



HCM Basic Navigation Guide 9.2

Version Date: June 27, 2018

Training Guide
HCM Basic Navigation Guide 9.2

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Logon to PeopleSoft via Citrix and the PS Launcher

Procedure

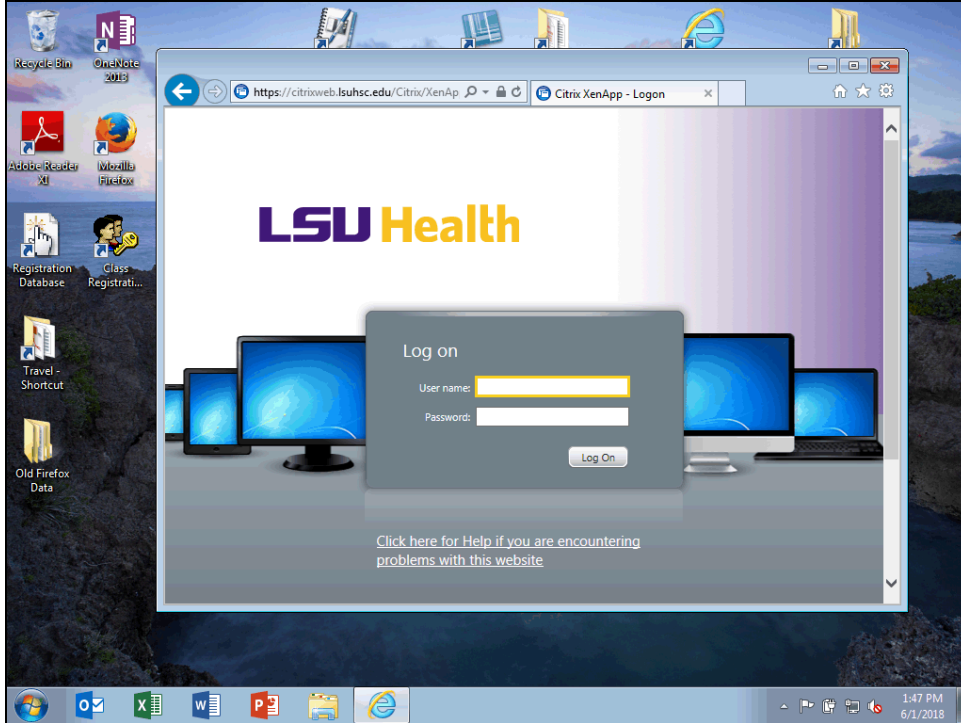
In this topic you will learn how to **Logon to PeopleSoft via Citrix and the PS Launcher**.



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

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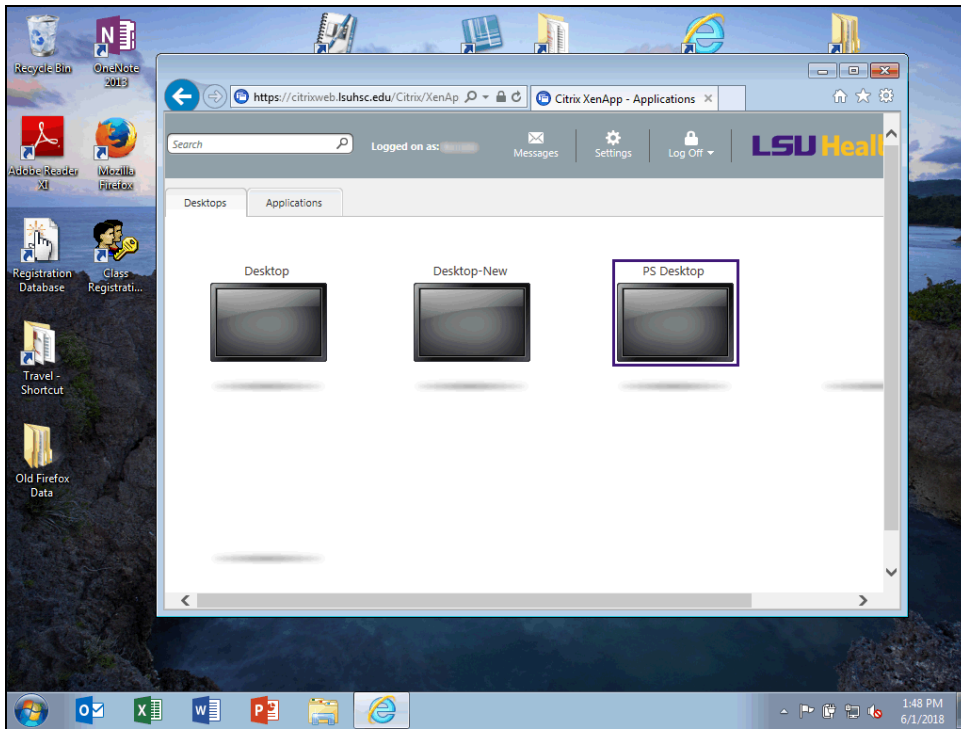


Step	Action
2.	<p>You will enter the same log on information as when you are logging on to your computer.</p> <p>User name: your LSUHSC User ID - is not case sensitive Password: your password - is case sensitive and must be entered the way the user created it</p> <p>Enter the desired information into the User name: field. Enter "Your LSUHSC User ID".</p> <p>User name: <input data-bbox="342 1329 792 1377" type="text"/></p>
3.	<p>Enter the desired information into the Password: field. Enter "Your LSUHSC Password".</p> <p>Password: <input data-bbox="342 1472 776 1520" type="password"/></p>
4.	<p>Click the Log On link.</p> <p><input data-bbox="342 1583 480 1631" type="button" value="Log On"/></p>

Step	Action
5.	<p>After clicking the Log On button, periodically the Change Password Warning box will appear to notify you of the pending expiration of your password. When the change password message displays, <u>always click NO.</u></p> <p><i>NOTE: NEVER change your Password in the Citrix environment, as it will lock you out of the system!</i></p> <p>Change your Password at https://www.lsuhs.edu/changepassword, or on your Windows Desktop, or using Outlook Web Access. Your Password will automatically update in Citrix using any of these methods.</p> <p><i>NOTE: If you are locked out of the system, or need help changing your Password:</i></p> <p><i>LSUNO and HCSD</i> users contact the PeopleSoft Help Desk at 1-800-303-3290 (Long Distance) or 504-568-HELP (4357) (Local calls) or helpdesk@lsuhs.edu for assistance.</p> <p><i>LSUSH</i> users contact the Help Desk at 318-675-6506 or SHVHELP@lsuhs.edu for assistance.</p>

