



Specialized PeopleSoft 9.2 Financial Management

PeopleSoft v9.2 Foundations

Financials Supply Chain Management (FSCM) Introduction & Basic Navigation Course Training Guide

Contact Information:

SpearMC Consulting, Inc. 1-866-SPEARMC info@SpearMC.com www.SpearMC.com



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PREFACE - COURSE OBJECTIVE

The SpearMC PeopleSoft v9.2 Introduction and Basic Navigation course guide and introduction course will provide students with basic concepts and functionality used in all PeopleSoft Enterprise v9.2 modules.

This course content will cover the newest powerful features unique to v9.2 as a result of PeopleTools v8.53 release. This guide will provide an introduction to Enterprise Requirement Planning Systems (ERP) and the latest features for navigating and understanding the basic PeopleSoft notions.

Participants who read this guide and take part in the Basic Navigation course will understand navigating PeopleSoft pages and key tips to personalizing content and general methods of updating system data. Concepts related to PeopleSoft specific tools such as PS Query, Workflow, and Process Monitor will be explained. Students will leave the course with the skills necessary to take next level SpearMC PeopleSoft v9.2 courses.



Lesson 1 WHAT IS PEOPLESOFT?

In this lesson, an overview of what makes up an ERP System will be presented. A brief history of the PeopleSoft application will be covered along with design highlights of the latest PeopleSoft v9.2 Release.

TOPIC 1: ERP DEFINED

Enterprise Resource Planning (ERP) is an integrated computer-based system used to manage an organization's internal and external resources including, but not limited to, inventory, financial resources, customers, suppliers, human resources and intellectual property.

ERP systems consolidate all business operations into a uniform and enterprise -wide system environment. The design of ERP software facilitates the flow of information between all business functions inside of an organization and manages the connections to outside stakeholders such as customers and vendors.

ERP is built on a centralized database on a common computing platform and typically resides on a centralized server, which communicates across a local area network and the internet.

To be considered an ERP system, a software package should have the following traits:

- It should be integrated and operate in real-time with no periodic batch updates.
- All applications should access one database to prevent redundant data and multiple data definitions.
- All modules should have the same look and feel.
- Users should be able to access any information in the system without needed integration work on the part of the IT department.

Business processes supported in most ERP packages include the following:

Accounting and Financials

General Ledger, Accounts Payable, Accounts Receivable, Billing, Cash Management, Asset Management

- Sales
 Order Management, Demand Planning, Fulfillment & Distribution
- **Z** Customer Relationship Management (CRM)
- Human Resources (HCM Human Capital Management) Payroll, Time & Attendance, Benefits
- Supply Chain Management
 Inventory, Purchasing, Supply Planning (MRP, CRP), Manufacturing, Warehouse Management (WMS)
- Project Management
 Costing, Time Tracking, Activity Management
- Decision Support
 Data Warehouse and Reporting



Other ERP related Facts and Terminology:

EAS (Enterprise Application Suite)

EAS is a new name for formerly developed ERP systems which include almost all segments of business using ordinary Internet browsers as thin clients.

Image: Sest Practices

Industry *Best Practices* are incorporated into most ERP vendor's software packages. *Best Practices* are what the software vendor deems as the most efficient way to carry out a particular business process in an Integrated Enterprise-Wide system

TOPIC 2: HISTORY OF PEOPLESOFT

- **4 1987** PeopleSoft Founded by David Duffield and Ken Morris
 - PeopleSoft was originally headquartered in Walnut Creek, California before moving to Pleasanton, California.
 - PeopleSoft version 1 was the first fully-integrated, robust client-server Human Resource Management Software
- **1992** PeopleSoft expanded its product range to include Financials
- **1994** Inventory and Product Distribution functionality incorporated into the package
- **4 1996** Manufacturing and Supply Planning added.
- **1997** PeopleSoft ver. 7 released, considered a formal ERP package.
- **2003** PeopleSoft acquires rival ERP package J.D. Edwards.
- **2004** Oracle Corporation completes a 2 year long acquisition of PeopleSoft.
- **2012** PeopleSoft Human Capital Management (HCM) v9.2 is released.
- **2013** PeopleSoft Financials & Supply Chain (FSCM) v9.2 is released.



TOPIC 3: PEOPLESOFT ENTERPRISE V9.2 MODULES

Financial Management		
General Ledger	Billing	Receivables
Payables	e-bill Payments	e-Settlements
Cash Management	Expense Management	Treasury Management
Financial Analytics		

Human Capital Management		
Human Resources	Payroll	e-Benefits
Time and Attendance	Workforce Scheduling	e-Performance (Performance Management)
Incentive Compensation	Learning Management	Recruiting
Supply Chain Management		
Demand Planning	Supply Planning	Order Management
Purchasing	e-Procurement	Manufacturing
Inventory	Cost Management	Quality Management
Engineering		
UPK – User Productivity Kit (Online Training Development Tool for PeopleSoft)		

Customer Relationship Management		
Customer Service Sales & Services Management Marketing Solutions		
Industry Specific CS Modules, exp. Energy, Insurance, Public Sector		CRM Analytics

Supplier Relationship Management (Procurement)		
Strategic Sourcing	e-Procurement	e-Supplier Connection
Supplier Contract Management	Services Procurement	



Asset Life Cycle Management		
Real Estate Management	Maintenance Management	IT Asset Management

