



PEOPLESOFT TIPS

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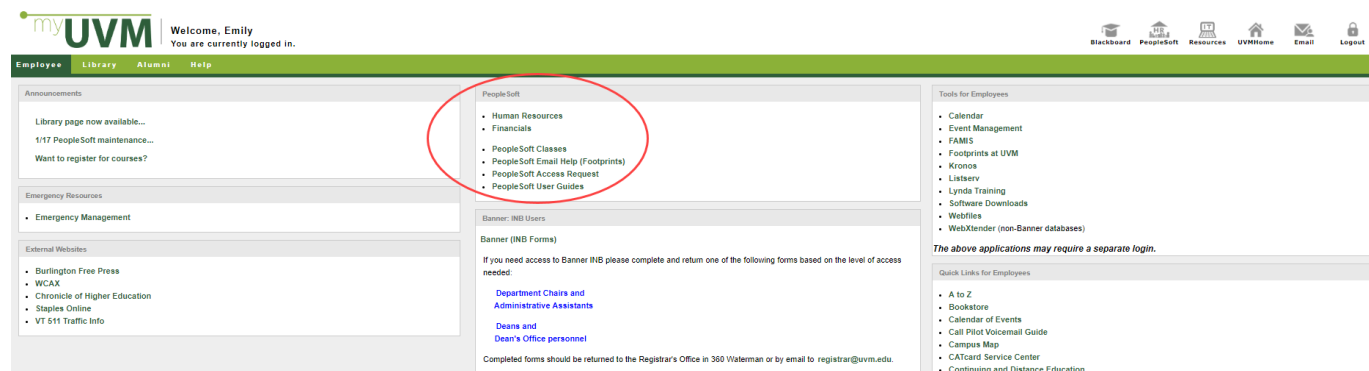
Overview

This document highlights tips for navigating and working more efficiently in PeopleSoft. Most of the tips and tricks in this document apply to both the Human Resources (HR) and Financial (Financials) systems.

The UVM Portal page (MyUVM)


The [MyUVM Portal](#) page contains links to go directly into PeopleSoft, Outlook, Banner, Blackboard, and other applications by only logging in once. Logging in to PeopleSoft requires [multi-factor authentication](#). Other applications such as Kronos will require you to log in separately.

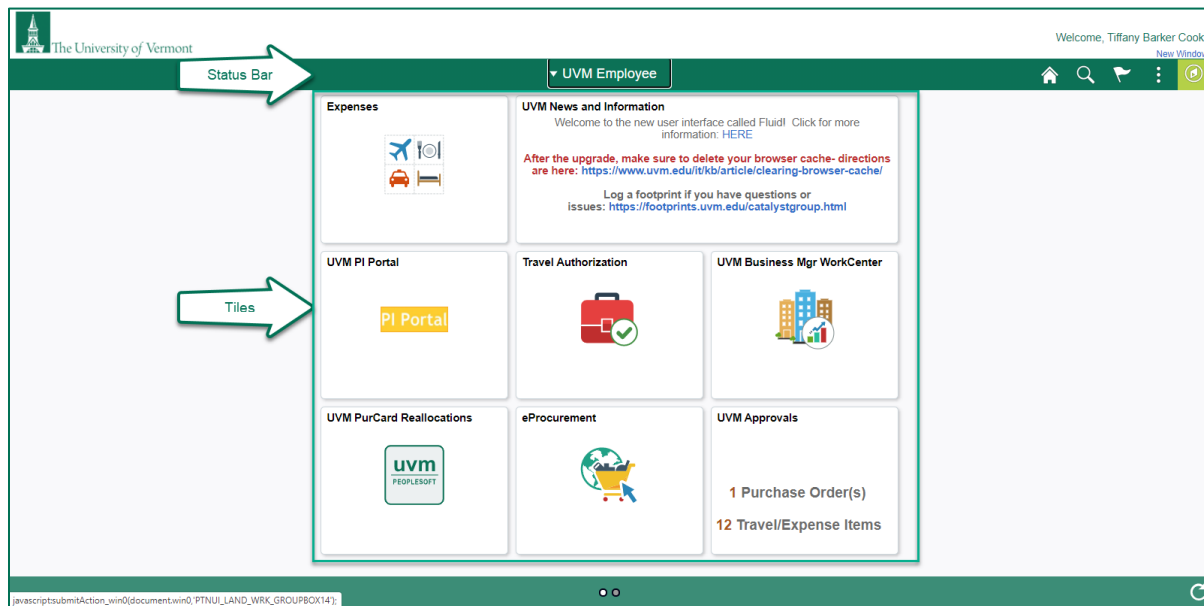
1. Log in to [MyUVM](#) using your UVM **NetID** and password.
2. In the **PeopleSoft** section of the **Employee** tab, you will find helpful links to PeopleSoft resources and training.
3. The PeopleSoft link in the upper right corner of the screen is for accessing the PeopleSoft HR system.



