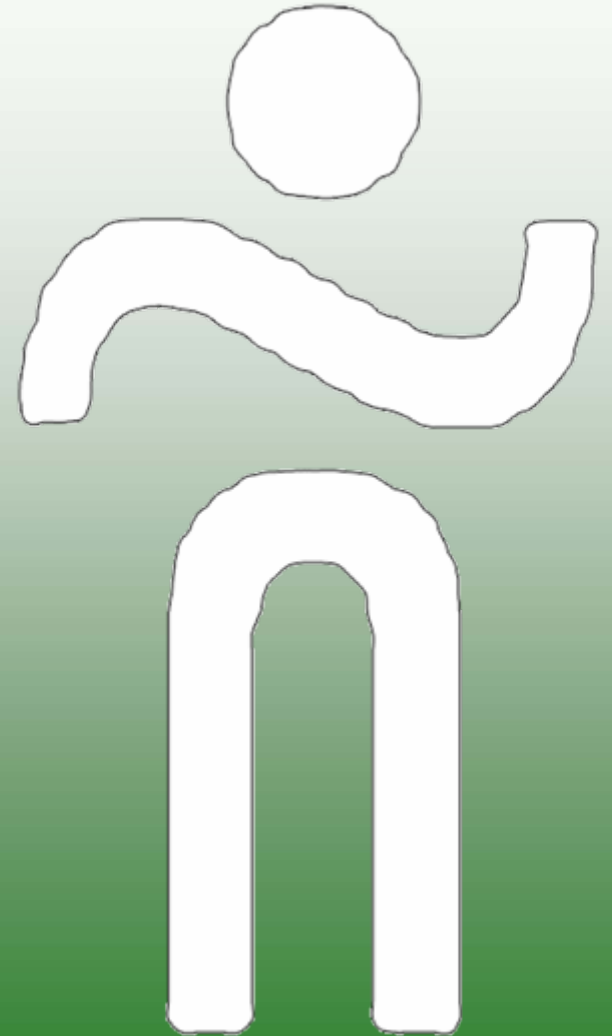


# PeopleSoft HCM 8.9

Navigation

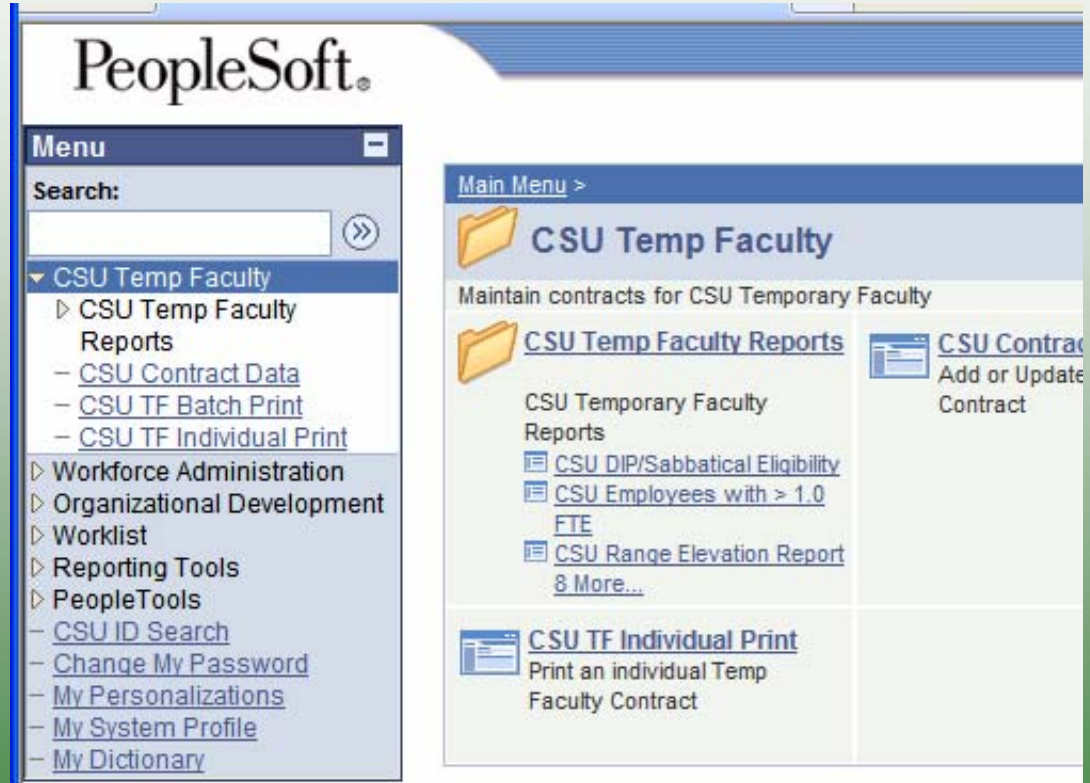
# Map of Today's Class

- We will explore:
  - PeopleSoft Navigation & Configuration
  - Discuss personalization options available