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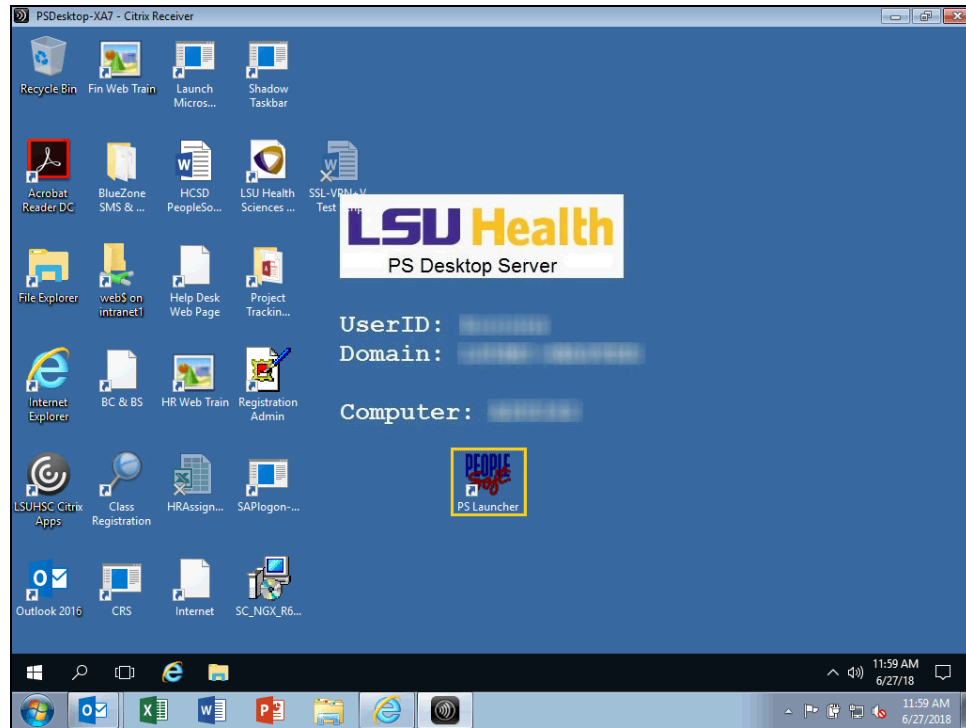
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Step	Action
6.	The Citrix XenApp - Applications page displays. Click the PS Desktop button.

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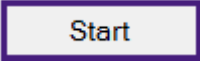
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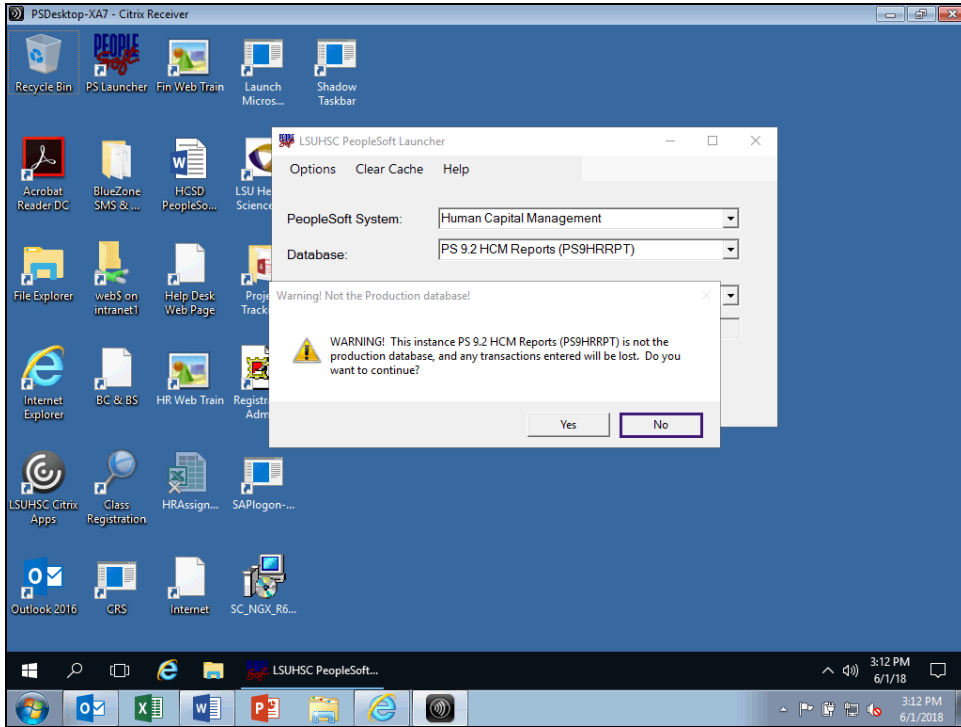


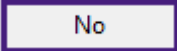
Step	Action
7.	Click the PS Launcher button. 
8.	From the PeopleSoft Launcher, you will make the following selections: PeopleSoft System: Human Capital Management Database: <ul style="list-style-type: none"> • PS 9.2 HCM Production (PS9HRPRD) to enter data or • PS 9.2 HCM Reports (PS9HRRPT) to view data only Application: PeopleSoft Click the drop-down button to the right of the field to change defaulted options.
9.	Click the button to the right of the Database field. 
10.	Click the PS 9.2 HCM Reports (PS9HRRPT) list item. 

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Step	Action
11.	Click the Start button. 



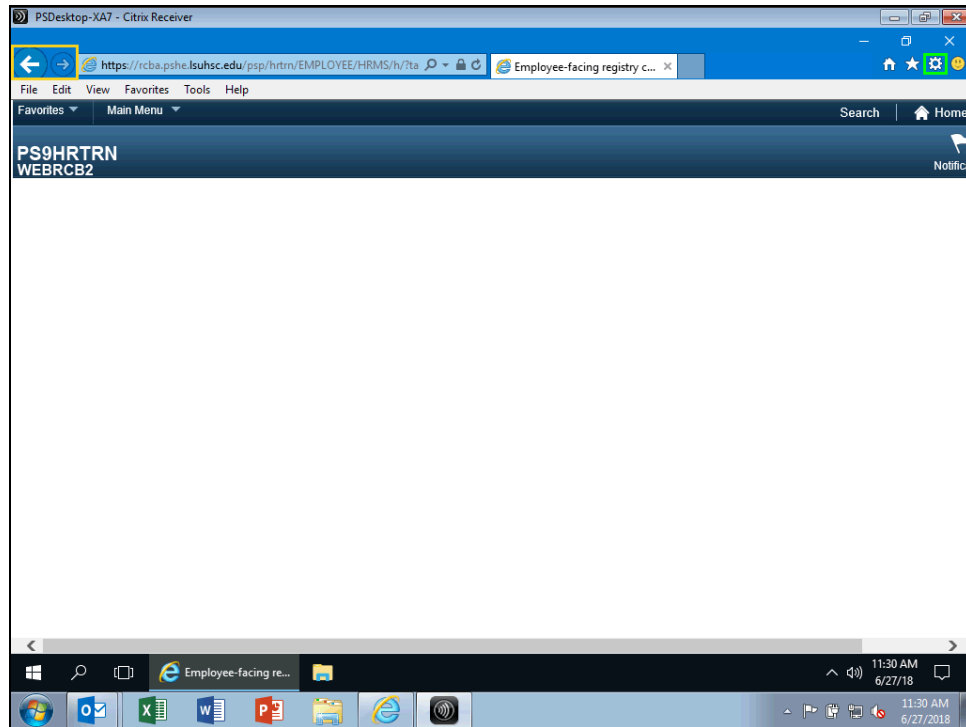
Step	Action
12.	When selecting the Reports database, the warning message shown here will display. You will not receive this warning message when accessing the Production database. If your database selection was incorrect , click No . If your database selection was correct , click Yes . Click the No button. 
13.	This completes <i>Logon to PeopleSoft via Citrix and the PS Launcher</i> . End of Procedure.

PeopleSoft Homepage and Basic Navigation Tips

Procedure

In this topic you will learn the *PeopleSoft Homepage and Basic Navigation*.

