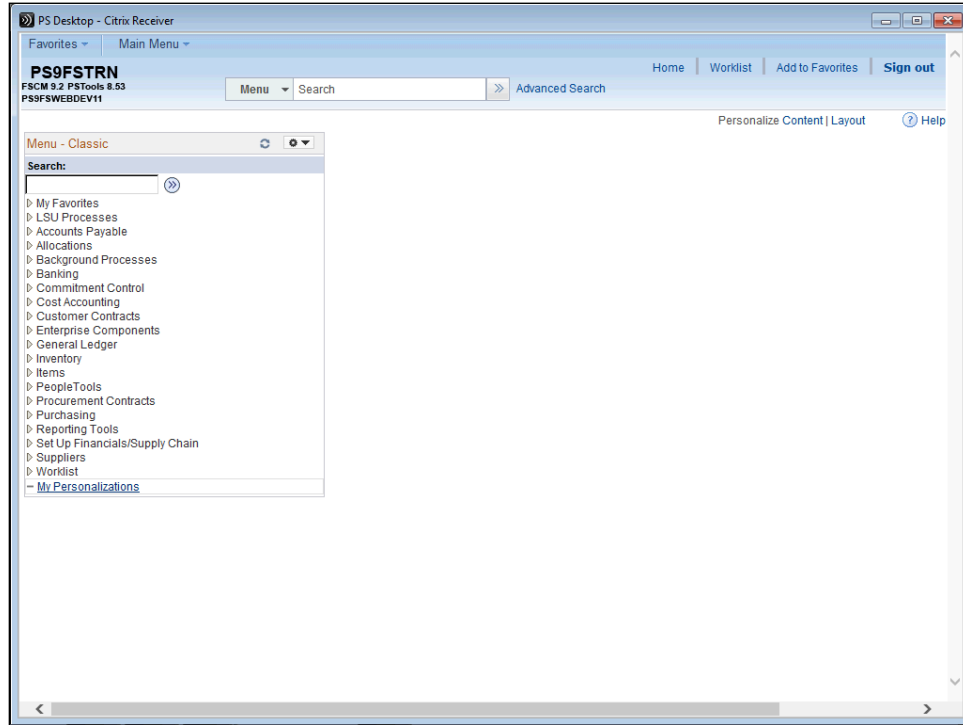
Basic Navigation for Financials 9_2



Step	Action
58.	<p>Personalizing Your Home Page</p> <p>Users can now personalize their Home page using the Layout link. The page layout can be changed, pagelets can be added to the page, and the placement of a pagelet on the page can be changed.</p> <p>In this example, you will complete the following steps:</p> <ol style="list-style-type: none"> 1. Select a 2-column layout for the page. 2. Add the My Reports pagelet to your Home page. 3. Change the placement of the My Reports pagelet from the left side to the right side of the page.

Training Guide

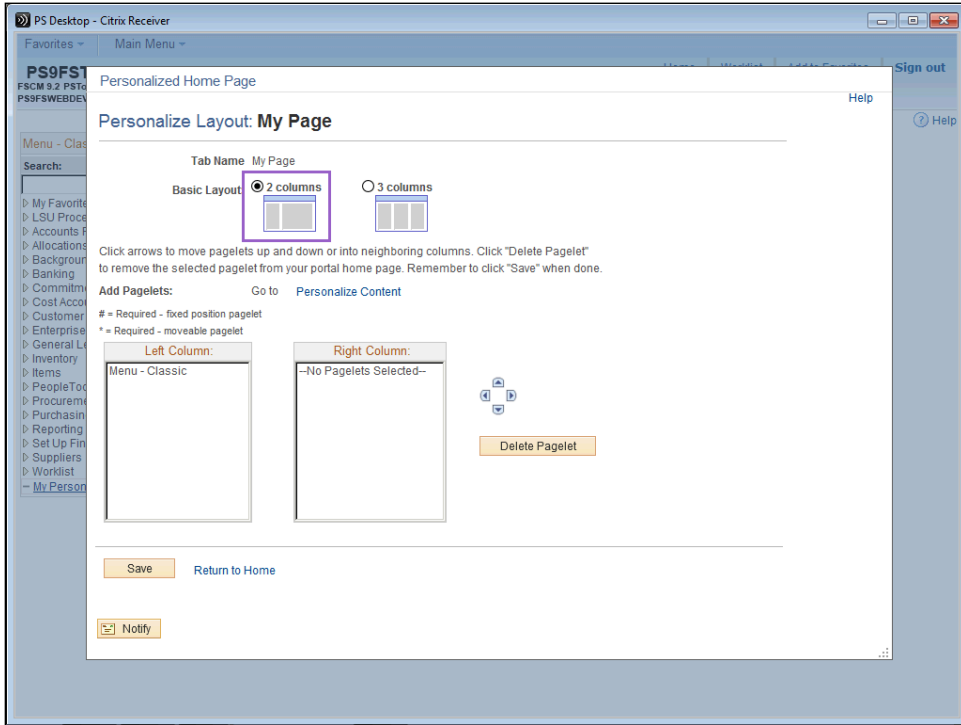
Basic Navigation for Financials 9_2




Step	Action
59.	Click the Layout link. Layout

Training Guide

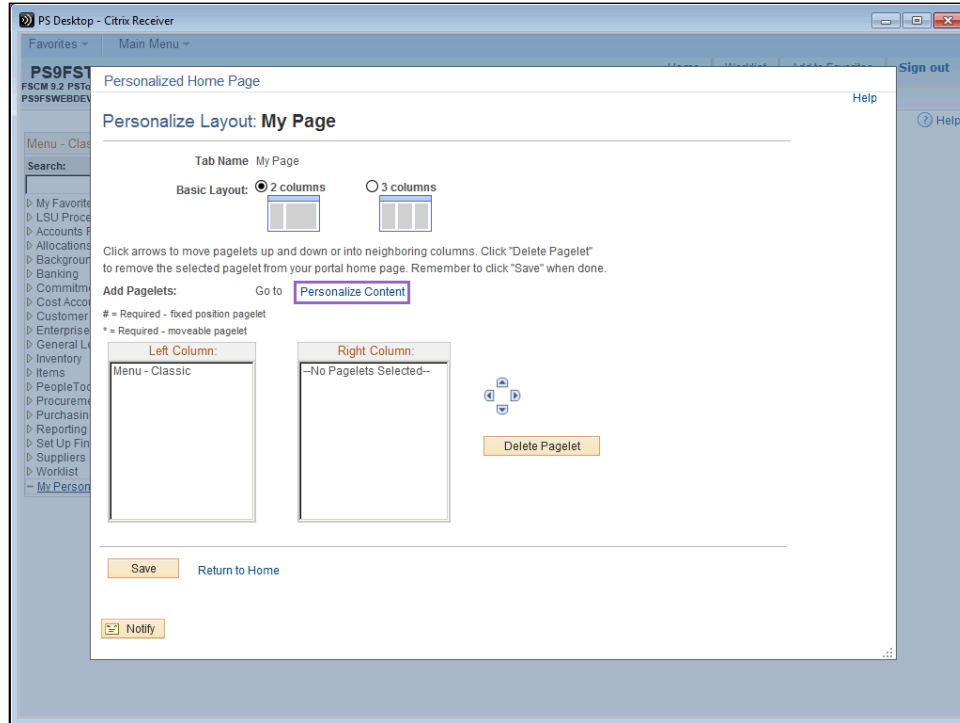
Basic Navigation for Financials 9_2



Step	Action
60.	<p>Click the 2 columns option for the page layout.</p> <p><input checked="" type="radio"/> 2 columns</p> 

Training Guide

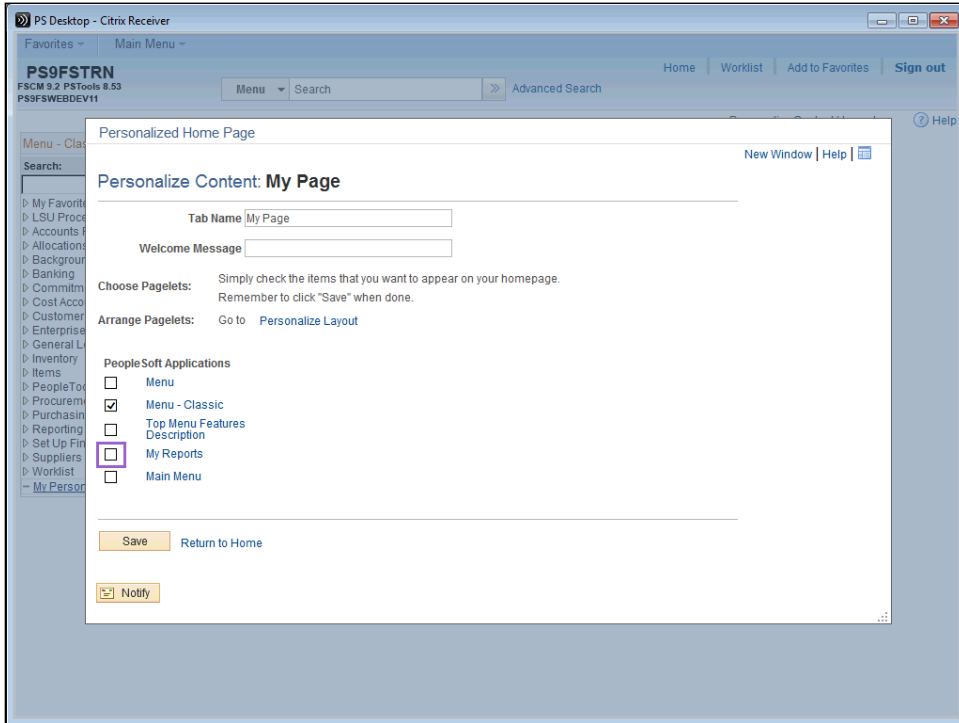
Basic Navigation for Financials 9_2



Step	Action
61.	Click the Personalize Content link to add a pagelet. Personalize Content

Training Guide

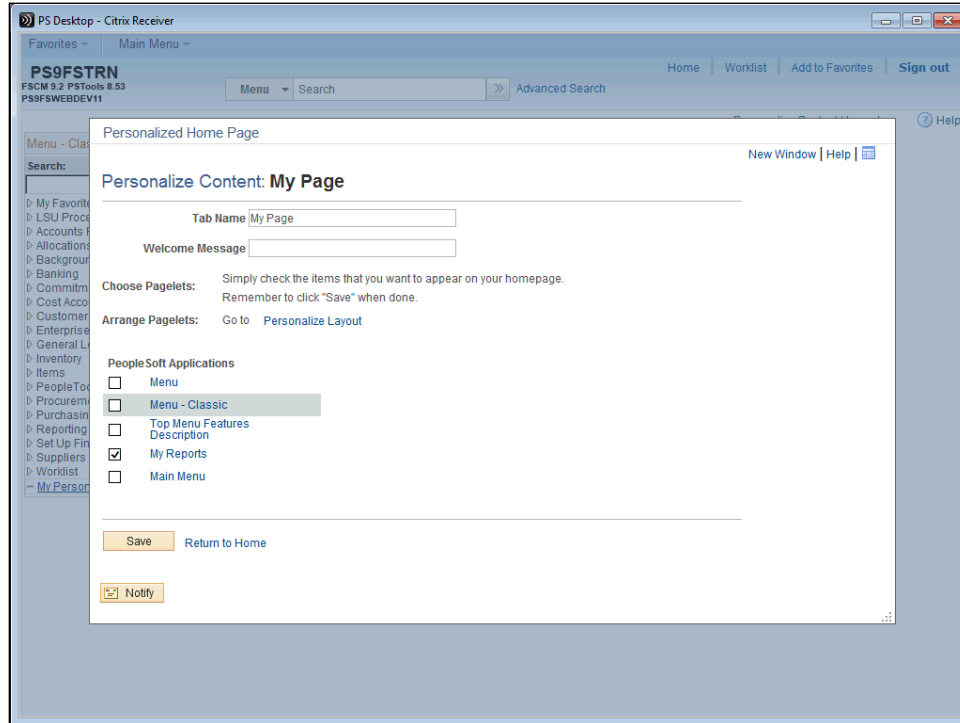
Basic Navigation for Financials 9_2

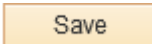


Step	Action
62.	Click the My Reports option. <input type="checkbox"/>

Training Guide

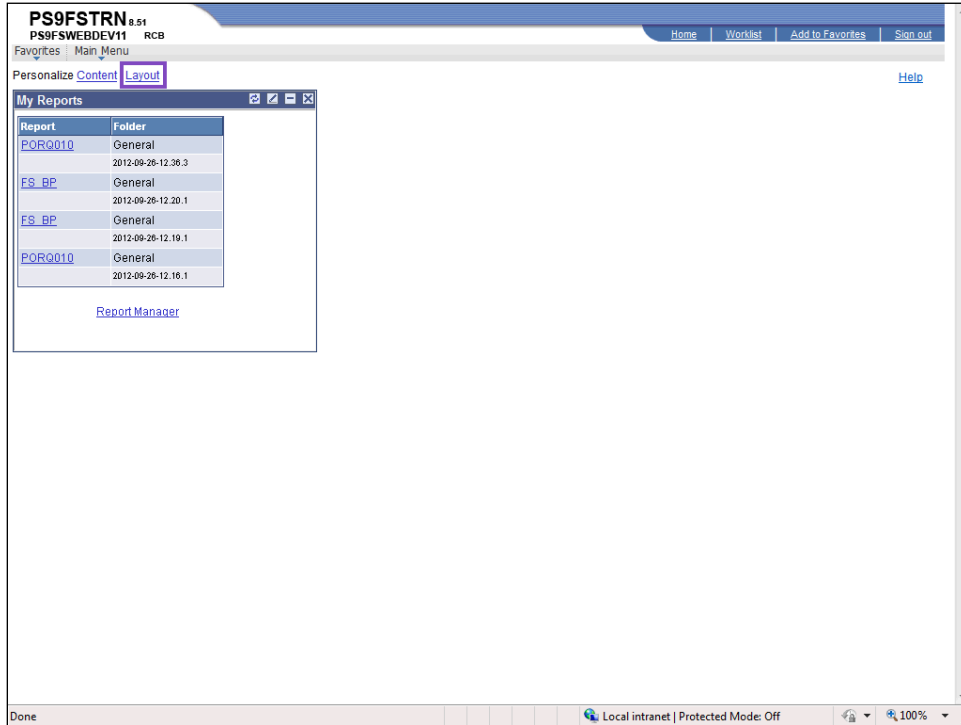
Basic Navigation for Financials 9_2



Step	Action
63.	Click the Save button to add the pagelet. <div style="text-align: center; margin-top: 10px;">  </div>

Training Guide

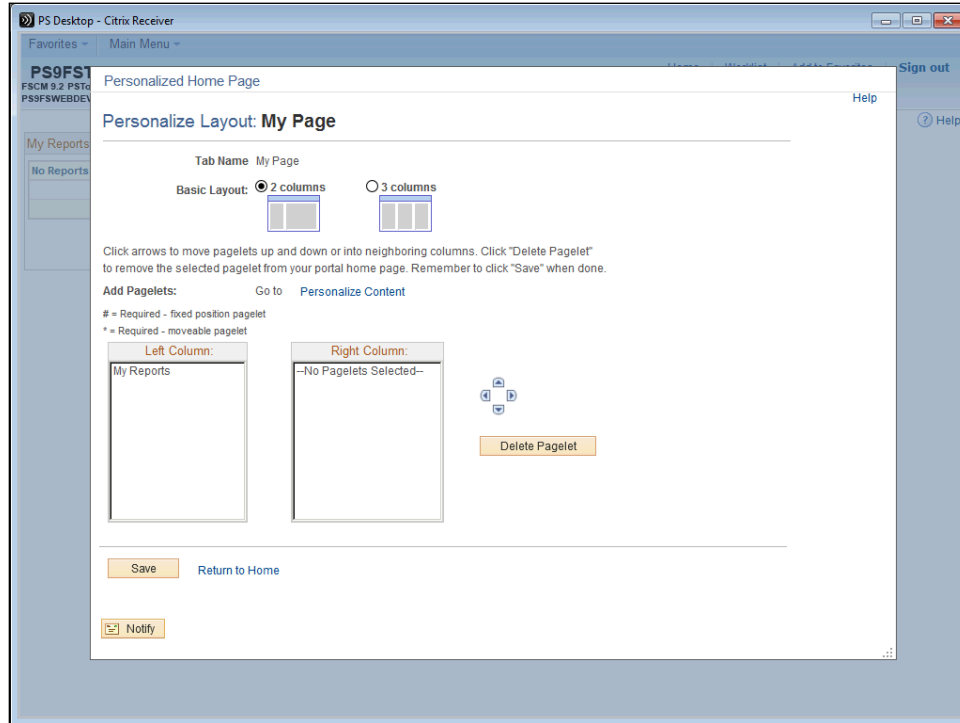
Basic Navigation for Financials 9_2



Step	Action
64.	<p>The My Reports pagelet displays on the Home page. The system will default the pagelet to the left side of the page unless specified on the Personalize Layout page.</p> <p>You will now change the placement of the pagelet to the right side of the page.</p> <p>Click the Layout link.</p> <p>Layout</p>

