PeopleSoft 9.1 Basics

College of Lake County
Professional Development Center
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INTRODUCTION

The College of Lake County has been using PeopleSoft software to manage the Human Resources and Student Administration processes of the college. The college has adopted a new version of the PeopleSoft system, PeopleSoft 9.1.

The new version of PeopleSoft includes all of the functionality of the previous PeopleSoft 8 system. Additionally, the PeopleSoft 9.1 system has some additional functionality, including bookmarking within the application, downloading data to Excel, and sending e-mails from within PeopleSoft.

This manual includes step-by-step instructions on how to use the new system and how the navigation has changed. The table of contents at the beginning of the document outlines each of the areas covered in this manual.

GETTING STARTED

LOGGING INTO THE NETWORK

When you first turn on the computer you will need to log into the network. You will see a login box as shown below.

1. Enter your Network User name.
2. Enter your Network password.
3. Click OK.
ACCESSING PEOPLESOFT

Once you have logged onto the network, you will need to access the web-based system. To access the system:
1. Bring up Internet Explorer.
You can click on the Internet Explorer icon, , in your taskbar. OR

2. Type http://clcweb.clcillinois.edu.
3. Press Go or press [Enter].
4. Click the myCLCcenter link.

The PeopleSoft login screen will display.

5. Enter your Network User Name and press [Tab].
6. Enter your Network Password.
7. Click Sign In.

The new PeopleSoft 9.1 home page will display, as seen below:
Note: Screen shots in this manual may include areas of the system where you do not have access.

Tip: You may want to consider setting the CLC Intranet home page as a Favorite in Internet Explorer, so that you can quickly access the PeopleSoft log in screen. For help with this, refer to the “Working with Favorites in Internet Explorer” section of this manual. Otherwise, you may want to make the CLC Intranet your home page on your PC, so that it will automatically come up when you launch Internet Explorer. Instructions on setting up the CLC Intranet as your home page follow.

GUIDELINES FOR CREATING PASSWORDS

A compromised password not only puts a user’s E-mail and files at risk, but may also expose sensitive CLC data and systems. All members of the CLC community are responsible for taking the appropriate steps to select and secure their passwords. It is also a must to have a strong password policy in place to meet regulatory and audit requirements. This document outlines the guidelines and requirements for choosing, managing, and protecting strong passwords at CLC.

One of the most common methods that attackers use to guess passwords is known as a brute force attack. In a brute force attack, the attacker systematically tries possible passwords until he manages to break into an account. Attackers frequently use dictionary files to generate lists of possible passwords. Choosing passwords that are easy to remember but hard for an attacker to guess, will significantly improve the security of the computer and data.
The following guidelines should be considered when creating a password:

Steps 1 – 3 are Required

1. **At least eight** characters long
2. The first character **MUST BE AN ALPHA CHARACTER AND CAPITALIZED**.
3. **Must** contain at least one numeric character
4. May contain at least one punctuation or symbol character (e.g. !@#$%^&*()_+|~-\[]":;'<>?,./ )
5. Are not trivially derived from the user’s CLC Network ID, name, or a dictionary word.
6. Avoid using dictionary words in your passwords. This includes foreign language words, slang, jargon, and proper names.
7. Avoid using passwords that contain words associated with CLC, such as lancers, Grayslake, brandel, etc.
8. Avoid common misspellings and substitutions in your passwords (e.g. replacing “e” with “3” or “i” with “1”)
9. Avoid using passwords that are based on any personal information, such as name, user ID, birthdates, addresses, phone numbers, or relatives' names.
10. Do not use sample passwords, such as the ones included in this guide.

Think up a phrase or part of a book, poem, or song and use part of it to form a memorable password. For example:

**Only 50 more days until I graduate from SFS!,** would be **O50mduIgfSFS!**
All of Gaul is divided into **3 main parts,** would be **“AoGidi3mp.”**

These guidelines were taken from an e-mail composed by Ratnakar Nanavaty 6-27-05.
Guidelines for Protecting Passwords

1. Password security is the responsibility of the end user. The end user will be held accountable for any misuse of guessed, disclosed, or compromised passwords.

2. Do not share passwords with anyone, including supervisors, administrative assistants, secretaries, and technology service providers. It is against CLC policy for a technology service provider to request a user’s passwords. If someone demands a password, refer them to this document or have them call someone in the CLC Information Security Office.

3. Do not use the CLC Network ID password for any other account or service at CLC or elsewhere. Your CLC Network ID password should be unique from any other password used.

4. Avoid using the same passwords for CLC accounts as for other non-CLC access (e.g., personal ISP accounts, free online E-mail accounts, instant messaging accounts, other online services, etc.). This will limit exposure if any of passwords are compromised.

5. Avoid storing passwords within applications or using the "Remember Password" feature (e.g. Netscape Messenger, Internet Explorer, etc.). These features typically do not adequately protect passwords, and it may be possible for a computer virus or unauthorized user to gain access to this information.

6. Do not write passwords down or store them anywhere in the office. Do not store passwords in a file on any computer system (including PDAs or similar devices) without using strong encryption.

7. If the account or password may have been compromised, report the incident to the CLC Information Security Office and change the password immediately.

SETTING UP THE CLC INTRANET AS YOUR HOME PAGE

To make the CLC Intranet page your home page:

1. Launch **Internet Explorer** by clicking on the Internet Explorer icon, 🌐.

2. Click **Tools** in the menu bar of Internet Explorer.

3. Click **Internet Options**.
4. In the Internet Options window in the Home page section at the Address line type: http://clcweb.clcillinois.edu.
5. Click OK.

The CLC Intranet home page will now appear on your PC whenever you launch Internet Explorer.
TIMING OUT IN THE SYSTEM

For security purposes the system automatically logs you off after 20 minutes of inactivity. If you are inadvertently logged off the system, due to idle time, and wish to return to your application, the following screen will appear.

1. Click the **Sign in to PeopleSoft** link to return to the login screen.

! Warning! Please keep in mind that anything you have entered, and not saved, will be lost if you are inadvertently logged off the system.

Once you have clicked the sign in link, the login screen will appear, and you can once again login to the system. Therefore, it is always best to regularly save your work, especially before you leave your workstation for an extended period of time, because anything entered and not saved will be lost if the system logs you off.

**Tip:** Sign out of the system if you are done using it, or if you will be away from the system for more than 20 minutes. Also be sure to always Lock your computer by pressing [Ctrl]+[Alt]+[Delete] and choose the “Lock Workstation” option, or log off the system completely, when you leave your desk.
LOGGING OFF OF PEOPLESOFT

When you have finished using PeopleSoft or will be away from your desk for 20 minutes or more, you should log off of PeopleSoft. To log off of PeopleSoft:

1. Click the **Sign out** link in the top right corner.

   ![Sign out link](image)

   **Note:** You can sign out whenever the “Sign Out” link appears in the toolbar. There is no need to return to the Home page to sign out.

   **Tip:** If not available, open a second window and sign out of it. Then close the first window. This will bring up the Sign In screen.
USING THE MENUS

MENUS

The PeopleSoft 9.1 system uses menus extensively as navigational tools. When you first log into PeopleSoft 9.1, the homepage will display as seen below. The number of menu items displayed in the Menu window will depend on the security of each user.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>Refreshes the window</td>
</tr>
<tr>
<td>Minimize</td>
<td>Minimizes the window</td>
</tr>
<tr>
<td>Close</td>
<td>Displays an error message. Do not use this function.</td>
</tr>
</tbody>
</table>

DISPLAYING AND HIDING THE MENU PAGELET

1. Click **Minimize**, in the Menu pagelet.

The Menu pagelet is no longer visible. Only the Menu title bar is visible.