Project Management		
Program Management	Project Costing	Project Analytics
Prima vera Enterprise Project Portfolio Management		

Campus Solutions		
Student Records	Recruiting & Admissions	Financial Aid
GradeBook	Campus Self Service	

Enterprise Portal		
PeopleSoft Collaborative Workspace Tool	Shared Team Calendars	Discussions
Content Authoring and Sharing	Project Workspace and Action Item Management	Blend PeopleSoft and Non-PeopleSoft Content

Enterprise Performance Management & Reporting	
nVision	Performance Analytics and Business Score Cards
XMLPublisher	PeopleSoft Query and Connected Query

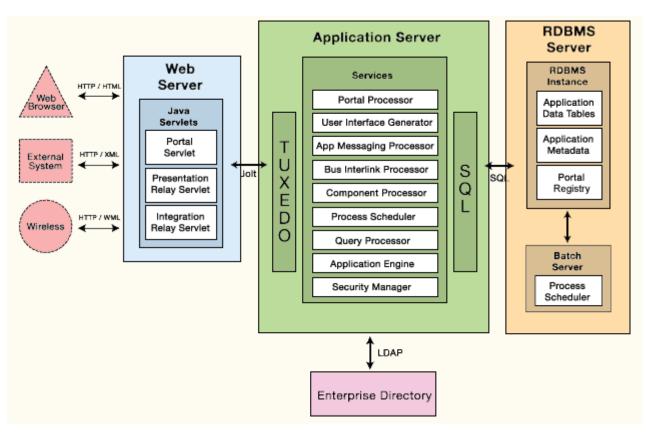


TOPIC 4: PEOPLESOFT PURE INTERNET ARCHITECTURE (PIA)

Pure Internet Architecture is PeopleSoft's proprietary web-centric design where you navigate through your company's business functions using a web browser, such as Internet Explorer or Firefox.

PeopleSoft's initial product suites were based on a client-server approach with a dedicated client. With the release of version 8, the entire suite moved to a web-centric design called Pure Internet Architecture (PIA).

Some of the user friendly navigation attributes of PIA include: Drop Down Menus, Portal Search Fields, Menu and Page Bars.



PeopleSoft PIA Architecture Diagram



TOPIC 5: PEOPLETOOLS V8.53

PeopleTools is the proprietary software development environment that was created by the PeopleSoft Corporation. Some of the new usability features in PS v9.2 are a result of new development features in PT v8.53. A few of the components of PeopleTools are:

Application Designer

- The Application Designer is the core application used to create and customize PeopleSoft applications.
- Used to Design Pages, Define Fields on Pages, Define Tables, etc.

Application Designer - Untitled - Page1 (Page)		_ @ ×
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Layour (ruer	
	HTML Area Properties	×
	HTML Label General	
	_ Value	
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	Record Name:	
	Field Name:	
	<pre></pre> (iframe src="http://psoftdev.blogspot.com" height="1000" width = "1000" frameborder="0" scrolling="ho">	
Development Degrade		
	OK Cancel	

People Code

- Object-oriented proprietary programming language used to control the processing that goes on behind PeopleSoft Pages.
- People Code syntax resembles the programming language called Java language.
- Close interaction of People Code and Structured Query Language (SQL)



PSU_PO_DTL.ORDER_LINE_NBR.RowI	insert (Record PeopleCode)	_ 🗆 ×
ORDER_LINE_NBR (field)	Rowinsert	
<pre>«MAXLINE = 0;</pre>		
For aI = 1 To ActiveRowCount(
<pre>&LINE = FetchValue(PSU_P0_ If &LINE > &MAXLINE Then</pre>	DIL. ORDER_LINE_NER, GI);	
«MAXLINE = «LINE;		
End-If;		
End-For;		
PSU_P0_DTL.ORDER_LINE_NBR = 6	MAXLINE + 1;	
		<u>+</u>

Application Engine

- PeopleSoft processing environment for batch processing where you have data that must be processed without user intervention for example, calculating salaries in payroll processing checks. Another example might be converting money from one currency to another.
- Includes a designer where you define your batch program and a runtime environment where you run and monitor your program.

Z Data Mover

- Transfer application data between PeopleSoft databases.
- Control database security and access.
- Create, edit, and run scripts which combine SQL commands and PeopleSoft Data Mover commands for exporting and importing data.



Lesson 2 LOGGING ON AND BASIC NAVIGATION

This lesson will cover logging into the system along with key features of navigating on PeopleSoft pages. Common PeopleSoft terminology will be defined.

TOPIC 1: LOGGING ON & SYSTEM SECURITY

PeopleSoft v9.2 is a web based application that can be accessed and run using an internet browser such as Microsoft Internet Explorer, Mozilla Firefox or Google Chrome.

Login Steps:

1. Click on your PCs internet Browser Icon to open a new browsing session.

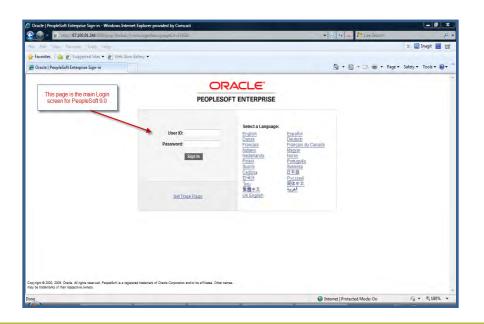


2. In the Address bar of your browser enter the URL for your PeopleSoft 9.2 System. This will be provided to you from your organization's Information Technology Department or PeopleSoft System Administrator.