  - Semantic Menu Changes
  - Sorting and Saving Search Results
  - Exporting Options
  - Notes Capabilities
  - Spell Check
  - E-mail Notifications



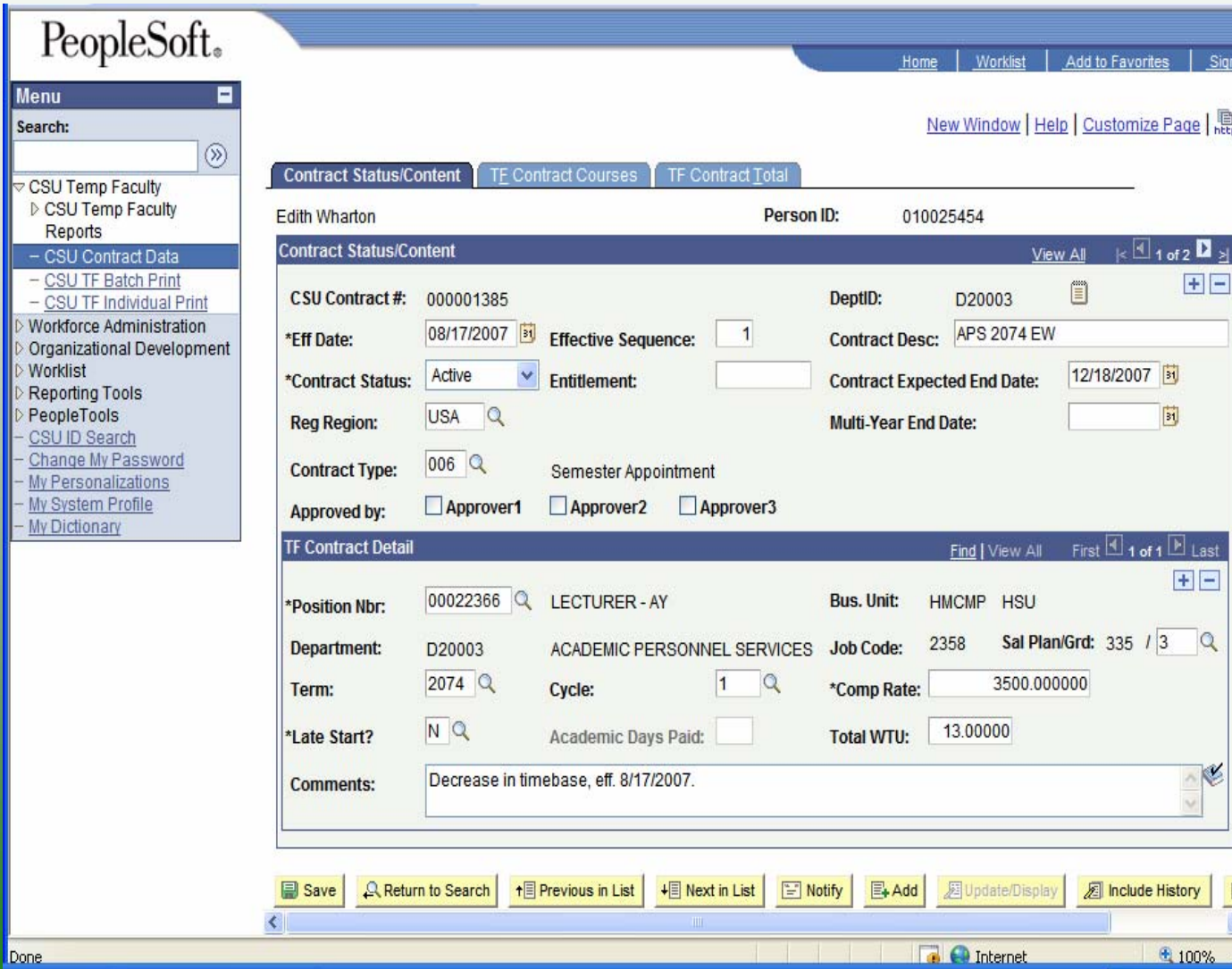
# Navigation and Configuration Cont.