2. Click **Maximize**, in the Menu title bar.

The full menu screen will display again.
USING MENUS

On the left side of the PeopleSoft 9.1 home page the Menu pagelet is displayed. It contains a list of folders, which provide the primary method for moving through the system. This list contains the areas of the system to which you have access.

![Menu pagelet diagram]

**Note**  The Menu pagelet displays all folders available to the current user. The folders available will vary based on the user’s security permissions.

To use the Menu pagelet you may either select a folder (or menu item) in the list or use the search prompt at the top of the window to search for a particular folder.

Navigation to pages is accomplished through selections in the Menu. If a Menu selection has other choices associated with it, you will see an arrow pointing sideways towards the selection, . This indicates that there are submenus associated with the menu item. If a Menu choice is open and the additional submenus associated with it are visible, the arrow next to the Menu choice will point downwards, . If a Menu choice navigates you directly to a page, it will have a hyphen in front and be underlined in blue type suggesting that it is a hyperlink to a page.

![Menu pagelet diagram with annotations]

To select a Menu item, click your mouse on the desired selection. This will expand the associated Menu choice to its submenu. You may also click on any of the page links at the bottom of the Menu pagelet.
OPENING A PAGE FROM THE NAVIGATION MENU

1. Click **Records and Enrollment** in the Menu pagelet.

The main menu will collapse and the Records and Enrollment menu will display. The Records and Enrollment submenus will now be visible. The screen shot below has the following submenus: Enroll Students, Enrollment Summaries, Transcripts, Student Term Information, Term Processing, Transfer Credit Evaluation, Career and Program Information and Enrollment Verifications. You can access any of the search pages by clicking on the page links that display.
2. Click the **Enrollment Summary** link.

The Enrollment Summary search screen will now be visible.
MENU BREADCRUMBS

As you click on selections from the menus, a series of links appear at the top of the page. These links are menu breadcrumbs. In the screenshot below the user has clicked on Records and Enrollment from the Main Menu. The menu breadcrumbs help with navigating through the system.

Favorites will always appear to the left of the menu breadcrumbs. Favorites will be covered later in this manual.

The menu breadcrumbs show the last path the user has taken in the system. Additionally each entry in the menu breadcrumbs (except the one displaying the search component) will display a list of navigation options for additional access in PeopleSoft.

1. Click the **Main Menu** breadcrumb.

The main menu will display including the search prompt, folders and links.

*Note:* You can bring up the main menu by clicking on the Home link as well.

2. Click **Curriculum Management**.

![Main Menu Breadcrumb Drop Down]

![Menu Breadcrumbs]

![Favorites]
A second drop down menu appears with all of the submenus under Curriculum Management.

3. Click **Course Catalog**.

Another drop down menu displays.

4. Click **Course Catalog (View Only)**.
The Course Catalog search screen displays.

```
Course Catalog (View Only)

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

Limit the number of results to (up to 300) 300
Academic Institution:  CLCCC
Subject Area:  AOS
Catalog Nbr:  begins with
Campus:  begins with
Course ID:  begins with
Description:  begins with

☑ Include History  ☐ Case Sensitive

Search  Clear  Basic Search  Save Search Criteria
```

The menu breadcrumbs now display at the top of the page showing the path we took to get to the Course Catalog search screen. Each entry in the menu breadcrumbs displaying a down arrow will provide a drop down menu of navigation options when clicked.

**RETURNING TO THE MAIN MENU**

The easiest way to return to the main menu is to use the Home link in the upper right corner of the window.

1. Click the **Home** Link.

```
ORACLE

Favorites  Main Menu  Curriculum Management  Course Catalog  Course Catalog (View Only)
```

```
ORACLE

Favorites  Main Menu  Curriculum Management  Course Catalog  Course Catalog (View Only)
```
The main menu now displays.

![Menu Search Function](image)

**USING THE MENU SEARCH FUNCTION**

There is a Search prompt at the top of the Menu pagelet. If you are not sure where to find information in PeopleSoft 9.1, simply type in a keyword and then press Enter. We will search for student enrollment information using the search prompt.

1. Click in the **Search: prompt** at the top of the menu pagelet.
2. Type **enrollment**.
3. Press **Enter**.

![Search Prompt](image)

A search screen like the one below will display. A list of each menu item appears as a hyperlink along with a description of the menu. The path to the menu item also displays under the description.
4. Click the **Enrollment Summary** hyperlink.

![Menu Path](image)

The Enrollment Summary search screen appears, as seen below. You can then enter your search fields to view enrollment data for a specific person.

![Enrollment Summary](image)

5. Click in the **Search** prompt again.
6. Enter **user defaults**.
7. Press **Enter**.

The Search screen will display, as seen below.

8. Click the **Search Tips** hyperlink.

A list of suggestions for using the Search: prompt will display.

9. Click the **Return to Search** hyperlink.
The Search screen will display again.

10. Click the **Customize Settings** hyperlink.

![Customize Settings](image)

You can customize your search results by hiding summaries and changing the number of search results you would like to see on a page.

11. Click the **down arrow** to the right of 25 per page.
12. Select **10 per page**.
13. Click **Save**.

![Search Results](image)

Now when you use the search prompt, your search result lists will display in groups of 10.

14. Click the **Home** to return to the main menu.
PRIMARY ELEMENTS OF WINDOWS

There are several common elements to windows in the system. Understanding these elements and how they function will help you to effectively use the system. Many different types of elements are used to organize information on pages and to allow you to enter data into the system.

**NAVIGATION HEADER**

The navigation header area remains static as you move through the various areas of the system and appears as follows:

There are three primary buttons on the navigation header:

1. Home
2. Add to Favorites
3. Sign Out

The following table provides information about the buttons contained in the navigation header.

<table>
<thead>
<tr>
<th>Navigation Header Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Takes you back to the Home page in the PeopleSoft 9.1 system.</td>
</tr>
<tr>
<td>Add to Favorites</td>
<td>Save the current page as a favorite in PeopleSoft 9.1. Once the favorite has been created, you can access it using the My Favorites menu item. Detailed information on using this feature can be found in the Using Favorites section of this manual.</td>
</tr>
<tr>
<td>Sign Out</td>
<td>Use to sign out of the system, when you would like to leave Internet Explorer open. Pressing this button will take you back to the PeopleSoft login screen. <strong>Note:</strong> Be sure to save your work before signing out.</td>
</tr>
</tbody>
</table>

**Warning** - **ALWAYS USE THE SIGN OUT OPTION TO LOG OFF OF PEOPLESOFT!**

Do not use the close button in the Internet Explorer browser to end your PeopleSoft session.
**TOOLBAR BUTTONS**

At the bottom of most pages you will find buttons. These buttons change dynamically, depending on the type of page in use. The buttons come in three different types:

1. search list navigation buttons,
2. page navigation buttons and
3. page action buttons.

The table below provides a list of toolbar buttons along with a description of each:

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save</strong></td>
<td>Saves information you have entered into the page. Generally, you will save when you finish editing or adding information to a component. The Save command updates the data for all pages in a component. <strong>Note:</strong> This button will appear only if you have rights to add information to PeopleSoft.</td>
</tr>
<tr>
<td><strong>Return to Search Page</strong></td>
<td>Returns you to the last search page used.</td>
</tr>
<tr>
<td><strong>Next In List</strong></td>
<td>Displays the data for the next record in your search results list. The button will be unavailable, or grayed out, if you did not select the record from a search results list, if there was a single row in the list, or if the data displayed is the last record in the list.</td>
</tr>
<tr>
<td><strong>Previous in List</strong></td>
<td>Displays the data for the previous record in your search results list. The button will be unavailable, or grayed out, if you did not select the record from a search results list, if there was a single row in the list, or if the data displayed is the first record in the list.</td>
</tr>
<tr>
<td><strong>Update/Display</strong></td>
<td>Provides access to existing rows of data. If the data is effective-dated, it will display only current and future rows.</td>
</tr>
<tr>
<td><strong>Include History</strong></td>
<td>Displays all rows of data: current, future and history.</td>
</tr>
<tr>
<td><strong>Add</strong></td>
<td>Allows you to add a new record. <strong>Note:</strong> This button will appear only if you have rights to add information to PeopleSoft.</td>
</tr>
<tr>
<td><strong>Notify</strong></td>
<td>Allows you to send an e-mail message from within PeopleSoft.</td>
</tr>
</tbody>
</table>
WORKING WITH COMPONENTS AND PAGES

The system is made up of components and pages. Components are the functional areas in the system, and consist of multiple pages. There are hundreds of different components in the system. Some examples of components in the system are:

- User Defaults
- Course Catalog
- Student Training History
- Biographical (Student)

You will have access to components based on your security level in the system.