Navigate PeopleSoft

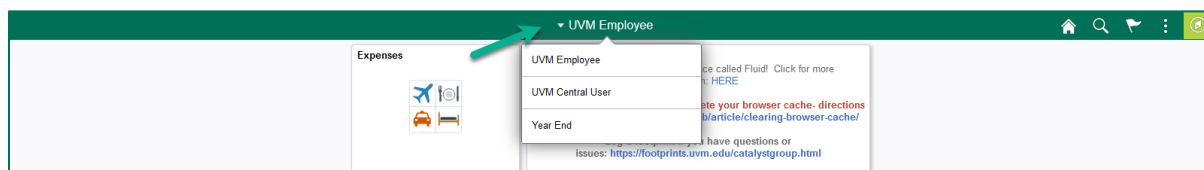
UVM Employee Homepage

When opening PeopleSoft you will be immediately brought to the **UVM Employee Homepage**. Each employee's homepage may look different based on the access that they have. From any page in PeopleSoft, you can return to your homepage by clicking the **Home**  icon in the top left of your screen.




Status Bar


The Status Bar at the top of your homepage shows the homepage and several icons including, home, search, notifications, action menu, and Navbar. As you navigate through different pages in PeopleSoft the Status bar will change to indicate what page you are currently on. If you have multiple homepages you can click the homepage name to switch between homepages.

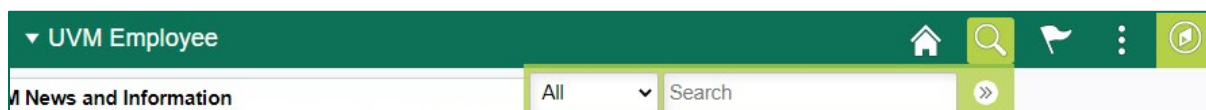



Home

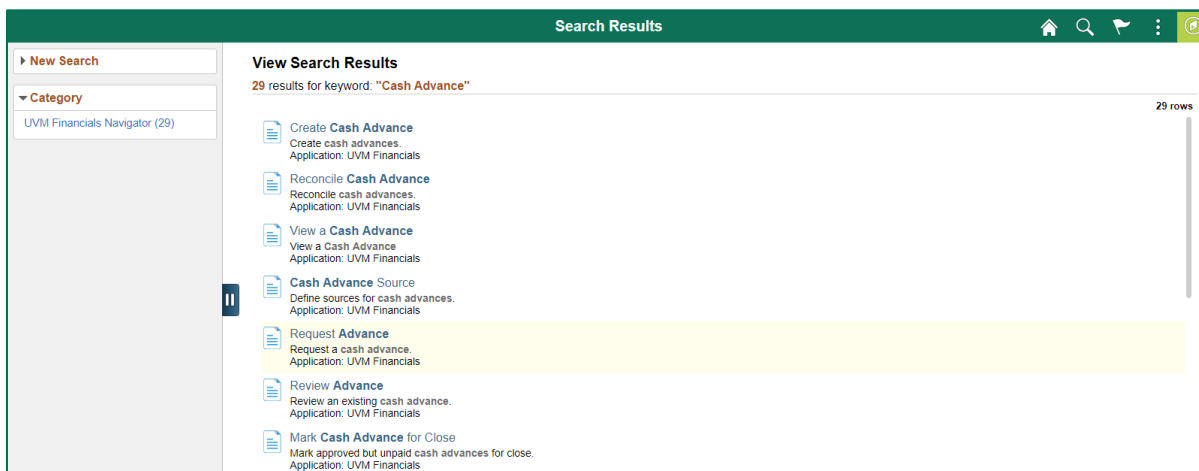
Home  in the status bar is used to return to the UVM Employee Homepage or the preferred homepage. To change the preferred homepage see [personalize homepage](#).

