Welcome to the Basic Navigation Training module! This module contains the information and tools needed to navigate the new elements of Peoplesoft version 9.0.

Goal
To have the skills and knowledge to navigate in PeopleSoft 9.0

Participate
at the end of this module, you will be able to………

Objectives
1. Navigate Peoplesoft 9.0
2. Understand key terms

If you have any questions about this document please contact the Training group at 504-280-5645 or visit us at UCC-101Q.
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What is PeopleSoft? (WebSTAR)

PeopleSoft is a web application used by the University of New Orleans to maintain view and update Student University Data and Human resource data. The content included is Admissions, Student Records, Course Information, Human Resource, Biographic and Student Financials data. To access PeopleSoft all you need is a browser on your PC or MAC. PeopleSoft is best used with Internet Explorer.

Navigation to Web-STAR

<table>
<thead>
<tr>
<th>Step 1.</th>
<th>Navigate to the UNO Home Page: <a href="http://www.uno.edu/">http://www.uno.edu/</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2.</td>
<td>Select the Faculty &amp; Staff link.</td>
</tr>
</tbody>
</table>

![UNO Home Page](http://www.uno.edu/)

**Step 3.** Select the **Web-STAR** logo.
Step 4. Select the appropriate link based on your role at the University.

Step 5. Enter your UNO username and password. **Note**: Your user name is the as your email, computer or blackboard course username and password.
Welcome to the Web-STAR Home Page. The home page is your starting point. On the left-hand side of the homepage is the menu. The items available in your menu are determined by your PeopleSoft Security. Menu items with triangles next to them can be expanded and collapsed.

### Signing Out

To sign out click the Sign Out link on the navigational header that appears at the top of the page.

**Note:** Before you sign out of any transaction page, you must save any changes before signing out. For security purposes, the system will automatically log you out after a period of twenty minutes of inactivity. Prior to your session timeout, the system will provide a warning that your browser session is about to expire. You can continue your session by clicking on the OK button in the warning message.

**Step 1.** Select the Sign Out link on the navigational header.
Navigating in WebSTAR

Using Menu Pagelet
The menu pagelet navigation is on the left side of the page and is an intuitive way of updating or viewing data in Web-STAR (PeopleSoft). The menu is located on the left side of your screen and consists of a hierarchy of folders and content references. Expanding and collapsing these folders, and selecting content references from within them, is one of the primary ways of navigating within PeopleSoft applications.
Using Navigation Pages

The menu is a navigation hierarchy. When you click on a menu option at the highest level, the next level is expanded and highlighted.

**Step 1.** Click the **Campus Community** link. When you open a menu level, a navigation page is also displayed. PeopleSoft provides navigation pages as alternatives to the menu pagelet. The navigation pages provide task-driven pages that group processes into sections, with a brief explanation of what each section is about, and one or more links to either folders or page groups. Notice also that the header shows the navigation path, with links you can click if you want to return to a higher level.

**Step 2.** Click the **Personal Information** link.

Icons at each section level identify whether a link will open a new folder, or a page. The Address Search section displays a link to a page group. Other sections show folder icons. In these sections, the links that are contained in the folder are also displayed. Up to four links are displayed. If there are more than four, you can click the **More** link to view the additional links.

**Step 3.** Click the **Biographical** link and select the desired link under the Biographical folder.
Using Favorites
One of the new features of PeopleSoft 9.0 is the ability to add pages that you use frequently to a Favorites menu in PeopleSoft. The favorites list is your own list of bookmarks. Once you add a favorite, it appears under the favorites menu. You can return to the page by clicking the link for the page that you want to view.

Add Favorites

**Step 1.** Navigate to **Self Service, Payroll and Compensation, View Paycheck**.

**Step 2.** When you are on the **View Paycheck** page. Select the **Add to Favorites** link on the navigational header.

**Step 3.** The description of the page will auto populate. If necessary, the description can be modified.

**Step 4.** Click **OK**. Once the favorite is added you are automatically returned to the page that you were on before you selected Add to Favorites.
Remove Favorites

**Step 1.** Click the My Favorites link.

**Step 2.** Select Edit Favorites.
**Step 3.** At this point, you can change the name of any favorites, change the sequence they appear in, or delete one altogether. To change the name type over the displayed name.

**Step 4.** To change the sequence, type the desired number over the displayed numbers.

**Step 5.** After you submit changes click **Save.**

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**Edit Favorites**

Click the **Save** button after editing or deleting favorites.