- Portal Like Navigation
- Menu is collapsible and expandable
- All items can be found on the left hand side of the screen
- As the user drills down the menu folders and subfolders will appear on the right hand side of the screen.



The screenshot displays the PeopleSoft user interface. On the left, a 'Menu' sidebar is visible with a search field and a list of navigation items. The 'CSU Temp Faculty' folder is expanded, showing sub-items like 'CSU Temp Faculty Reports' and 'Workforce Administration'. On the right, the 'Main Menu' area shows the selected path: 'Main Menu > CSU Temp Faculty'. Below this, there are several menu items, including 'CSU Temp Faculty Reports' and 'CSU Contract', each with a brief description of its function.

# Navigation and Configuration



**PeopleSoft**

Home | Worklist | Add to Favorites | Sign o

New Window | Help | Customize Page | http

**Contract Status/Content** | **TF Contract Courses** | **TF Contract Total**

Edith Wharton | Person ID: 010025454

**Contract Status/Content** | View All | 1 of 2

CSU Contract #: 000001385 | DeptID: D20003 | Contract Desc: APS 2074 EW

\*Eff Date: 08/17/2007 | Effective Sequence: 1 | Contract Expected End Date: 12/18/2007

\*Contract Status: Active | Entitlement: | Multi-Year End Date:

Reg Region: USA | Contract Type: 006 | Semester Appointment

Approved by:  Approver1  Approver2  Approver3

**TF Contract Detail** | Find | View All | First | 1 of 1 | Last

\*Position Nbr: 00022366 | LECTURER - AY | Bus. Unit: HMCMP | HSU

Department: D20003 | ACADEMIC PERSONNEL SERVICES | Job Code: 2358 | Sal Plan/Grd: 335 / 3

Term: 2074 | Cycle: 1 | \*Comp Rate: 3500.000000

\*Late Start? N | Academic Days Paid: | Total WTU: 13.00000

Comments: Decrease in timebase, eff. 8/17/2007.