Search


Search  opens a box that allows you to perform a search of the pages in the system.




1. Enter keywords separated by a space. Press **Enter** or click the **Double Arrow**  button on the right side of the box to view the search results.
2. The **View Search Results** page is displayed with a list of possible matches. Click on a link to go to that page.



Notification Flag

The Notification Flag  indicates when certain actions or alerts are available. For instance, if you run a process a notification will be triggered alerting you to that process instance.

Action Menu

The Action Menu  provides access to different actions based on the page you are on. When on the UVM Employee Homepage the options available in the action menu are Personalize Homepage, My Preferences, Help, & Sign Out. My Preferences and Sign Out will be accessible in the Action Menu regardless of what page you are on.

Personalize Homepage

This option allows you to add/remove tiles on a homepage or create a new homepage. For more information, see the [Personalize Homepage](#).


My Preferences

This option allows you to change preferences in regards to accessibility, language, calendars, navigation and more. In PeopleSoft Financials, you also have preferences specific to Travel & Expenses and Requisitions. For more details see [My Preferences](#).

Help

When you select Help, a new screen will appear with a list of hyperlinks to PeopleSoft support topics specific to the page that you are on. If you do not have the Help option in the action menu, you can use the Help hyperlink in the top right corner of the page.

NavBar

The NavBar  provides the ability to access navigation in several different ways, including Recent Places, My Favorites, and the Navigator. Additionally, the NavBar has a direct link to the Process Monitor. For details on how to personalize the NavBar see [Personalize NavBar](#).

Recent Places

When you access a page, it is added to the Recent Places list. To access a page from the Recently Used menu, click the page name.

