



Specialized PeopleSoft 9.2
Financial Management

PeopleSoft v9.2 Foundations

Financials Supply Chain Management (FSCM)

Introduction & Basic Navigation Course

Training Guide

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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
- **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.

➤ **"Best 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

- **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*
- **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
Primavera 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

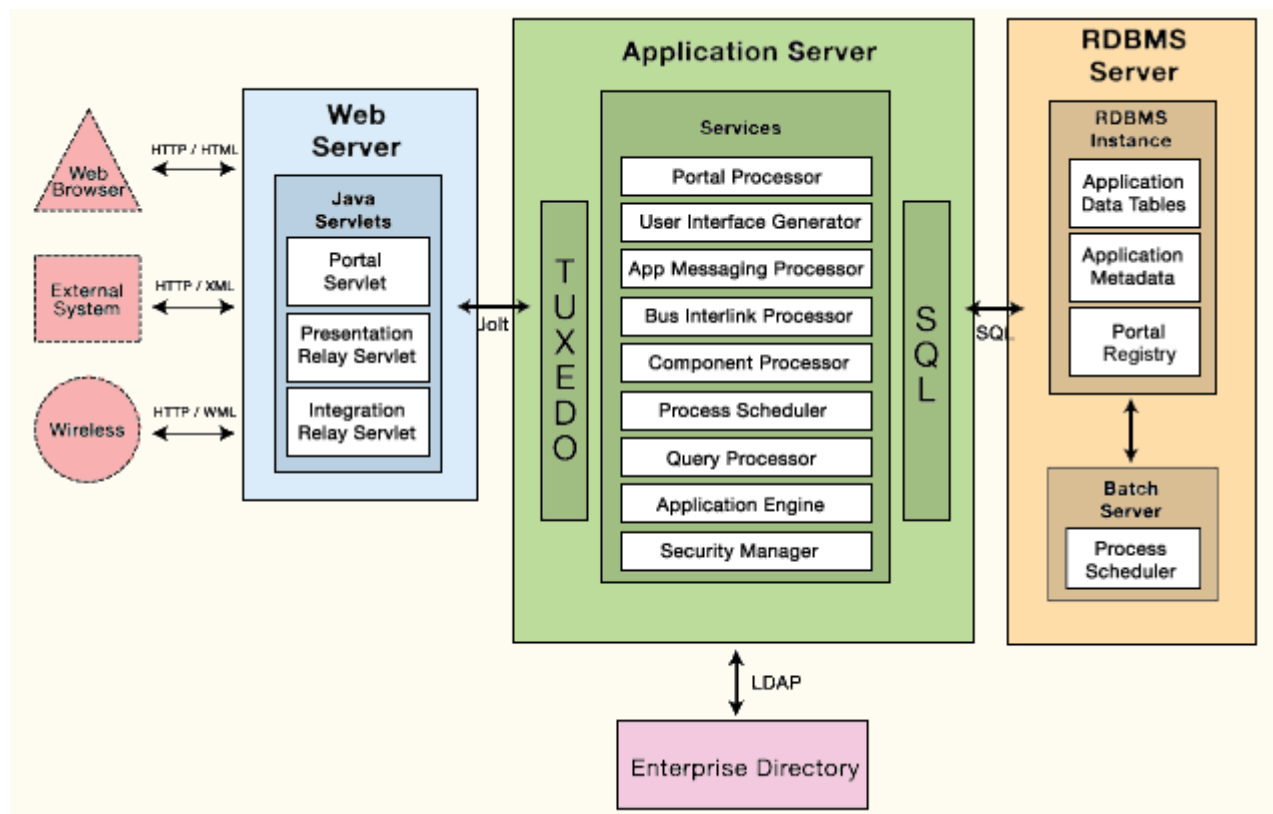
Enterprise Performance Management & Reporting	
nVision	Performance Analytics and Business Score Cards
XML Publisher	PeopleSoft Query and Connected Query

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.



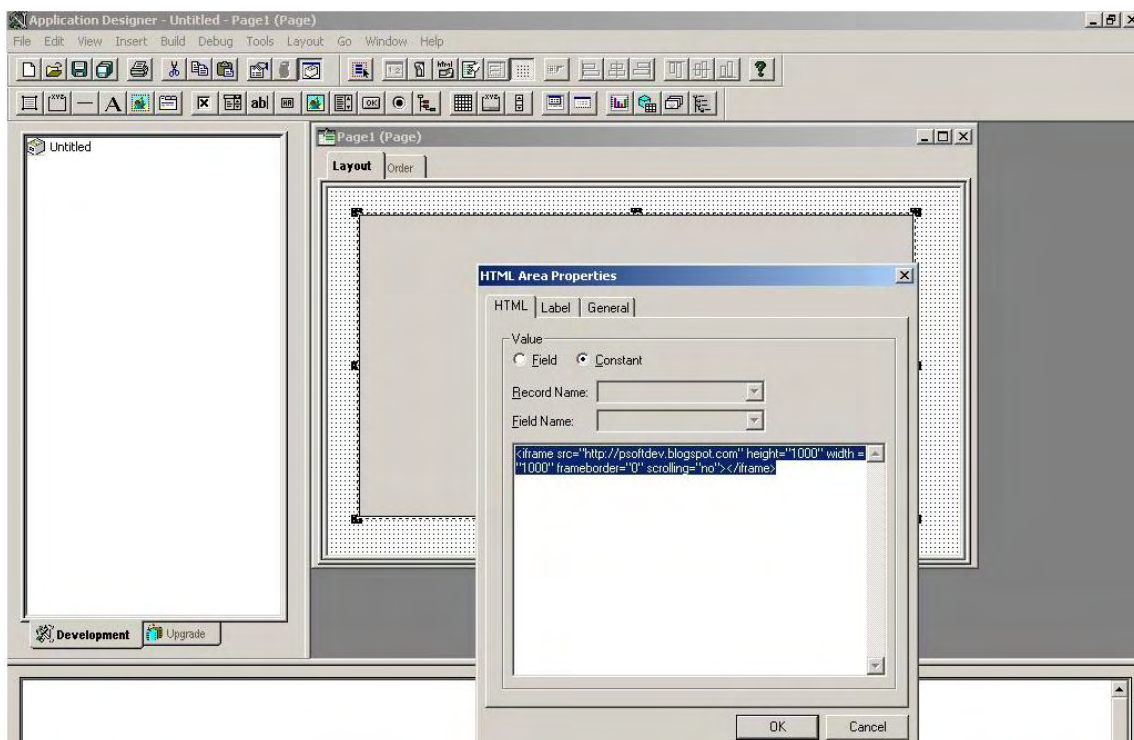
PeopleSoft PIA Architecture Diagram

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:

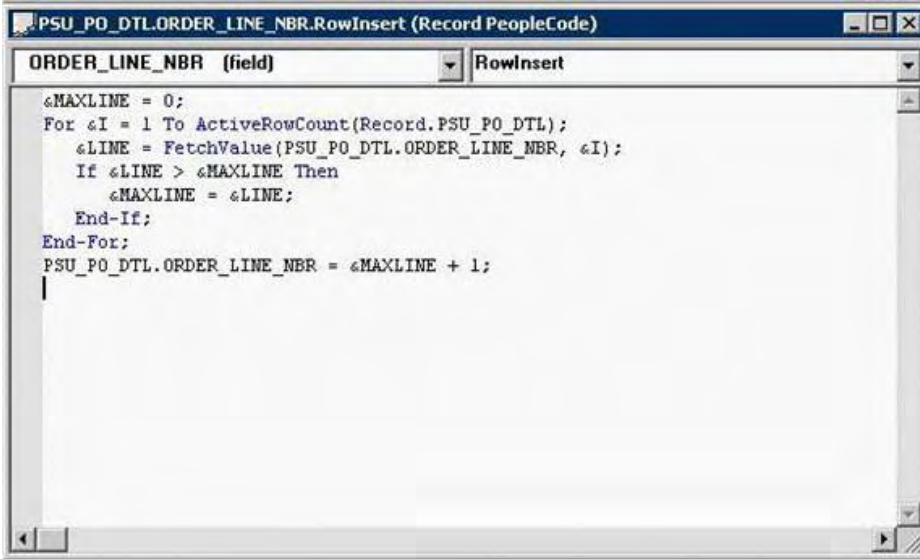
➤ Application Designer

- 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.



➤ 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)



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.