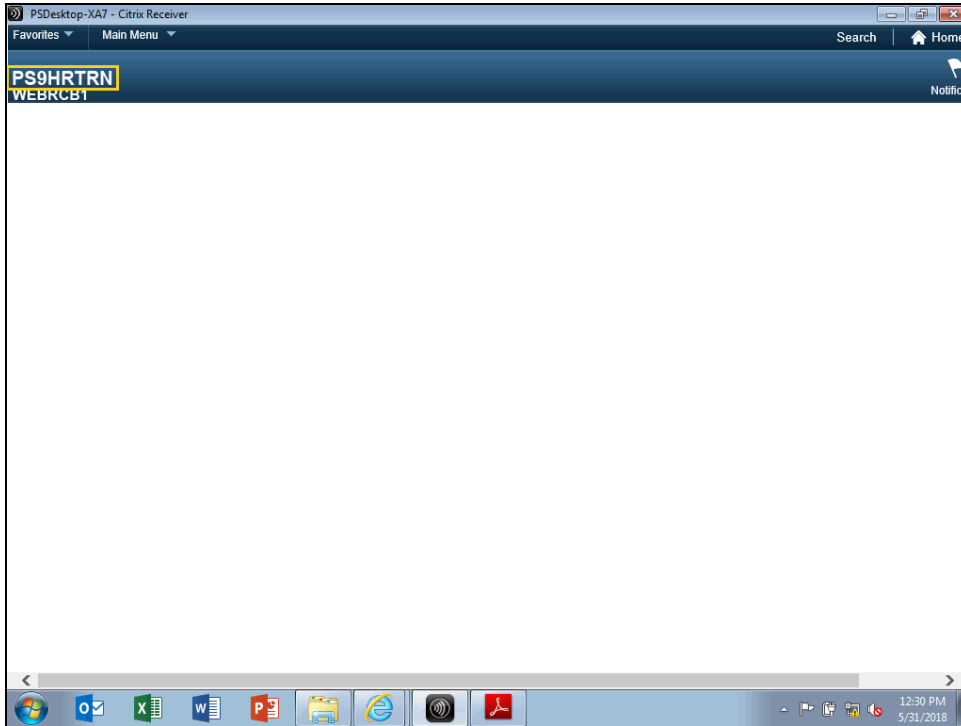
NOTE: In this guide, the exercises in the *PS9HRTRN* database will be used for training purposes only. Users will access the *PS 9.2 HCM Production (PS9HRPRD)* database when entering information into the system, and *PS 9.2 HCM Reports (PS9HRRPT)* when retrieving information from the system.



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>Pages can be printed by selecting File, Print on the browser menu bar, or by clicking the Tools button (highlighted in green) and selecting the Print option from the menu.</p> <p>NOTE: The Back and Forward buttons (highlighted in yellow) on the browser should NEVER be used in PeopleSoft. Use only the buttons and links provided in the panels.</p>

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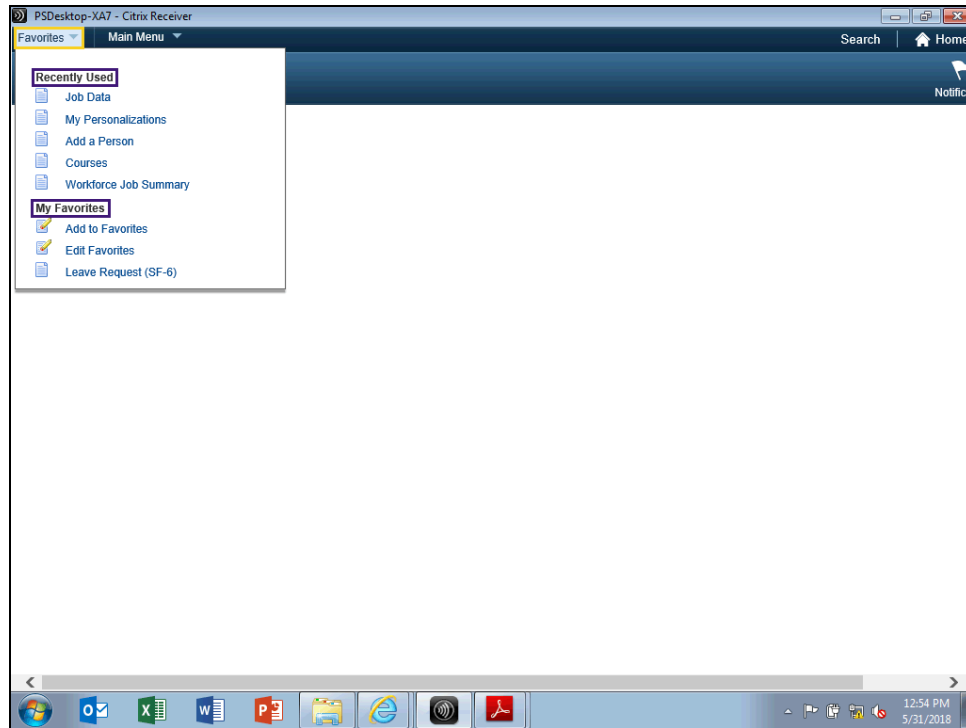
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Step	Action
2.	<p>The system defaults you into the Home page which serves as your navigational start point.</p> <p>In the top left corner, the database designation is displayed. In this example, the database designation is PS9HRTRN, where:</p> <ul style="list-style-type: none">PS - PeopleSoft9 - version of PeopleSoft we are usingHR - Human Resource applicationTRN - Training database

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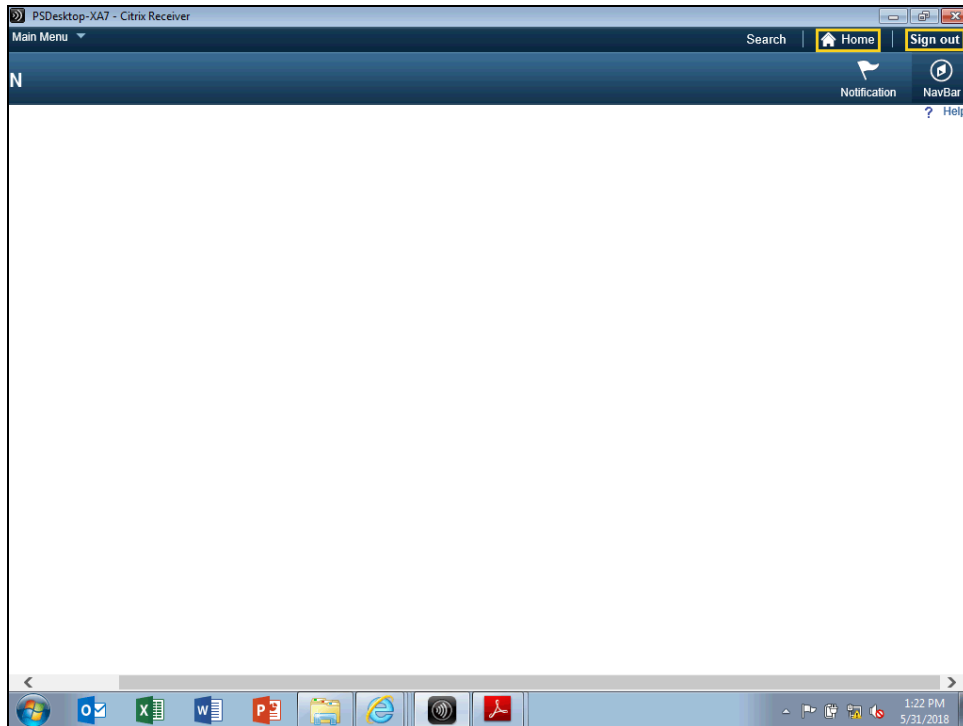
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Step	Action
3.	<p>Favorites provides users easy accessibility to pages often used within PeopleSoft. Your five most recently viewed pages will display in the Recently Used section. Simply click on the link to access a listed page rather than navigating through the Main Menu.</p> <p>As a web-based application, a user can save a favorite page in the system just as s/he would when using the web. Saved pages will be listed in the My Favorites section, such as the Leave Request (SF-6) page shown here. Again, simply click the link to access the page.</p>
4.	<p>The Main Menu link allows users to access transaction pages from which you can enter and modify data. The Main Menu provides an organized view of available submenus and component pages. Submenus and components can be viewed in cascading pagelets or static pages. Both will be discussed later in this guide.</p>
5.	<p>The Search option located on the homepage enables users to find a transaction page without searching through submenus if s/he is unsure of its navigational location. Based on the information entered, the system retrieves a list of available pages from which the user can choose to navigate.</p>