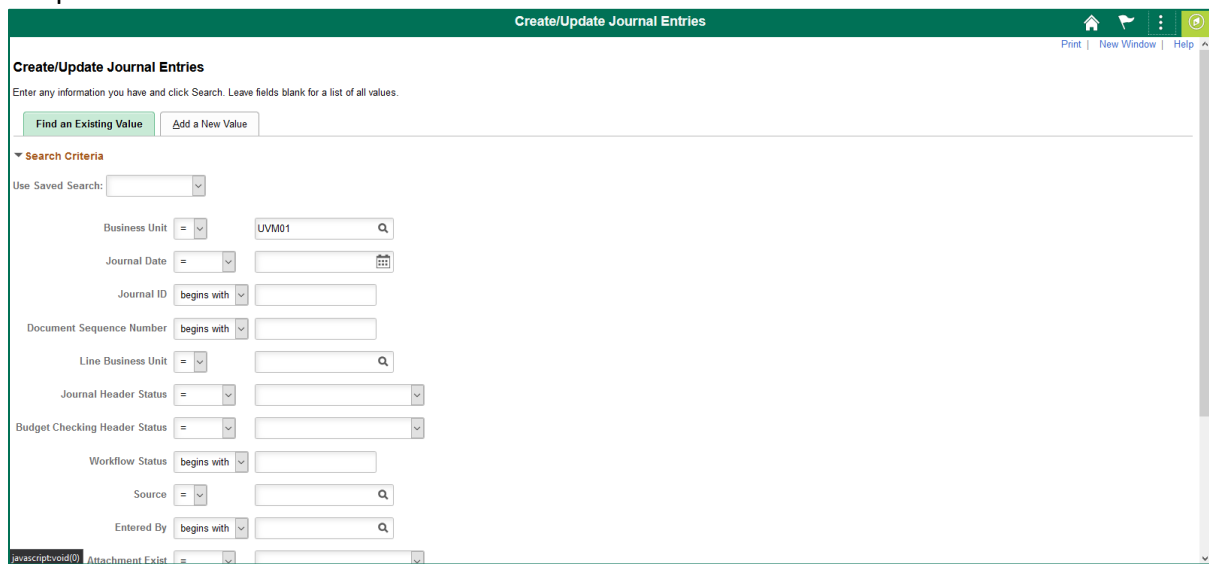



My Favorites

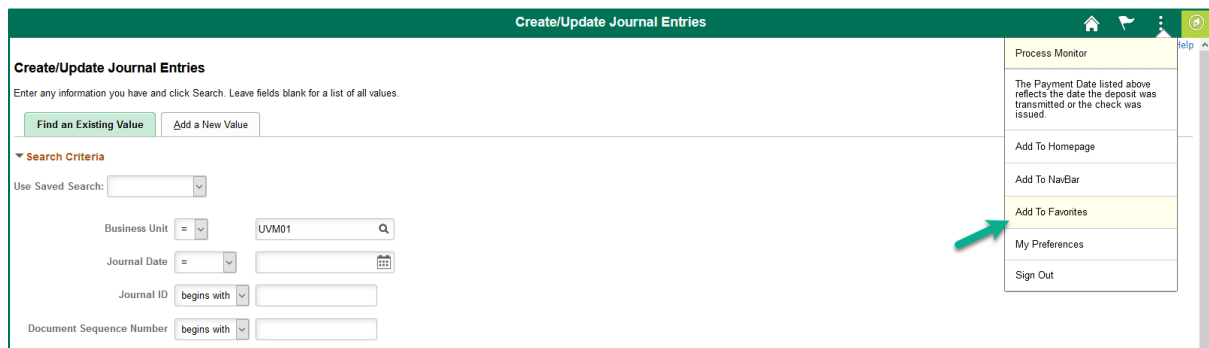
My Favorites is a way to bookmark frequently used pages in PeopleSoft. Your Favorites list is specific to the system you are working in. *Financials Favorites will not be available in the HR system, and vice versa.*

Add to Favorites

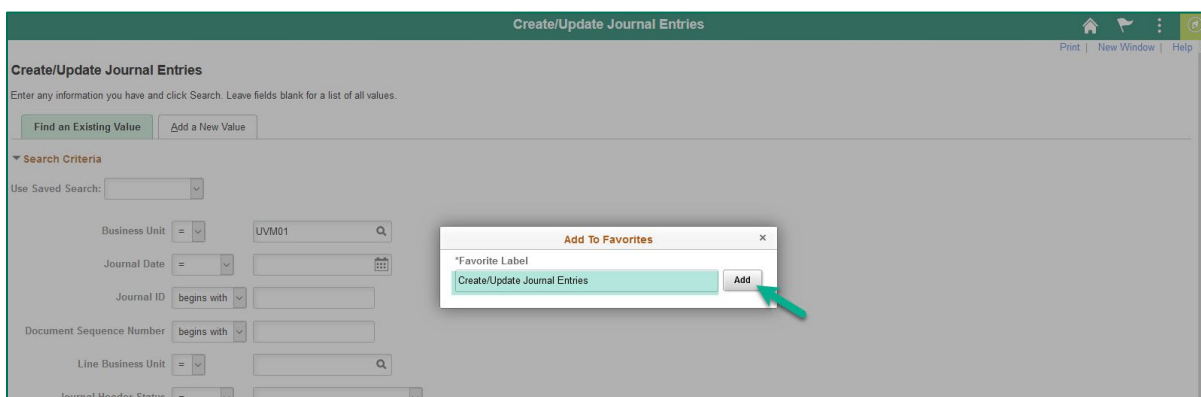
1. Log in to [PeopleSoft](#) using either the **Human Resources** or **Financials Login**.
2. Navigate to the page desired. This example is the **Create/Update Journal Entries** page in PeopleSoft Financials.



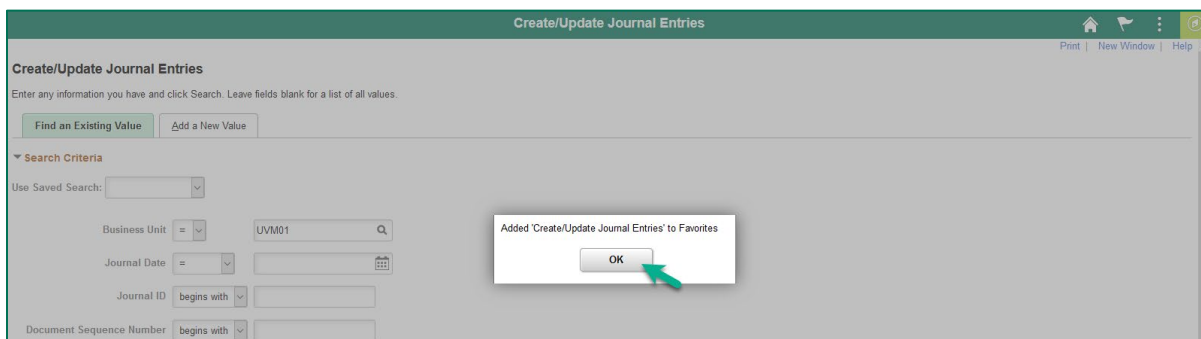
3. Click the **Action Menu**  in the **Status Bar** then **Add to Favorites** at the top right corner of the screen. In the **My Favorites** section, click **Add to Favorites**. Add to Favorites is also located in the top right corner of the screen.