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

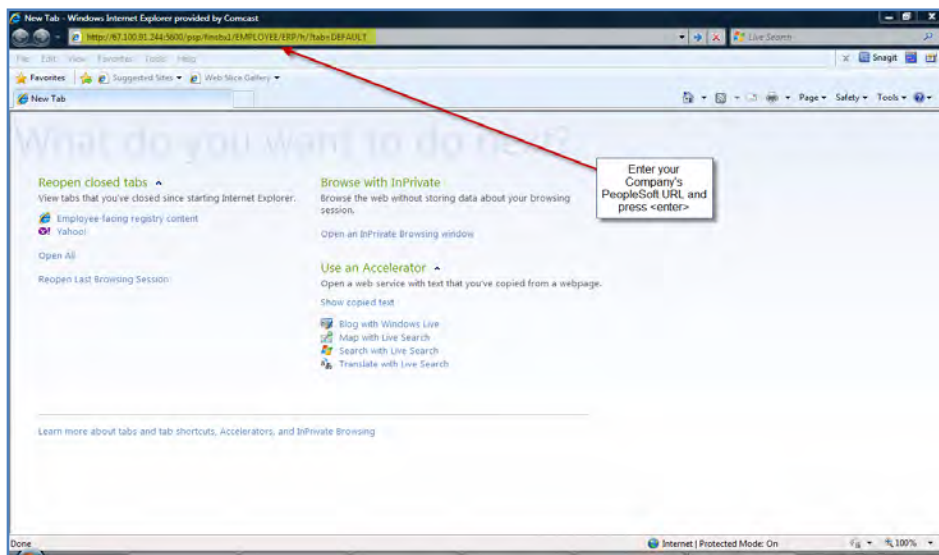
PeopleSoft v9.2 is a web based application that can be accessed and run using an internet browser such as Microsoft Internet Explorer, Mozilla Firefox or Google Chrome.

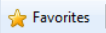
Login Steps:

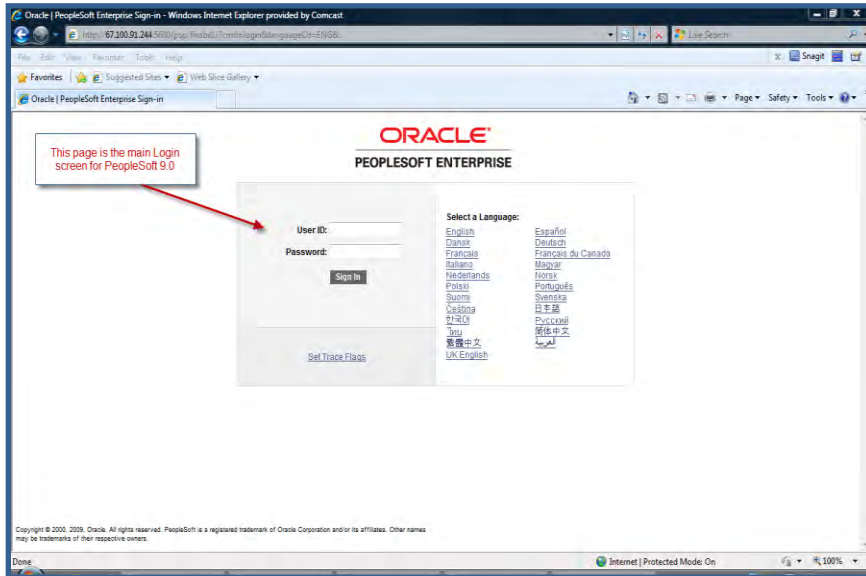
1. Click on your PC's internet Browser Icon to open a new browsing session.



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.



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**.

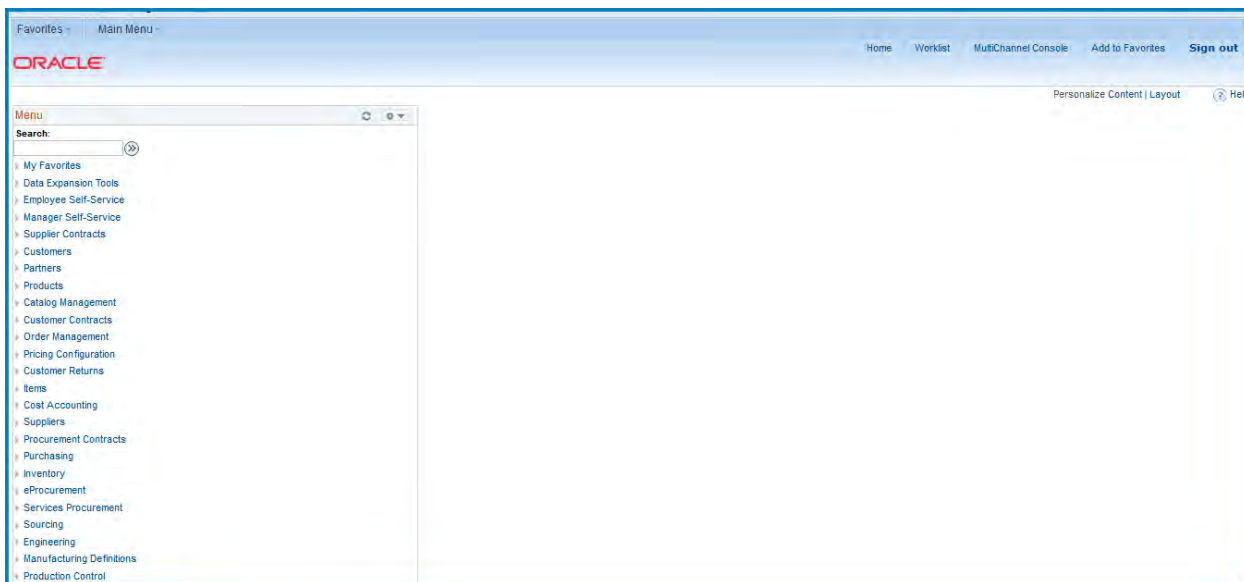


5. After selecting **Sign In**, your mouse pointer will momentarily change to either an hour glass or other 'processing' icon. This commonly occurs when the PeopleSoft system is accessing the database.



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.



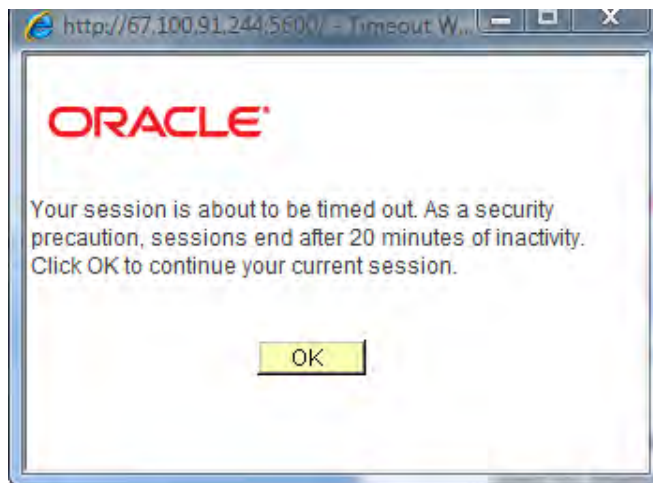
NOTE PeopleSoft passwords may be authenticated through LDAP technology. LDAP enables your PeopleSoft User ID and Password may be the same as your organizations local area network ID and password. When you change your network ID or password, this will automatically update your PeopleSoft v9.2 login to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

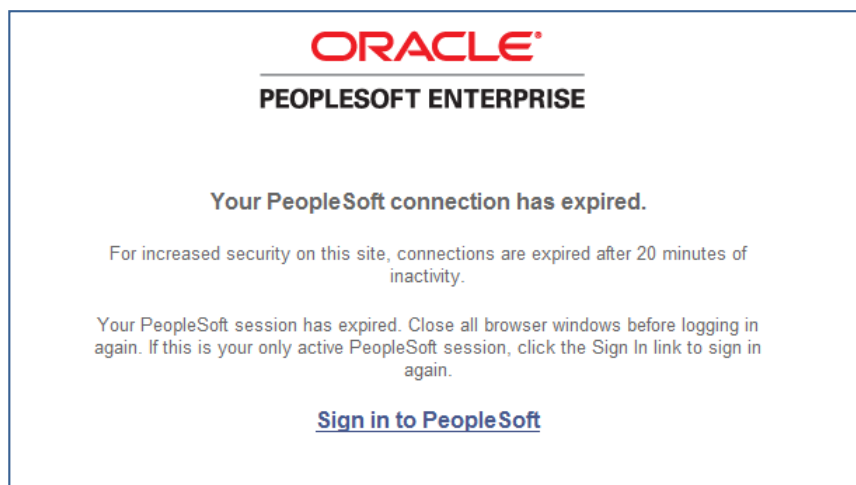
- PeopleSoft User IDs and Passwords are case sensitive.
- PeopleSoft User IDs are recorded within the PeopleSoft Database for each transaction performed by a user. It is important that you always log out of PeopleSoft while not at your work area.
- PeopleSoft System Administrators may setup the system 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-logout limit, the window below will appear.