New Tab - Windows Internet Explorer provided by Comcast		and the second	- 6 ×
(a) = (a) http://67.100.91.244;56/00/psp/finsbul/EMIPEOYEE/ERP/ht	/hab+DEFAULT	🔹 🔹 🔀 Live Search	• بر
Ne Edit view Favortes Tools Help			🗙 🖬 Snagit 🗾 🖽
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What do you we			
Reopen closed tabs View tabs that you've closed since starting Internet Explorer.	Browse with InPrivate Browse the web without storing data about your browsing	Enter your Company's PeopleSoft URL and press <enter></enter>	
 Employee-facing registry content Yahool 	session. Open an InPrivate Browsing window	press series	
Open All			
Reopen Last Browsing Session	Use an Accelerator A Open a web service with text that you've copied from a webpa	ige.	
	Show copied text		
	Blog with Windows Live See Map with Live Search Search Search Search Search		
Learn more about tabs and tab shortcuts, Accelerators, and Iri	finvate Browsing		
one		Internet Protected Mode: On	·s • \$100% •

Create bookmarks in your internet browser 'Favorites' list for each of the PeopleSoft Environments you will use on a regular basis.





Note on Multiple Environments. Typically, organizations will have multiple PeopleSoft Environments installed for the purposes of user training, IT Systems Development, User Acceptance Testing and for live Production processing. Please pay attention to ensure you are logged into the intended PeopleSoft environment.

Single Sign on Access: If configured, PeopleSoft will allow users to work in multiple PeopleSoft applications and databases without having to sign in to each instance of the software. This feature is supported when organizations enable Active Directory (LDAP) for their PS environment. If LDAP is not enabled, you will need to sign on to each separate instance of PeopleSoft.

- 3. Select the language in which you want your transaction pages to appear.
- 4. Enter your assigned PeopleSoft User ID and Password and press the Sign In button or press TAB or Enter.





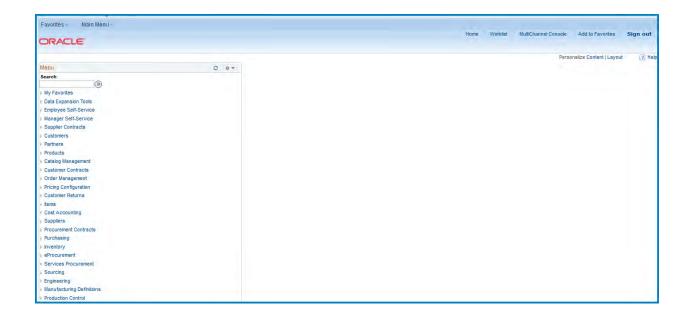
5. After selecting **Sign In**, your mouse pointer will momentarily change to either an hour glass or other 'processing' icon. This commonly occurs when the PeopleSoft system is accessing the database.



NOTE

Your initial login screen will look similar to the one shown below. This screen is typically set as your initial system 'HOME PAGE'.

NOTE: Your home page can be changed to another preferred page. This is covered later in the course.



PeopleSoft passwords may be authenticated through LDAP technology. LDAP enables your PeopleSoft User ID and Password may be the same as your organizations local area network ID and password. When you change your network ID or password, this will automatically update your PeopleSoft v9.2 login to the same values.

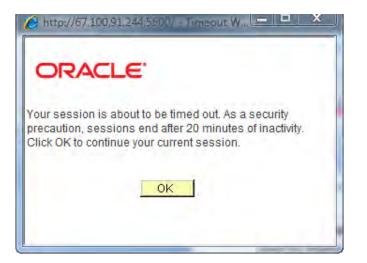
System Security: PeopleSoft is configured to ensure that company information and users are protected against unauthorized system access. Here are few key points related to system login security.

- PeopleSoft User IDs and Passwords are case sensitive.
- PeopleSoft User IDs are recorded within the PeopleSoft Database for each transaction performed by a user. It is important that you always log out of PeopleSoft while not at your work area.
- PeopleSoft System Administrators may setup the system so that your account will become locked if



you incorrectly type your password 3 consecutive times.

- Always close your internet browser after logging out of PeopleSoft
- Users will be automatically logged out of PeopleSoft if your session is inactive for a period of time that is set by your system administrator. Upon reaching the system auto-logoff limit, the window below will appear.



If the ok button is not selected, the system will log you off and the browser screen will be shown as below.





TOPIC 2: HOME PAGE LAYOUT & NAVIGATION FEATURES

Background

The PeopleSoft Internet Architecture is similar to browsing web pages. It is a simple and intuitive way of working with your organization's business information. This section will review the common elements of PeopleSoft pages that are shared across all modules of PS v9.2. Each implementation of PeopleSoft may differ slightly. This topic provides a general understanding of how to navigate in PS v9.2.

Universal Navigation Header

The outlined section of the screenshot below is the navigation header and is common to all PeopleSoft v9.2 pages. The more important elements in the Navigation header are called out and will be covered in upcoming topics.