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History

Page Layout

Universal Navigation Header

Page Bar

Page Tabs

Content

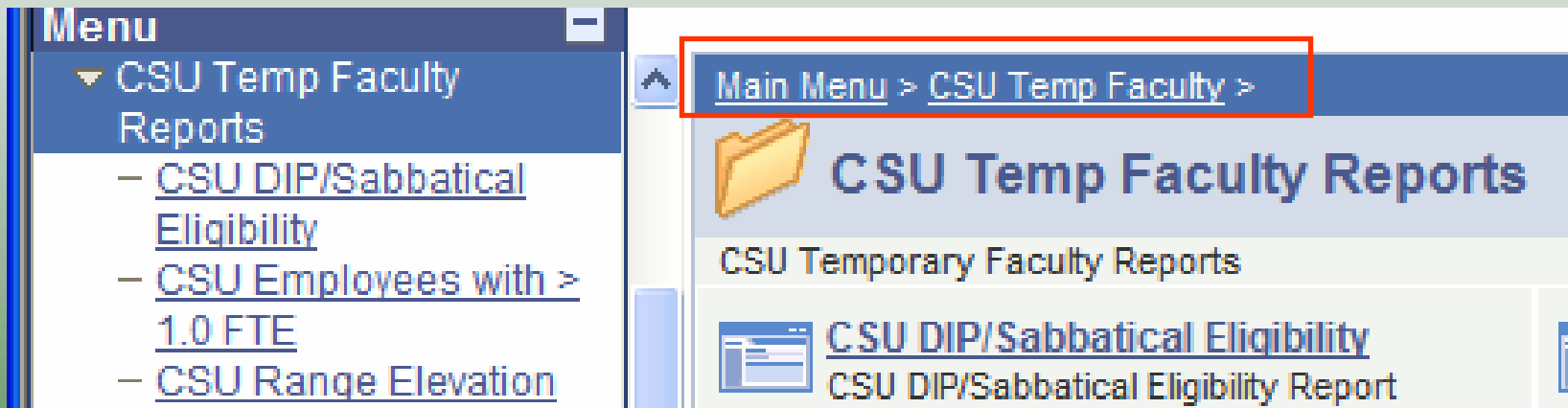
Expanded Menu Button

Menu Navigation

Buttons Toolbar

# Menu Breadcrumbs

Just above the menus are the breadcrumbs, which are underlined links that indicate where you have navigated in the application. Once you enter a search page the menu breadcrumbs will disappear.



The screenshot displays the application's navigation interface. On the left is a 'Menu' sidebar with a blue header and a list of items under 'CSU Temp Faculty Reports':

- CSU Temp Faculty Reports
  - [CSU DIP/Sabbatical Eligibility](#)
  - [CSU Employees with > 1.0 FTE](#)
  - [CSU Range Elevation](#)

On the right, the main content area features a breadcrumb trail at the top: [Main Menu](#) > [CSU Temp Faculty](#) >. This breadcrumb trail is highlighted with a red rectangular box. Below the breadcrumbs is a folder icon and the heading 'CSU Temp Faculty Reports'. Underneath this heading are two sub-sections: 'CSU Temporary Faculty Reports' and 'CSU DIP/Sabbatical Eligibility CSU DIP/Sabbatical Eligibility Report', the latter accompanied by a document icon.

# Navigation and Configuration Cont.

## Search

- Find menu items quickly by using the search functionality.
- Search Results will include
  - Menu Titles
  - Descriptions
  - Navigation Guide (Breadcrumbs)
  - Direct Link
- Customize Settings
  - Decide to show or hide search summaries



The screenshot shows a search interface with a 'Menu' search bar at the top. Below it, the main search page displays the search results for 'contract'. The first result, 'CSU Contract Data', is circled in red. The page includes navigation links like 'Home', 'Worklist', and 'Add to Favorites', and search options like 'New Search' and 'Search Within Results'.

# Navigation and Configuration Cont.

## My Favorites

- Add your most used and visited business processes to “My Favorites.”
- Click “Add to Favorites” in the upper right of your browser window.



Hidden Favorites List



Collapsed Favorites List



# CSU ID Search

- The CSU ID Search is the first step prior to any data entry. This is done to determine if a person exists in the PeopleSoft Database. Always search by National ID first.



Menu

Search:

▷ CSU Temp Faculty  
 ▷ Workforce Administration  
 ▷ Organizational Development  
 ▷ Worklist  
 ▷ Reporting Tools  
 ▷ PeopleTools  
 - **CSU ID Search**  
 - Change My Password  
 - My Personalizations  
 - My System Profile  
 - My Dictionary

### CSU ID Search

▼ CSU ID Search

Search    Reset

EmplID:

National ID:

	Detail	Name	EmplID	Natl ID (Last 4)	Applicant ID	DOB (mm/dd)	Org Rel	Classification	POI Type	HR Sta
1	<a href="#">Detail</a>	Adams,James R	CCS000050	1737		10/09			Campus Solution Person	
2	<a href="#">Detail</a>	Baldwin,James	SR2000213	0397		06/03			Campus Solution Person	
3	<a href="#">Detail</a>	Baldwin,James	SR2000320	2525		03/27			Campus Solution Person	

# CSU ID Search Continued....

## •CSU ID Search Results

	<a href="#">Detail</a>	Name	EmplID	Natl ID (Last 4)	Applicant ID	DOB (mm/dd)	Org Rel	Classification	POI Type	HR Status	Empl Red Nbr	Job Code	Job Code De
1	<a href="#">Detail</a>	Adams,James R	CCS000050	1737		10/09			Campus Solution Person				
2	<a href="#">Detail</a>	Baldwin,James	SR2000213	0397		06/03			Campus Solution Person				
3	<a href="#">Detail</a>	Baldwin,James	SR2000320	2525		03/27			Campus Solution Person				
4	<a href="#">Detail</a>	Bond,James CC	004359613	4578		02/08	Employee	Regular		Active	0	3312	Administrato
5	<a href="#">Detail</a>	Clavel,James ExtApp		2145	5	02/05	Applicant						
6	<a href="#">Detail</a>	Ellison,James Franklin	CCS000072	3557		06/03			Campus Solution Person				
7	<a href="#">Detail</a>	Fraser,James CC	CC0000004	6544		07/05			Campus Solution Person				
8	<a href="#">Detail</a>	Kirk,James T	TEST00001	0000		01/05			Campus Solution				

Depending on the type of record the following pages will be displayed when detail is selected.