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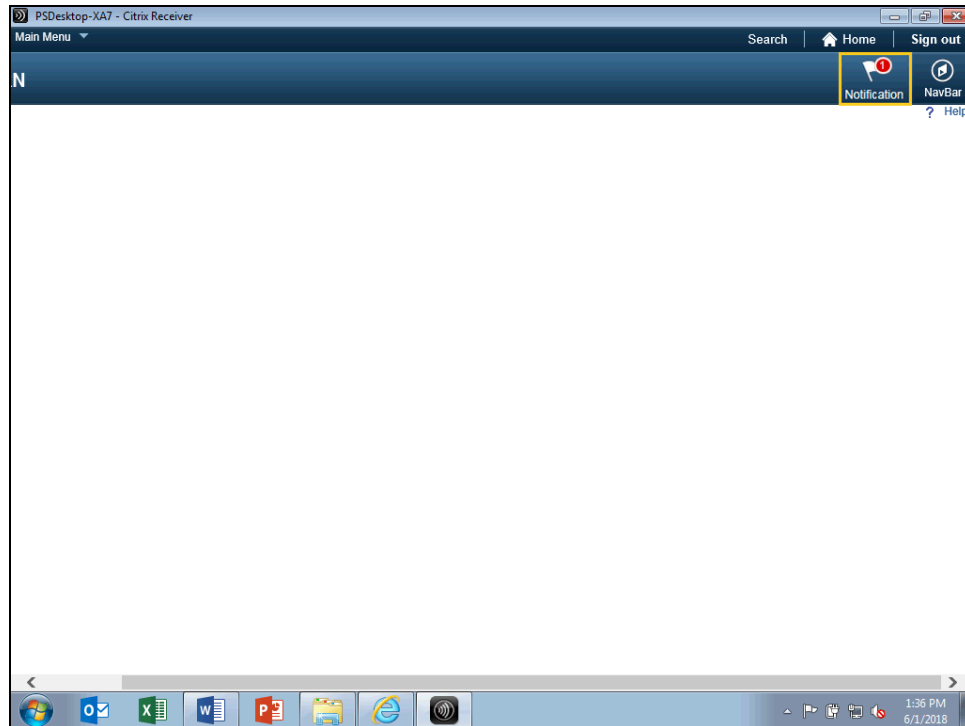
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Step	Action
6.	Click the Home link to return to your homepage. Click the Sign out link to exit of the application. Please do not " X " out of the PeopleSoft or Citrix.

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Step	Action
7.	<p>The Notification flag displays a number count on the flag icon in the banner to notify users of any new Actions. Actions are links that allow you to navigate directly to an action needing your attention.</p> <p>Notification Actions will include:</p> <ul style="list-style-type: none"> • PER-3 manager approval notifications • Manager Leave Approval <p>You will either Approve or Deny the request. Once Approved the Notification count is removed or reduced.</p> <p>NOTE: LSU Health Shreveport and HCSD will <u>not</u> receive Actions through the Notification flag. Only LSU Health New Orleans managers will receive action items through the Notification flag.</p>
8.	<p>The NavBar is a new feature in version 9.2 and is used in conjunction with Fluid Menus. The NavBar will be discussed later in this guide.</p>
9.	<p>This completes <i>PeopleSoft Homepage and Basic Navigation</i>. End of Procedure.</p>

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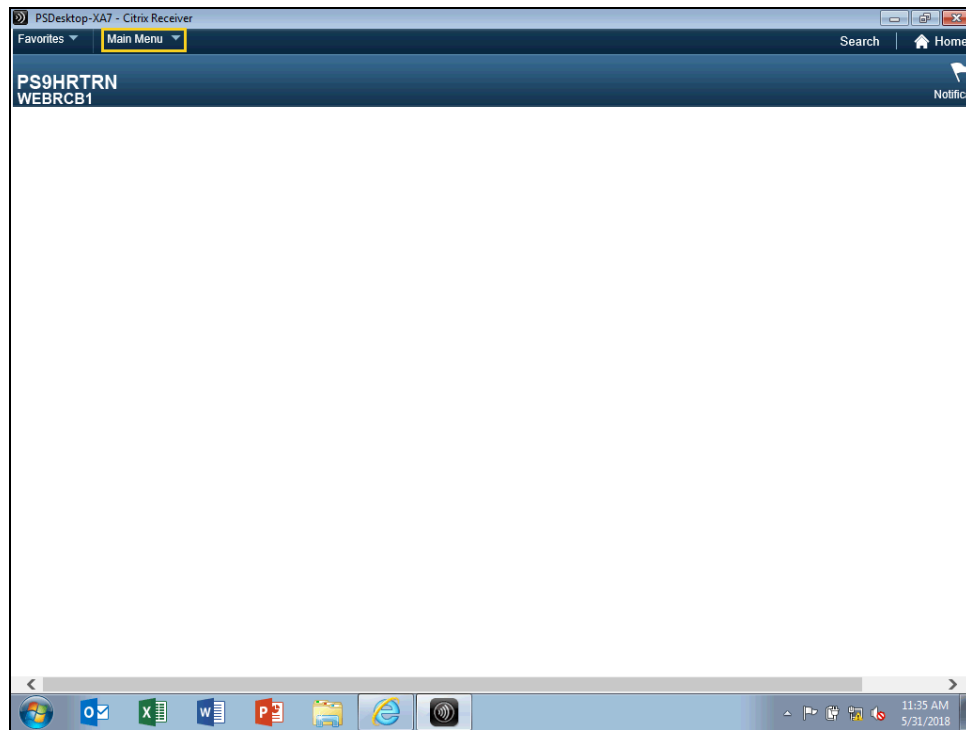
Menu Navigation

Drop-Down/Classic Menu Navigation

Procedure

In this topic you will learn how to use **Drop-Down/Classic Menu Navigation**.



Step	Action
1.	<p><i>Drop-down Menu</i> navigation is an intuitive way of accessing data in the PeopleSoft database. <i>Drop-down</i> navigation consists of a hierarchy of cascading folders and/or menu choices when a user clicks on a menu option.</p> <p><i>NOTE: Drop-down Menu is also known as Classic Menu navigation. References in this manual to Classic Menu navigation are considered synonymous with Drop-down Menu navigation.</i></p>



Step	Action
2.	<p>Click the Main Menu link to access and view cascading or static submenus and component pages.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Main Menu ▾ </div>