Favorites - Main Menu -			Home Worklist MutiChannel	Console Add to Favorites Sign out
ORACLE	Drop Down Main Menu	Universal Navigation Header		Personalize Content Layout (?) Help
Menu	Menu			Personance content cayout
Search:		0		
Sector		0,		
My Favorites		1		
Data Expansion Tools		Add and Edit Favorites	Personalize Content	Link to
Employee Self-Service			and Layout	PeopleBooks
Manager Self-Service				Online Help
Supplier Contracts				
Customers				
+ Partners				
Products				
+ Catalog Management				
Customer Contracts				
Order Management				
+ Pricing Configuration				
Customer Returns				
+ Items				
Cost Accounting				
Suppliers				
Procurement Contracts				
Purchasing				
Inventory				
eProcurement				
 Services Procurement 				
Sourcing				
Engineering				
Manufacturing Definitions				
Production Control				

Content Area

The area just below the Navigation Header is the 'Content Area.' This dynamic area is used to display:

- 7 The Menu Pagelet
- Navigation Pagelets
- Pages and Component Pages

Many of the items displayed in the Content area are customizable to meet individual user preferences. These features will be covered in more detail later in the course.

Menu Pagelet

A Menu Pagelet is an expandable hierarchy of *Navigation Pages* and *content references*. By default it is located on the left side of your home page. By clicking on the *list arrows*, the content groups can be expanded and collapsed.

The main level of the Menu Pagelet is also known as *Home*. The screenshot below shows a menu pagelet with all PS v9.2 system options.



PeopleSoft system security is configurable and users will not see items in the menu pagelet for which they are not authorized to access. Typically a user's menu pagelet will be limited to a much smaller list of navigation pagelets and content references.

Nu Concerning Service	Refresh Paglet Content Area	When Home is selected by Default the Main Menu Page is displayed	Personaize Content Layout 🛞 H
Contact Information Customer Hierarchy			
artners roducts			
atalog Management			

Navigation Pagelets

From the menu pagelet, you can also directly access *Navigation pagelets*. This style of page provides an alternative method to access the same items in the menu pagelet.

- They are a more intuitive view of the content in the list.
- Navigation pagelets use icons and folders to make navigation more user-friendly.
- Just like the menu pagelet, navigation pagelets can display links to other navigation pagelets (displayed as folders) as well as content references (icons)

Steps to Access a Navigation Pagelet:

- 1. Scroll through the Menu pagelet to find the desired item
- 2. As needed expand the menu list by using the List Arrows
- 3. Click on the body of the text in the Menu.



Favorites Main Menu -			
ORACLE			
Мели	1	0.	
Search:			
S			
My Favorites			
Data Expansion Tools			
Employee Self-Service	2		
Manager Self-Service			
Supplier Contracts			
- Customers Customer magnation			
Conversations			
Review Customer Information	Click on the		
- Reports	Customers menu Item		
Customers by Unit			
Customers by SetID			
Contacts by Unit			
Contacts by SetID			
Sold To Customer Master			
Sold To Cust Relationships			
Ship To Customer Master			

- 4. Click on a folder to drill into another Navigation Pagelet.
- 5. Click on Icons to go to a content Page.

DRACLE			Favorites -	Home Worklist MultiChannel Console Main Menu -> Customers -> Contact Information	Add to Favorites Sign
Customers	Click on Page Icon to see a component Page		DRACL	E	Edit "Customers" Folder
Manage customer elemention Contact Information Create and maintain contact information. Conversations Review and update retorer conversations. Update Conversation Ausociate Keywords Define FollowUp Action 2 More		Customer Information Create and maintain outloner © Quick Customer Create © General Information © Dun & Bredstreet © More Review Customer Informm Review Customer Informm Review Customer Informm Review Customer Informm Massages © Attachments © Attachments © Attachments © Attachments © Attachments © Attachments © Credit Available	Find an Exist	ation you have and cloc Search. Leave fields blank for a let of all values	105
		Exercise Han Hens (Castomers) CRACLE Castomer Conversations		Home Variant BullChermitCh	
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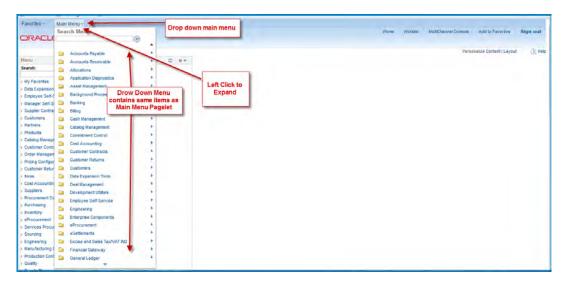
Drop Down Menus

A new and alternative method to navigate in your PeopleSoft system is *Drop down Menus*. Drop down Menus are located on the left side of the Universal Navigation Header. See the screen image below.

- The Drop down *Main Menu* displays all of the same content that is in the menu pagelet.
- Provide a cascading view of menus and submenus.
- Contain links to navigation pagelets and content references for which you have authority to access.
- Drop down menus always expand in a viewable region of your screen and are presented in a bread



crumb fashion so that the full navigation path is visible.



Steps to Navigate with Drop Down Menus

- 1. Left Click on the Drop Down Main Menu.
- 2. Hover over a folder list item to expand a sub-menu.
- 3. Hover over subsequent folders to expand another sub-menu.