**Employees/ Person of Interest:** Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person

**Campus Solutions Person:** Main Menu > Campus Community > Personal Information > Add/Update a Person

**HR Recruiting:** Main Menu > Recruiting > Add New Applicant

# Semantic Menu Changes

- New titles section headings
  - Administer Workforce is now Workforce Administration
  - Develop Workforce is now Workforce Development
  - Develop Workforce>Recruit Workforce is now Recruiting
  - Develop Workforce>Manage Positions is now Organizational Development>Position Management
  - HR Setup is now located under - Set Up HRMS
  - eRecruit is now Careers
  - CSU ID Search has moved to the “top level” on the menu

Subheadings contain descriptions of functionality.



The screenshot shows the PeopleSoft interface for Workforce Administration. The main menu is titled "Workforce Administration" and includes subheadings for "Personal Information", "Job Information", and "Global Assignments". The "Personal Information" subheading is highlighted with a red box and contains the following items: "Add a Person", "Modify a Person", "Person Organizational Summary", and "8 More...". The "Job Information" subheading contains "Job Data", "Add Employment Instance", "Add Contingent Worker Instance", and "50 More...". The "Global Assignments" subheading contains "Track Assignment", "Assignee Qualifications", "Educational Allowances", and "Define Education Related Info".

# My Personalizations

- PeopleSoft 8.9 offers personalization options including:

## Regional Settings

- Accessibility Features
- Excel 97 grid download
- Time page held in cache
- Multi Language Entry
- Spell Check Dictionary

## General Options

- Afternoon Designator
- Auto-recognize Gregorian Dates
- Calendar
- Date Format
- Local Time Zone
- Time Format
- Use Local Time zone
- First day of week

## System & Application Messages

- Save Warning

## Navigation Personalizations

- Automatic menu collapse
- Tab over Calendar Button
- Tab over Grid Tabs
- Tab over Lookup Button
- Tab over Browser Elements
- Tab over Page Links
- Tab over Related Page Links
- Tab over Toolbar

# Sorting and Saving Search Results

- Enhanced Searches
  - More extensive, user-defined operators allow for flexible searches.
  - Ability to save search criteria.
  - Sort your search results.

**CSU Faculty Assignment**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**EmplID:**  begins with   
**Empl Rcd Nbr:**  begins with   
**Name:**  contains   
**Last Name:**  =   
**Second Name:**  not =   
**Alternate Character Name:**  ^   
**Middle Name:**  <=   
>   
>=   
between   
in

Include History   
  Correct history   
  Case Sensitive

  
    
[Basic Search](#)   
 [Save Search Criteria](#)

**Search Results**

View All First 1-2 of 2 Last

EmplID	Empl Rcd Nbr	Name	Last Name	Second Name	Alternate Character Name	Middle Name
<a href="#">004359613</a>	<a href="#">0</a>	<a href="#">James Bond</a>	<a href="#">BOND</a>	<a href="#">(blank)</a>	<a href="#">Bond,James CC</a>	<a href="#">CC</a>
<a href="#">004359574</a>	<a href="#">0</a>	<a href="#">Sherlock Holmes</a>	<a href="#">HOLMES</a>	<a href="#">(blank)</a>	<a href="#">Holmes,Sherlock Staff</a>	<a href="#">Staff</a>

# Sorting and Saving Search Results

- Wildcard Searches

You can use three different wildcard features to assist in searching for data. These wildcards can be helpful in finding the exact information you want to process. The following are the supported standard wildcard features:

Wildcard	Function
% (percent sign)	Match one or more characters.
_ (underscore)	Match any single character.
\ (back slash)	Escape character—don't treat the next character as a wildcard.