Training Guide

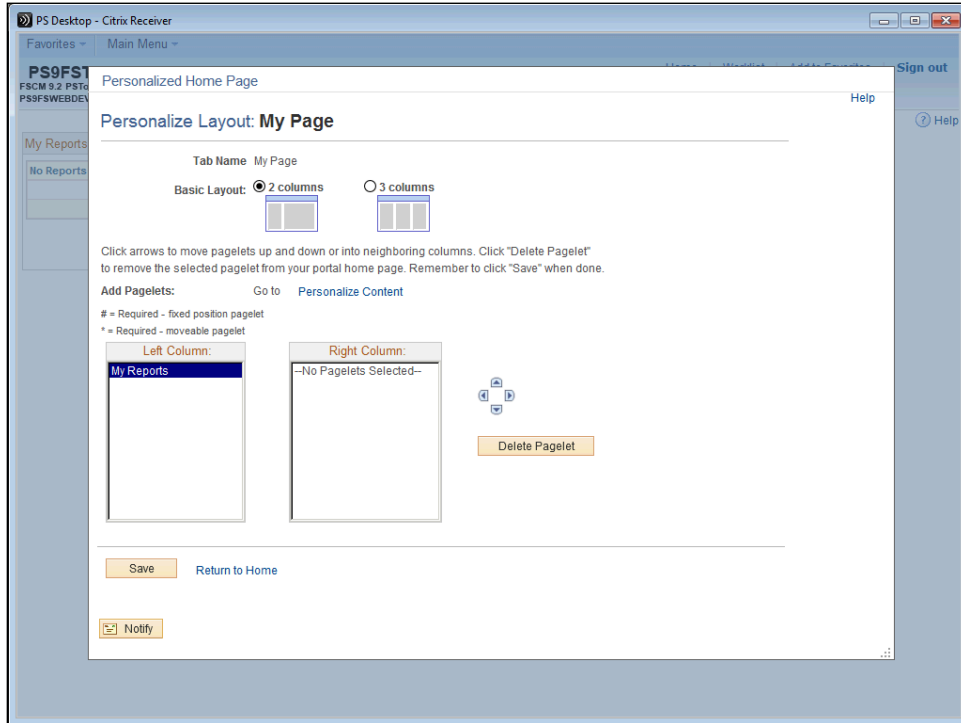
Basic Navigation for Financials 9_2




Step	Action
65.	Click the My Reports list item. <div style="border: 1px solid black; padding: 2px; display: inline-block;">My Reports</div>

Training Guide

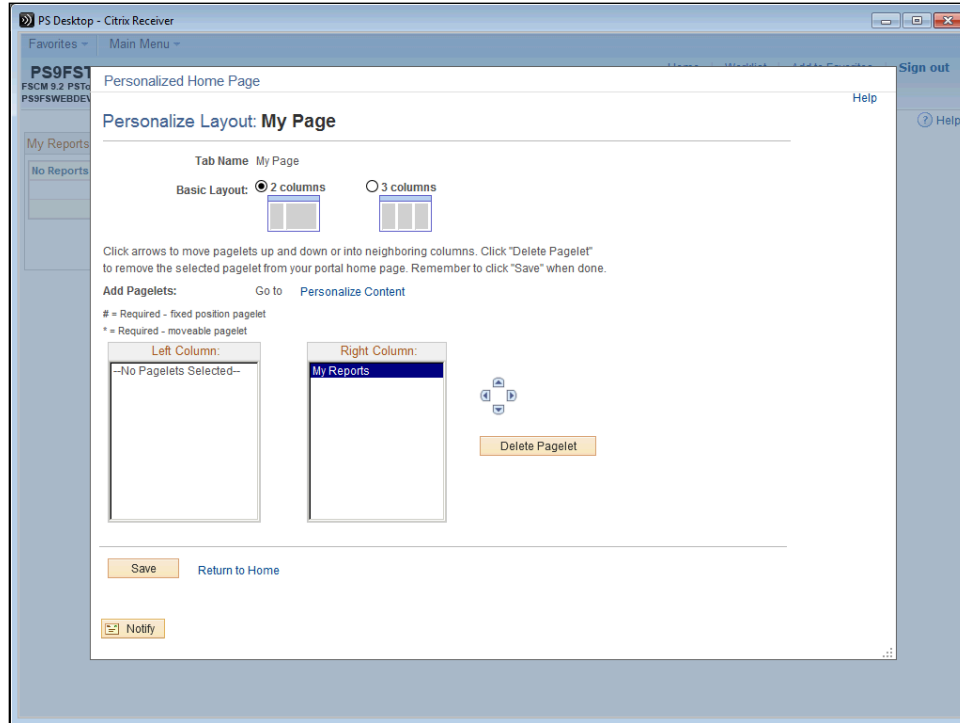
Basic Navigation for Financials 9_2

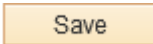


Step	Action
66.	Click the Move Right button. 

Training Guide

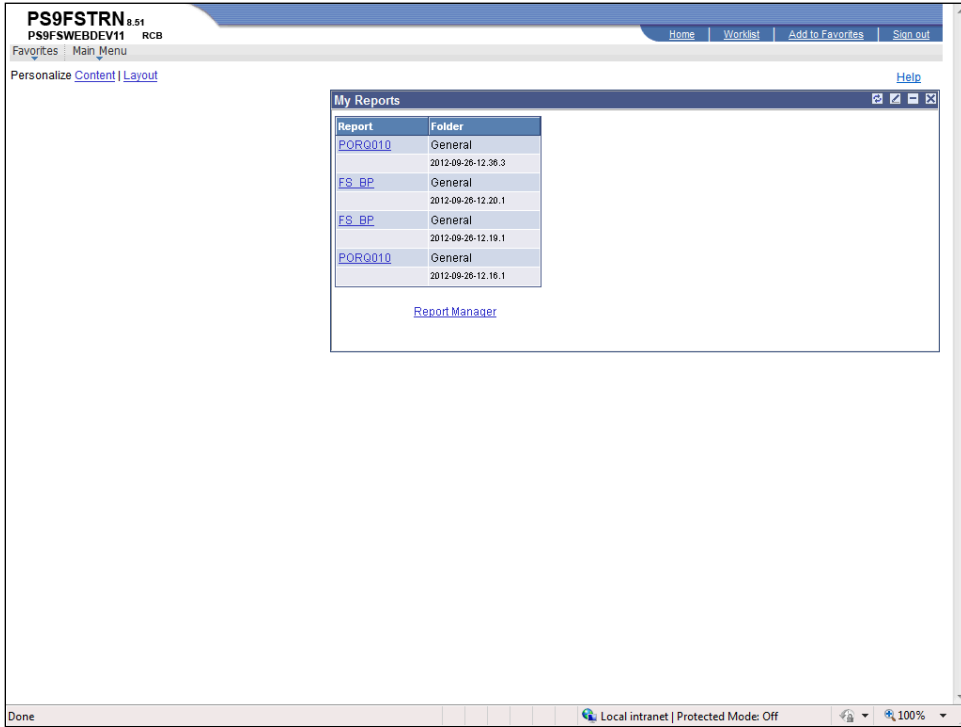
Basic Navigation for Financials 9_2



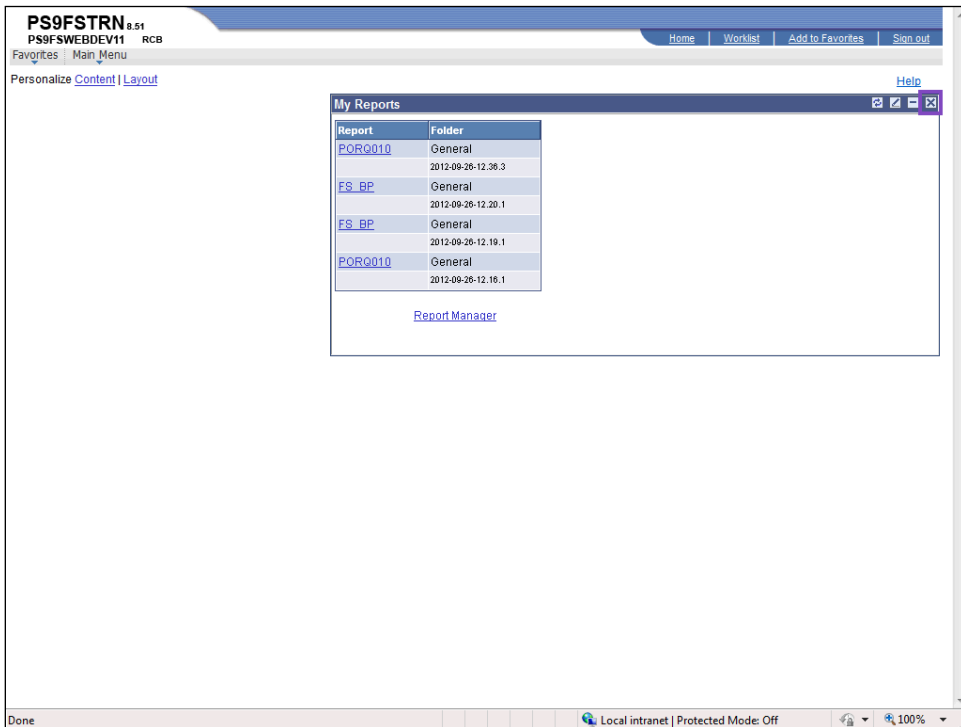
Step	Action
67.	Click the Save button. 


Training Guide

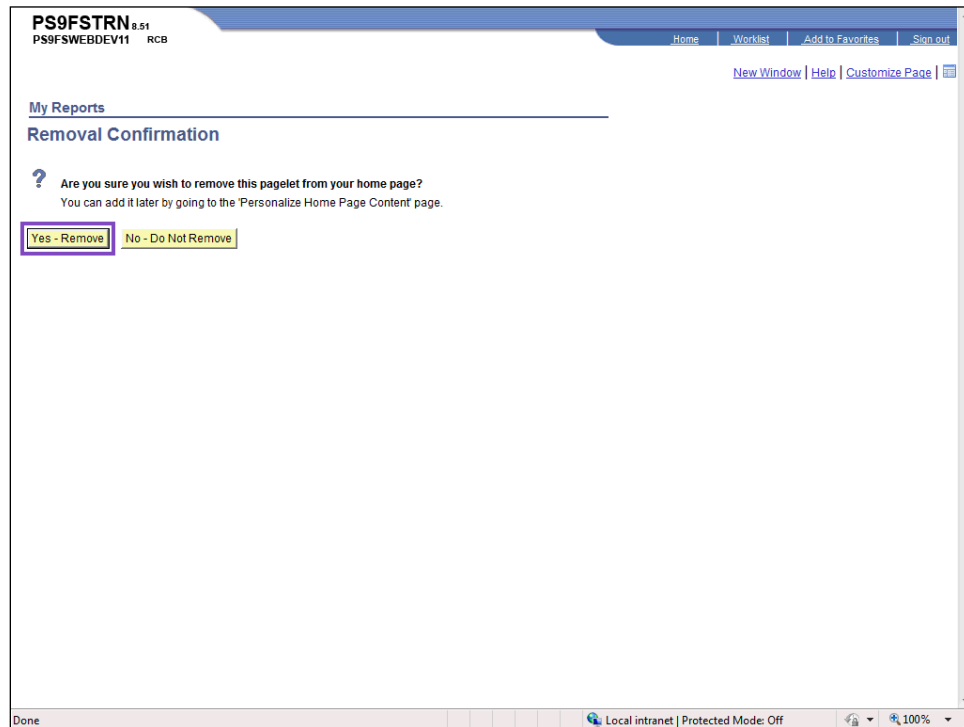
Basic Navigation for Financials 9_2

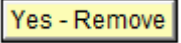


Step	Action
68.	The My Reports pagelet has moved to the right side of the Home page.



Step	Action
69.	<p>Remove a Pagelet from the Home Page</p> <p>Click the Remove My Reports button.</p> 



Step	Action
70.	<p>Click the Yes - Remove button.</p> 
71.	<p>The My Reports pagelet has been removed from the Home page.</p>
72.	<p>This completes <i>Navigating Basics for PeopleSoft 9.2</i>. End of Procedure.</p>

Training Guide

Basic Navigation for Financials 9_2

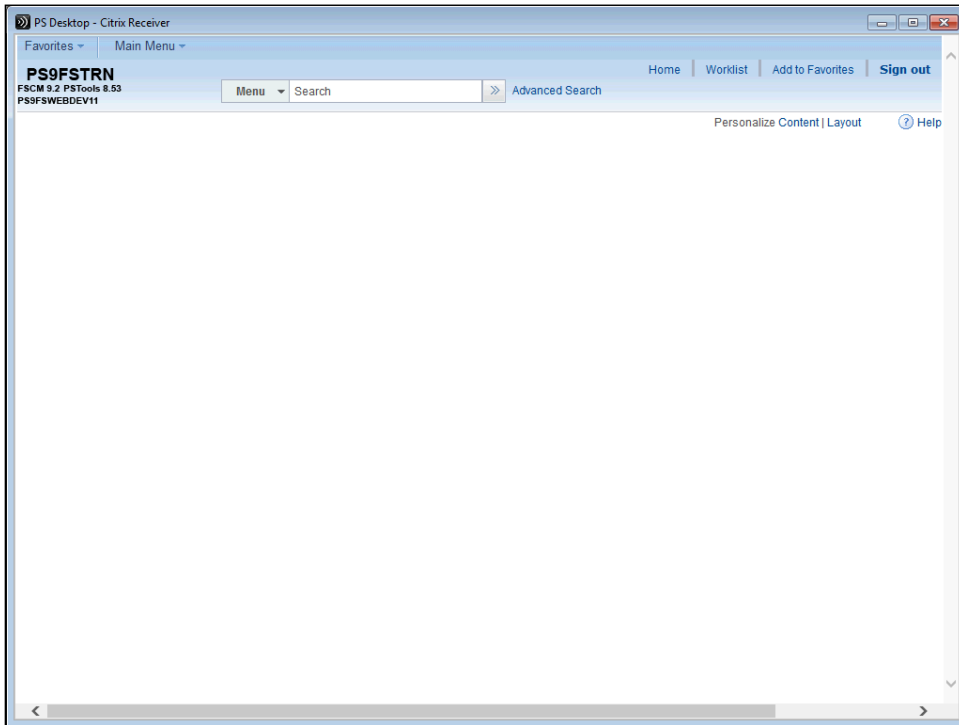
Navigating Page Buttons and Hyperlinks in 9.2

Procedure

In this topic you will learn how to:

- Use the buttons and links on a page.
- View the data in the various Action Types.
- Move between the pages of a Component.
- Move between rows of data on a page by using Scroll Areas.
- Add and Delete rows of data.
- Save data.
- Sign out of PeopleSoft 9.2.
- Log off of Citrix.