Favorites -	Main Menu +			
	Search Menu:	Left Click to Expand Drop Down	Home Worklist	MutiChannel Console Add to Favorites Sign out
Menu Search: My Favorites Data Expansion Employee Self- Manager Self-Self- Suppler Contra Suppler Contra Partners Products Catalog Manager Products Customer Retur Customer Retur Customer Retur Customer Retur Customer Retur Customer Retur Inventory Cost Accountin Supplers Procurement Services Procu- Sourcing Manufacturing Manufacturing Production Con	Background Processes Banking Banking Cash Management Catalog Management Coatakorer Contracts Coustomer Contracts Customer Contracts Customer Contracts Customer Returns Customer Returns Data Expansion Tools Deal Management Development Utilities Engineering Entryrise Components Excise and Sales Tax/VAT ND Finacial Gateway	er Information		Personalize Content Layout 🛞 H

4. Left Click on a folder icon to reveal a navigation Page



Favorites -	Main Menu -				and the second sec
	Search Menu:			Home Workl	st MultiChannel Console Add to Favorites Sign out
ORACLE	1				a contraction of the second se
	Accounts Payable				Personalize Content Layout 🛞 He
Menu	Accounts Receivable) v		
Search:	Allocations				
My Favorites	Application Diagnostics	18			
 Data Expansion 	Asset Management				
 Employee Self-3 					
Manager Self-S					5)
Supplier Contra	E Billing				
Customers	Cash Management				
Partners	Catalog Management		lick on the folder	Favorites - Main Menu - Chatomers	
> Products	Commitment Control		con to reveal the	ORACLE	
Catalog Manage	Cost Accounting	1	navigation page	CITALLE	
Customer Contr	Customer Castrante			Customers	
Ørder Managen				Customers Manage butomer information	
Pricing Configur				Contact Information	Castiomer Information Create and maintain outcomer information
 Customer Retur Items 	Data Expansion Tools			Create and maintain context information:	Create and maintain outcomer information. m Quice Customer Create m General Information
Cost Accountin					Iff Duri & Bradstreet S More
y Suppliers	Development Utilities			Conversations	Review Customer Information
Procurement Co				Review and update customer convensitions (C)/date Conversations	Review customer address, messages, credit evailable, br credit # Atlantments
Purchasing	a care a contra			RE Associate Keywords T Clefine Fallow-Up Action	70 Messages III Notes
Inventory	Engineering			2 More	III Crebit Available
eProcurement	Enterprise Components				
Services Procu				ment & Andrew	in provident
	Cattlemante				

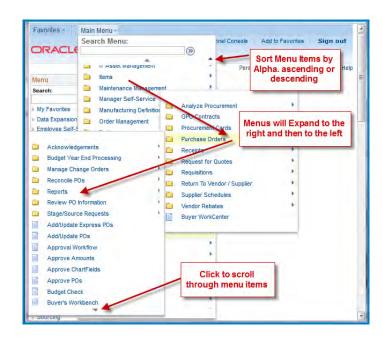
5. Left Click on a Content Reference Icon to reveal a page or component page.

DRACLE				
Contact Info				
	n you have and o	click Search. Leave	fields blank for a list of all values.	
Find an Existing	Value Add a	a New Value		
* Search Criter	a			
				÷.
	- 1 m	SHARE	Q.	
SetID:				
SetID: Contact ID:	begins with 👻		14	
	begins with • begins with •		~	
Contact ID:	begins with 👻			
Contact ID: Contact Name:	begins with 👻		a. 	

Other Drop down Menu Features

- Scroll through drop down menus with your mouse wheel or use the directional arrows on the bottom and top of drop down lists.
- Cascading menus will open to the right or the left depending on the viewable area of your screen
- Contents in a drop down menu can be sorted alphabetically or by system default sort order.







Pages and Component Pages

Pages and Component pages are the primary work spaces in which you enter new data or change, delete, and modify the existing data in your PeopleSoft applications. Pages are also used to retrieve and view current or historical data as well as an area to initiate various types of system processing. This section of the course will cover the most common features and functionality that are universal across all PeopleSoft pages and component pages.

There are two types of component pages. *Search Page* and *Processing Page*. Each of these page types will be covered in detail later.

Supplier Information		S	earch P	age
Enter any information you hat Find an Existing Value	Add a New V		nk for a list	of all value
Search Criteria				
SetID: Supplier ID:	= + begins with +	SHARE	Q	
Persistence:	= •			-
Short Supplier Name: Our Customer Number:	begins with -		Q	
Supplier Name:	begins with -		a	
Include History	Correct History	Case Sensitiv	e	

Favorites - Main Menu - Suppliers - Supplier Information - Add/Update - Supplier	ier Q	
ORACLE [.]	Home Worklist	MultiChannel Console Add to Favorites Sign out
	Processing Page	New Window Personalize Page 🛅
Summary Identifying Information Address Contacts Location Custom		
SetID SHARE	*Supplier Name Mel's Diner ×	
Supplier ID 000000044	Additional Name	
*Supplier Short Name MELS MELS-001	☐ Withholding ☑ Open For Ordering	
*Classification Outside Party V		
HCM Class	*Supplier Audit Default	
*Persistence Regular V *Supplier Status Approved V	Supplier Audit	
Expand All	Collapse All Attachments (0) Profile Questions Categorization	
Supplier Relationships		
Corporate Supplier	InterUnit Supplier	
	InterUnit Supplier ID	
Corporate Supplier ID 0000000044 Mel's Diner	Supplier Hierarchy	
Create Bill-To Customer		
Create Bill To Customer		
▷ Supplier Rating		
▷ Supplier Logo		
▶ Additional ID Numbers		
▷ Duplicate Invoice Settings		
▷ Government Classifications		
D. Standard Industry Codes		