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



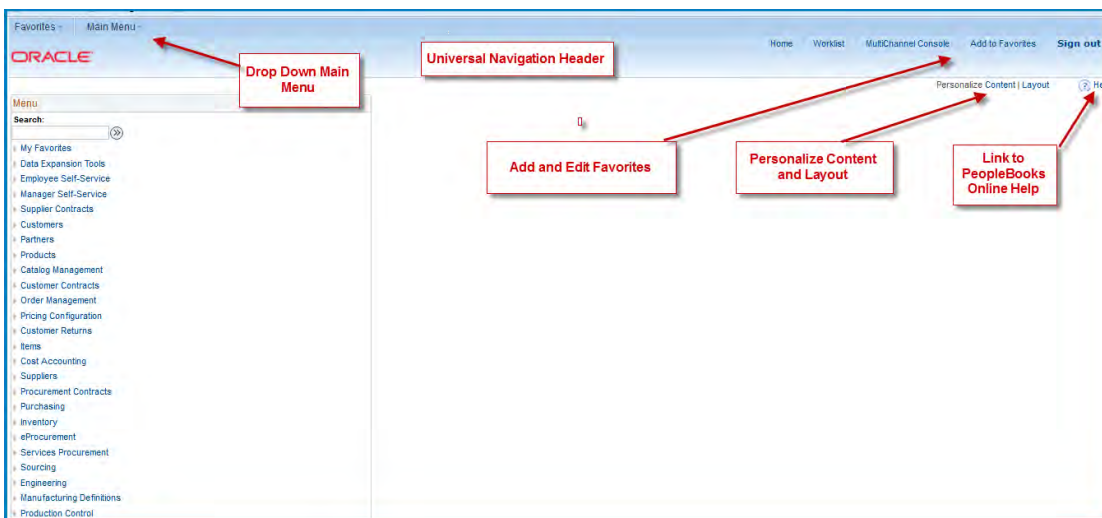
TOPIC 2: HOME PAGE LAYOUT & NAVIGATION FEATURES

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.



Content Area

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

-  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.

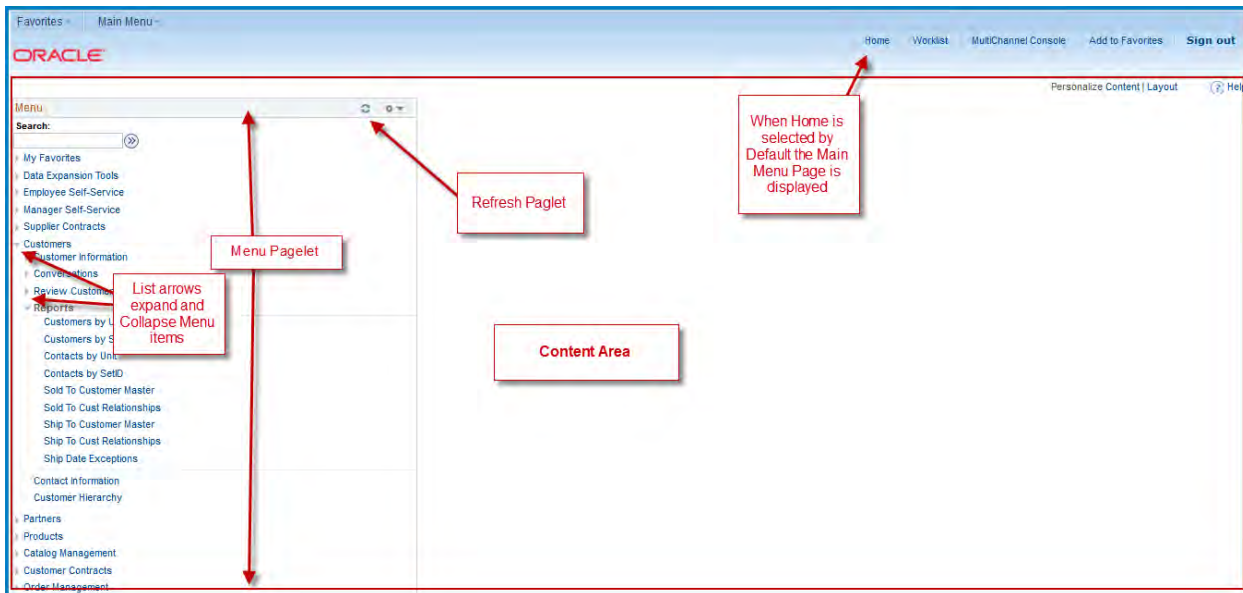
Menu Pagelet

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.



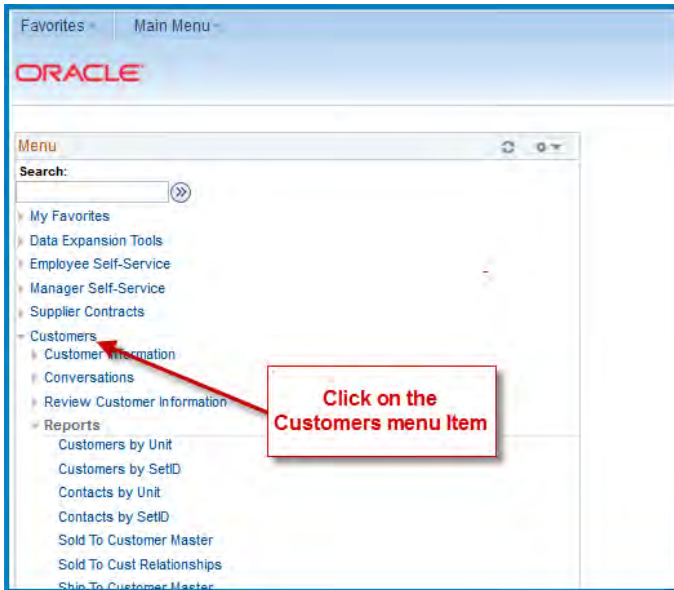
Navigation Pagelets

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.

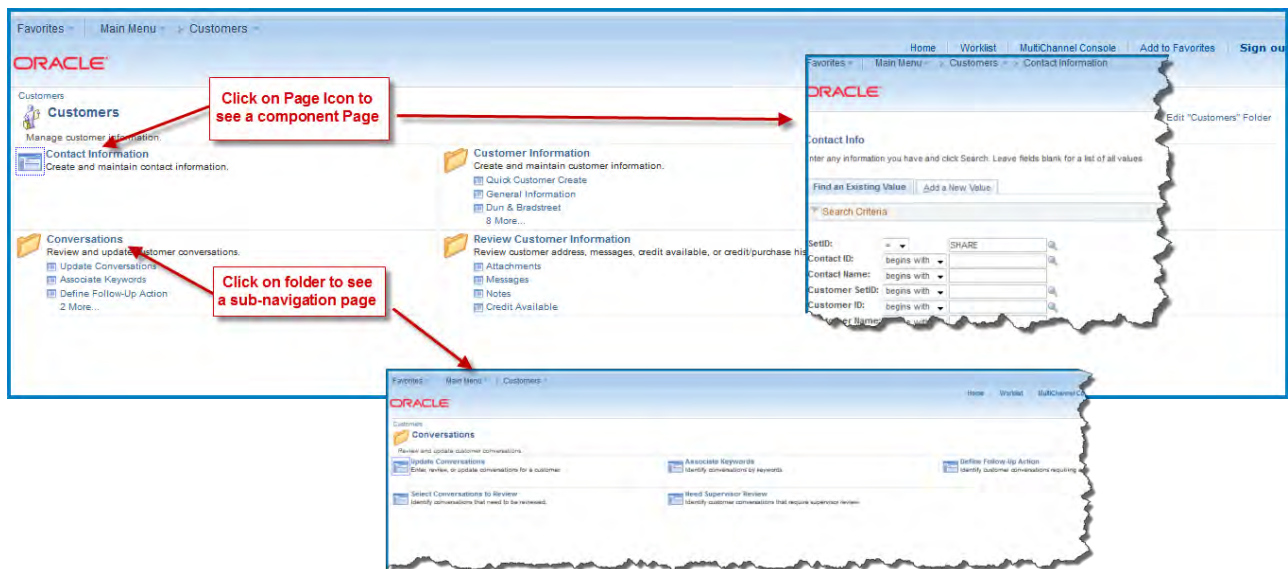
- They are a more intuitive view of the content in the list.
- Navigation pagelets use icons and folders to make navigation more user-friendly.
- Just like the menu pagelet, navigation pagelets can display links to other navigation pagelets (displayed as folders) as well as content references (icons)

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.