NOTE: *The Vendor pages are used in this example to demonstrate the buttons and hyperlinks contained in the PeopleSoft 9.2 pages. These features can be applied to any PeopleSoft page (if they display on the page).*

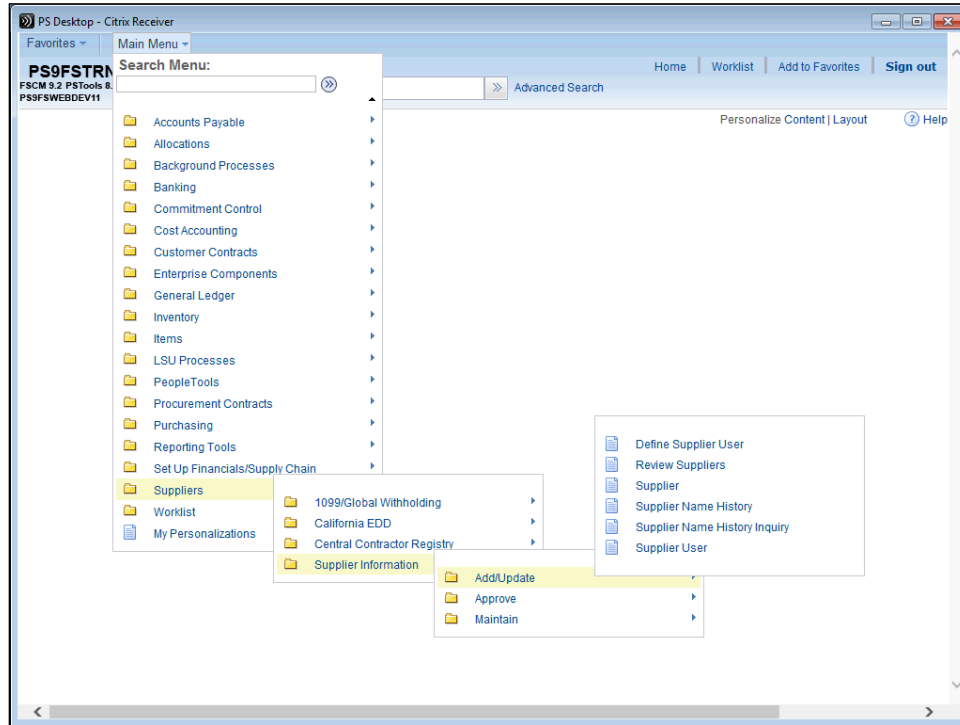


Step	Action
1.	Click the Main Menu button. Main Menu
2.	Click the Suppliers menu. Suppliers

Training Guide

Basic Navigation for Financials 9_2

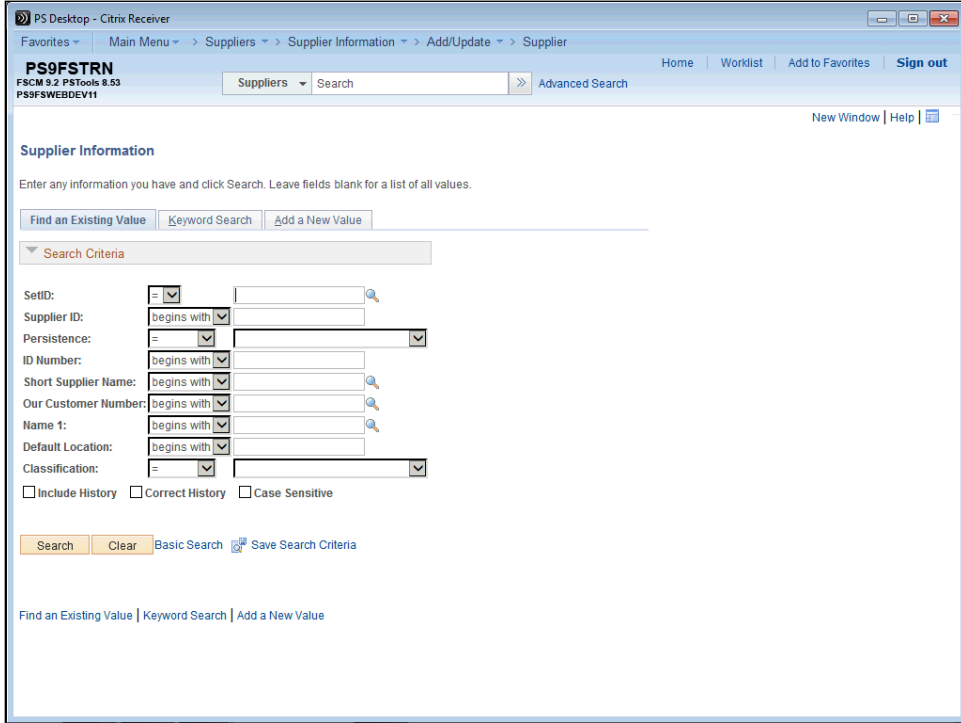
Step	Action
3.	Click the Supplier Information menu. Supplier Information ▶
4.	Click the Add/Update menu. Add/Update ▶



Step	Action
5.	Click the Supplier menu. Supplier

Training Guide

Basic Navigation for Financials 9_2

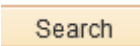


Step	Action
6.	Enter the desired information into the SetID field. Enter " SHARE ".
7.	Enter the desired information into the Name 1 field. Enter " OFFICE% ".
8.	Click the Include History option. <input type="checkbox"/> Include History

Training Guide

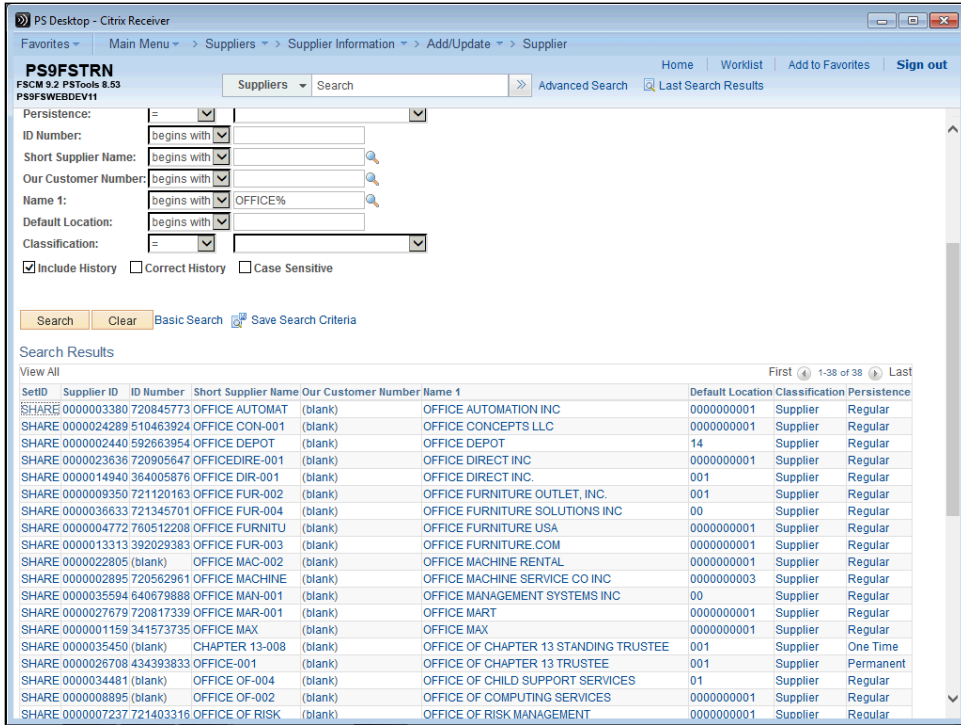
Basic Navigation for Financials 9_2

The screenshot shows a web application window titled "PS Desktop - Citrix Receiver". The breadcrumb navigation is "Suppliers > Supplier Information > Add/Update > Supplier". The user is logged in as "PS9FSTRN" with session ID "FSCM 9.2 PSTools 9.53" and "PS9FSWEBDEV11". The page title is "Supplier Information". Below the title, there is a search bar with "Suppliers" selected and a "Search" button. There are also links for "Home", "Worklist", "Add to Favorites", and "Sign out". A "New Window | Help" link is in the top right. The main content area has a "Search Criteria" section with a dropdown arrow. Below this, there are several search criteria fields: "SetID:" with a dropdown set to "=" and a text input containing "SHARE"; "Supplier ID:" with a dropdown set to "begins with" and an empty text input; "Persistence:" with a dropdown set to "=" and an empty text input; "ID Number:" with a dropdown set to "begins with" and an empty text input; "Short Supplier Name:" with a dropdown set to "begins with" and an empty text input; "Our Customer Number:" with a dropdown set to "begins with" and an empty text input; "Name 1:" with a dropdown set to "begins with" and a text input containing "OFFICE%"; "Default Location:" with a dropdown set to "begins with" and an empty text input; and "Classification:" with a dropdown set to "=" and an empty text input. At the bottom of the search criteria section, there are three checkboxes: "Include History" (checked), "Correct History" (unchecked), and "Case Sensitive" (unchecked). Below the search criteria, there are four buttons: "Search", "Clear", "Basic Search", and "Save Search Criteria". At the bottom of the page, there are three links: "Find an Existing Value", "Keyword Search", and "Add a New Value".

Step	Action
9.	Click the Search button. 

Training Guide

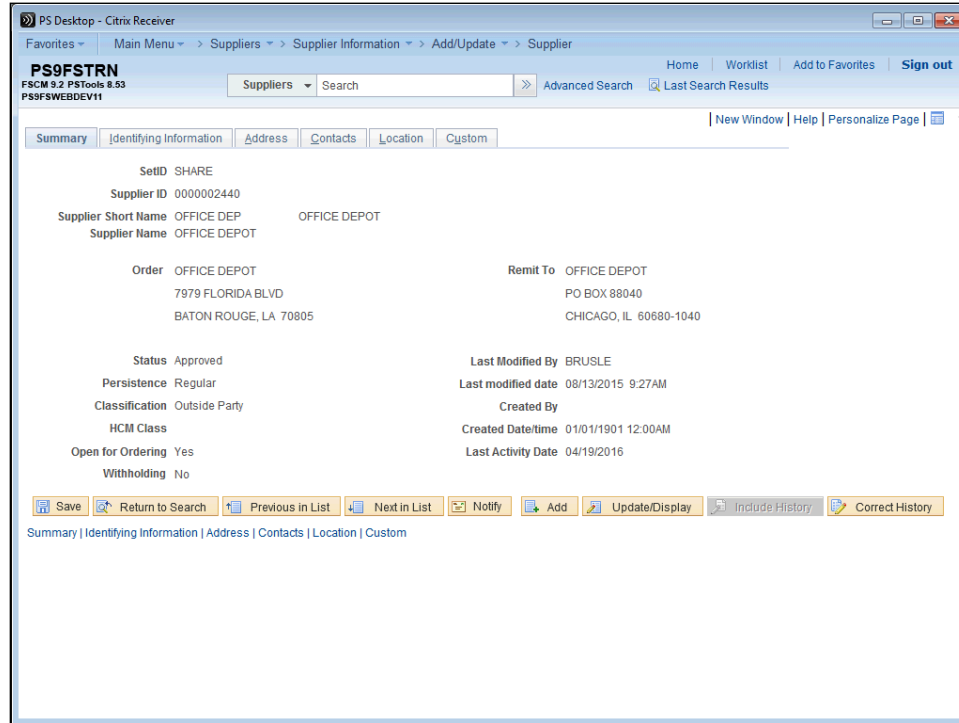
Basic Navigation for Financials 9_2



Step	Action
10.	Click the 000002440 (Office Depot) link. 000002440
11.	To view or enter data in a PeopleSoft application, you first access a component . Components consist of several pages within the same window. These pages are related and in some applications need to be completed in succession. The Vendor component shown here has five additional pages. As you finish one page, select the next page you wish to open in the component.

Training Guide

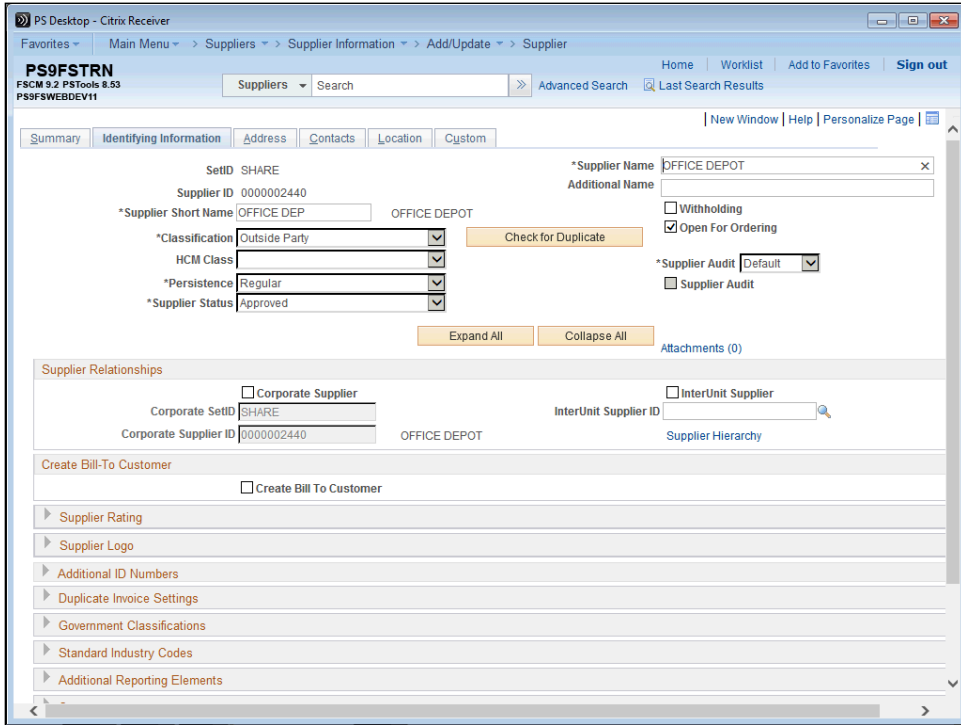
Basic Navigation for Financials 9_2




Step	Action
12.	<p>You can move between the pages of a component by choosing one of the following methods:</p> <ol style="list-style-type: none"> 1. Click the folder tabs at the top of the page; 2. Click the page links at the bottom of the page. <p>NOTE: <i>The active page will be depicted by a dark blue folder tab and the page link will no longer be underlined (i.e. Summary). Also, a gray button depicts that it is selected (i.e. Include History).</i></p> <p>1. Using Folder Tabs to move between the pages.</p> <p>Click the Identifying Information tab.</p> <p>Identifying Information</p>

Training Guide

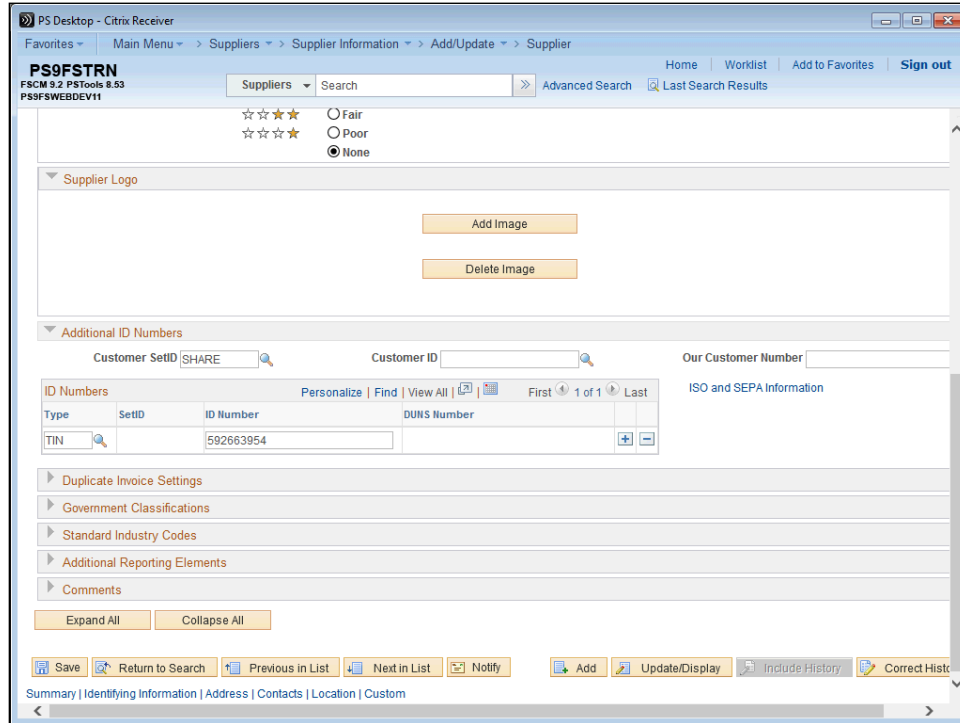
Basic Navigation for Financials 9_2



Step	Action
13.	<p>Expand Section Buttons</p> <p>Expand Section buttons allow you to view additional fields and information on a page.</p> <p>Click the Expand section button.</p> 