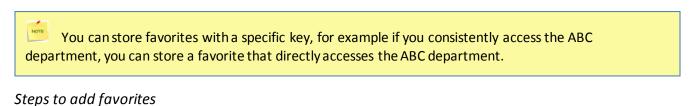
TOPIC 3: UNIVERSAL NAVIGATION HEADER

As stated earlier in the course, the universal navigation header is located at the top of all PeopleSoft pages and remains static as you navigate through any page. The universal navigation header contains the following important links.

- Favorites
- Main Menu
- Home
- Work list
- 🛛 🛛 Sign Out

Favorites

The Favorites list is your own list of bookmarks to frequently used navigation pages and content pages. Once you add a favorite, it always appears under your Favorites menu. You can return to the page by clicking the Favorites menu and clicking the link for the page that you want to view.



- 1. Open the page that you want to designate as a favorite. In this example Navigate to the '**Customers**' Navigation Page
- 2. Click on the **Favorites** drop down menu.
- 3. Click on the Add to Favorites with the page name as the default in the Description field.





- 4. Enter a description for the page that is meaningful to you.
- 5. Click OK

DRACLE'		
Automers Customers Manage sustomer information:		Edit "Customerg" Folder
Contact Information Create and maintain contact information.	Existence information Create an aministic account information If Oxice Calatomic Preste III General Information III Dun & Branthest B Mone	Customer Hierarchy Shows customers in hierarchical tree
Review and update customer conversations. III Update Convensations III Convensations III Centra Follow-Up Action 2 Mote	Adad Merciev Customer information Review Customer information Review Characteristic auxitableexceeditionus Merciev Adad Merciev M	Reports Operating full Percents

- 6. The favorite is saved. Click on ok in the confirmation box.
- 7. Click on the Favorites drop down menu and your newly added item is listed. Click on the link and you will be taken to that page.

Favorites Main Menu - > Custon Recently Used	ners -			Home Worklist MultiChannel Cons	ole Add to Favorites Sign ou
Suppler Pay Cycle Manager Voucher Financial Gateway Center	Click on the Favorites Menu	Customer Information Create and maintain custon	ner information.	Customer Hierarchy	Edit "Customers" Folder
Recent Search Results My Favorites Add to Favorites Edit Favorites Update Customers 2 More	Click on the newly added Favorite link	Cuid Custome Create General Information Dun & Bradsteet More Nove: Review Customer address, m Rata ments Mossages Notes Credit Available	Facolles Man Menu Costomore	Customer Information Deale and maritim autometer infor- Dial Customer Chain Dial Customer Chain Dial Customer Chain	
		•	Centre? satignes Review of locate automer poynations Maddase Reprotein Andorae Review Andorae	A tore,	



Steps to edit favorites

- 1. Click Favorites drop down menu.
- 2. Click Edit Favorites list item.
- 3. The Edit Favorites page appears as shown below.

Favorites Main Menu -	Home W
C Recently Used	
Regular Entry	
Supplier	
Pay Cycle Manager	0 *
Youcher	
Financial Gateway Center	
Click on the	avorites
Recent Search Results drop down n	
Necen Search Neschis	
My Favorites	
Edit Favorites	
Update Customers	
Catalog Management	ites
Customer Contracts	Favorites - Main Menu -
Order Management	ORACLE (
Pricing Configuration	
Customer Returns	Edit Favorites
» Items	
Cost Accounting	Click the Baye button after editing or deleting tavorities.
Suppliers	Fevenites Personalice Find (2) First * 1-3 of 3 * Last
Procurement Contracts	
Purchasing	Produci Catalops 0 📟 Suppliero 0
Inventory	Update Customers 0 =
eProcurement Services Procurement	
Services Procurement Sourcing	
Engineering	and anone who are a
P Engineering	

- 4. Re-label a favorite by typing a new title in the desired text box.
- 5. Change the order in which items appear in the favorites list by assigning sequential numbers to each favorite
- 6. Delete a favorite by clicking the Delete button on the desired row.
- 7. Click the Save button to keep your changes.



	Contraction of the State of the
avorite Sequence number	hange sort order of List
Product Catalogs 2	
/endors 3	
Customers 1 🖃 🔨 Cliu	ck Delete to remove a
fav	orite and OK to confirm
Eavailt	es - Main Menu-
Click SAVE to confirm Changes	ACLE
Edit F	Favorites
	he Save button after editing or deleting favorities
Save 🔄 Notify	worites Personalize Find 19 19 First = 1-2 of 2 = Last
Favor Favor	and sednance unumer

Also in the favorites drop down list is the **Recently Used** list. The most recently selected content pages or component pages are listed and are active for selection.

Pay Cycle Manager	roduct Catalogs upplier egular Entry s.	List of most Recently accessed pages
Sequence number	First Sequen	
	dit Favorites	

Main Menu

The main menu drop down list contains all of the same folders, sub menus, and content references that are contained in the Main Menu pagelet on the left side of the content area. One important feature in the main menu drop down list and on the main menu pagelet is the Portal Search Field.