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

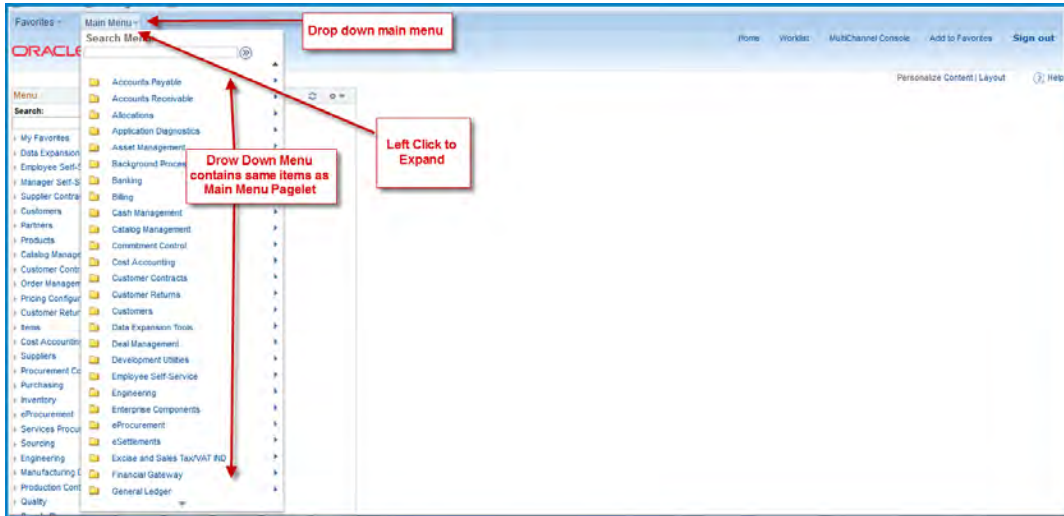


Drop Down Menus

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.

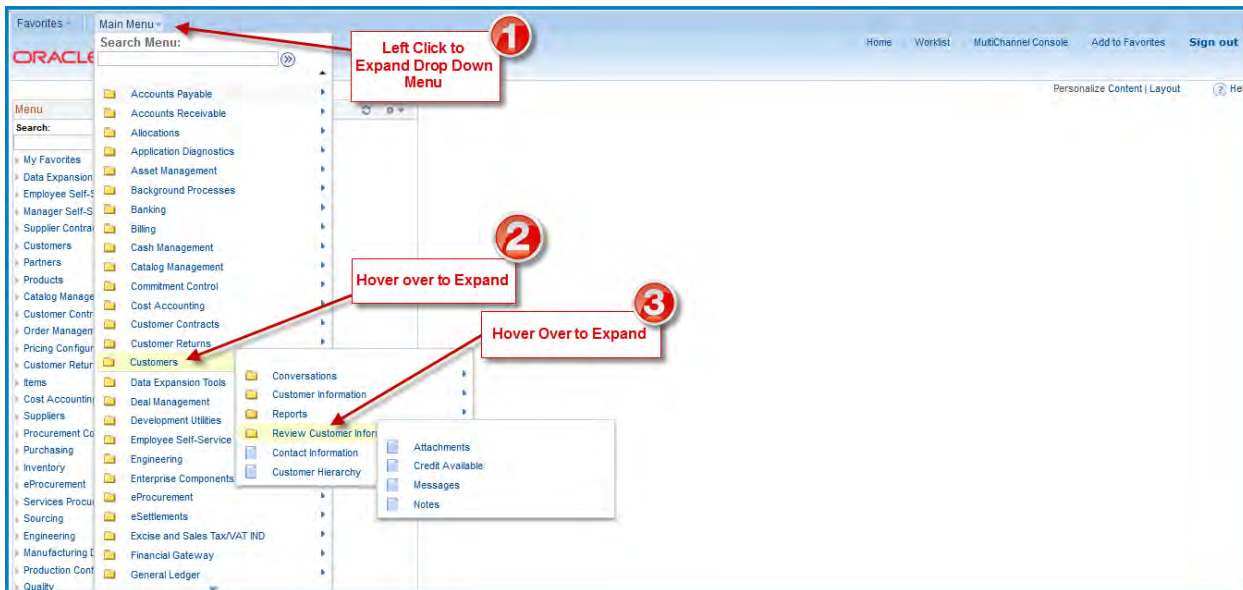
- The Drop down *Main Menu* displays all of the same content that is in the menu pagelet.
- Provide a cascading view of menus and submenus.
- Contain links to navigation pagelets and content references for which you have authority to access.
- Drop down menus always expand in a viewable region of your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

crumb fashion so that the full navigation path is visible.

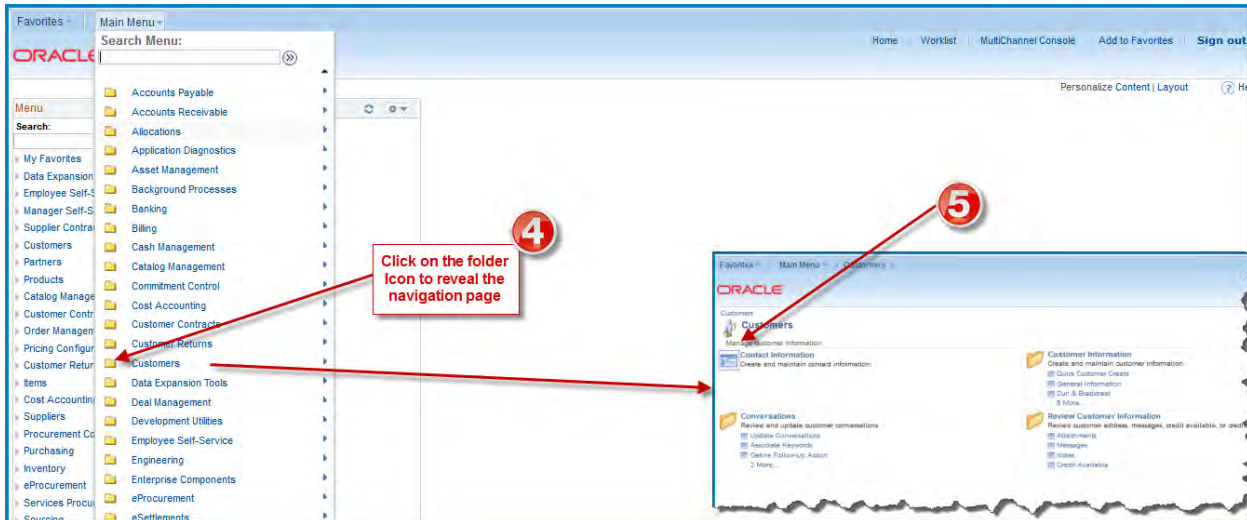


Steps to Navigate with Drop Down Menus

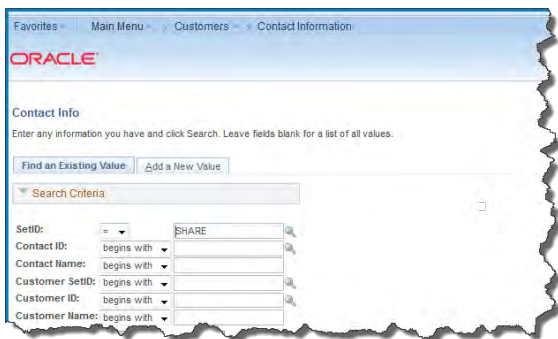
1. Left Click on the Drop Down Main Menu.
2. Hover over a folder list item to expand a sub-menu.
3. Hover over subsequent folders to expand another sub-menu.