Training Guide

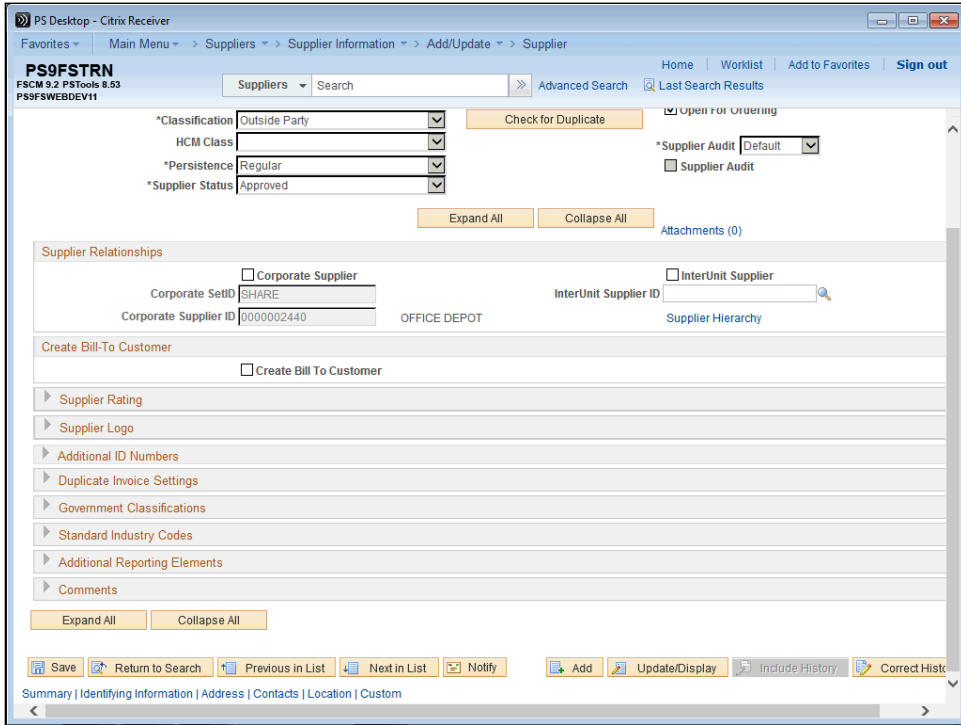
Basic Navigation for Financials 9_2



Step	Action
14.	<p>Collapse Section Button</p> <p>Click the Collapse section button.</p> 

Training Guide

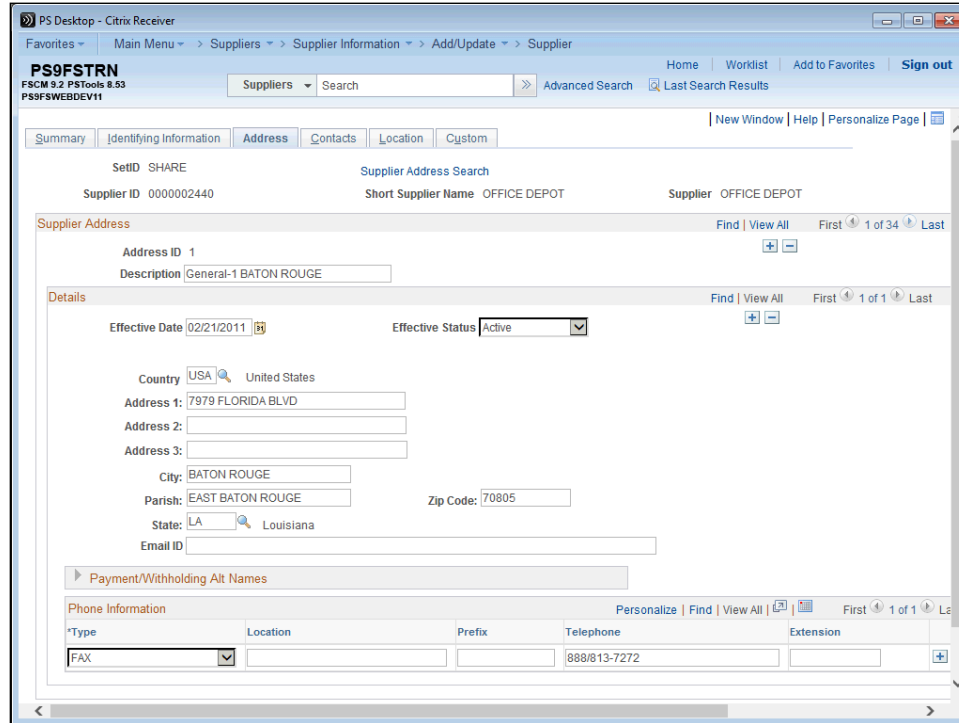
Basic Navigation for Financials 9_2



Step	Action
15.	<p>2. Using Page Links to move between the pages.</p> <p>Page links display below the row of buttons at the bottom of the page.</p> <p>Click the Address link.</p> <p> Address</p>

Training Guide

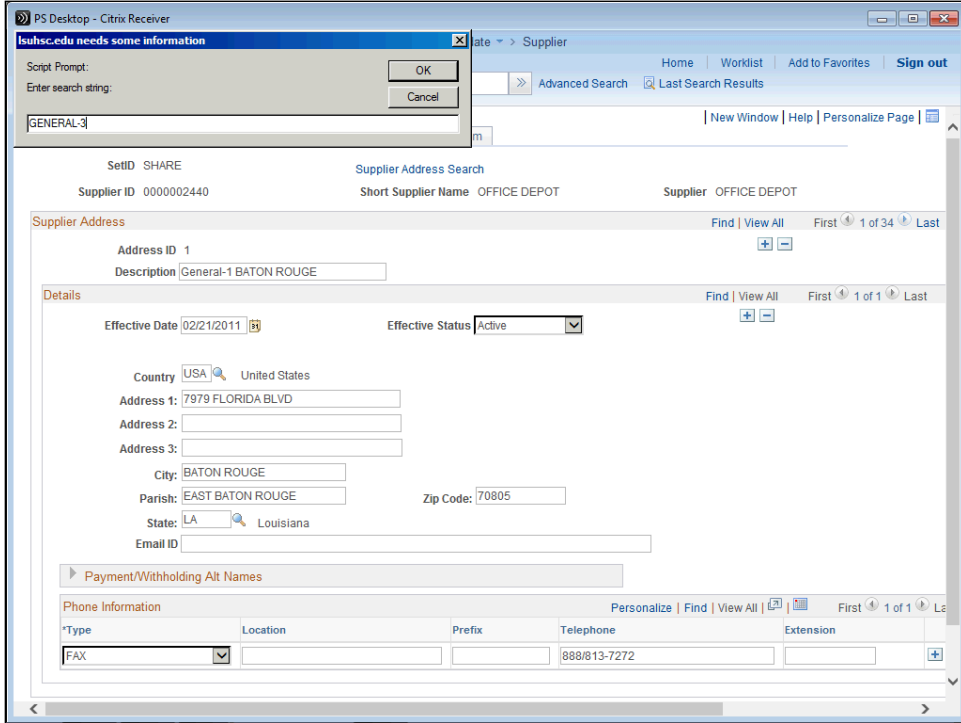
Basic Navigation for Financials 9_2

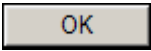


Step	Action
16.	<p>Find Link</p> <p>The Find link allows you to search all rows within a scroll area in order to find a particular item.</p> <p>Click the Find link.</p> <p>Find</p>
17.	<p>Enter the desired information into the Search String field. Enter "GENERAL-3" to access the row of data in the Description field.</p>

Training Guide

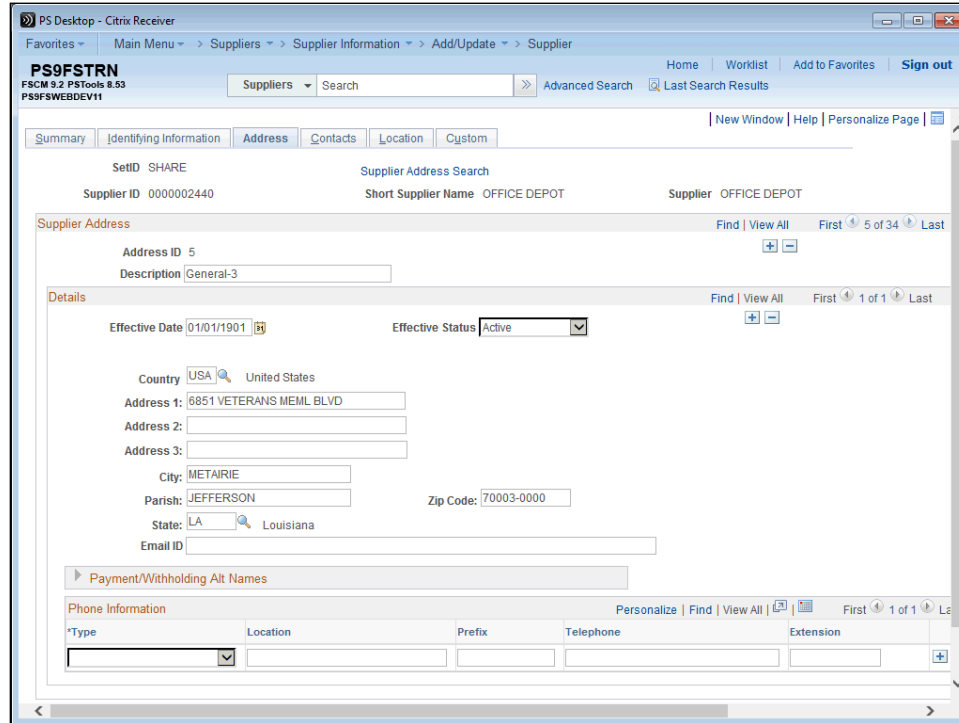
Basic Navigation for Financials 9_2



Step	Action
18.	Click the OK button. 
19.	The system automatically takes you to the specified item.

Training Guide

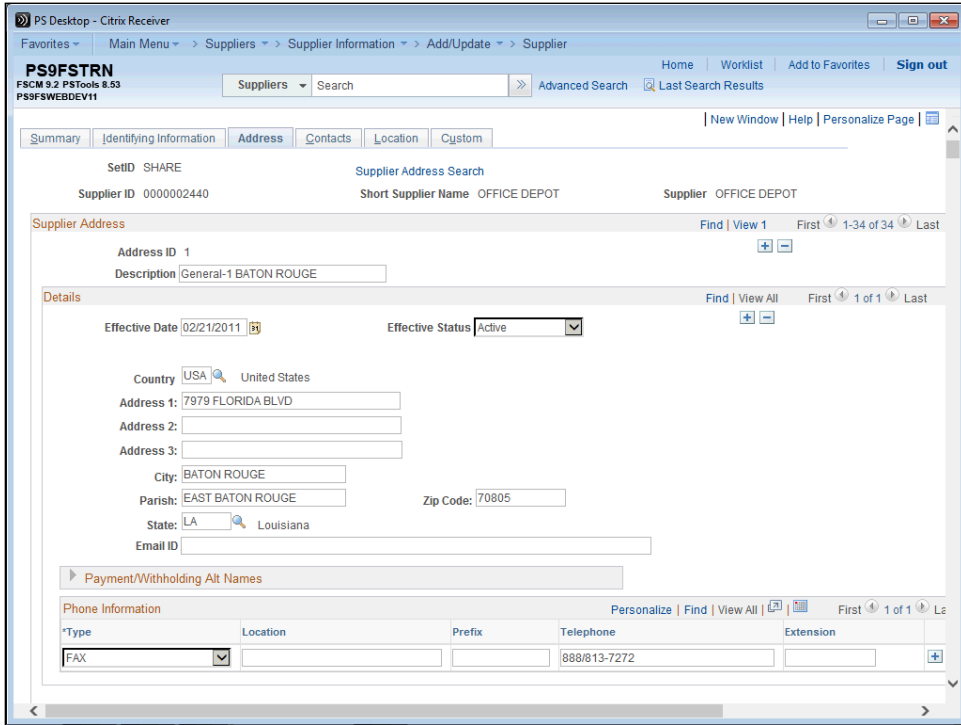
Basic Navigation for Financials 9_2




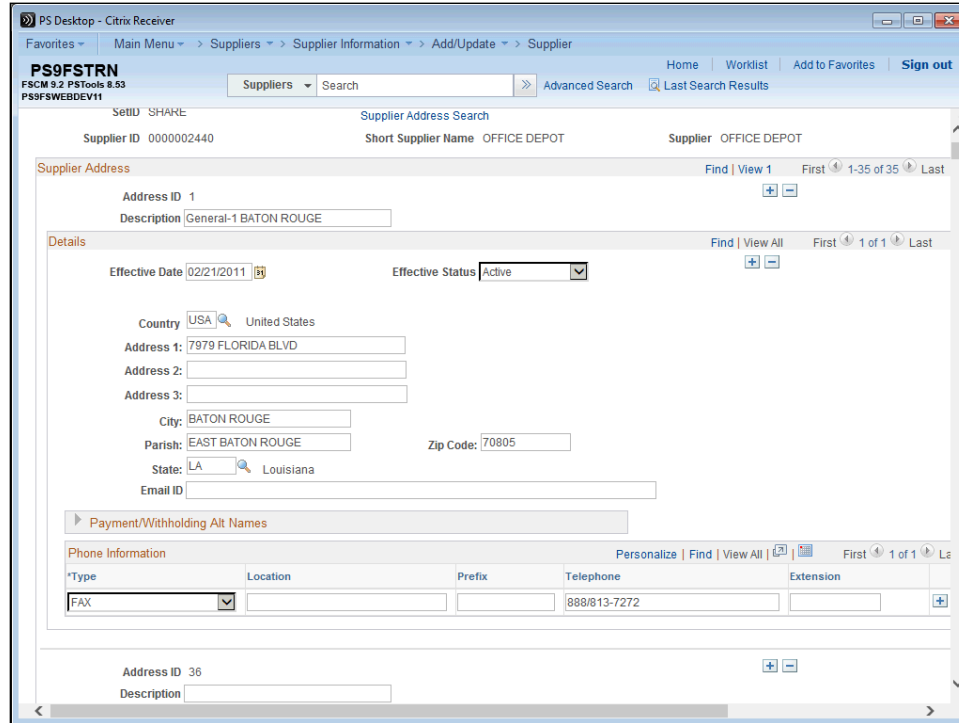
Step	Action
20.	<p>Scroll Areas</p> <p>Click the View All link to view all records on one page.</p> <p>View All</p>
21.	<p>While in View All, you will use the vertical scroll bar on the right side of the window to scroll through all of the rows of data.</p> <p>Click the View 1 link to return to the original view.</p> <p>View 1</p>
22.	<p>While in View 1, you will use the scroll area to scroll through all of the rows of data.</p> <p>Click the Last link to view the last row of data.</p> <p>Last</p>
23.	<p>Click the First link to view the first row of data.</p> <p>First</p>
24.	<p>Click the Show next row button to view the next row of data.</p> <p>Show next row</p>
25.	<p>Click the Show previous row button to view the previous row of data.</p> <p>Show previous row</p>


Training Guide

Basic Navigation for Financials 9_2



Step	Action
26.	<p data-bbox="341 1029 584 1060">Add a Row of Data</p> <p data-bbox="341 1092 1218 1123">Scroll Areas may contain an Add a new row button and Delete row button.</p> <p data-bbox="341 1155 1299 1260">Click the Add a new row at row 1 button to add a new row of data. On some PeopleSoft pages, a prompt box will display for you to specify the number of rows to be added.</p> <p data-bbox="341 1291 1266 1365"><i>NOTE: You may opt to click in a field and press Alt+7 keys on your computer keyboard to add a row.</i></p> <p data-bbox="341 1375 381 1407"></p>



Step	Action
27.	<p>Date Boxes</p> <p>Click the Choose a date button.</p> 



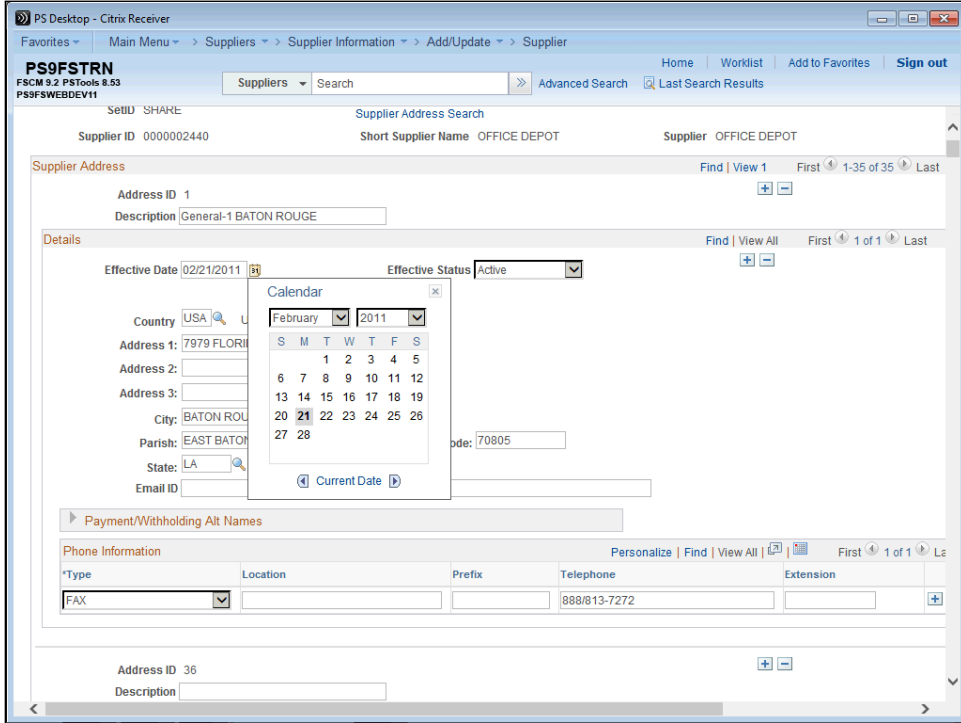
Date Boxes

Enter a date by one of the following methods:

1. To view the calendar and select the date, click the **Calendar** icon next to the **Due Date** field. Once you have selected the month and year (if necessary), click on the day you wish to select.
2. Enter the date (mm/dd/yy) – PeopleSoft requires that **6 digits** be entered, but the user **does not** have to type the slashes (e.g. 010113). The slashes will populate once the user presses the **Refresh** button or moves to another page (this includes actually navigating to another page or clicking the search button on another field on the same page, since searching on a field actually brings you to another page).