1. Click the Home link,
2. Click Set Up SACR.
3. Click the User Defaults link.

The User Defaults component displays:
Components, such as User Defaults, are accessed from the menu lists. To reach a given component, you will move through a succession of menus and sub-menus. In the example above the menu item chosen was Set Up SACR followed by clicking on the User Defaults page link.

(For more information regarding menus, refer to the “Using the Menus” section of this manual.)

Pages in the system are the individual display screens, and provide a means for performing the following operations in the system:

- viewing,
- updating and
- editing data.

Pages make up the components and are much like pages of a form. You can leaf through the pages in a component, just as you can the pages in a form. Additionally, just as you may need to complete each page of a multi-page form, in many cases, you will need to enter data into all pages of a given component.
MOVING BETWEEN PAGES OF A COMPONENT

The easiest way to move between pages in a component is to click on the page tabs at the top of the page or the page links at the bottom of the page. The screen display below shows the page tabs and links associated with the User Defaults component:

1. Click the **User Defaults 2** tab.
A second page in the User Defaults component will display.

2. Click the User Defaults 1 link at the bottom of the page.

Page tabs and page links work the same way; however, there may not be enough space in the window for all of the tabs to appear. When this happens, you will see a right-facing arrow, indicating that there are additional tabs. All pages will appear as page links at the bottom of the page; they are not limited by the size of the window.

3. Click the right-facing arrow at the end of the tabs to see the rest of the page tabs.

The additional tabs will now appear and a left-facing arrow will appear.

4. Click the left facing arrow.

The first tabs will now appear again.

Note: All pages in a component have the same search record, so the prompts in the initial search page will be the same, regardless of which page you access first. Additionally, you will not be prompted to enter new search criteria as you move from page to page in the component.
SAVING DATA IN A COMPONENT

Pages in a component are treated as a single entity when you try to save data. When you save data for a page, data stored on all of the pages in the component will be saved.

Some of the fields in a page may require you to enter data. These are the required data entry fields. If you have forgotten to enter data that is required, the system will prompt you to enter this data. You will not be able to save a record if you have not entered data into the required data entry fields. Required data entry fields will have an asterisk, *, to the left of their field name.

1. Click in the **Term: prompt** and enter the **current term code**.

   **Note:** Term codes are four digits and always begin with the number 1. The next two digits are the last two numbers of the current year. The fourth digit is the number of the term where spring term is 1, summer term is 2 and fall term is 3. The term code in the window below is for spring 2011.

2. Click **Save**.

   Once you have entered data, you must click the Save button to have them saved in PeopleSoft.

3. Click the **Home** link, at the top of the page.
GETTING HELP

Within the PeopleSoft 9.1 application, you can find documentation to help you.

1. Click the **Help** link in the upper right corner of the window.

The PeopleSoft Help window will display.

2. Click **Show Reference Pane** in the upper right corner of the window.
The Reference pane displays. This is a table of contents and tabs which can be used to look up specific help topics.

**Note:** Help in PeopleSoft is context sensitive. Since we were on the Home page in PeopleSoft when we clicked the Help button, the default help window displays information about Using the Menu Pagelet.

The table of contents is a difficult way to look up information in the system, as you have to search through chapters and subchapters looking for a specific help topic. It is much easier to use the Index search.

**Note:** The Search tab does not work for looking up information in PeopleSoft.

3. Click the **Index** tab.
4. Type: **search** into the prompt.

A list of topic related to searches appears.

5. Select **criteria operators**.

![Image of criteria operators search]

**Note:** PeopleBooks Help may *not* take you to the exact reference because of the CLC customization of PeopleSoft 9.1.

You will receive the message “No content available” and then be returned to a more general high-level help page instead.

6. **Close** the Help window.
FERPA (FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT)

The College of Lake County is legally obligated to protect the privacy of its students in compliance with the Family Education Rights and Privacy Act (FERPA). CLC offers on-line training in FERPA.

To access the on-line FERPA training:

1. Bring up Internet Explorer. You can click on the Internet Explorer icon, , in your taskbar.
2. Type http://clcweb.clcillinois.edu.
3. Press Go or press [Enter].
4. Click on the CLC Intranet link
5. Type your **Network User Name** followed by @clcillinois.edu and press [Tab].
6. Type your **Network Password** and press [Tab].
7. Click **OK** or press [Enter].

The CLC Intranet page will appear.

8. Click the **Professional Development Center** link.
9. Click the eLearning link on the left side of the page.

10. Select FERPA.

The online FERPA Training page will appear.

11. Click the Training on FERPA link.

The FERPA training program will display.
12. Click **forward** to advance through the program.

**OPENING A NEW WINDOW**

**NEW WINDOW FUNCTION**

In the upper right-hand corner of each page in a component, you will notice the New Window link. The New Window function allows you to open a second session in the system. By opening a new window you can keep the current component active (without having to close out of it) and have a second component, or a second session of the same component, open at the same time.

For example, in the screen below, we have both the User Defaults and Course Catalog search windows open at the same time. To open both windows:

1. Access the **User Defaults** component first.

   The menu options are Set Up SACR/User Defaults.

2. Click the **New Window** link.

3. Click the **Home** link.

4. Follow this path: **Curriculum Management/Class Search**.

   Now both components are open at the same time. From this point, you can view, or enter data, in each of the open components.

5. **Close** the class search window.

6. Click the **Home** link.

**TIPS FOR USING THE NEW WINDOW FUNCTION**
Here are some guidelines for using the New Window function:

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

- **Use the New Window function only once** to open up one additional new window. Do not continue opening new windows after you already have two windows open.

- To be on the safe side, **it may be better for you to open another session of your browser**, in order to open more than one component at a time (e.g. open a second session of Internet Explorer and log on, then open the second component you would like to access).

- **Once you have finished using a second component, close this window** using the browser menus, File/Close, or click the close button, ✗, in the upper right-hand corner of the window you would like to exit. This should be done because after 30 minutes of inactivity, in a second open window, your new window session will timeout or expire. This does not invalidate your other, current window, but simply means this expired window is no longer useable. Any unsaved changes in this second window, however, will be lost.

  **Warning!**  Do not use your browser’s menu commands File/New/Window feature. Doing so merely copies the current HTML code from the parent window, rather than opening a new system-maintained window session.
IDENTIFYING TYPES OF DATA ENTRY ELEMENTS

On some pages you will see several types of data entry elements. All of the different kinds of data entry elements serve a common purpose – to provide you with a simple way to enter and update data in the system. You can type directly into some data entry elements, such as edit boxes. Other data entry elements, such as radio buttons and drop-down lists, require you to select a value from a list of choices. Understanding how to use each type of data entry element will help you to use the system more effectively.