Portal Search Field

The portal search field is used to search for content reference pages within the system.

- 1. Enter the name of the page you want to find
- 2. Press **ENTER** or click the search button.



Favorites -	Main Menu - Search Menu: Cust	Enter a full or partial search word	
Menu Search:	Customs Benefit Scheme Define benefit schemes for customs duties. Customs Item SION Define standar input/output norms for	Press Enter or select the search button	
 My Favorites Data Expans Employee So 	items. Customer Tax Applicability Define tax applicability for a customer address.		Search
Manager Sel	Customer Hierarchy Shows customers in hierarchical tree		Enter soardt veywoods eseanted by a space. Not kometia Clare Control Winder Stater. Witew Search Stater St
Customers Partners	Customer Data Field Set up oustomer data fields for oustomer visualization		Hold Summaria Savara Regulat 1 Set 15 Oat Breaktenanten Cost Franz Breaktenanten
Products Catalog Man Customer C	Customer Data Item Set up oustomer data items for oustomer visualization		Van Innovichmenskripping dat 15 og Hindenster 2. July 15 och Historiumskripping Orana mender og parting synde til motemans vard avar sestarket ankelsen Uter Menderskripping og her och Brittoriumskripping Uter Menderskripping og her och Brittoriumskripping
Order Manac Pricing Conf	Customer Activity View a chronological history of transaction activity for a customer.		Chemic Cald Department Hould's Selection and investment and another metal instead of the selection Advanced Cald Department Hould's Anternal Cald Department Hould's Chemica Cald Department Hould Cald Department Chemica Cald Department Chemica Cald Department Hould Cald Department Chemica Cald De
Customer R Items Cost Accoun	Customer Pending Items Review information for items not yet posted.	• •	Wave-Introduction Selange Recurst National-Keneral Call Selander Halary South Wine of Presonalization Extrational personalization for write 41 to contornit ease thread-in account Seland Seland Seland Seland Seland Seland Seland Seland ease thread-in account Seland Records Seland Seland Seland Seland e To Control Seland Records Seland Records f To Control Seland Records Seland Records
Suppliers Procuremen	Customer Aging Review aged accounts.		 Too Load Laws Personalization for law contomentative balances. Establisher energinatizations for law contomentative balances. Wan Herschnatssaw Suppl Chark-Networkszon Fotor - Fite-Top Cast Sales Tensonization
 Purchasing Inventory 	Customer Drafts List the drafts that make up the oustomer's draft receivable balance.	•	Instantiv Verity

The search feature will only return a list of relevant content reference pages. Folder pages will not be returned.

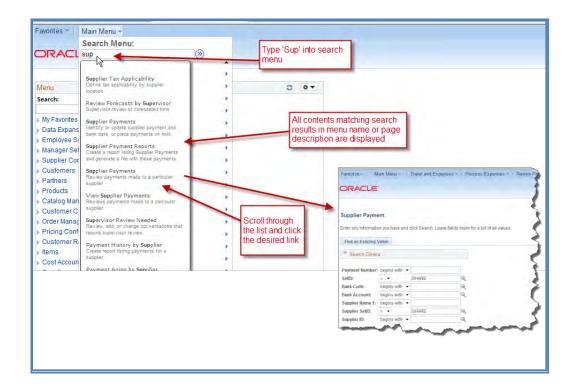
Type Ahead Search

A new feature to v9.2 is the *type-ahead* feature. As you type in the search window the system will dynamically search and display relevant content for which you have authority to view.

To Use type-ahead search:

- 1. Enter the first word or first few letters of the content page you would like to find. Exp. 'Ven' for Vendors
- 2. Wait for just a second and a system drop down window will automatically appear.
- 3. Scroll through the drop down list and select the desired content page.







Home

Clicking the *Home* link in the Navigation header will always return you to the system default page similar to the one below. This page can be personalized to meet individual user preferences. These features are covered in a later topic.

Favorites * Main Menu *			
ORACLE		He	me Worklist MultiChannel Compile
Menu	0 0*	Click Home link on any	Parj
Search:		page and you will always navigate back to this page	
My Favorites Data Expansion Tools			
Employee Self-Service Manager Self-Service			
Supplier Contracts Customers			

Work list

A work list is an organized list of the work items awaiting your attention. If your organization utilizes workflow-enabled applications, you typically will either receive notification of a new work list task in an email or you can view this page to see all your outstanding work list items.

ORACLE		Home Worklist MuniChannel Console Add to Favorites Sign ou
Menul Search: Wy Favortes Data Eccension Toda Ermotyces GenSendce Managar Self Sendce	0.0*	Click on the Worklest Link and you will be directed to your personal list of workflow items to be worked.
Harburger Schlerende Louistemarks Dustemarks Innouchs Unationarks Catalog Management Catalog Management Drateg Configuration Coster Management Prinsing Configuration Coster Management Prinsing Configuration Coster Management Beims Beims Dott Accounting Supplems Frooratement Contractas		Termin - New York - New All - Stranke CRACLE Workfard Workfard
Purchasing inventory eProJutement Sourcise Procement Sourcise Procement Mandaduring Detentions Mandaduring Detentions Mandaduring Detentions Audit Transing Carafis Program Management Proget Costin Project Costin Maintenance Management Resource Management Resource Management Resource Management Resource Management Resource Management Staffing		Processor Processor Read Read Processor Read Files Second of Table Allow Second of Table Allow Processor Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow Second of Table Allow Processor Read Files Second of Table Allow Second of Table Allow

Multi-Channel Console & Performance Trace

Because these are optional settings that your system administrator enables, Multi channel Console and Performance Trace may or may not be visible in the Navigation Header. Multichannel console relates PeopleSoft integration with technologies such as Online Chat, Voice Mail etc. Performance trace is a utility used to troubleshoot PeopleSoft technical issues.