<table>
<thead>
<tr>
<th>Favorite</th>
<th>Sequence number</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNO - Order Emp Parking Decal</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>View Paycheck</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>My Home and Mailing Address</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>
Using Search Criteria

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

Default operators are provided for each search key. Notice on the displayed search page that the defaults are = or begins with. This means that the system searches for records in which the field value equals (matches exactly) your criteria or, in the second case, begins with your criteria. Note: that if you choose between, a second field will open for the end value of the range.

Displayed below is a list of all the operators that are available when conducting a search.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Field Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begins with</td>
<td>Character fields.</td>
</tr>
<tr>
<td>contains</td>
<td>Character fields.</td>
</tr>
<tr>
<td>=</td>
<td>All field types.</td>
</tr>
<tr>
<td>Not=</td>
<td>All field types.</td>
</tr>
<tr>
<td>&lt;</td>
<td>All field types.</td>
</tr>
<tr>
<td>&lt;=</td>
<td>All field types.</td>
</tr>
<tr>
<td>&gt;</td>
<td>All field types.</td>
</tr>
<tr>
<td>&gt;=</td>
<td>All field types.</td>
</tr>
<tr>
<td>between</td>
<td>All field types.</td>
</tr>
<tr>
<td>in</td>
<td>All field types.</td>
</tr>
</tbody>
</table>
In this example, you are searching for a course in the English department. You know the course name begins with English, but you aren’t sure of the exact name. If the course description began with the word English, you could use the "begins with" operator and enter the word English in the field next to the operator. This would return all descriptions that begin with the word English. But if you’re not sure that the course title begins with the word English, you need to use the "contains" operator. Using an operator for more than one field helps to make your search even more specific. The Search Results list displays all the English courses with the word English in the description.
Working with grids

On some pages, some of the fields are repeated in order to enter multiple rows of data. For this purpose, PeopleSoft uses grids. With grids, you have the ability to add, edit, and view multiple occurrences (rows) of data for a group of fields on one page.

The Class Roster page contains a grid area. Instead of using a traditional scroll bar to scroll through the rows of data in a grid, PeopleSoft uses navigation buttons and hyperlinks.

Most often, you will find these buttons and hyperlinks in the navigation header for each area, with the exception of the Insert Row and Delete Row buttons. The First link takes you to the first row of data. Use the Previous Row arrow to navigate to the previous row of data. Use the Previous Row arrow to navigate to the previous row of data. The number system for the rows shows the number of rows you are currently viewing. Use the Next Row arrow to navigate to the next row of data.

Grids look similar to a spreadsheet with column headings, rows, and cells. The cells are equivalent to fields. Fields within a grid may be represented as edit boxes, drop-down list boxes, check boxes, and radio or prompt buttons.

Using the Customize Link to Personalize Grids

For most grids, including some analytic grids, you can use the Customize link to change the order of the columns, the sort order, which columns are frozen, and which columns are hidden. You can also share your grid customizations with other users or copy other users' settings. You control these settings on the Personalize Column and Sort Order page, which you open by clicking the Customize link in the grid’s navigation header. Any personalizations that you make to a grid remain in place until you change them.
Changing the Column Ordering

**Step 1.** Select the **Customize** link on the grid.

**Step 2.** Under the **Column Order**, select the column that you want to move.

**Step 3.** To change the sequence, or add fields to sort order, highlight column name, then press the appropriate button.

**Step 4.** Click **OK** to save your changes and return to the transaction page.
Printing Active Screens in PeopleSoft Version 9 (Mozilla Fire Fox)

Print Frame

<table>
<thead>
<tr>
<th>Step 1.</th>
<th>Right-click in the desired frame.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2.</td>
<td>Select This Frame.</td>
</tr>
<tr>
<td>Step 3.</td>
<td>Select Print Frame.</td>
</tr>
</tbody>
</table>

Step 4. The data portion of the screen should print
Open and Print Frame in New Tab

**Step 1.** Right-click in the desired frame.

**Step 2.** Select **Open Frame in New Tab**. This will create a new browser tab containing the data portion of the screen.
Step 3. Use the normal **File > Print Preview** or **Print** dialog.

Step 4. In the Print Preview window, select **Landscape** mode.

Step 5. Select **Shrink to Fit**.

Step 6. Select **Print** button.
Printing Active Screens in PeopleSoft Version 9 (Internet Explorer)

Print Frame

**Step 1.** Right-click inside the desired frame.
**Step 2.** Choose **Select All.**
Step 2. Right-click a highlighted area and select **Print Preview**.

Step 3. In the Print Preview window, select **Landscape** mode.
Step 4. Under the **As laid out on the screen** drop-down, select **As selected on the screen**.

Step 5. Choose **Shrink To Fit** or **80%** shows all of the desired fields.

Step 6. Select the **button**.