4. You can use the system label for the page or you can choose a label that is more meaningful to you. Then click **Add**.

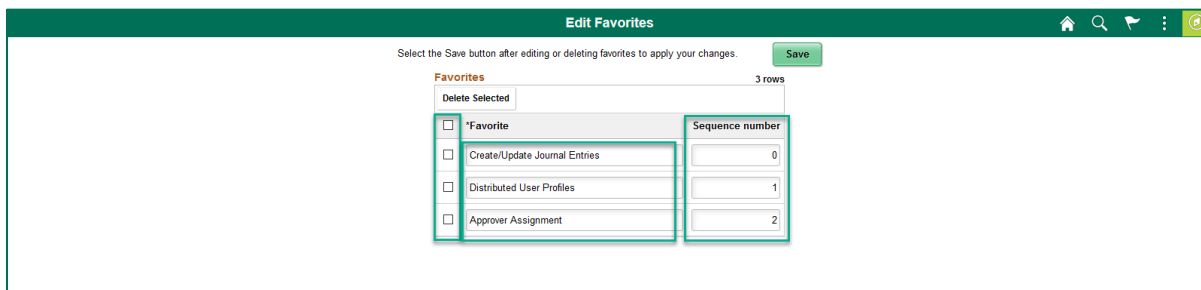


- Click **OK** to confirm adding the page to Favorites.




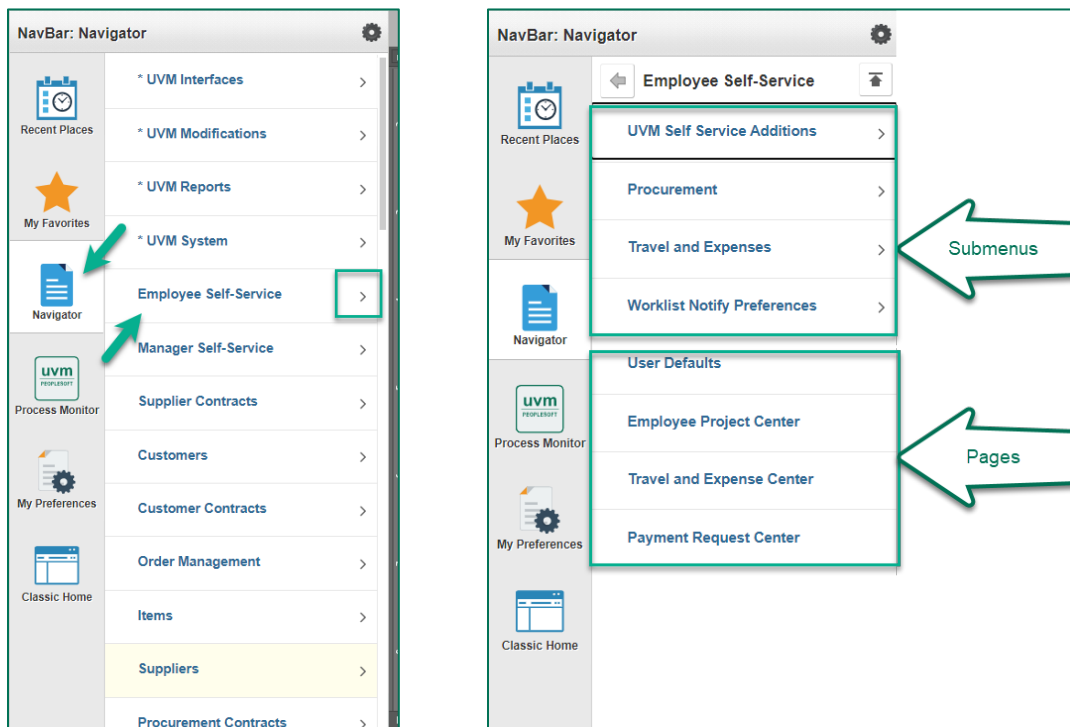
Edit Favorites



- Edit favorites under the **My Favorites** menu at the top. Click **Edit Favorites** to make changes to the saved list of favorites.
- Reorder the list by numbering each item in the **Sequence number** fields.
Rename a favorite by updating the label in the **Favorite** column.
Remove an item by checking the box to the left of the favorite then click **Delete Selected**.
- When done editing favorites, click **Save**.