TYPES OF DATA ENTRY FIELDS

Data entry elements that are associated with specific database fields include the following:

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Box</td>
<td>Small, square box that enables or disables an option. Typically, you select the check box by clicking within it. When you click an empty check box, a check mark appears in the box, ✅, indicating that the option has been enabled. To clear the option, simply re-click in the check box, and the check mark will disappear, ☐, indicating that the option has been disabled. <strong>Note:</strong> Use your spacebar to check and uncheck a check box.</td>
</tr>
<tr>
<td>Drop-Down List Box</td>
<td>Rectangular box, similar to an edit box. However, the box will have a down arrow button, ✗, within the box. Clicking the down arrow button will expand the box to display a list of valid values from which you can select a single option. <strong>Note:</strong> Typing the first character, or set of characters, of a value in a drop-down list box, will take you to an item in the list that begins with that character(s).</td>
</tr>
<tr>
<td>Edit Box</td>
<td>Rectangular box for entering data. Each field in the system is formatted to accept a maximum number of characters. Therefore, the size of the edit box provides a visual clue about the number of characters that can be entered. Some edit boxes have lookup tables associated with them. These edit boxes have a magnifying glass icon, 🕵️, to the right of them. The magnifying glass indicates that there is a predefined list of valid entries for a given field.</td>
</tr>
<tr>
<td>Date Box</td>
<td>Rectangular box with a calendar to the right of it. Click on the calendar icon to view an on-line calendar. Next, click on the proper date to select it.</td>
</tr>
<tr>
<td>Long Edit Box</td>
<td>Long rectangular box into which you enter long, free-form text items, such as comments. Clicking on the up and down arrows within the box allows you to view additional lines of text that do not fit in the box. <strong>Note:</strong> Most long edit boxes have a spell checker function as indicated by the book icon to the right of the prompt.</td>
</tr>
</tbody>
</table>
### Field Type

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio Button</td>
<td>Small round button that represents one option in a group of mutually exclusive options. Click to select the desired option; only one radio button in the group can be selected at a time. A dot in the middle of a radio button indicates that option is active. <strong>Note:</strong> The spacebar can be used to select and unselect radio buttons.</td>
</tr>
</tbody>
</table>

### Search Results Lists

An area where fields are displayed in a table, with a navigation bar. These fields are read-only, and clicking on any field in a given row will take you to the selected record.

---

**REQUIRED DATA ENTRY FIELDS FOR SAVING DATA**

When adding data to PeopleSoft you will be entering information using prompts. An asterisk in front of a data entry field, *, indicates that the field is a required data entry field. Below is an example of a required data entry field:

![Status: Active](image)

The asterisk to the left of the field name indicates that you must enter data into the field if you want to save the data in that component. Whenever, you attempt to save a record, where you have failed to enter data into one or more required data entry fields, a message will appear:

![Microsoft Internet Explorer](image)

In the message above, we can see that two different fields, fields 15 and field 30, are required data entry fields. When this message appears, click OK. You will return to the original data entry screen. Required data entry fields not completed will appear with a red background fill in the edit box:

![Responsible ID](image)

You must then enter data into all of the required data entry fields in order to save the record. If you close a component before you save your data the following window will appear:

![Save Warning](image)
NEWER FEATURES

This section contains many of the new features available in PeopleSoft 9.1. For class purposes we will only talk about these features.

USING SPELL CHECKING

When adding data to PeopleSoft, there are long data entry prompts that require typing. For these prompts there is usually a spell checking icon, , to the right of the prompt. For example, the Spell Check icon is available for the Long Description field in the Course Catalog component as seen below.

![Spell Check Icon](image)

After entering information into a prompt, click the Spell Check icon. If you have entered any text that is not in the dictionary a window like the following will appear. Simply click the appropriate button at the bottom of the window to correct the error and then click OK.

![Spell Check Window](image)
The following window will appear if there are no spelling errors. Simply click OK to close the window. If there are any spelling errors, you will have the opportunity to change these errors. This is a very handy tool when you are entering or editing data in PeopleSoft.

![Message Window]

**USING THE DOWNLOAD TO EXCEL FUNCTION**

There is a new function in PeopleSoft 9.1 that allows you to download data from PeopleSoft into another program, such as Excel. However, not all areas of the system have the download to Excel function.

1. Click the **download** icon.

This function is available for some tables in PeopleSoft.

![Enrolled Students Table]

After clicking the download icon the following window will display.

2. Click **Open** or **Save** to download the table data from PeopleSoft to Excel.

![File Download Window]

The Security Alert window may display.
3. Click **Yes** to continue the downloading process.

![Image of Microsoft Office Excel dialog box](image.png)

### ADDING DATA TO PEOPLESOFT

When you navigate to a search screen, if you have the Add a New Value tab at the top of the window, you have the ability to add new records to PeopleSoft in that area of the system.

The following screen shows the Course Catalog search, where the user has the Add a New Value tab.

1. To add data to a component, click the **Add a New Value** tab.

![Course Catalog search screen](image.png)

A new screen will appear.

2. Click **Add**.

![New data entry screen](image.png)

The data entry screen will appear. If you wanted to add new data, you would fill in the necessary prompts and then click the **Save** button, at the bottom of the page to save your work.
Note: You would want to run Spell Checker on any new fields having this feature.
USING THE NOTIFY BUTTON

The Notify button appears on many pages throughout PeopleSoft 9. It takes you directly to an e-mail page, thus making it easier to communicate with staff, faculty, or a student about any action just performed on that PeopleSoft page.

For example, if you’ve changed a student’s primary e-mail address (per their request), you can then confirm the change in the e-mail by using the Notify button at the bottom of the Contact Information page. There isn’t any need to transfer to CLC’s e-mail system to accomplish this notification.

1. Navigate to Curriculum Management/Course Catalog (View Only).
2. Fill in the prompts as seen below.
3. Click Search.

4. Scroll down to the bottom of the CIT 119 record and click Notify.
5. Fill in the necessary prompts.
6. Click OK.

The e-mail message will be sent from within PeopleSoft.

Note: PeopleSoft 9.1’s e-mail function is intended for use when communicating specifically about PeopleSoft–related information/actions. Otherwise, continue to use CLC’s e-mail system.
USING PAGE ACTIONS TO VIEW DATA

PAGE ACTION BUTTONS

The system comes with a number of page actions buttons, which are located at the bottom right-hand corner of some pages. Depending on the function you trying to execute in the system, all, some combination, or none of the page action buttons will appear. These page action buttons appear when you:

- retrieve rows in a table,
- modify rows in a table, or
- insert rows in a table.

Pressing any one of the buttons serves to apply specific rules to the data, based on the effective date. The button selected will dictate whether you can access certain fields, and what you can do with each type of row. The table below provides information on each of the page action buttons.

<table>
<thead>
<tr>
<th>Page Action Button</th>
<th>Views Available</th>
<th>Changes</th>
<th>Insert New Rows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update/Display</td>
<td>Current and Future</td>
<td>Future only. Will not include a historical record for the data.</td>
<td>Can use this option when the effective-date is greater than or equal to the current row.</td>
</tr>
<tr>
<td>Include History</td>
<td>History, Current and Future</td>
<td>Future only. Will create a history for the record.</td>
<td>Can use this option when the effective-date is greater than or equal to the current row.</td>
</tr>
<tr>
<td>Correction</td>
<td>History, Current, Future</td>
<td>All existing rows. Will update the historical record to reflect changes.</td>
<td>When using this option, there will be no effective-date restrictions. <strong>Note:</strong> Access to this function is security dependent.</td>
</tr>
</tbody>
</table>

1. Navigate as follows: Curriculum Management/Course Catalog (View Only)
2. Fill in the search prompts as seen below:
3. Click Search.

4. Click the **any of the links in the first row** of the search result list.
The current effective dated row appears along with any future dated versions.

5. Scroll down to the bottom of the page and click **Include History**.

All of the versions of the record are now available. In this case there are 11 records, meaning that the record has been edited 10 times over its history.