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

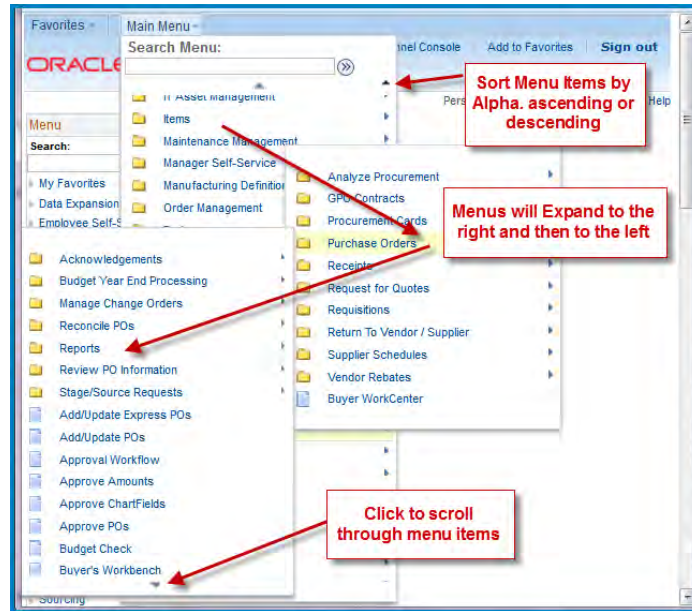


5. Left Click on a Content Reference Icon to reveal a page or component page.



Other Drop down Menu Features

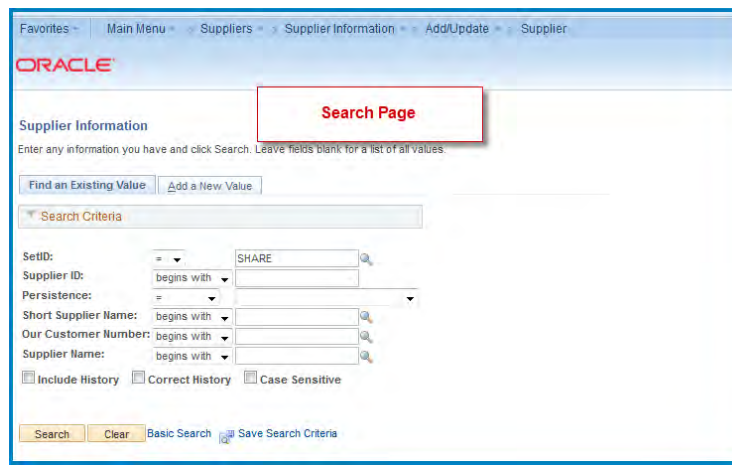
- Scroll through drop down menus with your mouse wheel or use the directional arrows on the bottom and top of drop down lists.
- Cascading menus will open to the right or the left depending on the viewable area of your screen
- Contents in a drop down menu can be sorted alphabetically or by system default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



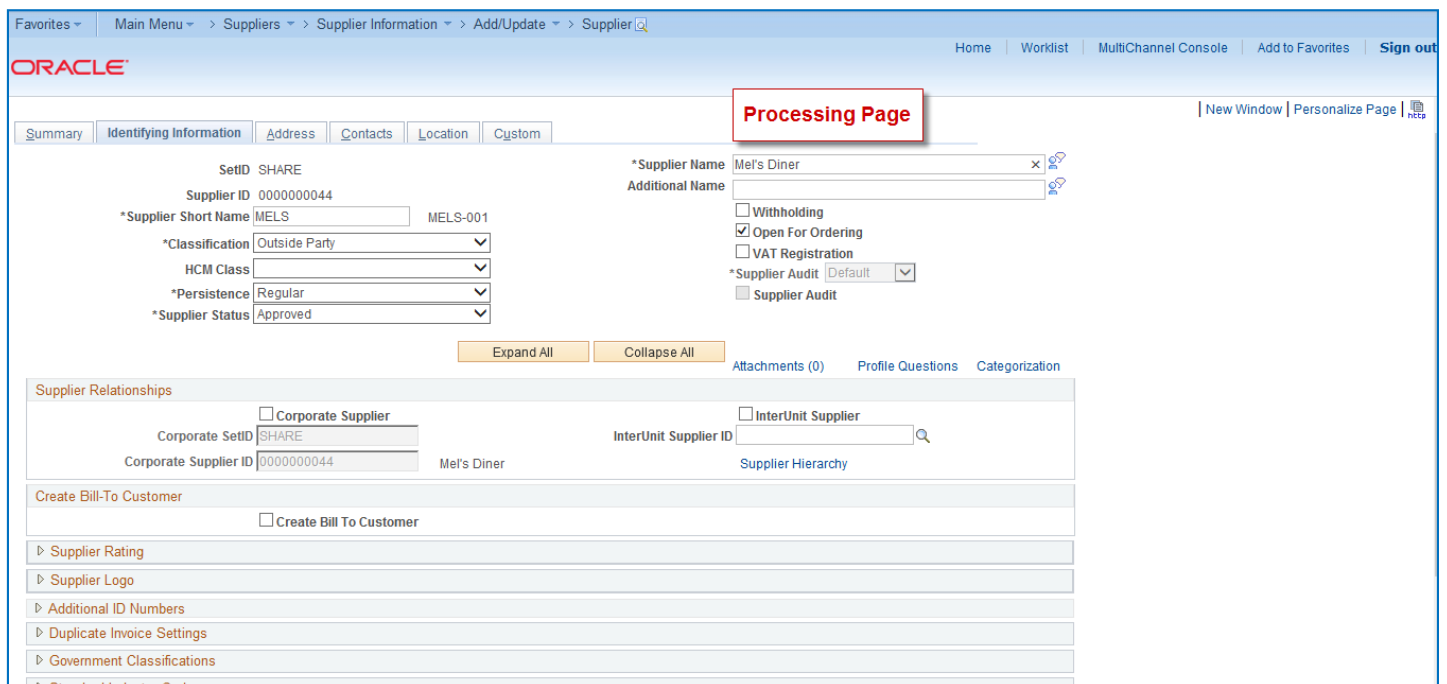
Pages and Component Pages

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.



The screenshot shows the Oracle PeopleSoft interface for a Search Page. The breadcrumb trail is: Favorites > Main Menu > Suppliers > Supplier Information > Add/Update > Supplier. The page title is "Supplier Information" and it includes the instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." There are two buttons: "Find an Existing Value" and "Add a New Value". Below is a "Search Criteria" section with several search fields: SetID (with a dropdown and a text input containing "SHARE"), Supplier ID (with a dropdown and "begins with" operator), Persistence (with a dropdown and "=" operator), Short Supplier Name (with a dropdown and "begins with" operator), Our Customer Number (with a dropdown and "begins with" operator), and Supplier Name (with a dropdown and "begins with" operator). There are also checkboxes for "Include History", "Correct History", and "Case Sensitive". At the bottom are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". A red box highlights the "Search Page" title.



The screenshot shows the Oracle PeopleSoft interface for a Processing Page. The breadcrumb trail is: Favorites > Main Menu > Suppliers > Supplier Information > Add/Update > Supplier. The page title is "Supplier Information" and it includes the instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." There are two buttons: "Find an Existing Value" and "Add a New Value". Below is a "Search Criteria" section with several search fields: SetID (with a dropdown and a text input containing "SHARE"), Supplier ID (with a dropdown and "begins with" operator), Persistence (with a dropdown and "=" operator), Short Supplier Name (with a dropdown and "begins with" operator), Our Customer Number (with a dropdown and "begins with" operator), and Supplier Name (with a dropdown and "begins with" operator). There are also checkboxes for "Include History", "Correct History", and "Case Sensitive". At the bottom are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". A red box highlights the "Processing Page" title.