Navigator

The Navigator is the secondary source of navigation in PeopleSoft. If specific pages are not available in the tile collections or workcenters the navigator can be used to access additional pages. Click on the Navigator to expand the NavBar displaying the additional navigation. Click on a menu to display the list of submenus and/or pages. The **Arrow**  icon indicates if the items is a menu or submenu containing additional navigation.



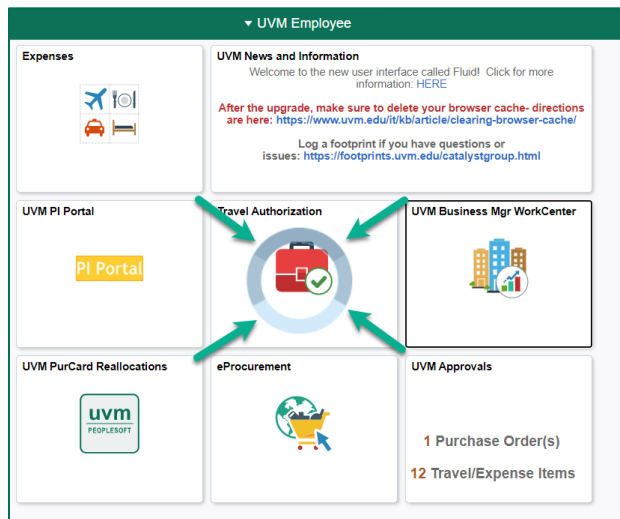
To go back to a previous submenu or menu click the **Back Arrow**  icon in the top left of the Navigator. If you use the mouse to hover over the back arrow it will display what the previous menu is. To return to the root of the Navigator click the **Back to Root**  icon in the top right of the Navigator. The menus, submenus, and pages displayed in the Navigator are based on each individual's security access, which is typically linked to their position.

Tiles

The UVM Employee Homepage is made up of several tiles. Each tile is comprised of different elements. When you click a tile, it could take you to another group of tiles, a list of pages, a workcenter, or directly to a specific page. The tiles displayed on the UVM Employee Homepage are based on each individual's security access, which is typically linked to their position.

Processing Indicator

A spinning graphic indicates that the system is processing information. This will appear on PeopleSoft pages when performing system tasks such as searching, saving, and navigating between pages.





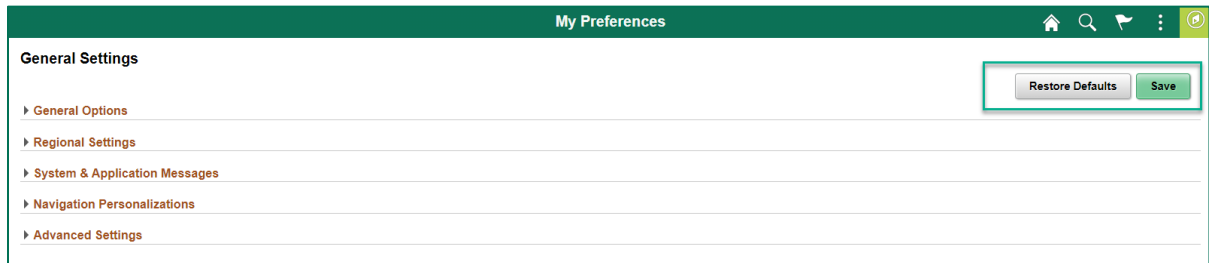
Personalization

The PeopleSoft Fluid User Interface (Fluid) grants individuals the ability to customize many different aspects of PeopleSoft to aid in a more user-friendly and efficient system.

My Preferences

My Preferences allows you to customize certain default settings about how PeopleSoft behaves, such as accessibility, language, calendars, and which elements are included when tabbing through a page.