# Sorting and Saving Search Results

- Saving Searches

## CSU Faculty Assignment

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Use Saved Search:

EmplID:	<input type="text" value="begins with"/>	<input type="text" value="00"/>
Empl Rcd Nbr:	<input "="" type="text" value="="/>	<input type="text"/>
Name:	<input type="text" value="begins with"/>	<input type="text" value="H"/>
Last Name:	<input type="text" value="begins with"/>	<input type="text"/>
Second Name:	<input type="text" value="begins with"/>	<input type="text"/>
Alternate Character Name:	<input type="text" value="between"/>	<input type="text"/> and <input type="text"/>
Middle Name:	<input type="text" value="contains"/>	<input type="text"/>

Include History  Correct History  Case Sensitive

[Basic Search](#)  [Save Search Criteria](#) [Delete Saved Search](#)

[Return to Advanced Search](#)

1. Enter Search Criteria

2. Click Save Criteria

3. Name Search Criteria

4. Click Save

5. You are returned to the search page. Notice that you are now given the option of using your saved search.

# Sorting and Saving Search Results

Search results can be sorted in both ascending and descending order. To change the order simply click on a column header.

**Search Results**

View All First 1-12 of 12 Last

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
AD6224	Thorn,Art	Male	****	(blank)	*****	USA	SSN	THORN	ART
FA0081	Thorp,Allison	Unknown	****	(blank)	*****	USA	SSN	THORP	ALLISON
FADLCD0086	Thorps,Rumba O	Female	****	(blank)	*****	USA	SSN	THORPS	RUMBA
FAPK0353	Thorpe,Jack C	Male	****	(blank)	*****	USA	SSN	THORPE	JACK
FAPK0354	Thornton,Rafael F	Male	****	(blank)	*****	USA	SSN	THORNTON	RAFAEL
FASS0189	Thorsedron,Gilly C	Unknown	****	(blank)	*****	USA	SSN	THORSEDRON	GILLY
KU0088	Thorp,Anson	Male	****	(blank)	*****	USA	SSN	THORP	ANSON
KUTZ508	Thorton,Janelle	Female	****	(blank)	*****	USA	SSN	THORTON	JANELLE
SEV0499	Thorp,Anson	Male	****	(blank)	*****	USA	SSN	THORP	ANSON
SFCW01	THORENT,Yann	Male	****	(blank)	*****	FRA	SSN	THORENT	YANN
SFTC03141	Thorsen,Joanna	Female	****	(blank)	*****	USA	SSN	THORSEN	JOANNA
SRN117	THORENAAR,FRANK	Male	****	(blank)	*****	NLD	SFI	THORENAAR	FRANK

Ascending Order

**Search Results**





View All First 1-12 of 12 Last

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
SRN117	THORENAAR,FRANK	Male	****	(blank)	*****	NLD	SFI	THORENAAR	FRANK
SFTC03141	Thorsen,Joanna	Female	****	(blank)	*****	USA	SSN	THORSEN	JOANNA
SFCW01	THORENT,Yann	Male	****	(blank)	*****	FRA	SSN	THORENT	YANN
SEV0499	Thorp,Anson	Male	****	(blank)	*****	USA	SSN	THORP	ANSON
KUTZ508	Thorton,Janelle	Female	****	(blank)	*****	USA	SSN	THORTON	JANELLE
KU0088	Thorp,Anson	Male	****	(blank)	*****	USA	SSN	THORP	ANSON
FASS0189	Thorsedron,Gilly C	Unknown	****	(blank)	*****	USA	SSN	THORSEDRON	GILLY
FAPK0354	Thornton,Rafael F	Male	****	(blank)	*****	USA	SSN	THORNTON	RAFAEL
FAPK0353	Thorpe,Jack C	Male	****	(blank)	*****	USA	SSN	THORPE	JACK
FADLCD0086	Thorps,Rumba O	Female	****	(blank)	*****	USA	SSN	THORPS	RUMBA
FA0081	Thorp,Allison	Unknown	****	(blank)	*****	USA	SSN	THORP	ALLISON
AD6224	Thorn,Art	Male	****	(blank)	*****	USA	SSN	THORN	ART





Descending Order

# Enhanced Grid Functionality

- Many pages that contain lists of data are now structured as editable grids.