Training Guide

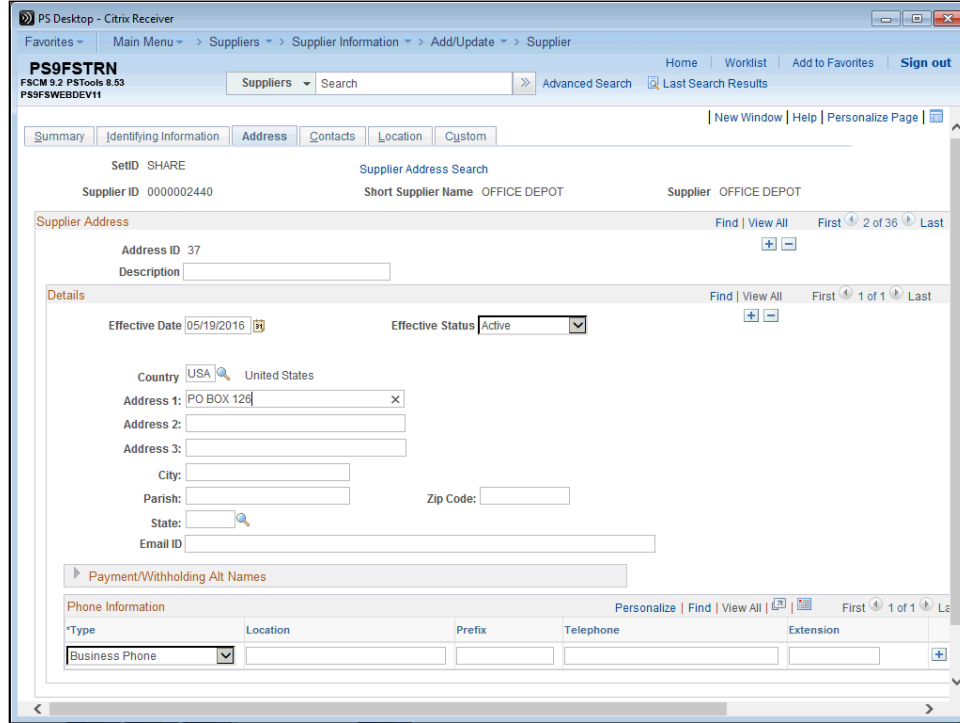
Basic Navigation for Financials 9_2




Step	Action
28.	Click the desired date. 28
29.	Enter Data into a Field Click in the Address 1 field. Enter the desired information into the Address 1 field. Enter " 5429 Airline Highway ".
30.	Press the Backspace button on your computer keyboard to delete the data in the Address 1 field.
31.	Enter the desired information into the Address 1 field. Enter " PO BOX 126 ".

Training Guide

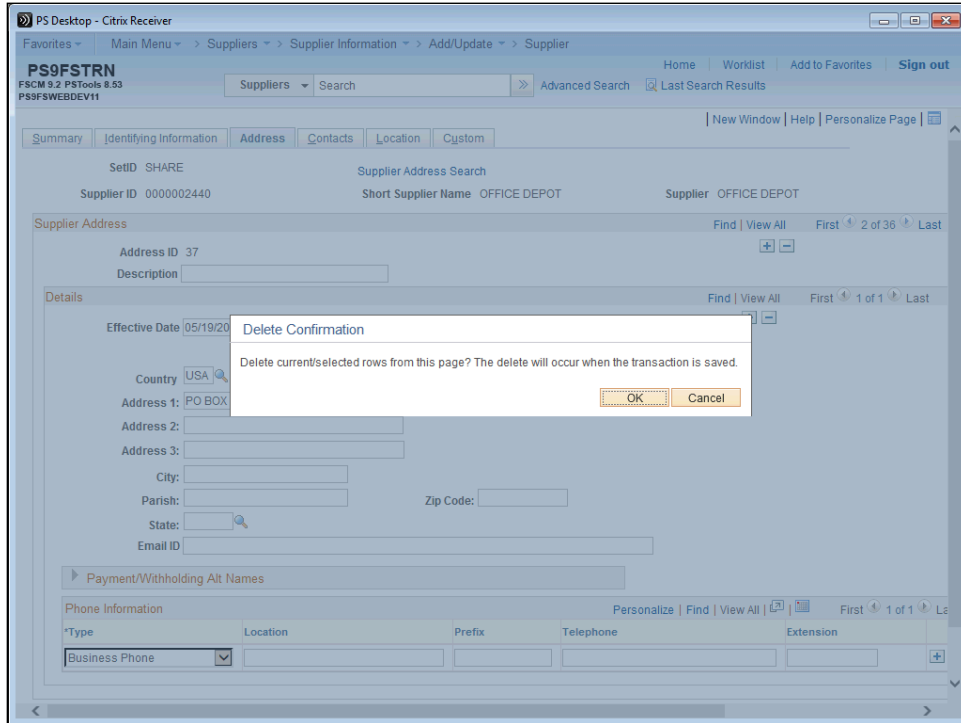
Basic Navigation for Financials 9_2




Step	Action
32.	<p>Delete a Row of Data</p> <p>Click the Delete row 1 button to delete a row of data.</p> <p><i>NOTE: You may opt to click in a field and press Alt+8 keys on your computer keyboard to delete a row.</i></p> <p></p>

Training Guide

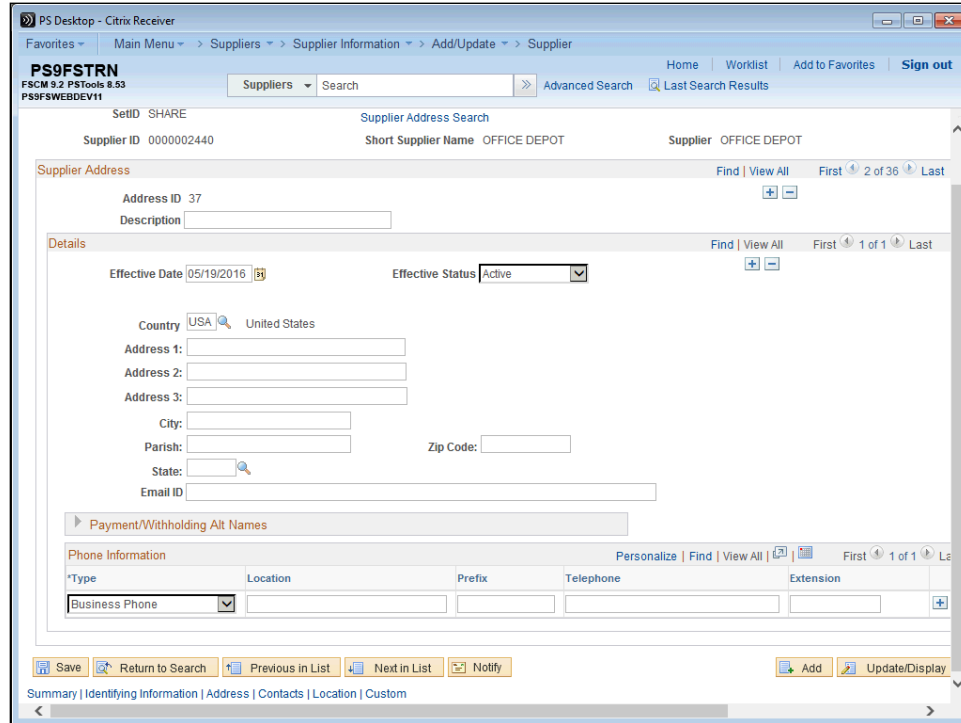
Basic Navigation for Financials 9_2




Step	Action
33.	Click the OK button. 

Training Guide

Basic Navigation for Financials 9_2



Step	Action
34.	<p>Save Data</p> <p>After making any changes to a page, you must click the Save button in order for the system to commit your changes to the database. Pages in a component are treated as a single entity when you try to save data. If you have not completed all required fields (i.e. the fields that contain a nested asterisk), the system prompts you to enter additional data.</p> <p>When you save, the Saving Indicator will flash in the upper right corner of the page. You will know that your data is saved when the Saving Indicator stops flashing and no error or warning messages are received. The word "Saved" replaces "Saving" in the upper right corner of the page.</p> <p>Click the Save button to save the data.</p> 
35.	<p>Pagebar (top right corner of the page).</p> <p>Just below the Universal Navigation Header sits the pagebar comprised of a series of links and buttons. The availability of these options is controlled by the application developer. All options may not be available for each component.</p>

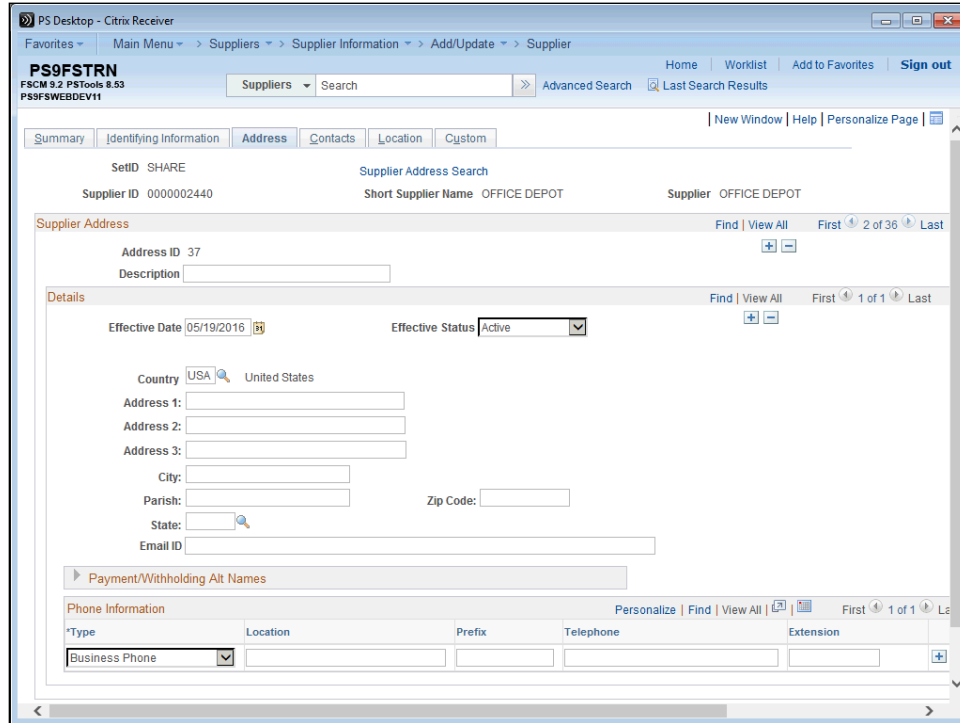
Training Guide

Basic Navigation for Financials 9_2

Step	Action
36.	<p>New Window</p> <p>You can use the New Window link to open a new browser (child) window. The new window shows the current component page as well as the navigation to your current position. From this window you can view or enter data. You can open as many child windows as needed using the New Window link. Each child window is opened from the previous child window.</p>
37.	<p>New Window Feature (continued)</p> <p>The end-user should note the following when using the New Window feature:</p> <ul style="list-style-type: none"> • Save any changes made in the current window prior to opening a new window. If the session times out (or expires) while you are working in a new window, you may lose any unsaved changes. See the "Session Time Out" topic for more information. • If a session expires while using the New Window feature, do not use the Sign in to PeopleSoft link on the expired page as this will invalidate the entire session in all open windows. Instead, close the expired window using the "X" (Close Window button) in the upper right corner of the browser or select File, Close on the browser menu bar.
38.	<p>New Window Feature (continued)</p> <ul style="list-style-type: none"> • <u>Do not</u> use your browser's Page, New Window feature. Doing so copies the current HTML from the parent window, instead of opening a new PeopleSoft-maintained window session. • It is not necessary to close open windows (including the original window) in any particular order. However, the end-user must remember to "sign out" of the original window only prior to closing the window. If you sign out of any window other than the original window, all of the windows will close. To close all windows, except the final window, click the "X" on your browser bar or select: File, Close from your browser menu bar. Signing out of PeopleSoft 9.2 will be covered later in this topic.

Training Guide

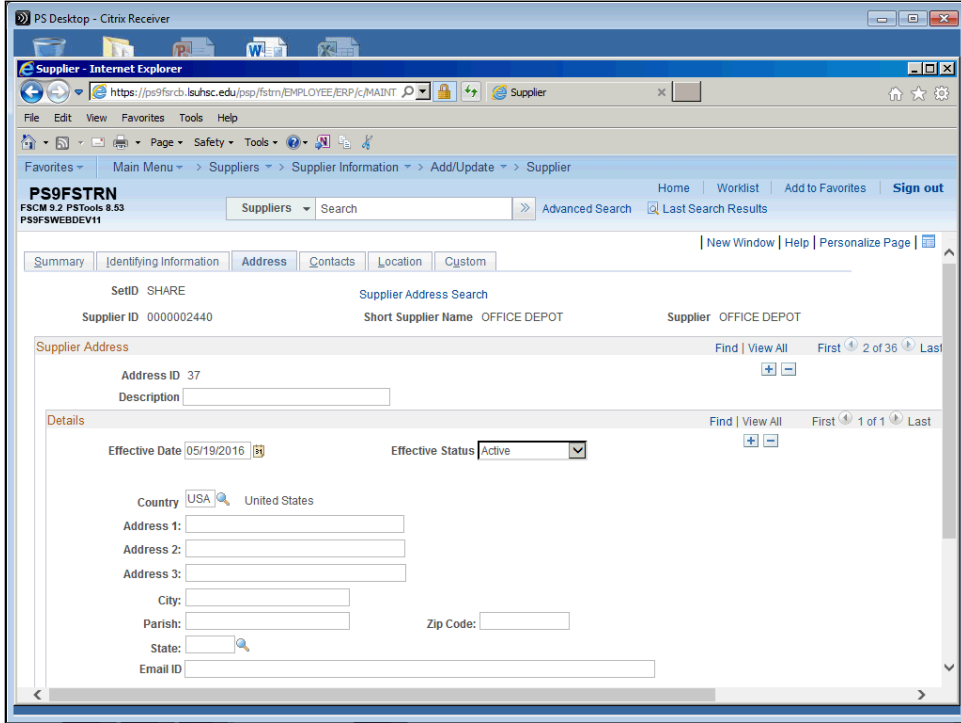
Basic Navigation for Financials 9_2




Step	Action
39.	Click the New Window link. New Window

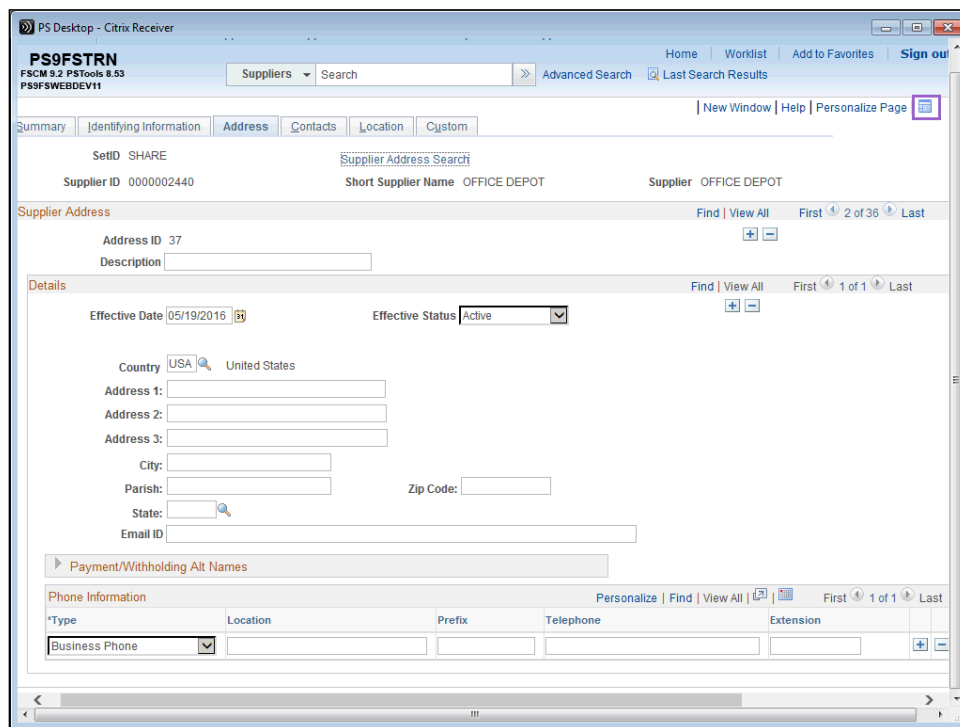
Training Guide

Basic Navigation for Financials 9_2



Step	Action
40.	<p>The new browser window displays.</p> <p>Click the Close button to close the new window.</p> <p><i>NOTE: You may opt to click File, Close on the browser menu bar.</i></p> 
41.	<p>The Help link opens the online PeopleBooks help for the specific transaction page that is displayed.</p>
42.	<p>The Personalize Page link enables you to control the initial display of the page.</p> <p><i>NOTE: This is not used by most end-users.</i></p> <p>Click the Customize Page link.</p> <p>Personalize Page</p>