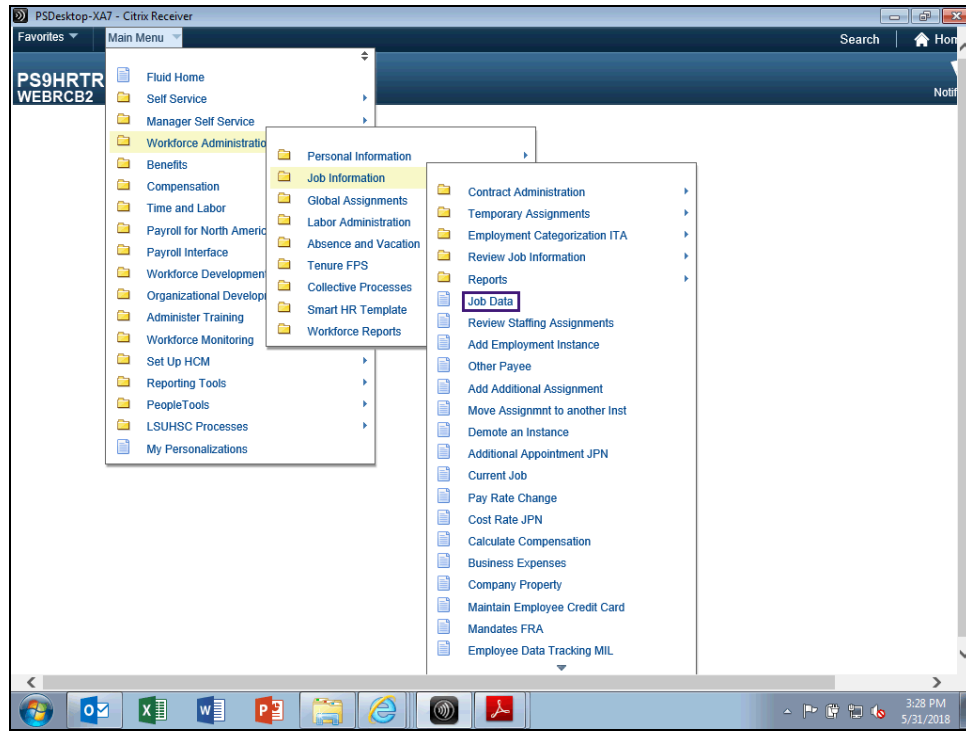
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Step	Action
3.	<p>The first cascading menu pagelet displays.</p> <p>Menu items with additional choices are called submenus and have an icon next to it that looks like a folder.</p> <p>Pages or Screen Components are shown in the menu with an icon next to it that looks like a sheet of paper.</p>
4.	<p>Cascading submenus will display when you click on the menu item name or the arrow to the right of the menu item name.</p> <p>Click the Workforce Administration link.</p> 
5.	<p>Another cascading pagelet displays a new set of submenus.</p> <p>Click the Job Information link.</p> 

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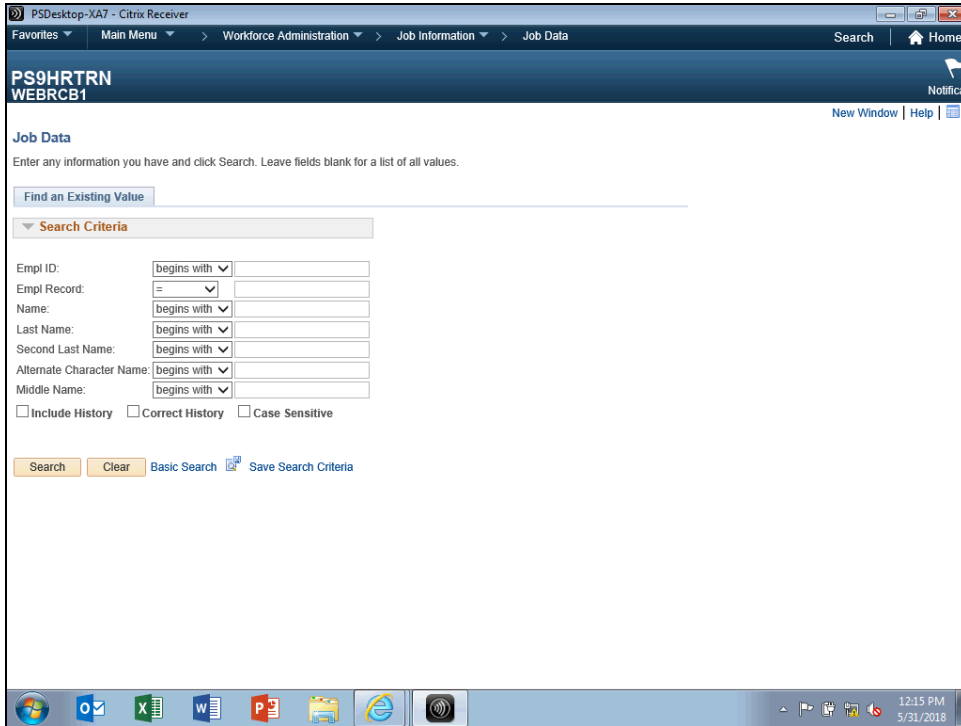
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Step	Action
6.	Click the Job Data link. Job Data

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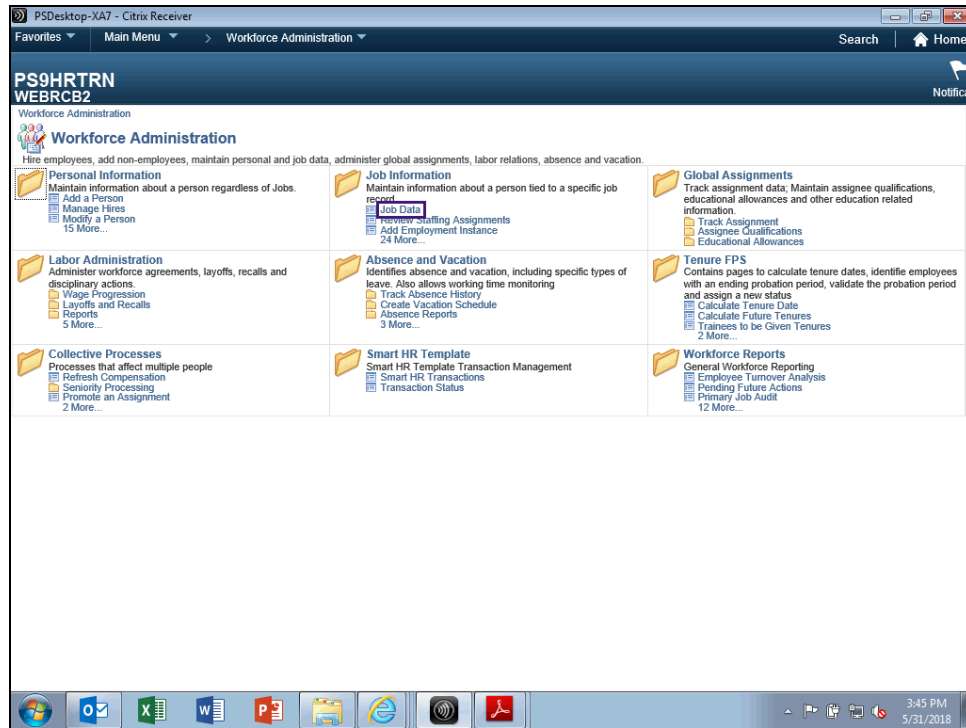
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Step	Action
7.	When a component is selected, the system will display the Search panel for that particular component. In this example, the Job Data Search page is displayed.
8.	Your navigation path , also known as breadcrumbs , displays across the top of the page to inform you of your location within the system. You can navigate directly from any of these points by simply clicking on the item name.
9.	Users now have the option of clicking the Sort Menu to arrange menu options in alphabetical order. The first click of the double black arrows will sort the item in A-Z order, the second click in Z-A order, and the third click return the items to their original order.
10.	Click the Sort Menu button. 
11.	If you click the folder button to the left of the menu item name, a static page menu will display. Click the Workforce Administration Folder button. 

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Step	Action
12.	<p>The same list of menu options will display in the static page. You will, however, be able to view and select some of the options available that would display on the next submenu without clicking on the required folder. For example, you are able to click the Job Data link without opening the Job Information folder.</p> <p>Click the Job Data link.</p> <p>Job Data</p>
13.	The Job Data Search panel displays.
14.	This completes <i>Drop-Down/Classic Menu Navigation</i> . End of Procedure.