The page displays the following information for the selected supplier:

- SetID: SHARE
- Supplier ID: 0000000044
- *Supplier Short Name: MELS (MELS-001)
- *Classification: Outside Party
- HCM Class: [Dropdown]
- *Persistence: Regular
- *Supplier Status: Approved
- *Supplier Name: Mel's Diner
- Additional Name: [Text Input]
- Withholding:
- Open For Ordering:
- VAT Registration:
- *Supplier Audit: Default
- Supplier Audit:

Buttons: Expand All, Collapse All, Attachments (0), Profile Questions, Categorization

Supplier Relationships:






- Corporate Supplier: Corporate SetID: SHARE, Corporate Supplier ID: 0000000044, Mel's Diner
- InterUnit Supplier: InterUnit Supplier ID: [Text Input]

Create Bill-To Customer: Create Bill To Customer

Supplier Rating, Supplier Logo, Additional ID Numbers, Duplicate Invoice Settings, Government Classifications, 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

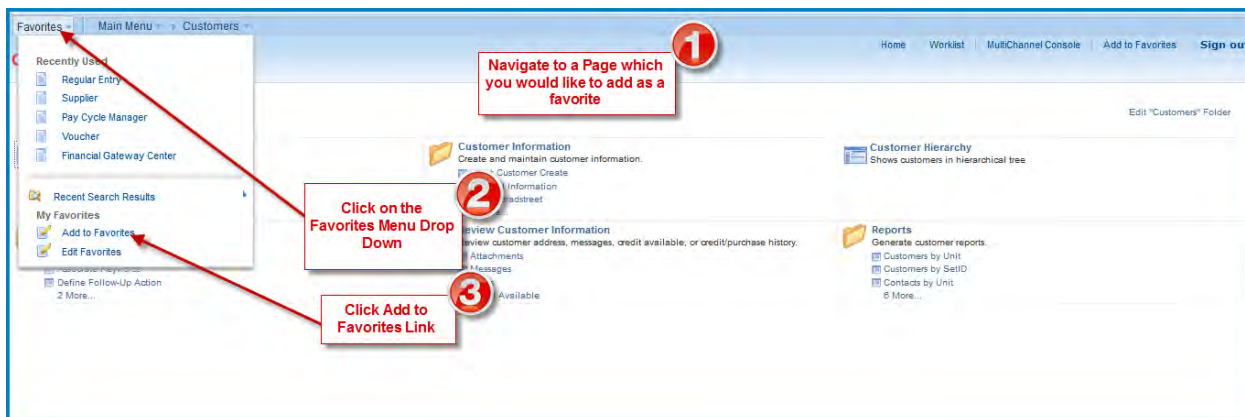
Favorites

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.

 You can store favorites with a specific key, for example if you consistently access the ABC department, you can store a favorite that directly accesses the ABC department.

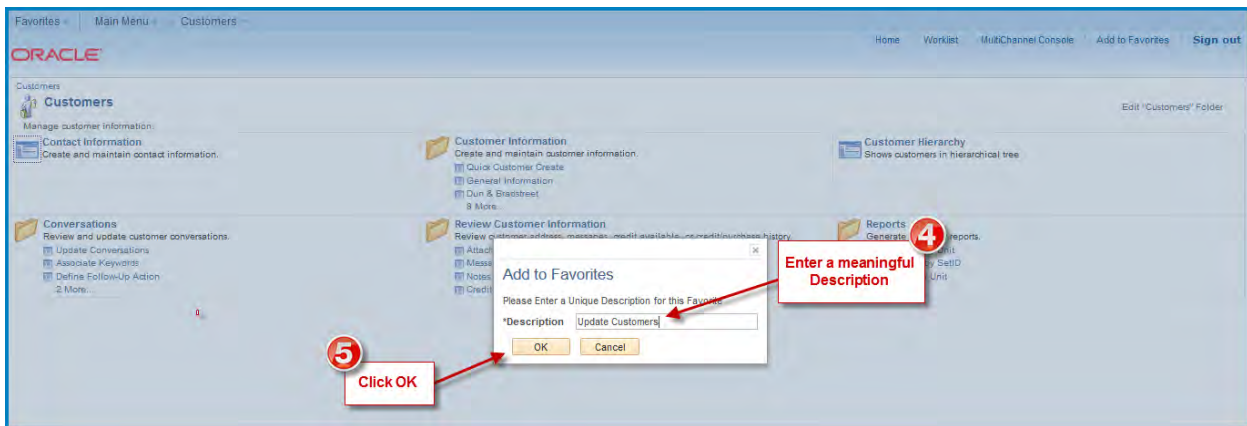
Steps to add favorites

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.



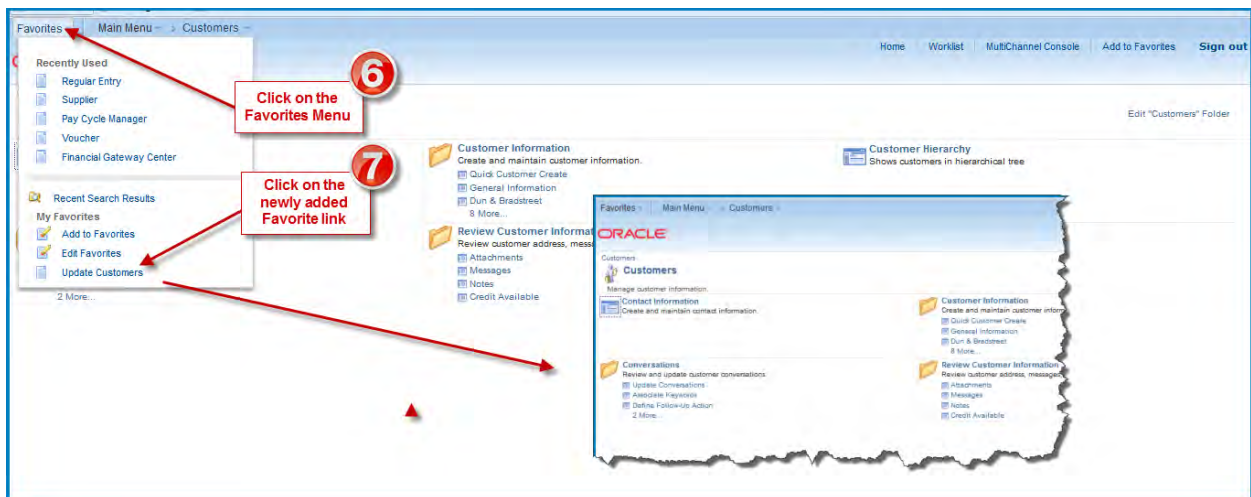
4. Enter a description for the page that is meaningful to you.

5. Click  .



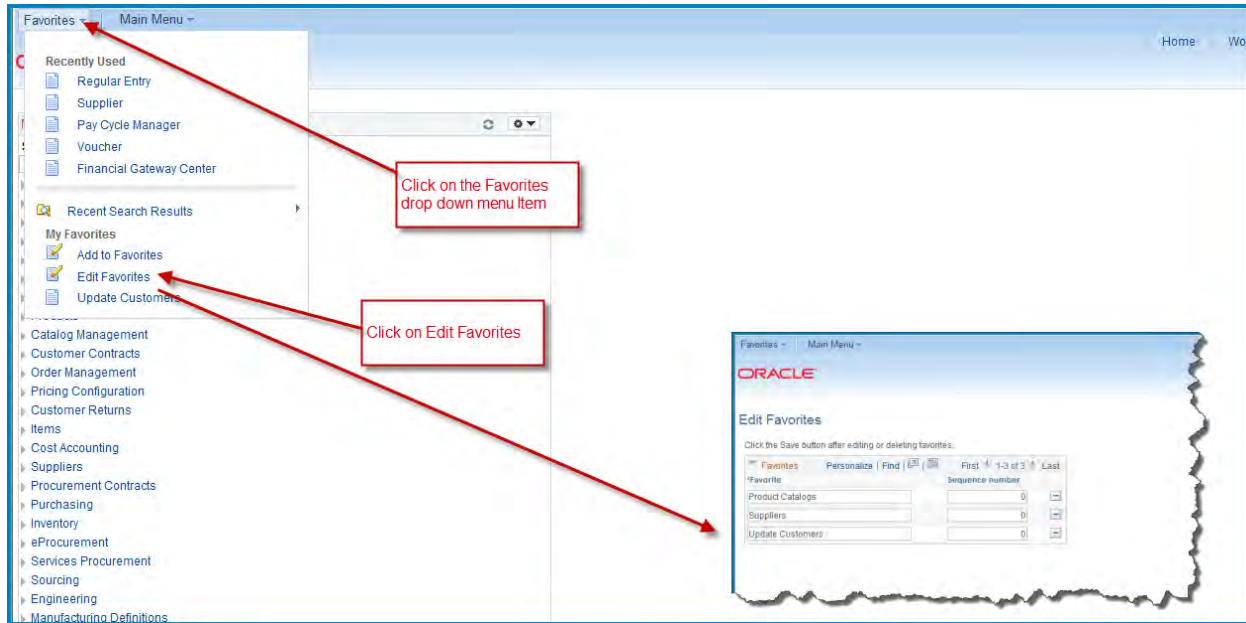
6. The favorite is saved. Click on  in the confirmation box.