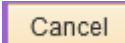
Step	Action
43.	<p>Use this page to:</p> <ul style="list-style-type: none"> • Select the initial page in the component to be displayed. • Save the state of the expanded and collapsed sections. • Save the state of the View All settings on the page for grids and scroll areas . • Customize the page field tabbing order. • Copy and share the settings that you have saved for the customized page. <p>Click the Cancel button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; background-color: #f0f0f0;">Cancel</div>

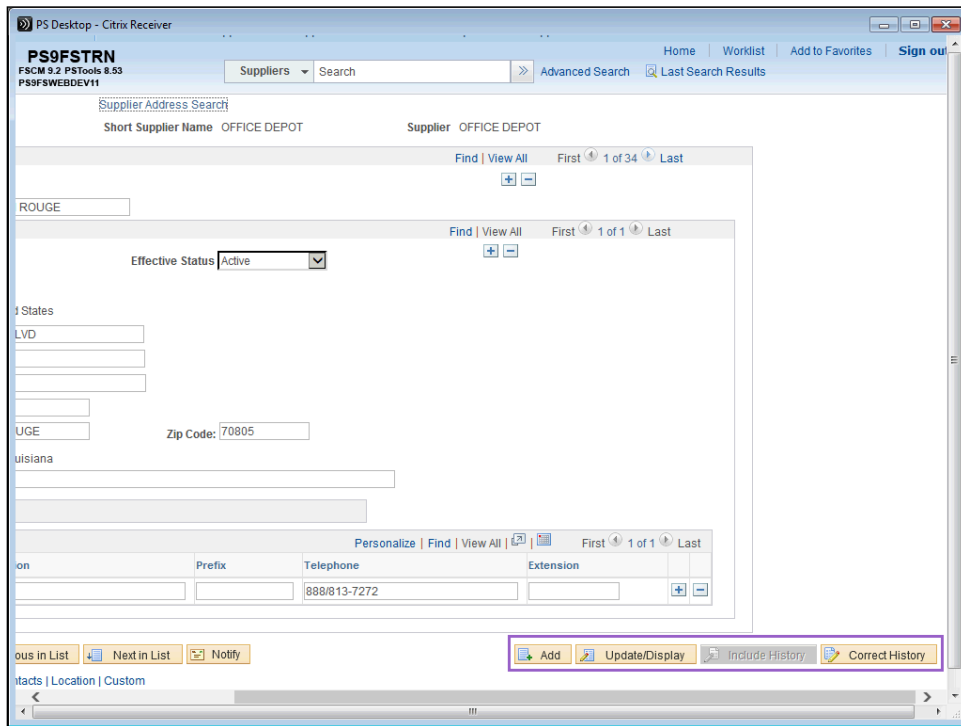


Step	Action
44.	<p>You use the http icon to copy the current page URL to the clipboard so that it is available for pasting in emails or other applications. The copied URL includes page, action, and search key information to display in the context of the portal, if you are using the portal. If you did not pass through the portal, then the system displays the page only without the portal frames.</p> <p><i>NOTE: This is not used by most end-users.</i></p>
45.	<p>Next in List Button</p> <p>Click the Next in list button to view the next record in the list of your search results.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; background-color: #f0f0f0;"> Next in List </div>

Training Guide

Basic Navigation for Financials 9_2

Step	Action
46.	<p>Previous in List</p> <p>Click the Previous in list button to view the previous record in the list of your search results.</p> 
47.	<p>Click the Notify button.</p> <p><i>NOTE: This is not used by most end-users.</i></p> 
48.	<p>Click the Cancel button.</p> 
49.	<p>Refresh Button</p> <p>A Refresh button may or may not display with the other buttons at the bottom of the page. Clicking the Refresh button populates fields with additional characters (e.g. if you enter a date without the slashes, when you click the Refresh button, the slashes will populate).</p>



Step	Action
50.	Action Types Update/Display is the default setting of PeopleSoft 9.2. The Action Type can also be selected from the Search page.



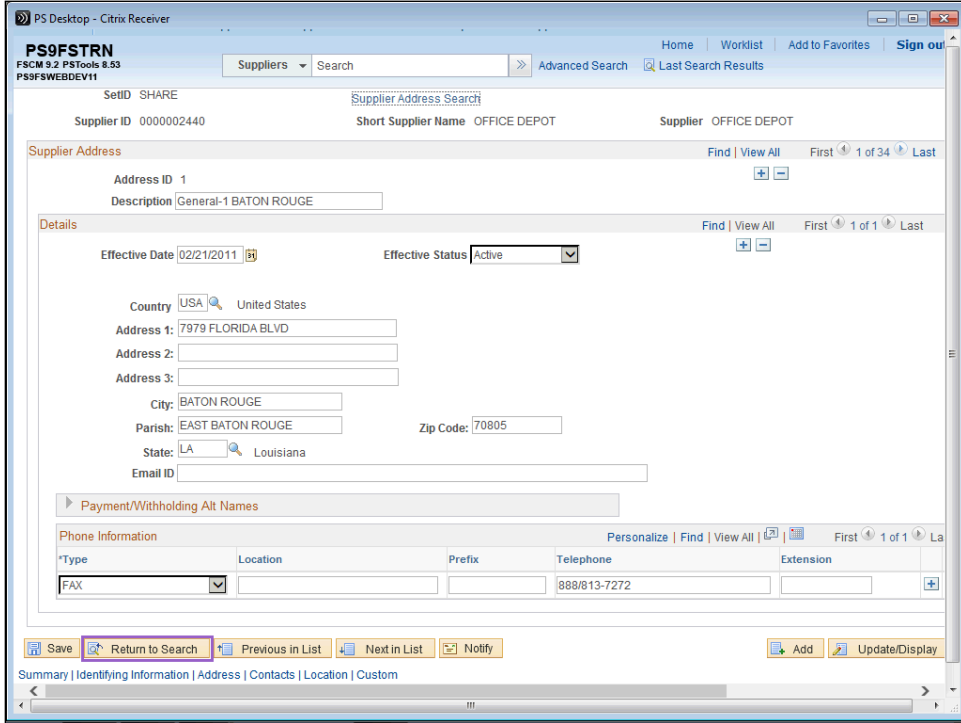
There are four **Action Types** available in PeopleSoft 9.1:

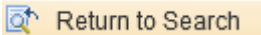
1. **Update/Display** is the **default setting** of PeopleSoft 9.1 and accesses existing records to view and/or add information. It allows you to view current and any future rows of data, but not history.
2. The **Add a New Value** hyperlink inserts a new record into the database. Click the hyperlink to select this action when available.
3. **Include History** accesses existing records to view and/or add information. It allows you to view current, any future and history rows of data. Place a checkmark in the checkbox in front of Include History to select this action.
4. **Correct History** accesses existing records to view, add and/or modify information. Place a checkmark in the checkbox in front of **Correct History** to select this action.

The end-user's level of access (his/her Logon ID) will determine which action(s) is available to the end-user.

Training Guide

Basic Navigation for Financials 9_2

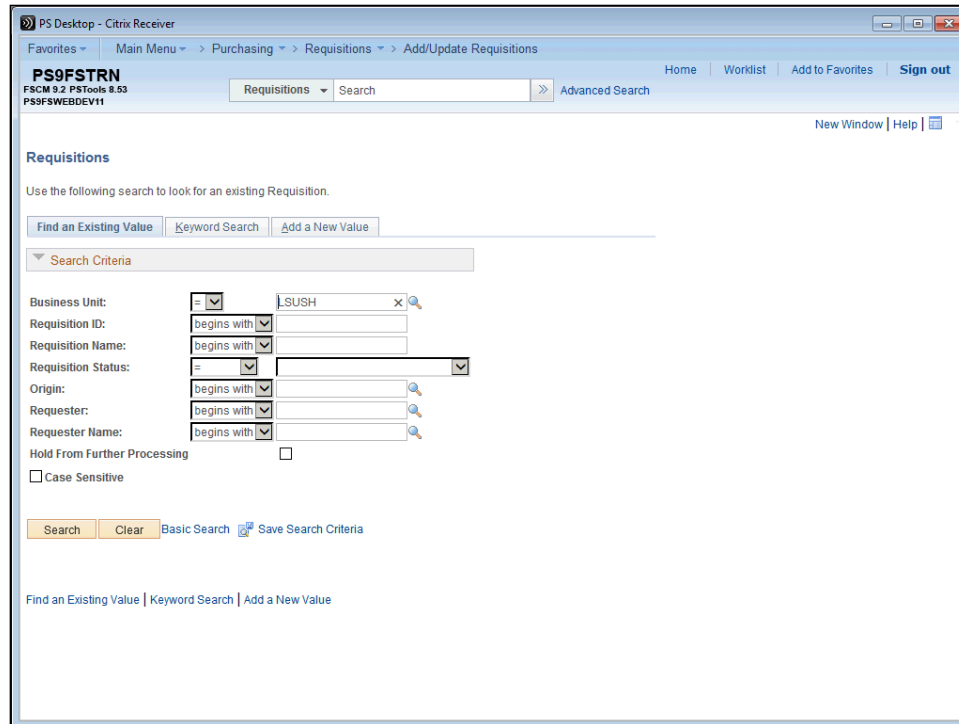


Step	Action
51.	<p>Return to Search Page Button</p> <p>Click the Return to Search button to return to the search results page and select another record from your existing search or begin a new search.</p> 
52.	<p>This completes <i>Navigating Page Buttons and Hyperlinks in 9.2</i>. End of Procedure.</p>

Sign Out and Log Off Procedures

Sign Out of PeopleSoft and Log Off of Citrix Web Procedure

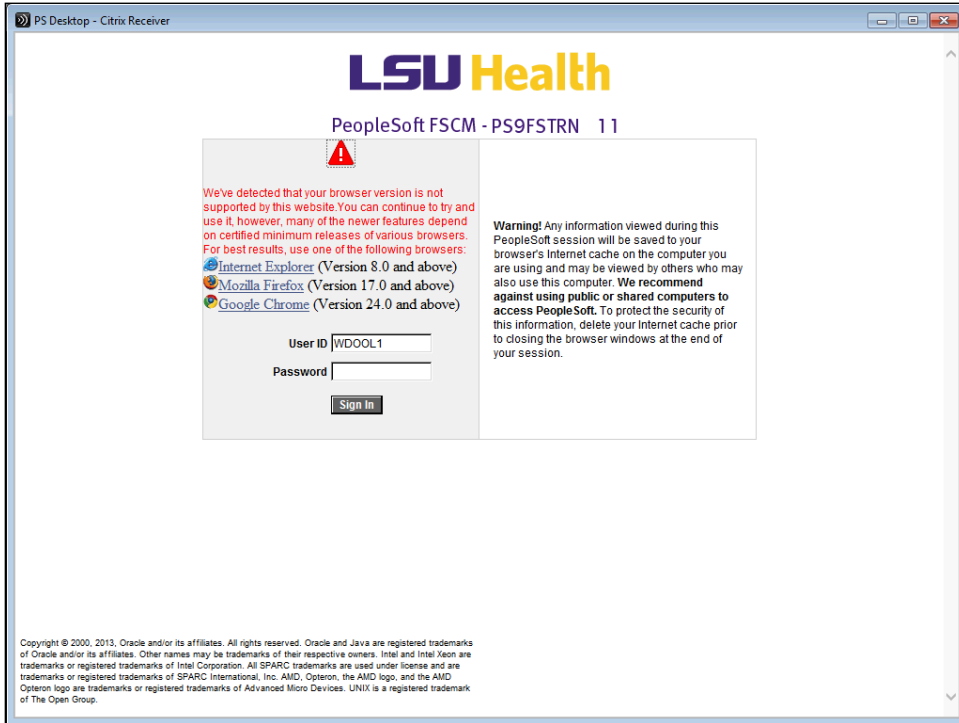
In this topic you will learn how to [Sign Out of PeopleSoft and Log Off of Citrix Web](#).




Step	Action
1.	<p>Sign Out of the PeopleSoft Database</p> <p>You <u>must</u> click the Sign out link to sign out of the database. The end-user <u>must always</u> sign out of the PeopleSoft database before closing the browser. If the browser is closed prior to signing out (i.e. click the "X" in the upper right hand corner of the browser or click File, Close on the browser menu bar) the connection to the application remains open and the end-user may be locked out of the system.</p> <p><i>NOTE: If you are locked out of the system, contact the PeopleSoft Help Desk at 1-800-303-3290 (Long Distance) or 504-568-HELP (4357) (Local calls) or helpdesk@lsuhsc.edu for assistance.</i></p> <p>Click the Sign out link.</p> <p>Sign out</p>

Training Guide

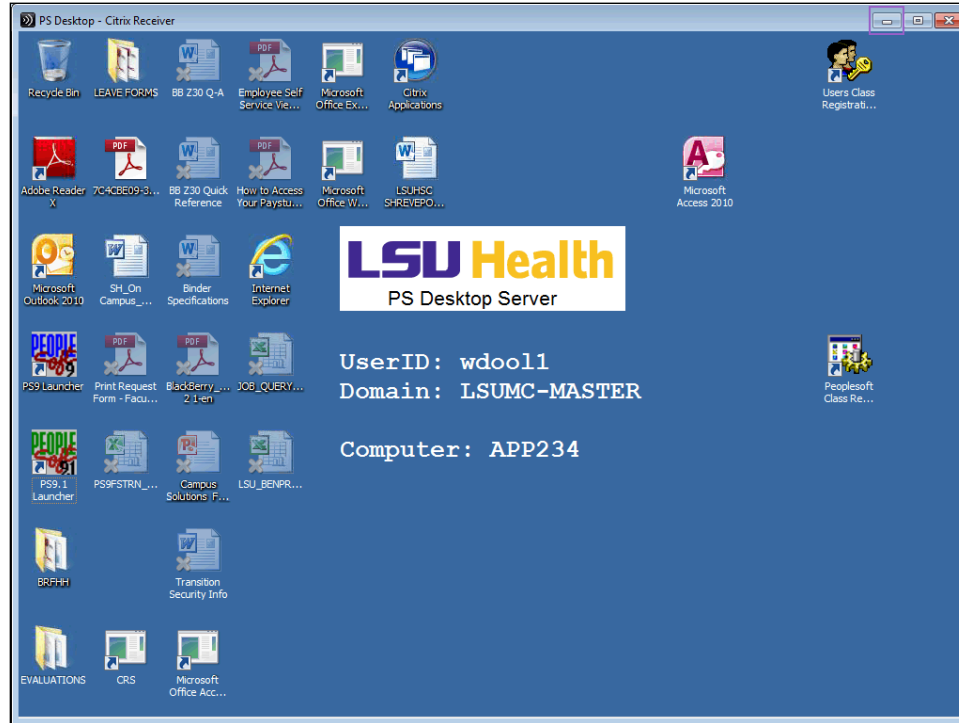
Basic Navigation for Financials 9_2



Step	Action
2.	<p>Close the Browser</p> <p>Click the Close button (or the "X" in the top right corner of the window on the PeopleSoft 9 Sign-in title bar)</p> <p><i>NOTE: You may opt to click File, Close on the browser menu bar.</i></p> 
3.	<p>Log Off of Citrix</p> <p>The user should logoff of Citrix when not working in PeopleSoft as this will prevent using available resources shared by the entire LSUHSC system.</p> <p><u>NEVER</u> exit Citrix by clicking the "X" (i.e. located on the Citrix ICA Client title bar) as it may lock you out of the system and will <u>not</u> disconnect the Citrix session. In the event that you are <u>not</u> locked out and are able to logon to another Citrix session with the previous session still connected, you will be using more than one user license. This is monitored by Server Support since using more than one user license could prevent another user from being able to logon to Citrix. Users <u>MUST ALWAYS</u> logoff Citrix by clicking the Citrix Start button (i.e. top Start button).</p>