Course Assignments											Customize   Find   		First	1-3 of 3	Last
	Class Nbr	Subject Area	Catalog Nbr	Description	Section	*K / S	K Factor	Units	#Students	WTU					
1	<input type="text"/>	APS	690		1	S 		0.50	3.00	1.500000	<input type="button" value="+"/>	<input type="button" value="-"/>			
2	<input type="text"/>	APS	300		1	K 		3.00		3.000000	<input type="button" value="+"/>	<input type="button" value="-"/>			
3	<input type="text"/>	APS	400		2	K 		2.00		4.000000	<input type="button" value="+"/>	<input type="button" value="-"/>			





Other Assignments							Customize   Find   		First	1 of 1	Last
	Assignment Type	Reason Code	Time Source Code	Academic Org/Dept	WTU	Description					
1	11 	<input type="text"/> 	Department <input type="button" value="v"/>	<input type="text"/> 	1.000000	APS 300 enrollment =92	<input type="button" value="+"/>	<input type="button" value="-"/>			




# Sorting data in grids

- Like search results, data found in grids can be sorted in ascending or descending order.

Click on column header to sort.













Course Assignments											Customize   Find   		First	1-3 of 3	Last
	Class Nbr	Subject Area	Catalog Nbr	Description	Section	*K / S	K Factor	Units	#Students	WTU					
1		APS	690		1	S 		0.50	3.00	1.500000	+	-			
2		APS	300		1	K 		3.00		3.000000	+	-			
3		APS	400		2	K 		2.00		4.000000	+	-			





Other Assignments							Customize   Find   		First	1 of 1	Last
	Assignment Type	Reason Code	Time Source Code	Academic Org/Dept	WTU	Description					
1	11 		Department 		1.000000	APS 300 enrollment =92	+	-			

# Exporting Grid Data to Excel


By clicking on the download icon shown below you will be able to export your grid data in Excel. The download feature must be enabled in “My Personalizations” prior to downloading. To enable it navigate to **My Personalizations > General Options > Excel 97 grid download**



Course Assignments												Customize	Find		First	1-3 of 3	Last
	Class Nbr	Subject Area	Catalog Nbr	Description	Section	*K / S	K Factor	Units	#Students	WTU							
1		APS	690		1	S 		0.50	3.00	1.500000							
2		APS	300		1	K 		3.00		3.000000							
3		APS	400		2	K 		2.00		4.000000							

Other Assignments							Customize	Find		First	1 of 1	Last
	Assignment Type	Reason Code	Time Source Code	Academic Org/Dept	WTU	Description						
1	11 		Department 		1.000000	APS 300 enrollment =92						


# Insert Rows and Delete Rows

You may add multiple rows by clicking on the plus symbol  located to the right of the grid data.

Course Assignments											Customize	Find	First	1-3 of 3	Last
	Class Nbr	Subject Area	Catalog Nbr	Description	Section	*K / S	K Factor	Units	#Students	WTU					
1		APS	690		1	S		0.50	3.00	1.500000	+	-			
2		APS	300		1	K		3.00		3.000000	+	-			
3		APS	400		2	K		2.00		4.000000	+	-			














  

Other Assignments							Customize	Find	First	1 of 1	Last
	Assignment Type	Reason Code	Time Source Code	Academic Org/Dept	WTU	Description					
1	11		Department		1.000000	APS 300 enrollment =92	+	-			

Additionally you may delete rows of data by clicking on the minus symbol located next to the plus symbol. 

# Adding Notes

- By adding notes you can leave comments, special circumstances, etc concerning the person/record in question.

Contract Status/Content		TF Contract Courses		TF Contract Total	
Sylvia Plath			Person ID: 010025623		
<div style="text-align: right;">View All &lt; 1 of 2 &gt;</div>					
CSU Contract #:	000001406	DeptID:	D20003		
*Eff Date:	01/10/2008 	Effective Sequence:	0	Contract Desc: APS 0708 SP	
*Contract Status:	Active 	Entitlement:	23.5	Contract Expected End Date: 05/16/2008 	
Reg Region:	USA 	Multi-Year End Date:		05/15/2010 	
Contract Type:	014 	12.12 Entitlement - Yr 1 of 3			
Approved by:	<input type="checkbox"/> Approver1 <input type="checkbox"/> Approver2 <input type="checkbox"/> Approver3				
TF Contract Detail <span style="float: right;">Find   View All    First &lt; 1 of 1 &gt; Last</span>					
*Position Nbr:	00022367 	LECTURER AY / 3 YEAR	Bus. Unit:	HMCMP HSU	
Department:	D20003	ACADEMIC PERSONNEL SERVICES	Job Code:	2358	Sal Plan/Grd: 335 / 3 
Term:	2074 	Cycle:	1 	*Comp Rate: 4253.000000	
*Late Start?	N 	Academic Days Paid:		Total WTU: 7.00000	
Comments:	Rehired annuitant 				