6. Scroll down to the bottom of the page and click **Update Display**.

The history for the record is no longer available.

7. Scroll down to the bottom of the page and click **Return to Search**.
The search screen displays again. When you conduct a search, by default only the current effective and future dated records appear. However, the Include History checkbox can be activated to conduct a search including historical records.

8. Click the Include History checkbox.
9. Click Search.

Activating the Include History checkbox, \( \checkmark \) Include History, in a search page is the same as clicking on the Include History button, \( \checkmark \) Include History, at the bottom of a component page.

10. Click the Home link.

**EFFECTIVE DATES**

The use of effective-dates in the system allows for:

- storage of historical data,
- viewing of changes in data over time and
- entry of future data

For example, you may want to track several events in the career of a student, such as:

- the date they applied for admission,
- when they were accepted, and
- when they graduated

When any data is added to the system, an historical record for each entry is maintained. This provides an audit trail for all additions and changes in the system.

When editing is done to records in the system, the original data is retained. The new data is added to the system along with an effective date (when the information will go into effect). In this manner changes made to a record can be tracked over time. Effective-dated rows are categorized into the following basic types:

<table>
<thead>
<tr>
<th>Types of Effective-Dating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>The data row with the date closest to, but not greater than, the system date. <strong>Note:</strong> Only one row can be the current row.</td>
</tr>
<tr>
<td>History</td>
<td>Data rows that have effective dates earlier than the current data row.</td>
</tr>
<tr>
<td>Future</td>
<td>Data rows that have effective dates later than the system date.</td>
</tr>
</tbody>
</table>
USING THE SEARCH FUNCTION

Once you have selected the menu items required to move to the desired area of the system, a search page will display. You must use search pages in order to locate system data. Therefore, you must understand how to use the various search functions in the system.

USING SEARCH CRITERIA

Searches can be conducted on a single or multiple database fields. If you would like to use a single field for your search, you will use a basic search page. If, on the other hand, you would like to use some combination of fields for your search, you will use an advanced search page.

Each component has a search record, which is a list of defined search fields that can be used to help you locate data in a given component. We will access the following menus to move to the Enrollment Summary component:

1. Click the Curriculum Management/Course Catalog (View Only).

In the basic search page below for courses, only one fields in the search record is required, Academic Institution. All other fields are optional.

2. Enter the search criteria seen below.
3. Click Search.

This search will locate all AOS 112 courses offered at CLC. The system automatically begins searching the database for entries meeting the criteria, and will provide you with a list of possible matches; or, if there is only a single match, the page you requested. When the search results display, there will be an indicator of the number of results meeting your criteria. In the example below, we have located 2 records meeting our criteria.

4. Click any of the links in the second row.

5. Click Return to Search, at the bottom of the page.
SEARCHES USING FIELD-LEVEL PROMPTS AND VALIDATION

Some fields in search pages are linked to lookup tables in the system. These lookup tables contain a list of valid entries for a given field. For example, if we want to look up courses based on the Subject Area field, there are only a limited number of subject areas. As such, they are stored in a lookup table. Lookup tables are necessary, then, to ensure that data stored within the system is valid.

In a search page, fields with associated lookup tables will have a magnifying glass, , to the right of the associated edit box. For example, in the screen below the display fields, Academic Institution, Subject Area, and Campus, all have lookup tables associated with them.

1. Click **Clear**.
2. Click the magnifying glass to the right of the Academic Institution field.

We have a list of only one term that can be used for this field.

3. Click **any of the links** in the Search Result list.

Look Up Academic Institution

- Academic Institution: begins with
- Description: begins with
- Short Description: begins with

Search Results

View 100

First 1 of 1 Last
4. Click the magnifying glass to the right of the Subject Area: prompt.

We have returned a list of 300 entries out of a possible 405. We need to further narrow our search to make things easier.

5. Type: **BUSDV** in the Academic Organization: prompt.
6. Click **Lookup**.

We have narrowed down the search to only those courses in the Business Division.

7. Click any of the **links in the first row**.
8. Click **Search**.

**USING AUTOCOMPLETE**

There is a second way to get help when entering data into fields having lookup tables (with the magnifying glass icon). You can simply begin typing in the field and a list of options having the string of character will display.

1. Clear the **Subject Area** prompt.
2. Click in the **Subject Area** prompt and type **C**.

A list of subject areas beginning with the letter C displays.

3. Click in the **first row**.

<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Academic Organization</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAD</td>
<td>EGRDV</td>
<td>CAD - Computer Aided Design</td>
</tr>
<tr>
<td>CALH</td>
<td>ACEDV</td>
<td>Continuing-Allied Health</td>
</tr>
<tr>
<td>CAVO</td>
<td>EDAFF</td>
<td>CAVO - Avocations</td>
</tr>
<tr>
<td>GBA</td>
<td>ACEDV</td>
<td>Bassett</td>
</tr>
<tr>
<td>CBOD</td>
<td>EDAFF</td>
<td>CBOD - Continuing-Mind and Body</td>
</tr>
<tr>
<td>CSBM</td>
<td>EDAFF</td>
<td>CSBM - Continuing-Business Management</td>
</tr>
<tr>
<td>CCAR</td>
<td>EDAFF</td>
<td>CCAR - Continuing-Career Skill</td>
</tr>
<tr>
<td>CCMP</td>
<td>EDAFF</td>
<td>CCMP - Continuing-Computer Skills</td>
</tr>
<tr>
<td>CCOL</td>
<td>EDAFF</td>
<td>CCOL - Continuing-College Prep</td>
</tr>
<tr>
<td>CCOS</td>
<td>ACEDV</td>
<td>CCOS - Continuing-Cosmetology</td>
</tr>
<tr>
<td>CCRF</td>
<td>EDAFF</td>
<td>CCRF - Continuing-Arts and Crafts</td>
</tr>
<tr>
<td>CCT</td>
<td>ACEDV</td>
<td>CCT</td>
</tr>
<tr>
<td>CDA</td>
<td>EGRDV</td>
<td>CDA - CAD Drafting Application</td>
</tr>
<tr>
<td>CDAN</td>
<td>EDAFF</td>
<td>CDAN - Continuing-Dance</td>
</tr>
<tr>
<td>CDIS</td>
<td>EDAFF</td>
<td>CDIS - Continuing-Discovery</td>
</tr>
</tbody>
</table>
The subject area prompt fills in with the proper code. This feature will save time in accessing lookup tables for prompts.

Note: The Autocomplete feature is turned off in PeopleSoft. If you want this feature activated, go to My Personalization/Personalize Navigation Personalizations and set Autocomplete to Yes.

USING SEARCH OPERATORS

To navigate to any of the components in PeopleSoft 9.1 you must first conduct a search. Each search screen includes a list of search fields along with a list of operators. In the Enrollment Summary search screen below, you will see nine search fields as well as specific operators associated with the fields.