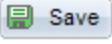
7. Click on the Favorites drop down menu and your newly added item is listed. Click on the link and you will be taken to that page.

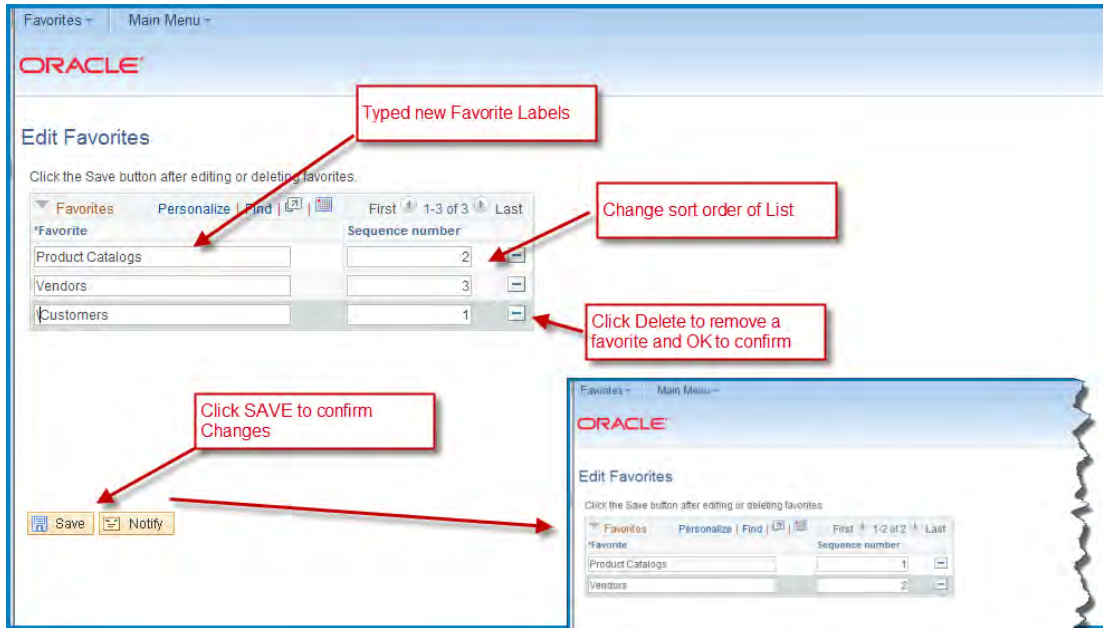


Steps to edit favorites

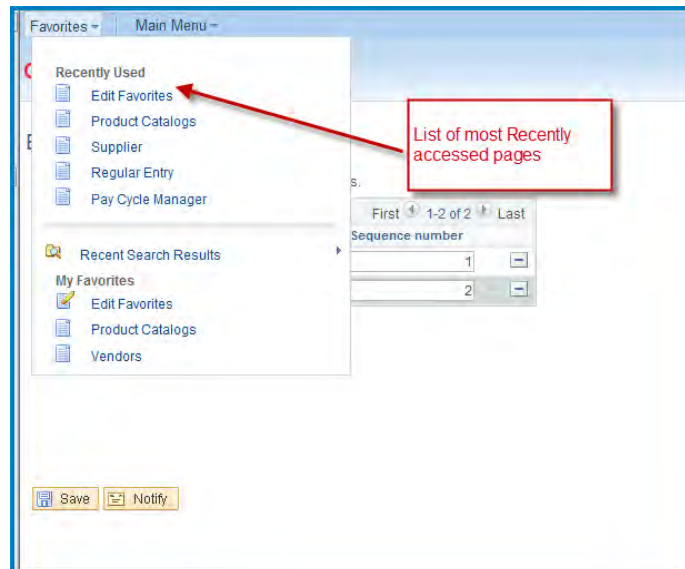
1. Click **Favorites** drop down menu.
2. Click **Edit Favorites** list item.
3. The Edit Favorites page appears as shown below.



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  button on the desired row.
7. Click the  button to keep your changes.



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.



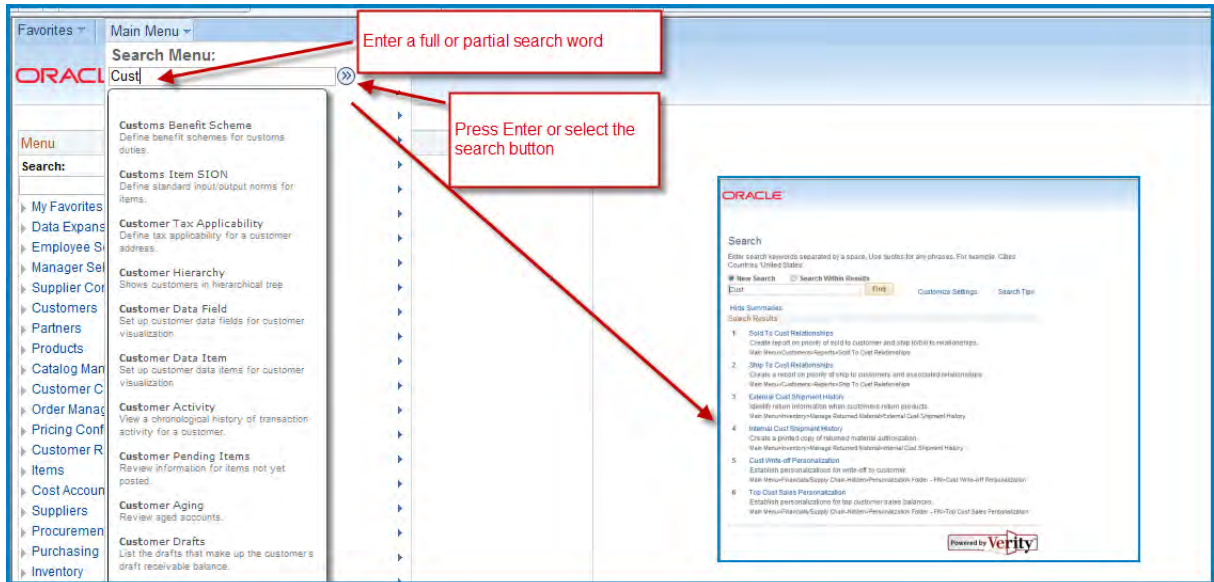
Main Menu

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.



NOTE 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.

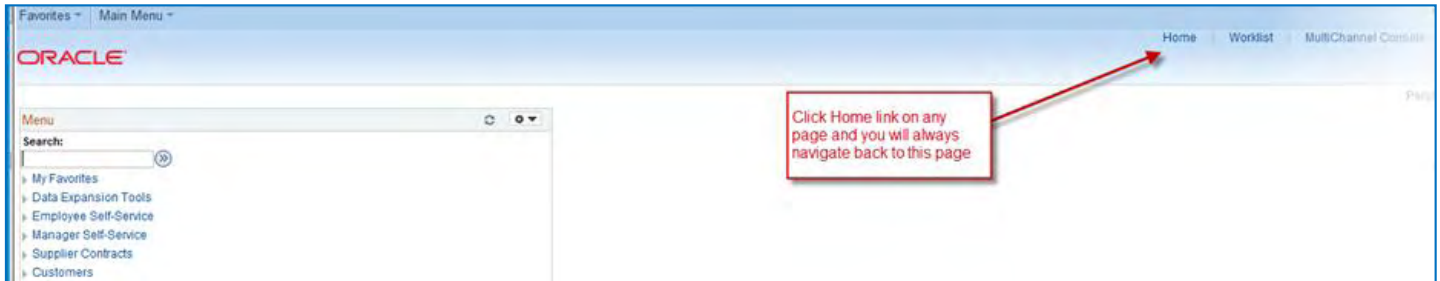
To Use type-ahead search:

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.

The screenshot shows the Oracle PeopleSoft Main Menu search interface. The search bar at the top contains the text 'sup'. Below the search bar, a list of menu items is displayed, including 'Supplier Tax Applicability', 'Review Forecasts by Supervisor', 'Supplier Payments', 'Supplier Payment Reports', 'View Supplier Payments', 'Supervisor Review Needed', and 'Payment History by Supplier'. A red box highlights the search bar with the text 'Type 'Sup' into search menu'. Another red box highlights the list of results with the text 'All contents matching search results in menu name or page description are displayed'. A third red box highlights the 'View Supplier Payments' link with the text 'Scroll through the list and click the desired link'. An inset window on the right shows the 'Supplier Payment' page, which includes a search form with fields for 'Payment Number', 'SetID', 'Bank Code', 'Bank Account', 'Supplier Name', 'Supplier SetID', and 'Supplier ID'.