My Preferences can be accessed via the **Action Menu**  on the UVM Employee HomePage, or via the **NavBar**  in PeopleSoft Financials only. In addition to General Settings, PeopleSoft Financials includes options for Expenses (Travel & Expense) and Procurement (Requisitions). After you have made any changes to My Preferences you will need to click **Save** to retain your settings. If you want to reset any changes you have made you can click **Restore Defaults**.



My Preferences

General Settings

Restore Defaults Save

General Options

Regional Settings

System & Application Messages

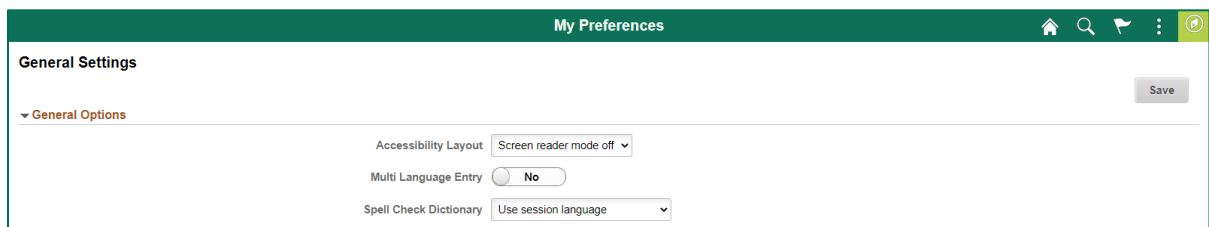
Navigation Personalizations

Advanced Settings

General Settings

General Options

General options includes accessibility and language settings



My Preferences

General Settings

Save

General Options

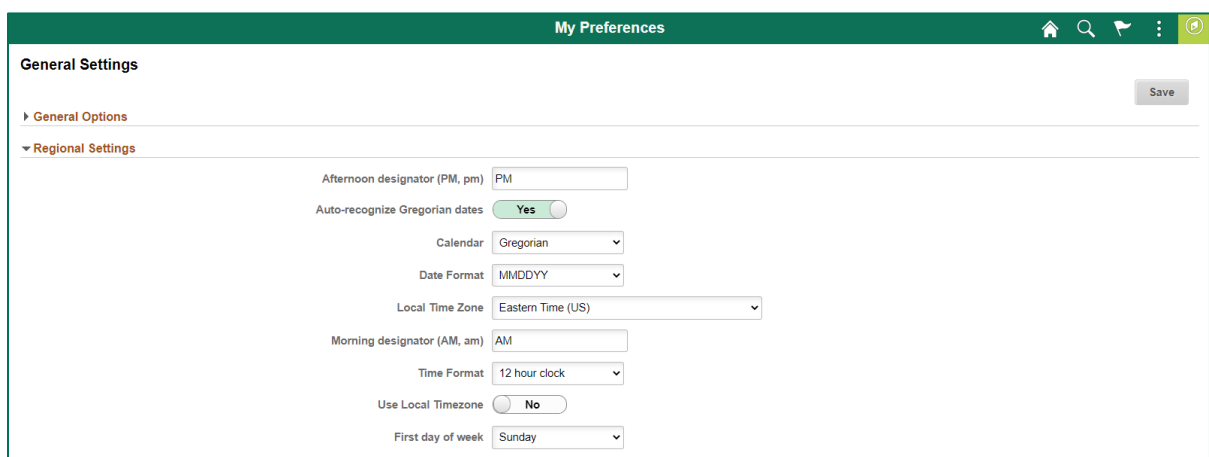
Accessibility Layout Screen reader mode off

Multi Language Entry No

Spell Check Dictionary Use session language

Regional Settings

Regional settings include calendar and date formatting.



My Preferences

General Settings

Save

General Options

Regional Settings

Afternoon designator (PM, pm) PM

Auto-recognize Gregorian dates Yes

Calendar Gregorian

Date Format MMDDYY

Local Time Zone Eastern Time (US)

Morning designator (AM, am) AM

Time Format 12 hour clock

Use Local Timezone No

First day of week Sunday

System & Application Messages

System & application messages give you the option to turn on or off the save warning.