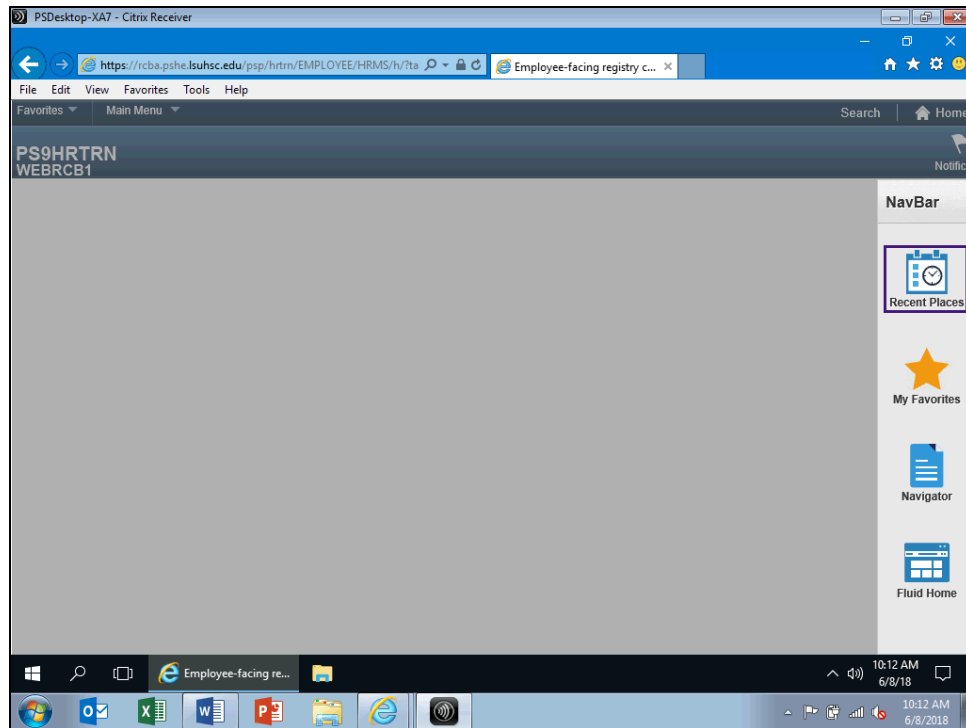
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NavBar Navigation

Procedure

In this topic you will learn **NavBar Navigation**.



Step	Action
1.	The NavBar is a new feature in version 9.2 and is used in conjunction with Fluid Menus. The NavBar provides navigation options to <i>Recent Places</i> , <i>My Favorites</i> , <i>Navigator</i> (which expands to show the classic menu hierarchy), and <i>Fluid Home</i> .



Step	Action
2.	Click the Recent Places button. 

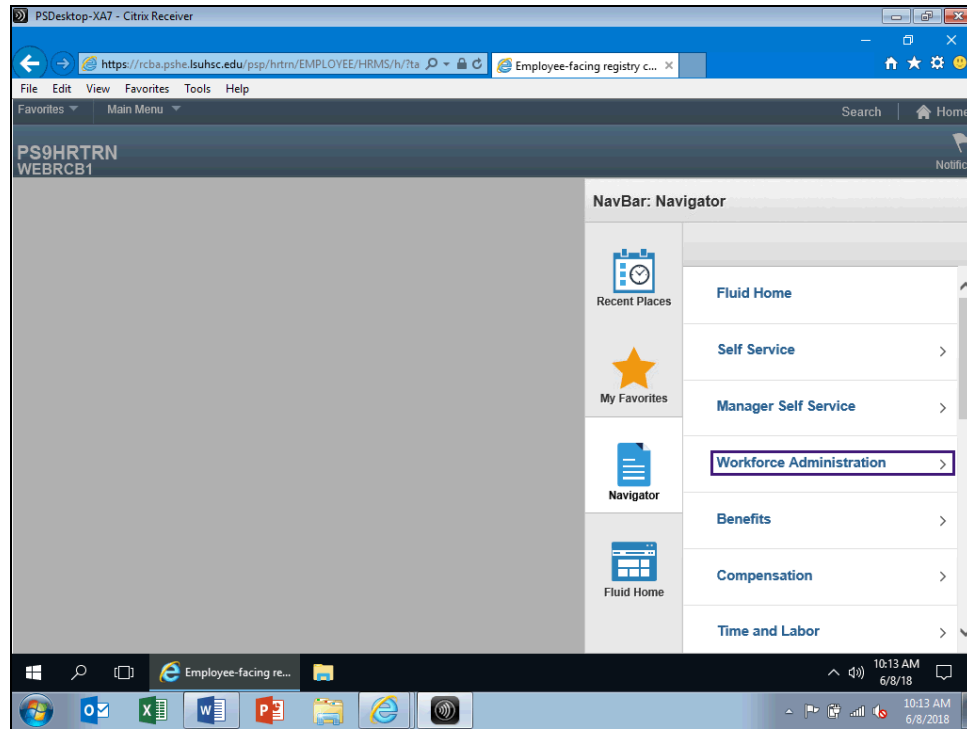
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Step	Action
3.	<p>The five most recent pages you have navigated to display. These pages are the same as those listed in the <i>Recently Used</i> section found when clicking on the <i>Favorites</i> link located in the top left corner of the page of the <i>Classic Menu</i>.</p> <p>Click the My Favorites button.</p> 
4.	<p>My Favorites displays your previously saved favorites. The <i>My Favorites</i> shown under the new NavBar come from any <i>My Favorites</i> you add via the Classic Menu. You <i>cannot</i> add favorites from the NavBar; you can only view them.</p> <p>Click the Navigator button.</p> 

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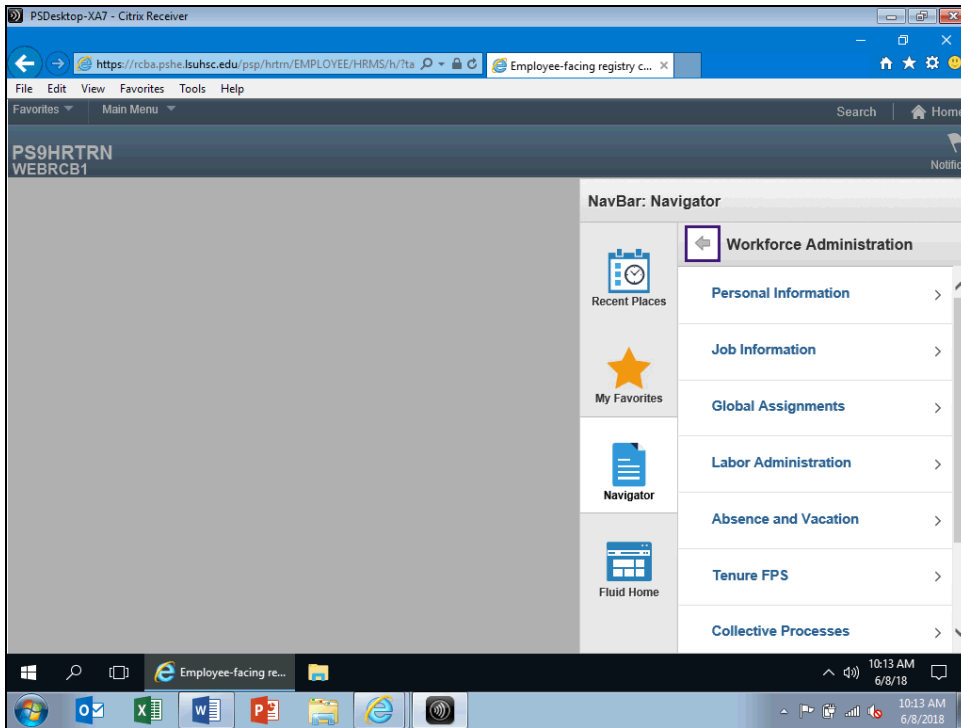
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Step	Action
5.	<p>The Navigator button is an alternate method for navigating the system, versus using the Classic Menu. You can still use the Classic Menu to navigate, however the Navigator offers an alternative way to navigate through menu items and can be easier to use on smaller screens and mobile devices. When you click on the Navigator button, menu options will display to the right.</p> <p>The Navigator functions the same as the Classic Menus. Simply click on the desired function link to either view additional options or a page.</p> <p>Click the Workforce Administration link.</p> <div data-bbox="440 1430 959 1486" style="border: 1px solid red; padding: 2px; display: inline-block;"> Workforce Administration > </div>