1. Navigate to Records and Enrollment/Enrollment Summary.

The default operator will display for each field. You can change the operator by simply clicking the down arrow to the right, and selecting a different option. For example, clicking the down arrow to the right of the equal sign (=) brings up a set of two options, = or in; or clicking the down arrow to the right of “begins with” brings up a list of ten options.
The table below includes a list of operators along with descriptions and examples of each.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>in</td>
<td>Allows you to enter two or more values for a field. The values must be comma-delimited.</td>
<td>in CIT, AOS, would locate all course with a subject area or CIT or AOS</td>
</tr>
<tr>
<td>begins with</td>
<td>Allows you to enter the first one, two, three, etc. values for a field.</td>
<td>begins with 12, would locate all values beginning with the numbers 1 and 2 in succession</td>
</tr>
<tr>
<td>contains</td>
<td>Allows you to enter any part of a field.</td>
<td>contains a, would locate any values having the letter “a” anywhere in the value</td>
</tr>
<tr>
<td>=</td>
<td>Must enter an exact match for a field.</td>
<td>=CIT</td>
</tr>
<tr>
<td>not=</td>
<td>Allows you to enter a value to be eliminated from the list of possible values</td>
<td>Not= CIT</td>
</tr>
<tr>
<td>&lt;</td>
<td>The less than operator should be used on fields containing numbers and will return values less than the specified value.</td>
<td>&lt; 345</td>
</tr>
<tr>
<td>&lt;=</td>
<td>The less than or equal to operator should be used on fields containing numbers and will return values lower than or equal to the specific value.</td>
<td>&lt;= 655</td>
</tr>
<tr>
<td>&gt;</td>
<td>The greater than operator should be used on fields containing numbers and will return values greater than the specified value.</td>
<td>&gt; 543</td>
</tr>
<tr>
<td>&gt;=</td>
<td>The greater than or equal to operator should be used on fields containing numbers and will return values higher than or equal to the specified value.</td>
<td>&gt;= 321</td>
</tr>
<tr>
<td>between</td>
<td>The between operator should be used on fields containing numbers and will allow you to specify a starting number and ending number. The result will include both numbers specified along with any between the specified values.</td>
<td>Between 36 and 45, would locate all values equal to 36 and 45 as well as all values in between.</td>
</tr>
</tbody>
</table>
Note: Defaults, like CLCCC, are set by the user in User Defaults. If not set, the user has more repetitive input to do each day. (See Setting User Defaults section of this manual for more information on setting user defaults.)

2. Click **Clear**.
This will clear the contents from all of the search fields.

3. Enter **Academic Career** for Academic Career.
4. Enter **CLCCC** for Academic Institution.
5. Click the **down arrow** to the right of the Term: prompt operator.
6. Select **in**.
The “in” operator allows you to select a list of valid values rather than a single value.

7. Click in the Term: prompt and type: **1111,1112**.

**Note:** Do not put a space after the comma. You can enter as many values as you want as long as you use a comma to separate them.

Using the “in” operator, you can conduct searches involving more than one value for a field. In this case we are searching for all students with a last name of Werch enrolled in either Spring ’11 or Summer ’11. When using the “in” operator, you must use only valid entries for the field and must delimitate the values with commas.

8. Click the **down arrow** to the right of the Last Name: prompt.
9. Select **=**.
10. Type **Werch** in the Last Name: prompt.
11. Click **Search**.

![Search Criteria Diagram]
12. Click the one of the links in the **first row**.

The summer 2011 schedule displays.

13. Click **Next in List**.

The spring 2011 schedule displays.
SAVING SEARCH CRITERIA

Once you have conducted a search, you may want to save it for future use.

1. Click the **Home** link.
2. Navigate to **Curriculum Management/Course Catalog (View Only)**.
3. **Fill in the prompts** as seen below.
4. Click the **Save Search Criteria** hyperlink.

5. Type **AOS Courses** in the Name of Search: prompt.
6. Click **Save**.
7. Click the **Return to Advanced Search** link.

At the top of the Enrollment Summary window will be a Use Saved Search: prompt. Your saved search, AOS Courses, will be in the prompt whenever you enter the Course Catalog (View Only) component.

8. To run the search, press **Enter** or click **Search**.

A search result list will display, as seen below.

9. Click on **any of the links in the first row** in the Search Results.

The information for the selected record will now display.
LIMITING NUMBER OF RECORDS IN A SEARCH

There may be times when you are conducting a broad search in PeopleSoft, but, rather than have the first 300 records display, you may want to generate a smaller search result. There is a prompt in the search window that will allow you to limit the search results to any number lower greater than or equal to 300.

**Note:** The default value for the number of records to return in the search results is 300.

1. Click the **Home** link.
2. Navigate to **Curriculum Management/Course Catalog (View Only).**
3. Enter **25** in the Limit the number of results to (up to 300): prompt.
4. Enter **CLCCC** in the Academic Institution prompt.
5. Click **Search**.

**Note:** Limiting the number of records in a search will save search time. Had we not limited the search, it would have taken PeopleSoft several seconds to look through 26,430 records.

**SEARCH RESULTS**
Whenever you execute a search, you can expect one of two possible outcomes:

1. **Go directly to the desired search record** – search criterion exactly matches a single record.
2. **Displays a search results list** - search criterion matches more than one record. To access any record in the search results list, click any of the hyperlinks for that record.

When your search criterion matches more than one record, you will return one of three search results.

- **Single Column Search Result List** - for smaller search results lists, you will return a list containing a single column of records. At the top of the list will be an indicator of the number of records in the list.
- **Subdivided Search Result List** - for larger search results lists, you will return multiple columns of records. At the top of the first list will be an indicator of how many total records are contained in the lists, and how they are subdivided.
- **List With Message to Narrow Search** - if the records matching your search criterion exceed 300, you will see a message at the top of the window indicating that you should further refine your search to limit the number of records returned.

**SINGLE COLUMN SEARCH RESULT LIST**

1. Navigate to Curriculum Management/Course Catalog (View Only).
2. Fill in the prompts as seen below.
3. Click Search.

![Search Screen](image.png)
A single column search result list will appear, if the number of records returned is relatively small. In the example below we can see that the search results list contains 10 entries.

If the list of records is large enough, you may need to use your scroll bar to view all of the associated records.

**SUBDIVIDED SEARCH RESULT LIST**

1. Click **Clear**.
2. Enter **CLCCC** in the Academic Institution: Prompt.
3. Click **Search**.
If your search criterion matches a large number of records, as in this example, it may be displayed in a subdivided list. In these cases your list will be distributed on more than one page.

**LIST WITH MESSAGE TO NARROW SEARCH**

The search function can retrieve up to 300 entries. If your search produces more than the 300 maximum numbers of entries, the message will appear at the top of your search results list:

In the search results below we are viewing the first 100 of the 300 records that were returned out of a possible 26,430 records.

1. Click the **right arrow**. Records 101-200 appear.
2. Click the **right arrow** again. Records 201-300 appear.
3. Click the **View All** link. All 300 records appear.
4. Click the **View 100** link to return to the subdivided search list view.

When this kind of search result occurs you should refine your search by adding additional criteria to get a smaller search result.
MOVING BETWEEN RECORDS IN A SEARCH LIST

When your search produces a large number of records, your search results list will include navigation functions to allow you so move from record to record in the list. Below is a navigation header for a search list:

<table>
<thead>
<tr>
<th>Button or Link</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>View All</td>
<td>Allows you to view all records in the search result list on the screen at the same time. Note: This will be grayed out if the full search result list is already displayed.</td>
</tr>
<tr>
<td>First</td>
<td>Takes you to the first record in the search results list. Note: This will be grayed out if you are already on the first record.</td>
</tr>
<tr>
<td>Left Arrow</td>
<td>In a single column search result list, moves you one record at a time backward through the search results list. In a subdivided list, moves you backward one list at a time. Note: This will be grayed out if you are already on the first record or list.</td>
</tr>
<tr>
<td>Right Arrow</td>
<td>In a single column search result list, moves you one record at a time forward through the search results list. In a subdivided list, moves you forward one list at a time. Note: This will be grayed out if you are already on the last record or list.</td>
</tr>
<tr>
<td>Last</td>
<td>Takes you to the last record in the search results list. Note: This will be grayed out if you are already on the last record in the list.</td>
</tr>
</tbody>
</table>
PRINTING

Once you have found needed information in PeopleSoft 9.1, you can easily print out the results. We will search for a specific class roster and print it out.

1. Click on **any link in the first record of the search results.**

The first record displays.

![Search Results](Image)

![Catalog Data](Image)
PRINTING OPTION #1 – FILE > PRINT

1. Select File from the main menu in Microsoft Internet Explorer.
2. Select Print.

The Print window displays.