Training Guide

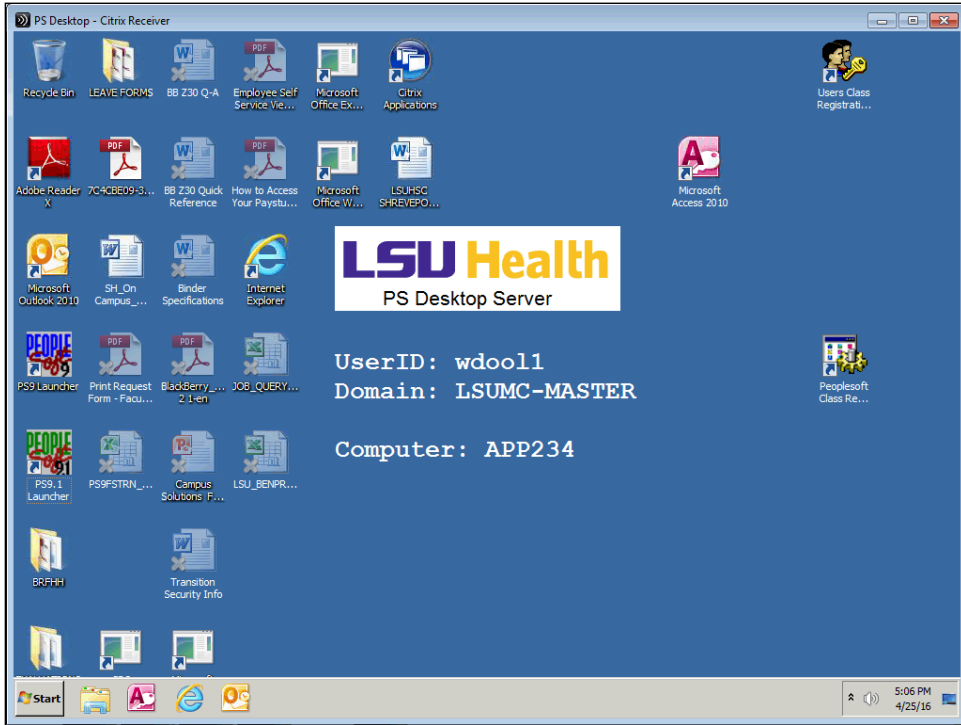
Basic Navigation for Financials 9_2


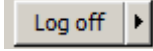


Step	Action
4.	<p>Users may click the Minimize button on the Citrix ICA Client title bar, to minimize the Citrix Desktop, if needed, but not the "X" to close the window.</p> <p><i>NOTE: When exiting the Citrix Desktop, the user is actually logging off of a second Desktop (rather than a window) and, therefore, must logoff via the Start button, as with the Windows Desktop.</i></p> <p><i>NOTE: If you are locked out of the system, contact the PeopleSoft Help Desk at 1-800-303-3290 (Long Distance) or 504-568-HELP (4357) (Local calls) or helpdesk@lsuhsc.edu for assistance.</i></p>

Training Guide

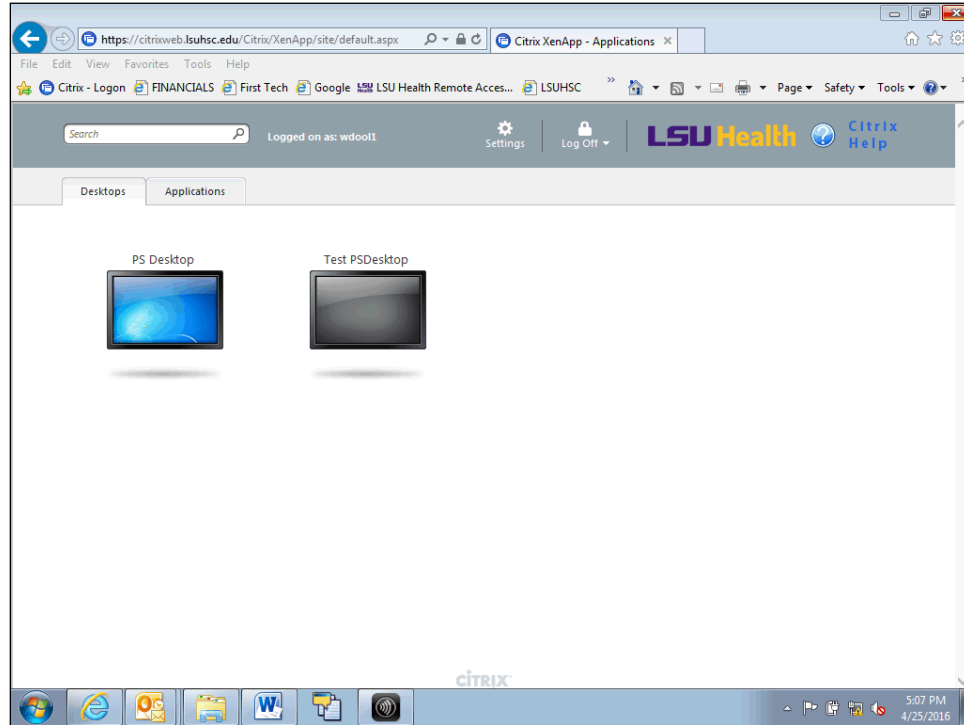
Basic Navigation for Financials 9_2




Step	Action
5.	Click the Start button. 
6.	Click the Log off button. 
7.	This page will display after clicking the logoff button. <p>NOTE: <u>DO NOT</u> click the Force log off or Cancel buttons. The page will close on its own.</p>

Training Guide

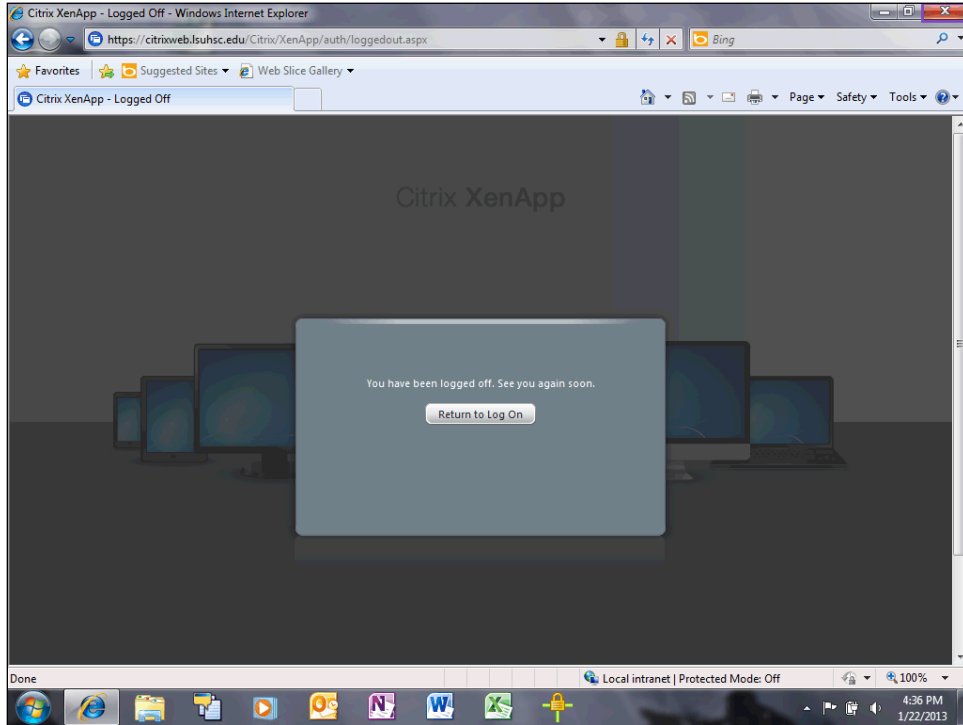
Basic Navigation for Financials 9_2




Step	Action
8.	<p>Click the Log Off link.</p> <p><i>NOTE: If the system has already logged you out due to inactivity, simply click the Close (red X) button.</i></p>  <p>The image shows a grey button with a white padlock icon and the text 'Log Off' followed by a small downward-pointing arrow.</p>

Training Guide

Basic Navigation for Financials 9_2



Step	Action
9.	Click the Close button. 
10.	This completes <i>Sign Out of PeopleSoft 9.2 and Log Off of Citrix Web</i> . End of Procedure.

Appendix

Clear Browser Cache

Procedure


In this topic you will learn how to clear your Browser Cache (i.e. delete your temporary Internet cookies and files).

Each time a PeopleSoft Database is accessed, it is put into the user's Cache. The user should clear his/her Cache:

- When problems arise (e.g. computer slowdowns, inability to load pages, inability to refresh the page when error messages are received, etc.);
- According to usage (once a month for light usage, once a week for medium usage, or every other day for heavy usage).

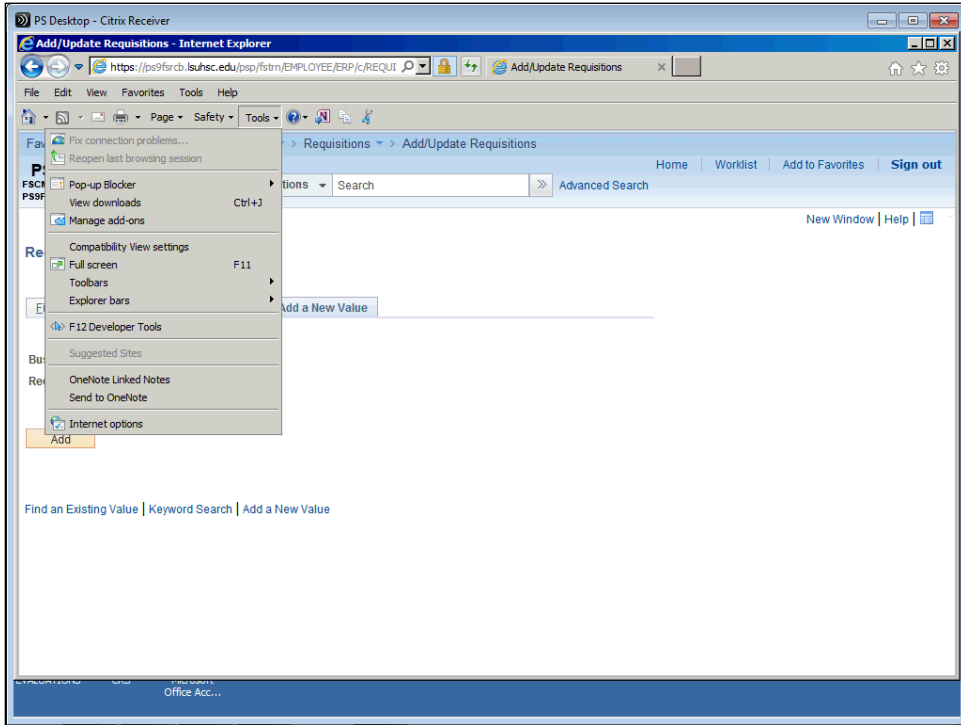
You can clear the Cache as often as you wish.

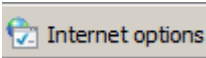

NOTE: Clearing Cache in PS 9.2 can be done at anytime while navigating through PeopleSoft. However, it is not recommended that you clear the Cache while entering a transaction, as this may result in the user having to start the document over. Once the Cache has been cleared, it may take a couple of seconds longer to load pages initially. However, once you have loaded a page, any subsequent loads of that page should be faster. This will be experienced mainly when adding new transactions.

Step	Action
1.	From any PeopleSoft 9.2 page: Click the Tools menu on the browser bar. 

Training Guide

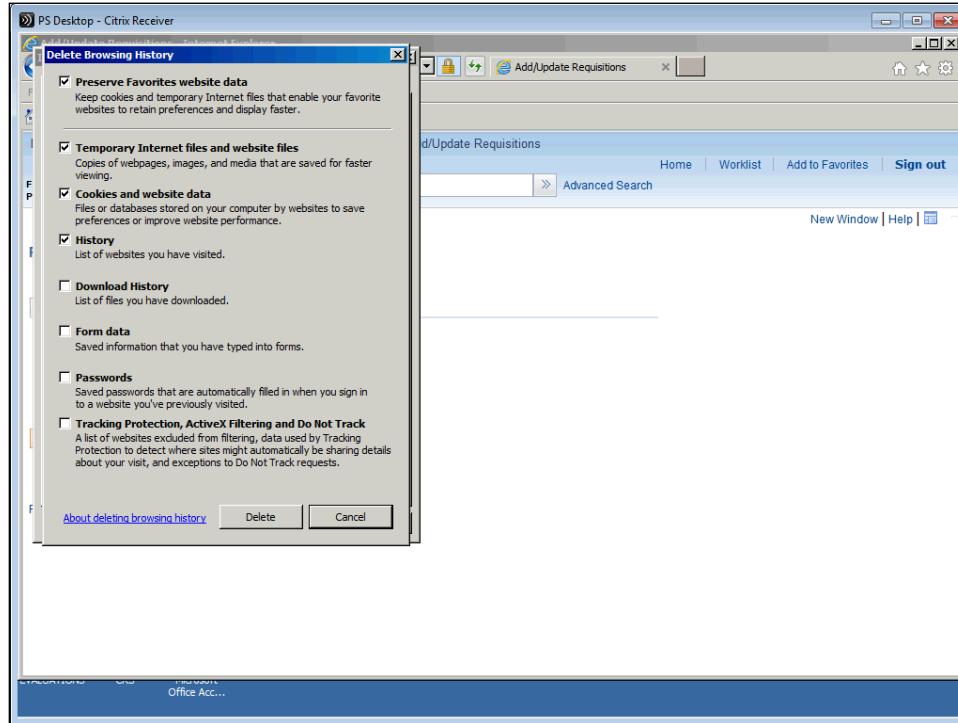
Basic Navigation for Financials 9_2


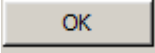


Step	Action
2.	Click the Internet Options menu. 
	<i>or Press [O].</i>
3.	NOTE: Verify the Delete browsing history on exit box is checked. Click the Delete... button. 
	<i>or Press [Alt+I].</i>

Training Guide

Basic Navigation for Financials 9_2



Step	Action
4.	<p>Verify that the following options have been checked (selected):</p> <ul style="list-style-type: none"> • Preserve Favorites website data • Temporary Internet files • Cookies • History <p>Click the Delete button.</p> 
5.	<p>Click the OK button.</p> 
	<p>or Press [Alt+F].</p>
6.	<p>This completes <i>Clear Browser Cache</i>. End of Procedure.</p>

Training Guide

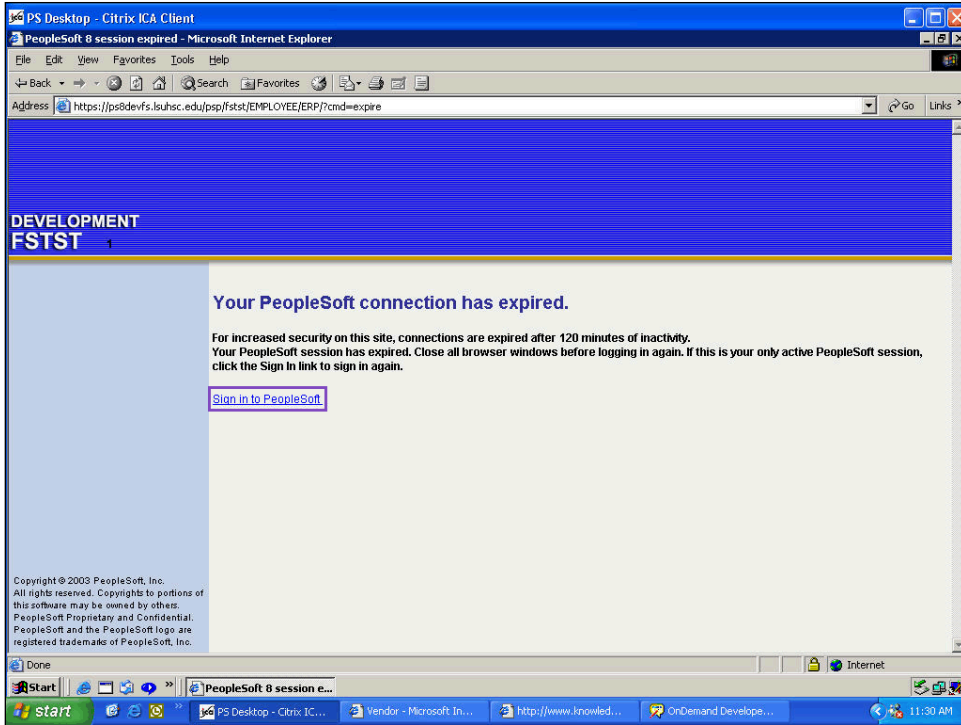
Basic Navigation for Financials 9_2

Session Time Out

Procedure

In this topic you will learn how to access PeopleSoft 9.2 when a **Session Times Out**.