Sign Out

NOTE

Click the **sign out** link to exit the PeopleSoft application. You should always use the sign out link to insure that your session is terminated.

Favorites - Main Menu -						
ORACLE			Home Wontist	MultiChannel Console Add to	Favorités Sig	n out
Mercu. Search:	0.0+			Personalize Col	nienti ayout	(2) Help
My Favorites Data Expansion Tools Employee Self-Service				Click on the Sign Out Link t PeopleSoft. The Sign In So is displayed as below.		
Manager Self-Service Supplier Contracts Gustomers		PEOPLESOFT ENTERP		1		
Pathers Products Catalog Management Customer Contracts		User ID SP1 Select a L Data Password Lanced	TANAS Damar Parcan au Canata	-		
Order Management Pricing Configuration Couptomer Returns Rems		Total and the second se	FORCED, ALL LEADERS Missouri Process Destination Destination Destination Constantion Const			
Cost Accounting Suppliers Procutement Contracts Purchasing		teday SetTime Fingt 14 Feature	Constant Minus P			
 Inventory 						

It is important that you always sign out when you are finished with your PeopleSoft session rather than simply closing the browser window. Other users could potentially access your cached homepage by opening a new browser window.

TOPIC 4: THE PAGEBAR

Just below the universal navigation header sits the pagebar. The pagebar is a dynamic group of links that appear on transactional pages. Not all of the links shown in the image below appear on all pages. The types of links that can reside in a pagebar are:

w

- 🏹 🛛 Help
- Personalize Page

Favorites - Main Menu - > Inventory -> Manage Inventory -> Inventory Status	Home Worklist MultiChannel Console Add to Favorilla Structure
Inventory Status "Uart [US801]@. Search	Pagebar

New Window

The New Window pagebar link enables users to open multiple sessions of PeopleSoft. This is often helpful when you need to refer to the content in one component while viewing another.

Steps to open a New Window

- 1. Click on the New Window link.
- 2. A second window opens to the same content page
- © 2013 SpearMC Consulting PeopleSoft v9.2 Foundations for FSCM



Favorites = Main Menu = Inventory = Manage Inventory = Inventory Status	Hame Workst AuditChannel/Chanale Add to Exvortee Sile	
Inventory Status "unit (USBOT) (4, Search	Click on the New Window Link	
	Interrupt Neuri, Ministration Science, Science Market, Science, Market, Market, Science, Market, Market, Science, Market, Market, Market, Science, Market, Ma	
	Inviatory Status reactions: (in (Anoministry ()))	
👔 Sawe 😒 Notry	A new browser session opens starting on the same PeopleSoft Page	
	Tous Galanced Research and a region of	

Help

The **Help** link on the pagebar will direct you to PeopleBooks.

- PeopleBooks is an online collection of user documentation for all PeopleSoft applications and tools.
- PeopleSoft Help is context sensitive. So, if you are on a page related to the setup of vendors and click help, you will be navigated to the PeopleBooks content for vendor setup.
- PeopleBooks is available to users several ways, depending on your company's software setup.
 - Oracle hosted PeopleBooks Content is continually updated by Oracle personnel and available online to all licensed PeopleSoft customers.
 - Downloadable PeopleBooks Files are periodically downloaded from Oracle and installed onto your organization's server.
 - PDF versions are also available for download.

Steps to Access PeopleBooks Help

- 1. Click the <u>Help</u> link in the Pagebar.
- 2. A new browser window will open to the context sensitive help page
- 3. Help search is context sensitive. PeopleBooks will open to the page related to your current PeopleSoft page.



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"Unit [USO1] Q. Sellon	Memory heats Water black black black black black Image: State black
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	Does Does Status

Personalize page

The customize page link is available in the pagebar for those pages that allow user customization. More about this topic will be covered later in the course.

TOPIC 5: USING KEYBOARD SHORTCUTS

PeopleSoft offers keyboard navigation alternatives to using the mouse while working. This section provides an overview of keyboard shortcuts and discusses how to:

- Use hot keys.
- Use access keys.

Hot Keys

Hot keys perform immediate actions. When you press one, the designated action occurs. Some frequently used hot keys are:

<u>CTRL+J</u> - Displays the system information page such as the one below

ACL	E!	
	Browser	1E/8.0
	Operating System	WINSP
	Browser Compression	ON (gzip)
	Tools Release	B.50.03
	Application Release	Financials/SCM 9 00.00 000
	Service Pack	U .
	Page	PORTAL_SRCH_RESULT
	Component	PORTAL_SEARCH
	Menu	PORTAL_ADMIN
	User ID	
	Database Name	FINSBX1
	Database Type	MICROSET
	Application Server	/RAPTOR 5650
	Component Buffer Size (KB)	6
	continue	

<u>CTRL+K</u> - When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.