3. Click Print to send the page to the printer.

Note: Any printed output from PeopleSoft pages will be displayed as a .pdf file in the reports manager. It is no longer necessary to go to a ‘Reports Drive’ to get output.
PRINTING OPTION #2 – PRINTER FRIENDLY VERSION

Some windows will include a “Printer Friendly Version” button. This button will allow you to preformat the screen to fit on an 8-1/2” x 11” piece of paper.

1. Click on the Printer Friendly Version link.

The printer friendly version of the page appears on the screen.

2. Click Ctrl+P.

The print window appears.

3. Click Print to print the page.
PRINTING OPTION #3 – RIGHT-CLICK

1. **Right-click** anywhere on the page.

   A dialogue box appears.

2. Select **Print**.

   ![Print window]

   The print window appears.

3. Click **Print** to print the page.
FACULTY SHORTCUTS

The Worklist are of PeopleSoft was created to help CLC faculty navigate to the faculty-specific areas in the system. To access these shortcuts:

1. Click on **Worklist**.

   ![Worklist Main Menu](image)

   Worklist Main Menu displays.

2. Click on **Navigator**.

   ![Navigator](image)

   Advisement for 19th 41st Hour displays.

3. Click the **CLC Advisement 19th 41st Hour** link.

   ![CLC Advisement](image)
CLC Advisement 19th 41st Hour footprints display.

4. Choose the one you want from the list on the left (A) OR from the icons on the right (B).
DATA NAVIGATION

TABLING BETWEEN FIELDS

When you are in a data entry screen, you should press your [Tab] key to move to the next data field in the window. The [Tab] key moves you one field at a time in a predetermined sequence in the window. To move to the next field, press the [Tab] key again. To move backward one field at a time in the window, press [Shift] + [Tab].

Note: You may also click on any edit box in the page rather than tabbing to it.

SCROLL AREAS

Scroll areas allow you to view one record at a time in a page. Each component in the system is made up of one or more scroll areas. Each scroll area contains information that is randomly arranged on the screen.

A scroll area looks like a data entry page with navigation tools in the header. Below is an example of a scroll area for the Catalog Data component:
To navigate through the data in the scroll area, use the navigation tools in the header. A description of each of these navigation tools can be found in the “Moving Between Records in a Search List” section of this manual. However, there is one additional tool for navigation in a scroll area, the Find function, which is described in the table below. You can enter a keyword or phrase to search for data in a particular component.

<table>
<thead>
<tr>
<th>Button or Link</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Find</strong></td>
<td>Brings up a search dialog box, where you can type in any combination of words to conduct a search for a particular record:</td>
</tr>
<tr>
<td><img src="image" alt="Explorer User Prompt" /></td>
<td>To use the search function, type your search string and press the OK button. <strong>Note:</strong> This will be grayed out if there is only a single record.</td>
</tr>
</tbody>
</table>

**SEARCHING FOR BIO/DEMO DATA IN THE SYSTEM**

Not all users at the college will have access to the Bio/Demo component in the system. However, we have included this section as many users will have access to this area.

To look up people information in the system:

1. Click **Campus Community** in the menu pagelet.
2. Click on **Biographical (Student)** in the submenu.

3. Click on **any link** in the submenu.

A search screen will display.

4. Enter **student information** in to one or more prompts.

5. Click **Search**.

6. Select the **record** for the desired person.
SETTING USER DEFAULTS

To save time on data entry, you can set up the system so that it will automatically fill in certain fields for you with default values. Setting up default values eliminates the need to key values for these fields. You can simply press [Tab], and the default value will automatically be entered. For example, if most CLC students live in Illinois, you could set the default value for the State field to IL.

Even after establishing default values for fields, you may override default values at any point during the data entry process by simply typing over existing values. For example, if you have a student who lives in Wisconsin, rather than Illinois, you can type WI in the state field, and the WI entry will override the default entry of IL.

To view user defaults:

1. Click **Set Up SACR** on the menu.

The User Defaults component will display, as seen below.

2. Click the **User Defaults** submenu.
The User Defaults 1 page displays. Each page contains:

- **Field Names** - appear in bold in the first column of the screen and contain the names of the data fields to complete
- **Prompts** - appear in the second column and contain the default value for the field or are left blank. If the default value box is left empty, there is no default defined for the field. These values are usually stored as codes in the system.
- **Text Descriptions** - provide an interpretation of the code for prompts that have a value.

Some of the fields will already have values filled in, because they were set by default. For example, in the screen below, you will see that the first default value, Academic Institution, is CLCCC, which stands for College of Lake County. You will also note that some of the values have been given a default value. However, other fields have been left blank. You set your system defaults to make data entry easier for you.

Notice that there are six different default value categories that appear as tabs across the top of User Defaults screen:

- User Defaults 1
- User Defaults 2
- User Defaults 3
- User Defaults 4
- Enrollment Override Defaults
- Communication Speed Keys
- User 3C Groups Summary

There are two additional categories that did not display in the tabs, Communication Speed Keys and User 3C Group Summary. To access this area, simply click on the page links at the bottom of the screen or click on the right-facing arrow to the left of the page tabs.
To create a default value for a field:

1. Click on the tab containing the field for which you would like to create a default value. If you are unsure, you may need to click on different tabs to locate the field.

2. Click on the magnifying glass, , to the right of the default value box for the field for which you would like to create a default value.

A lookup screen will appear. In this screen you will want to look up the values that are acceptable for this field. There is security built into the database that ensures that the correct type of data is entered into a field. Therefore, you cannot simply type in any value of your liking.

**Note:** The term code is always a four-digit code beginning with the number 1. The second and third numbers in the term code are the last two digits of the year. The fourth and last digit in the code represents the semester; the first semester of the year (spring semester) is 1, the second semester (summer semester) is 2, and the third semester (fall semester) is 3. For example, the fall semester for the year 2008 would be represented by the code 1083, where 08 is the last two digits of the year and 3 is the third semester of the years.
3. Click **Lookup**, to see a list of acceptable entries for the field.

You will now see list of acceptable entries at the bottom of the lookup screen.

4. From the search results list, click on any of the links in the row containing the **default value you would like for the field**. The new default value will now be entered in the User Defaults screen.

5. Click **Save**, and the user defaults will be saved and made effective immediately.
Tip: When setting default values keep in mind that some fields are related to one another. For example, you may select a default value that is in conflict with one of the original default values in another field. When this occurs, the original default value will be removed; and you will need to re-enter a default value that is appropriate.

FIELDS WITH DEFAULTS VALUE OPTIONS

In the following section we will look at the specific fields for which you can set defaults.

Note: Please keep in mind that your default pages may appear different than the images on these pages.

USER DEFAULTS 1

Below is a screen display showing the fields available for setting defaults in the User Defaults 1 tab:

USER DEFAULTS 2

Below is a screen display showing the fields available for setting defaults in the User Defaults 2 tab:
USER DEFAULTS 3

Below is a screen display showing the fields available for setting defaults in the User Defaults 3 tab:

![User Defaults 3 Screen Display]

USER DEFAULTS 4

Below is a screen display showing the fields available for setting defaults in the User Defaults 4 tab:

![User Defaults 4 Screen Display]
ENROLLMENT OVERRIDE DEFAULTS

Below is a screen display showing the fields available for setting defaults in the Enrollment Override Defaults tab:

![Enrollment Override Defaults](image)

COMMUNICATION SPEED KEYS DEFAULTS

Below is a screen display showing the fields available for setting defaults in the Communications Speed Keys Defaults tab:

![Communication Speed Keys Defaults](image)

USER 3C GROUPS SUMMARY DEFAULTS

Below is a screen display showing the fields available for setting defaults in the User 3C Groups Summary Defaults tab:

![User 3C Groups Summary Defaults](image)
USING SELF SERVICE

The Self Service area in PeopleSoft 9.1 contains the following areas:

1) Learning Management Systems – not used in PeopleSoft
2) Benefits
3) Faculty Center
4) Personal Information
5) Involvement
6) Advisor Center
7) Payroll and Compensation
8) Community Directory Search
9) Search

Note: Depending on your access in PeopleSoft, you may have more or fewer areas than those listed above.