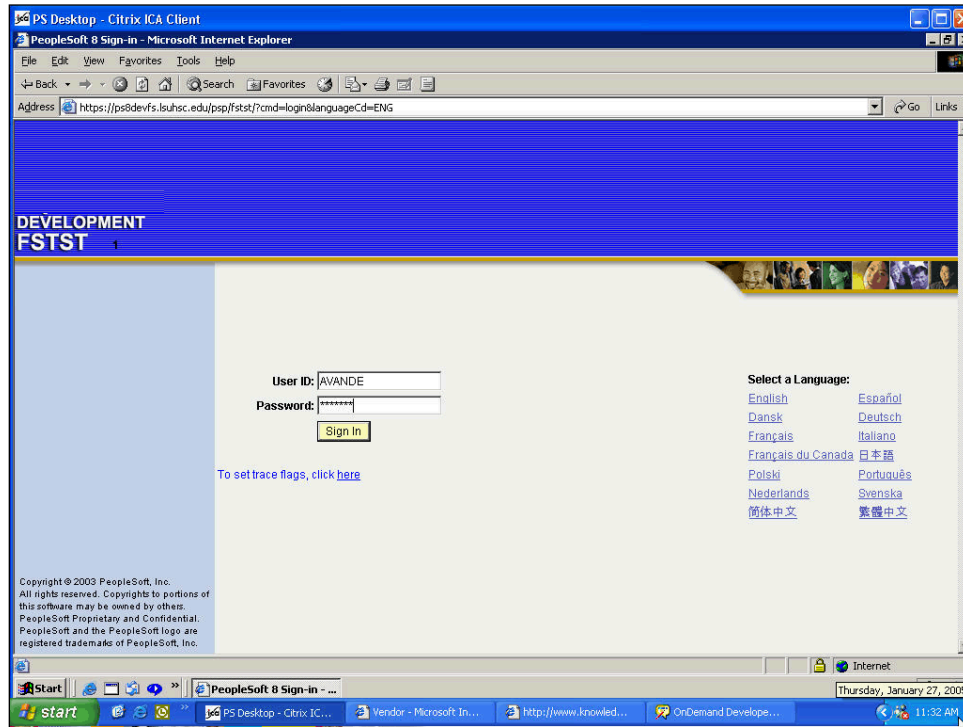
NOTE: For increased security on the site, when you are logged on to PeopleSoft 9.2 and the system detects that there has been no activity for 2 hours your connection will expire.




Step	Action
1.	Click the Sign in to PeopleSoft link. Sign in to PeopleSoft
2.	Enter your User ID (must be entered in ALL CAPS). <i>NOTE: This should be the same User name that you enter when you log on to your computer or access e-mail.</i> To practice, please Enter the following sample User ID: " AVANDE ".
3.	Enter your Password (must be entered the way the user created it). <i>NOTE: This is the same Password that you enter when you log on to your computer or access e-mail.</i> Enter the desired information into the Password field. Enter " ***** ".

Training Guide

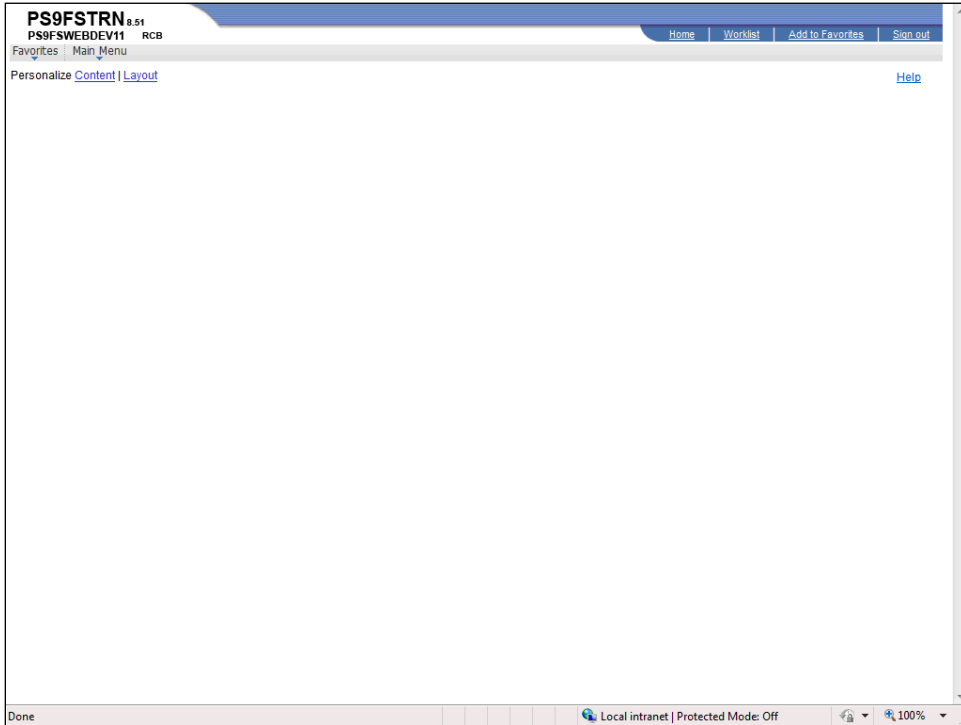
Basic Navigation for Financials 9_2



Step	Action
4.	Click the Sign In button. 

Training Guide

Basic Navigation for Financials 9_2


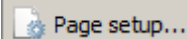


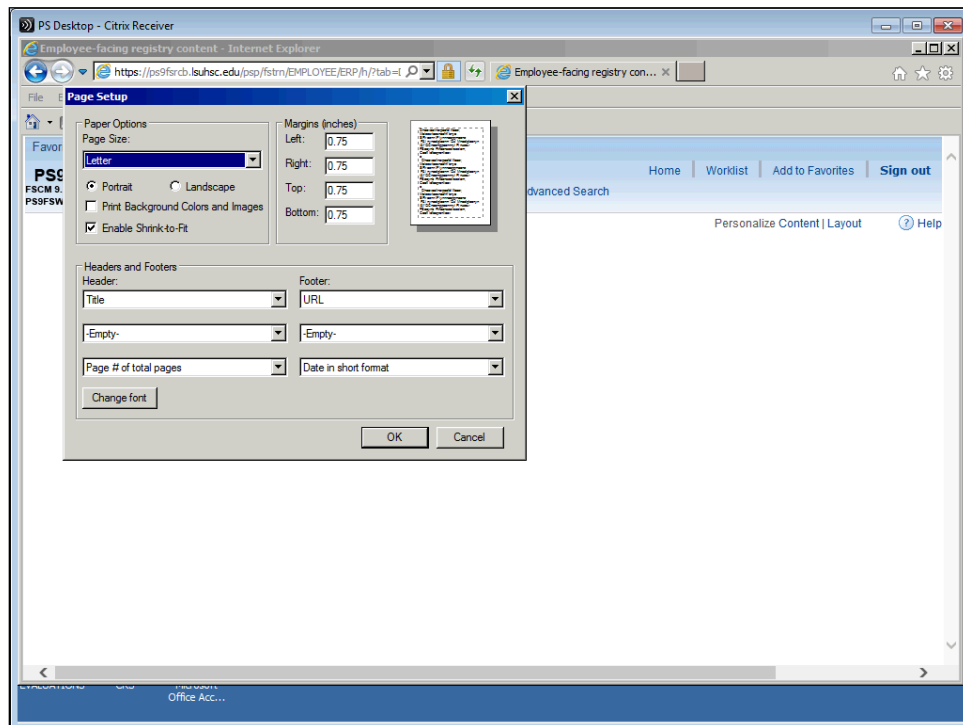
Step	Action
5.	<p>The following is an alternate method to access PeopleSoft 9.2 when your session expires. This method does not require the end-user to sign in:</p> <p>Close the Internet browser by choosing one of the following methods:</p> <ul style="list-style-type: none"> • Select File, Close on the Internet browser menu bar; • Click the “X” in the upper right corner of the Internet browser. <p>NOTE: <u>Do not</u> click the “X” on the PS Desktop - Citrix ICA Client title bar.</p> <p>Once the browser is closed, restart the PS9.2 Launcher. The PeopleSoft 9.2 Home page will display.</p>
6.	<p>This completes <i>Session Time Out</i>. End of Procedure.</p>

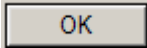
Print PeopleSoft 9.2 Pages

Procedure

In this topic you will learn how to **Print PeopleSoft 9.2 Pages**.

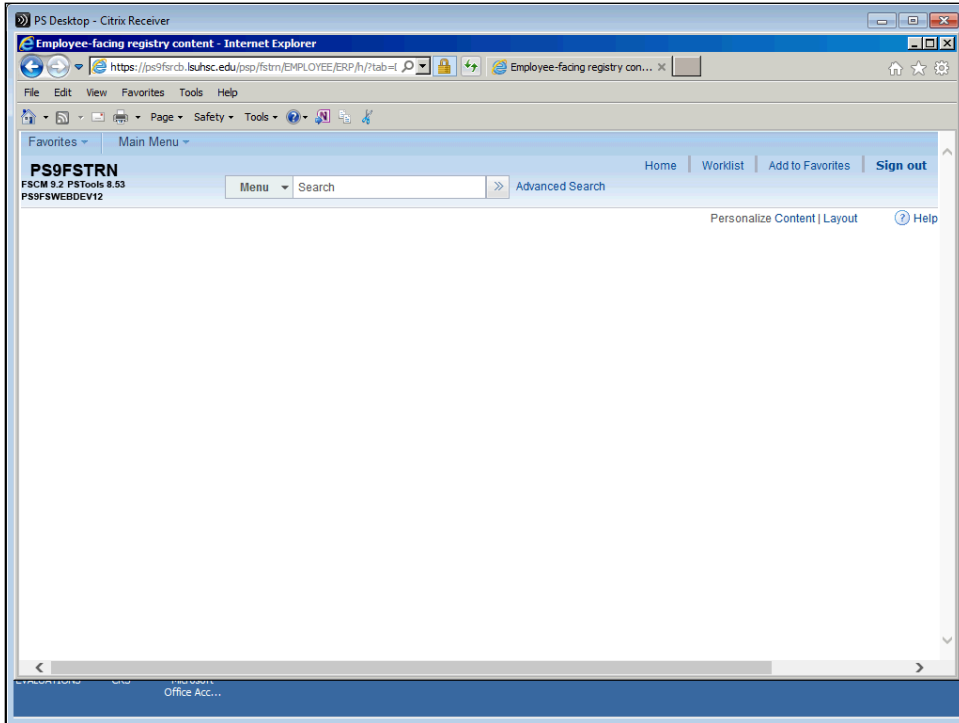
Step	Action
1.	Click the button to the right of the Printer icon. 
2.	Click the Page Setup... menu to change paper size, margins, etc. 




Step	Action
3.	Make needed changes. Click the OK button. 

Training Guide

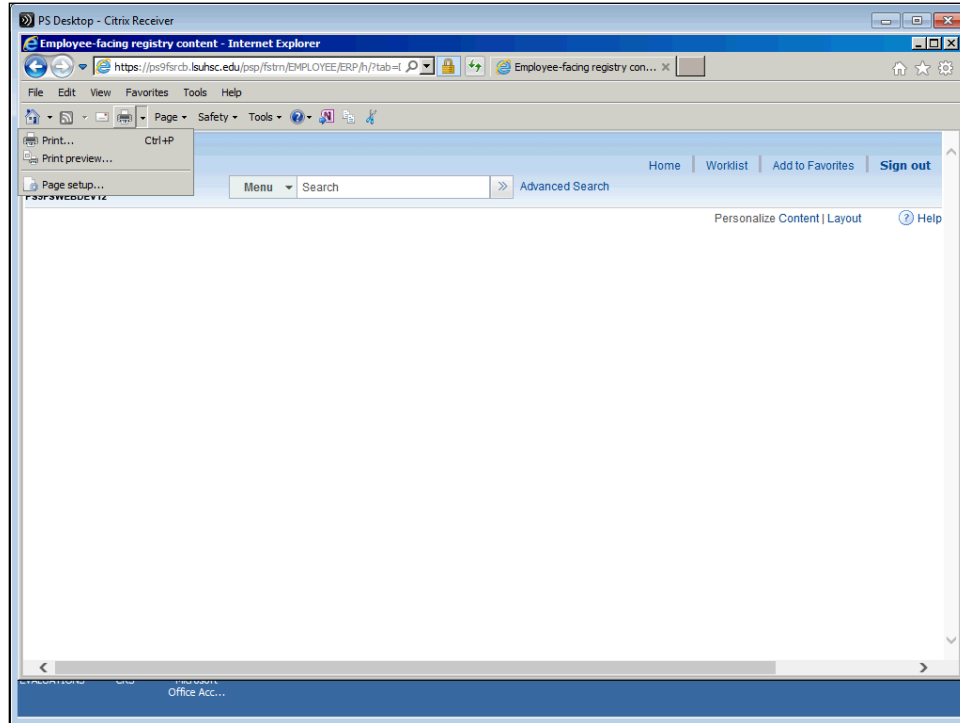
Basic Navigation for Financials 9_2




Step	Action
4.	Click the button to the right of the Printer icon. 

Training Guide

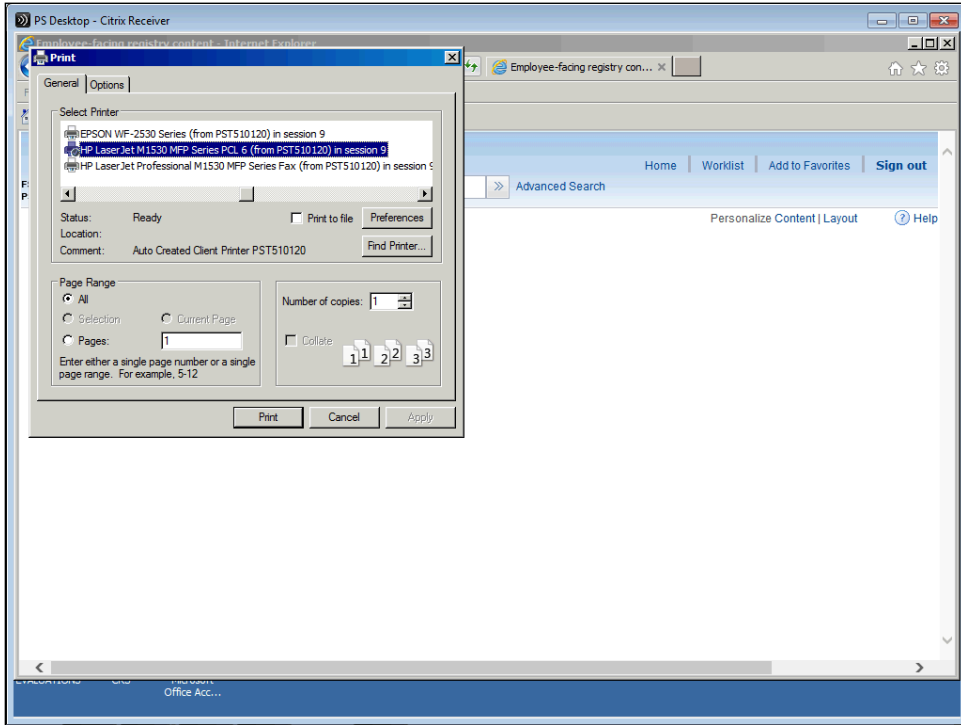
Basic Navigation for Financials 9_2

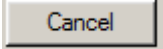


Step	Action
5.	Click the Print... menu. 
	or Press [P] .

Training Guide

Basic Navigation for Financials 9_2



Step	Action
6.	<p>Select the appropriate printer and click the Print button.</p> <p>For training purposes only, click the Cancel button.</p> 
	<p>or Press [Alt+P].</p>
7.	<p>This completes <i>Print PeopleSoft 9.2 Pages</i>.</p> <p>End of Procedure.</p>