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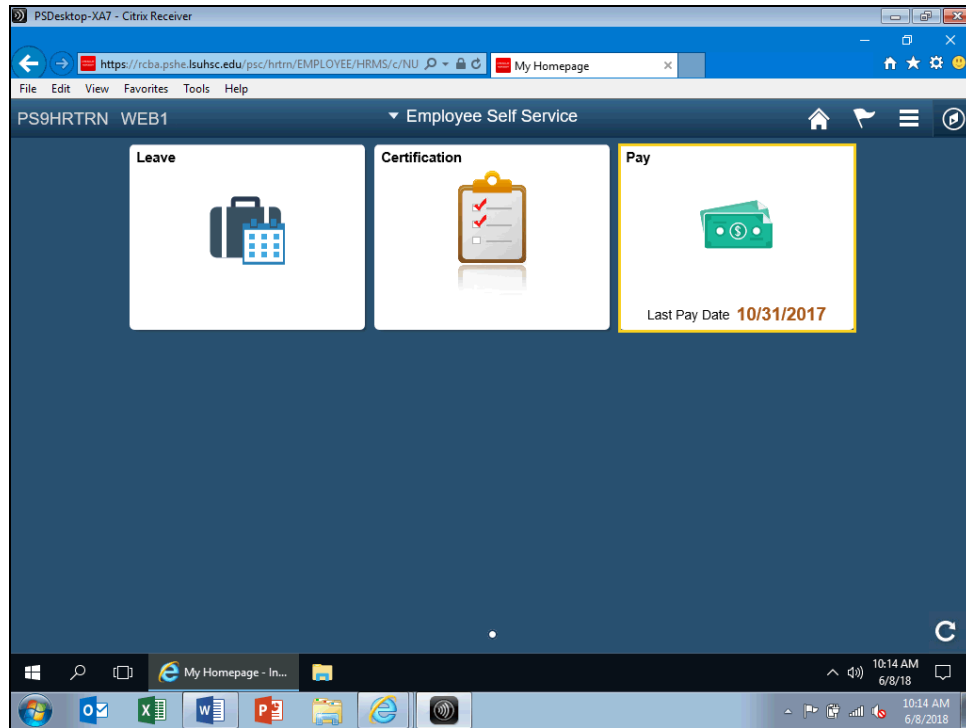
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Step	Action
6.	<p>Unlike the <i>Classic Menu</i>, you do not have bread crumbs or cascading menus in the Navigator. As you click menu items they move to the top of the NavBar list. There is a Back button next to the last menu item clicked that allows you to access previous menus rather than starting over if you have made a menu selection error.</p> <p>Click the Back button.</p> 
7.	<p>Another new feature in HCM 9.2 is the availability of <i>Fluid Menus</i>. <i>Fluid Menus</i> use tiles with icons on them to navigate the system. While LSU Health has decided to continue with the use of <i>Classic Menus</i> throughout version 9.2, a limited application of <i>Fluid Menus</i> is being instituted for <i>Employee Self-Service</i>.</p> <p>Click the Fluid Home button.</p> 

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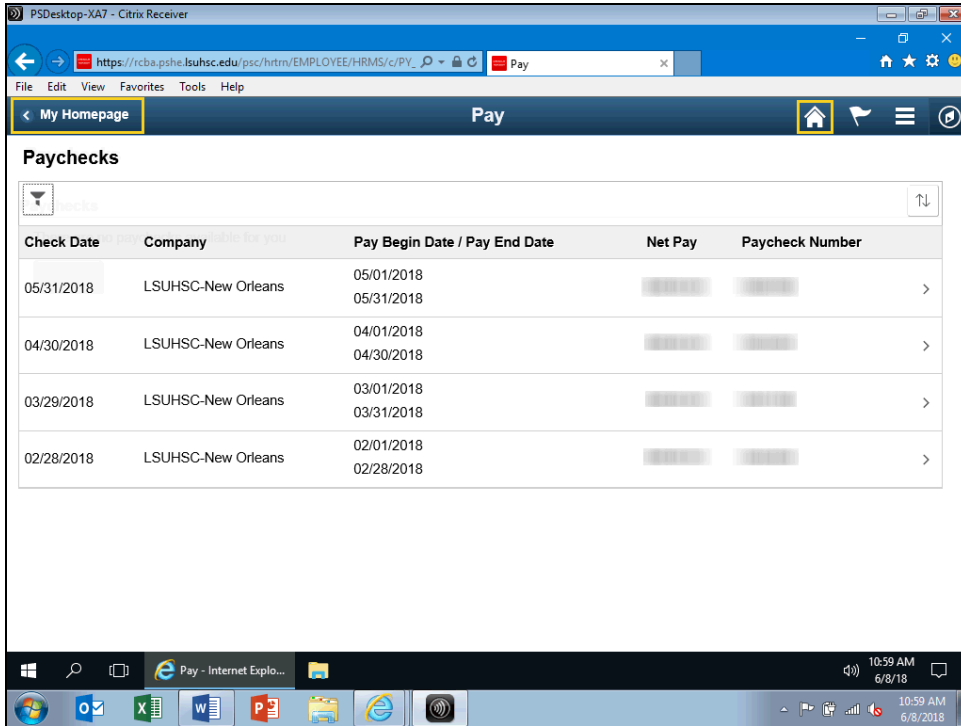
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Step	Action
8.	<p><i>Fluid Home</i> provides access to all <i>Fluid</i> home pages. Currently LSU Health has only one <i>Fluid</i> home page, <i>Employee Self-Service</i>. The <i>Fluid</i> page contains tiles users tap to access various transactions within the system. The tiles that are available to you will depend on your access. Currently only LSU Health <i>New Orleans staff</i> will have access to the <i>Leave and Certification tiles</i>. <i>All staff</i> will have access to the <i>Pay tile</i>.</p> <p>Click the Pay button.</p>