1. Click on Self Service in the Menu Pagelet.

The Self Service can be accessed using the main menu and can be used by staff to look up specific information including:

- Home and mailing addresses
- Phone numbers
- Email addresses
- Emergency contacts
- Marital status
- Name changes
- Paycheck
- Direct deposit
- Compensation history
- W-4 tax information
- W-2 reissue request
- Faculty event tracking
WORKING WITH FAVORITES IN PEOPLESOFT 9.1

**ADDING FAVORITES**

Once you start working in PeopleSoft 9.1, you will be able to set up Favorites within PeopleSoft the program. This is different from previous versions of PeopleSoft which relied on the Favorites tool inside the Microsoft Internet Explorer browser to manage Favorites.

1. Navigate to the Leave Balances Search page using the path **Self Service/Leave Balances**.
2. Click the **Add to Favorites** link.
The following window on the right appears. The Description field contains the name of the favorite. You can edit the description as needed. In this case we will keep Leave Balances as the Favorite name.

3. Type a new name or retain the default name.
4. Click **OK**.

5. Click **OK**.

The Page is added to the My Favorites menu item.

6. Navigate to **Curriculum Management/Course Catalog (View Only)**.
7. **Add to Favorites**.

**ACCESSING FAVORITES**

1. Click on **Favorites** in the menu breadcrumbs.
You will now see your Favorites, including Course Catalog and Leave Balances. Favorites will display in alphabetical order. Course Catalog appears at the top of the list.

**Note:** You can also add to Favorites by clicking on Favorites in the menu breadcrumbs and then selecting Add to Favorites.

2. Click on the Leave Balances link under My Favorites.

You will return to the Leave Balances search screen.

**SEQUENCING AND EDITING FAVORITES**

The order in which your favorites will display will depend on your use of them in PeopleSoft. For example, the last favorite accessed will always appear at the top of the list. Therefore, the order of favorites will change as you work in PeopleSoft. You can choose to establish a set order for your favorites so that it does not change dynamically.

Let’s add a second favorite.

1. Click Favorites in the menu breadcrumbs.
2. Select the **Edit Favorites** under Favorites in the menu breadcrumbs.

The **Edit Favorites** page displays. Each favorite has 0 for a sequence number. This is the default setting that sorts items in alphabetical order. To change the sort order you must change the sequence numbers.

3. Change the Sequence number for Course Catalog (View Only) to **2**.
4. Change the Sequence number for Leave Balances Search to **1**.
5. Click **Save**.
6. Click **Favorites** in the menu breadcrumbs to see the sequence change.
DELETING FAVORITES

Let's delete the Leave Balances favorite we just created.

1. Select **Edit Favorites** under Favorites in the menu breadcrumbs.
2. Click **Delete** to the right of Leave Balances.

![Edit Favorites screenshot]

3. Click **OK**.

![Delete Confirmation screenshot]

4. Delete the Course Catalog (View Only) favorite as well.

PERSONALIZATIONS

**USING MY PERSONALIZATIONS**

PeopleSoft 9.1 provides a section where a user can create Personalization preferences. The My Personalizations link can be found near the bottom of the Menu pagelet.

1. Click on **My Personalizations** link in the Menu pagelet.

![My Personalizations screenshot]
There are three areas that you can personalize:

- Regional Setting
- System and Application Messages
- Navigation Personalizations

However, the only personalization that makes sense to change is the navigation personalizations.

2. Click on **Personalize Navigation Personalizations**.

The following screen will appear. The Tab over options are used to control where your cursor stops each time you press the Tab key. If you do a lot of data entry in PeopleSoft, you may want to change some or all of the Tab over options to Yes in order to limit the number of times you will be pressing the Tab key while entering new information into PeopleSoft.

To modify a personalization setting:

3. Click on the **down arrow** to the right of the option you would like to change.
4. Select **Yes or No** from the drop down list.
5. Click the **OK** button.

![Personalizations](image)

**Note:** You can reset the Personalizations to the default value by clicking **Restore Category Defaults** and then clicking OK.

The following window will appear.

6. Click **Return**.
You will return to the Personalizations main window.

The table below provides information regarding the various areas in the My Personalizations areas.

<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option Category</td>
<td>Shows the description of the category of personalizations. This helps you to make sure that you have the correct category open.</td>
</tr>
<tr>
<td>Personalization Option</td>
<td>This column lists all of the personalization options available for you to modify. The text that appears in the list is a brief description of the option. For more information on the option, click the Explain link.</td>
</tr>
<tr>
<td>Default Value</td>
<td>Refers to the initial settings that your administrator has specified for the option. If you do not modify the default value, the option assumes the value provided by the system administrator.</td>
</tr>
<tr>
<td>Override Value</td>
<td>Enter any custom value you want to assign to the personalization option. To “override” a default setting means to “use in place of” the default setting.</td>
</tr>
<tr>
<td>Explain</td>
<td>Click this link to view more information on what the personalization option provides. See the following section for more information on the Explanation page.</td>
</tr>
<tr>
<td>Restore Category Defaults</td>
<td>Returns all modified options to the default values. This button applies only to the current category, as in the category you have open.</td>
</tr>
<tr>
<td>OK/Cancel</td>
<td>After you have made any modifications, click OK so that the system records your changes. If you do not want your changes recorded click Cancel. If you have not made any changes and just viewed the options, you can use either button to return to the Personalizations page.</td>
</tr>
</tbody>
</table>

To learn more about the options for personalization, you should read the Explain link, in each row, adjacent to each of the Personalization Options.
USING CONTENT PERSONALIZATIONS

You can personalize your home menu in PeopleSoft 9.1 using the Content link at the top of the menu.

1. Click on the Content link.

By default, the only option that is activated for your home page in PeopleSoft is Menu.

2. Type Welcome to PeopleSoft 9.1 in the Welcome Message: prompt.
3. Activate all of the checkboxes: Menu-Classic, Top Menu Features Description, My Reports, and Main Menu.
4. Click Save.

Your home screen has changed to include the new options you activated.
USING LAYOUT PERSONALIZATIONS

You can also personalize the way information displays on your screens in PeopleSoft using the Layout link. Submenus display in a three-column format by default. We will change the display to two-column.

1. Click on the **Layout** link.
The home screen is laid out in a three-column format by default. We can arrange the objects that we added into either a two- or three-column format.

2. Click the **Menu-Classic** object in the left column.
3. Click the right arrow to move it to the center column.
4. Click the **Top Menu Features Description** object in the left column.
5. Click the **right arrow twice** to move it to the right column.

6. Click **Menu-Classic** object in the center column.
7. Click the up arrow once.
8. Click **Save**.
Your home screen display is now changed to reflect the modifications made in Personalize Layout. Next we will change the home screen back to the default layout.

5. Click on the Content link again.
6. Deactivate the following checkboxes: Menu-Classic, Top Menu Features Description, My Reports, and Main Menu.
7. Click Save.

CLEARING THE BROWSER CACHE

As you access Internet pages, including PeopleSoft pages, they get stored in a temporary file. As these files tend to build up over time, every so often you will want to clear out theses temporary Internet folders, otherwise known as your “cache”. This should be done on a periodic basic. We recommend clearing out your cache at least monthly.

To clear out your “cache”:

1. Click on the Tools menu, on your browser menu and then select Internet Options.

2. Click the General tab.
3. Click Delete.
4. Click **Delete**.

5. Click **OK**.