# Adding Notes cont...

### Temp Faculty Notepad

**Instructions**

**Selection Criteria**

ID: 010025623  
CSU Contract Nb: 000001406  
\*DeptID: D20003  
\*Eff Date: 2008-01-10  
Earliest Note Date:

[Add a New Note](#)      [Return To](#)

There are no existing notes for the specif

[Return To: Contract Data page](#)

### Note Detail - Selected Note

**Instructions**

**Selected Note**

ID:	010025623	Sylvia Plath	Created:	05/16/2007 8:59PM
CSU Contract Nb:	000001406		Creator:	Suzan Logwood
DeptID:	D20003		Last Update:	
Eff Date:	2008-01-10		by:	

---

Subject:


Note Text:

[Save](#)      [Undo Changes](#)


[Return To: Note Selection Page](#)  
[Contract Data page](#)

# Adding Notes cont...

When lines appear on the icon then there are notes present.

Contract Status/Content		TF Contract Courses		TF Contract Total	
Sylvia Plath		Person ID:		010025623	
Contract Status/Content		View All		1 of 2	
CSU Contract #:	000001406	DeptID:	D20003		
*Eff Date:	01/10/2008	Effective Sequence:	0	Contract Desc: APS 0708 SP	
*Contract Status:	Active	Entitlement:	23.5	Contract Expected End Date: 05/16/2008	
Reg Region:	USA	Multi-Year End Date:		05/15/2010	
Contract Type:	014	12.12 Entitlement - Yr 1 of 3			
Approved by: <input type="checkbox"/> Approver1 <input type="checkbox"/> Approver2 <input type="checkbox"/> Approver3					
TF Contract Detail		Find   View All		First 1 of 1 Last	
*Position Nbr:	00022367	LECTURER AY / 3 YEAR	Bus. Unit:	HMCMP HSU	
Department:	D20003	ACADEMIC PERSONNEL SERVICES	Job Code:	2358	Sal Plan/Grd: 335 / 3
Term:	2074	Cycle:	1	*Comp Rate: 4253.000000	
*Late Start?	N	Academic Days Paid:		Total WTU: 7.00000	
Comments:	Rehired annuitant				

# Spell Check Functionality

 **Note Detail - Selected Note**

▶ Instructions


**Selected Note**

ID: 010025623	Sylvia Plath	Created: 05/16/2007 8:59PM
CSU Contract Nb: 000001406		Creator: Suzan Logwood
DeptID: D20003		Last Update: by:
Eff Date: 2008-01-10		

Subject: Test

Note Text: This is a note

**Windows Internet Explorer**

 No misspellings found. (124,234)

OK

Save Undo Changes

Return To: [Note Selection Page](#)  
[Contract Data page](#)

Many text fields now have spell check ability. Look for this icon.



# E-mail Notifications



E-mail notifications allow users to notify others of particular transactions. If enabled, the “Notify” button is located at the bottom of the page. When clicked the user is taken to the screen below.

### Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.  
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details		<a href="#">Lookup Recipient</a>	<a href="#">Delivery Options</a>
To:	<input type="text"/>		
CC:	<input type="text"/>		
BCC:	<input type="text"/>		
Priority:	<input type="button" value="v"/>		
Subject:	<input type="text" value="&lt;Enter Subject here&gt;"/>	<input type="button" value="OK"/>	
Template	Workflow Notification	<input type="button" value="v"/>	
Text:	Priority: %NotificationPriority	<input type="button" value="v"/>	
Message:	<input type="text"/>	<input type="button" value="OK"/>	

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.  
Click Apply to send this notification and remain on this page.

- The End and Good Luck with PeopleSoft