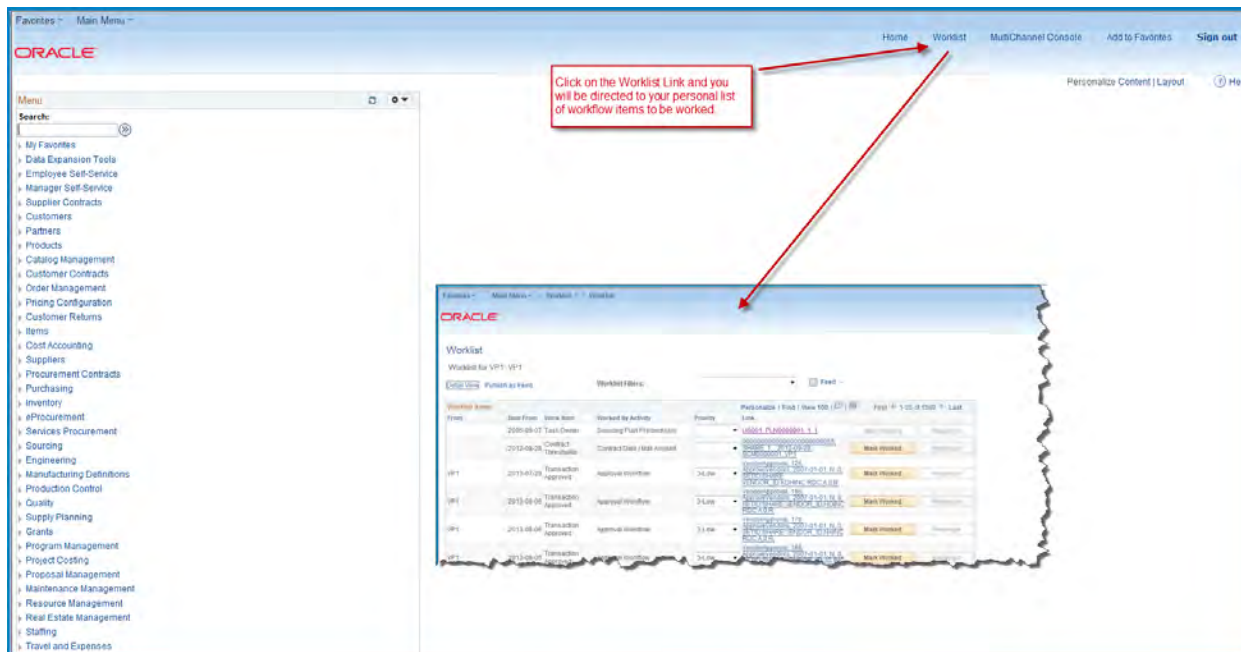
Home

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.



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.



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

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.

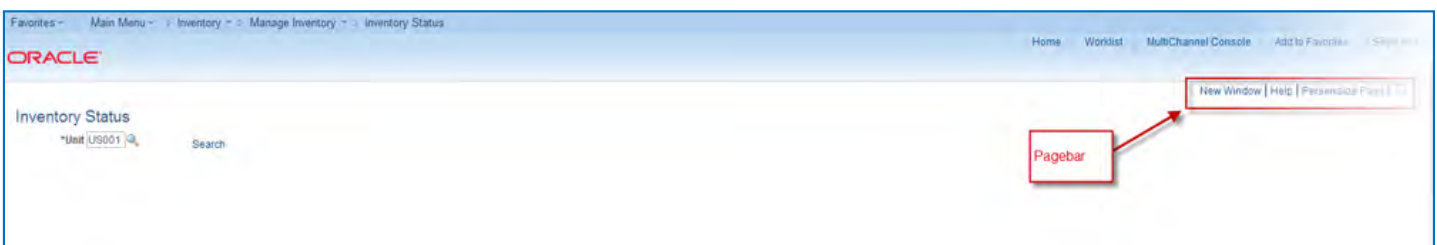


It is important that you always sign out when you are finished with your PeopleSoft session rather than simply closing the browser window. Other users could potentially access your cached homepage by opening a new browser window.

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:

- New Window
- Help
- Personalize Page

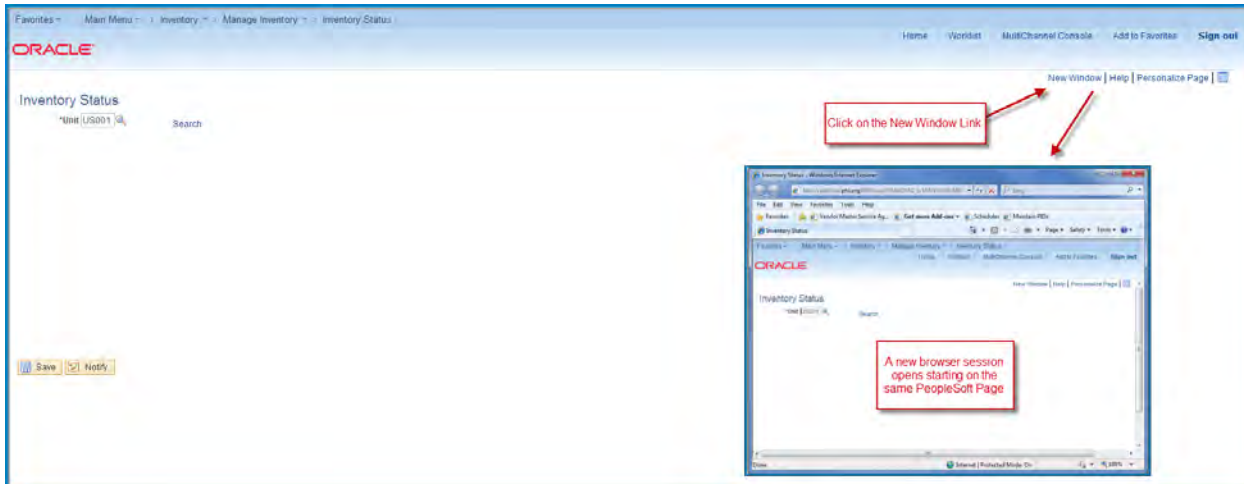


New Window

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



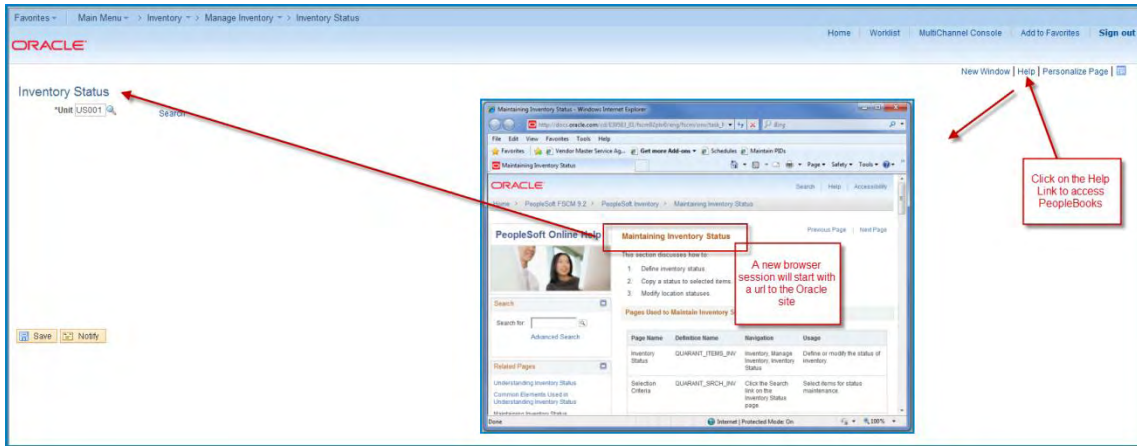
Help

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 [? Help](#) 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.



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:

CTRL+J - Displays the system information page such as the one below

ORACLE	
Browser	IE8.0
Operating System	WINXP
Browser Compression	ON (200)
Tools Release	8.50.03
Application Release	Financials/SCM 9.00 00 000
Service Pack	0
Page	PORTAL_SRCH_RESULT
Component	PORTAL_SEARCH
Menu	PORTAL_ADMIN
User ID	
Database Name	FRHS01
Database Type	MICROSOFT
Application Server	IRAPTOR5650
Component Buffer Size (KB)	5
continue	

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