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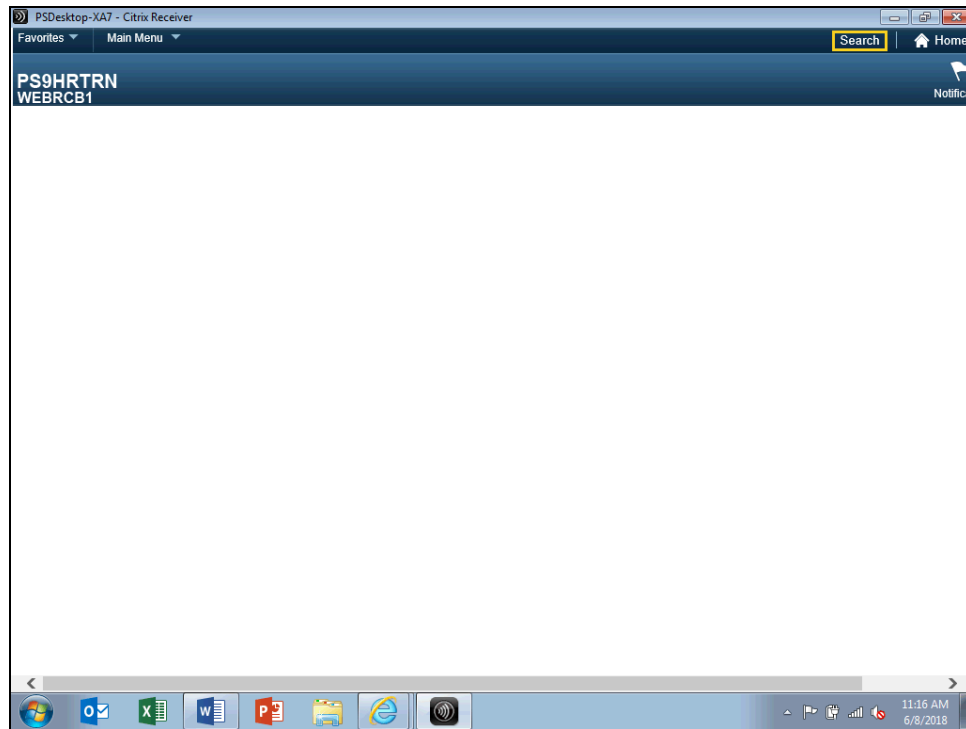




Step	Action
9.	<p>Once you click on the <i>Pay</i> tile you will receive the same information as you would have if you had accessed <i>Pay</i> via the <i>Classic Menu</i>.</p> <p>Click the <i>My Homepage</i> button to return to the <i>Fluid Menu</i> homepage.</p> <p>Click the Home button.</p> 
10.	<p>This completes <i>NavBar Navigation</i>.</p> <p>End of Procedure.</p>

Menu Search

Procedure

In this topic you will learn how to use **Menu Search**.



Step	Action
1.	<p>The Search feature allows you to search for an action when you are unsure of its menu navigation. The item used for the search must have a minimum of two characters. You can use multiple words to help focus your search as 'view pay'.</p> <p>Click the Search link.</p> 
2.	<p>Enter the desired information into the Search field. Enter "view pay".</p>
3.	<p>Click the Find button.</p> 
4.	<p>A list of items with the words 'view pay' will appear in a Search Results list. If there are more than 100 results, only the first 100 will be displayed. Either select an option from the retrieved list or change your search parameter to help focus your search.</p>
5.	<p>This completes Menu Search. End of Procedure.</p>

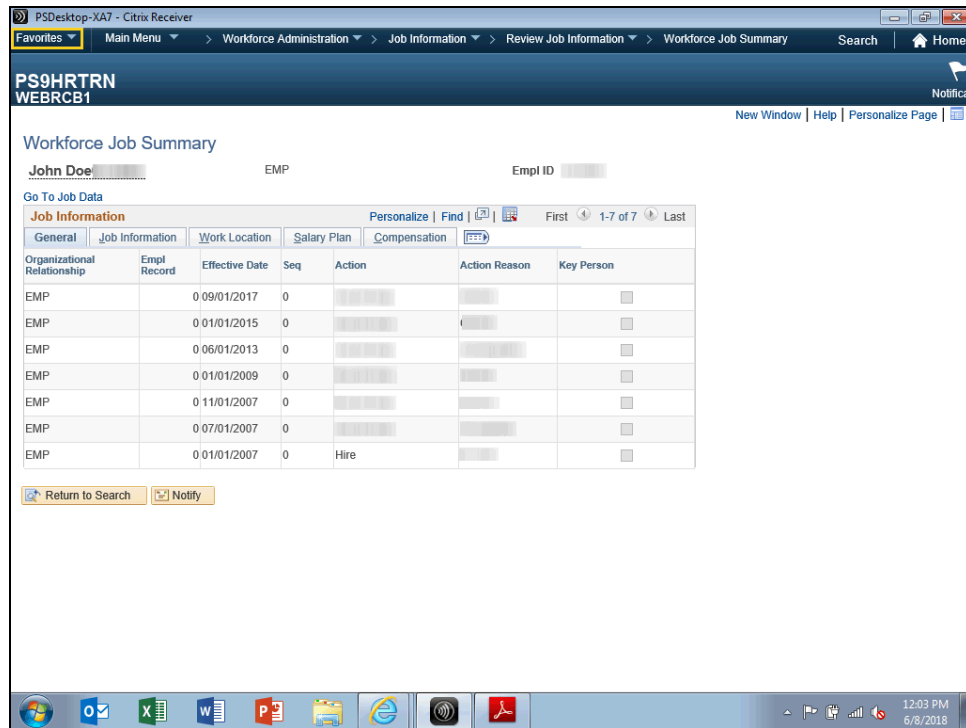
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Favorites

Favorites Specific Information

Procedure

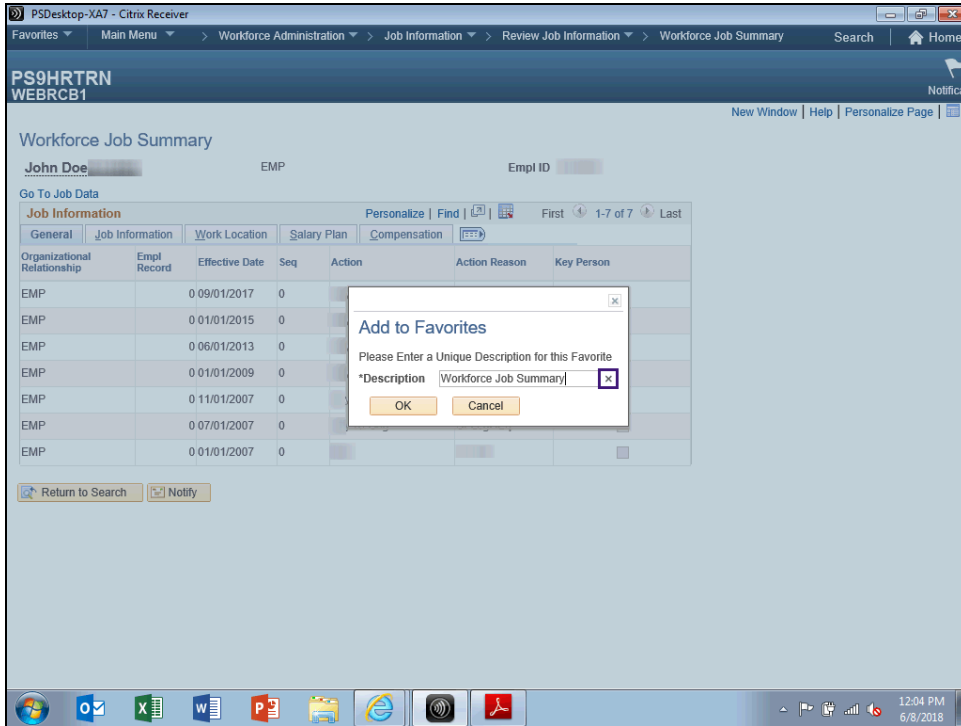
In this topic you will learn how to add **Favorites Specific Information**.



Step	Action
1.	<p>You can add a direct link to a specific page employee page, not just a Search page. Complete the normal navigation to the employee data page.</p> <p>Click the Favorites link.</p> 
2.	<p>Click the Add to Favorites link.</p> 

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Step	Action
3.	You will want to change the Description to make it more easily identifiable with the employee. Click the Delete button. 
4.	Enter the desired information into the Description field. Enter " Job Sum - John Doe0000000 ".
5.	Click the OK button. 
6.	Click the OK button. 
7.	Click the Home link. 
8.	Click the Favorites link. 
9.	Click the Job Sum - John Doe0000000 link. 

Step	Action
10.	This completes <i>Favorites Specific Information</i> . End of Procedure.