My Preferences

General Settings

Restore Defaults Save

General Options

Regional Settings

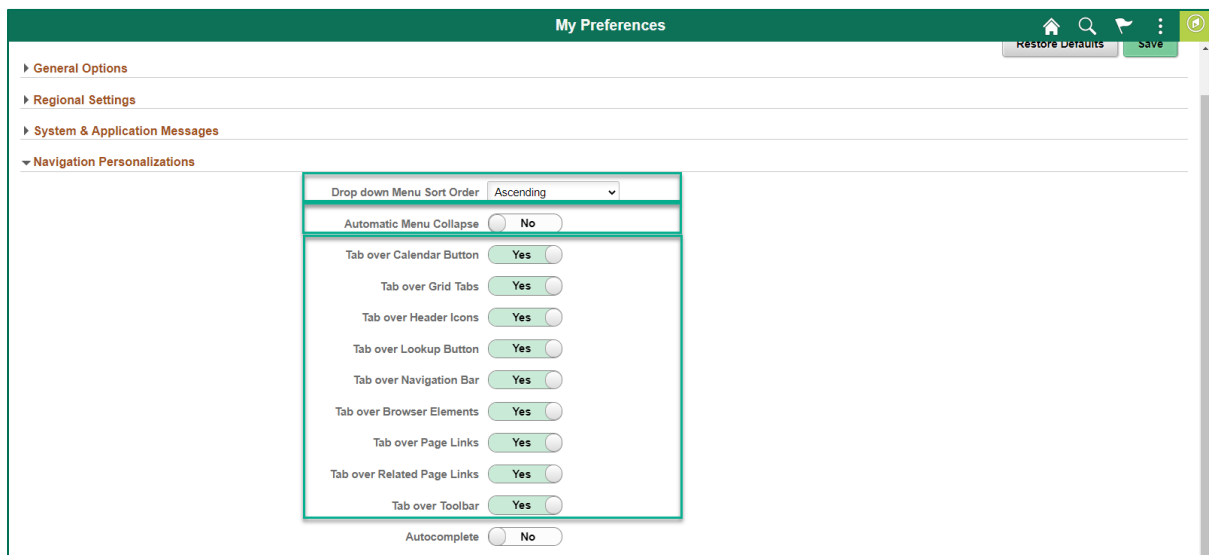
System & Application Messages

Save Warning Yes

Navigation Personalizations

Navigation personalizations allow you to include or exclude elements from tabbing, setting menus to automatically open as collapsed or expanded, and set the drop-down menu sort order to ascending (A to Z) or descending (Z to A) to avoid having to sort the Main Menu with each use.

Additionally, you enable/disable the autocomplete functionality.



My Preferences

Restore Defaults Save

General Options

Regional Settings

System & Application Messages

Navigation Personalizations

Drop down Menu Sort Order Ascending

Automatic Menu Collapse No

Tab over Calendar Button Yes

Tab over Grid Tabs Yes

Tab over Header Icons Yes

Tab over Lookup Button Yes

Tab over Navigation Bar Yes

Tab over Browser Elements Yes

Tab over Page Links Yes

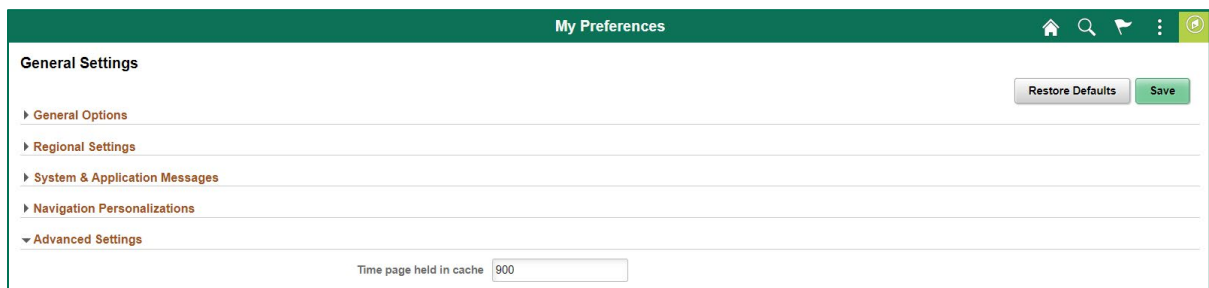
Tab over Related Page Links Yes

Tab over Toolbar Yes

Autocomplete No

Advanced Settings

Advanced settings contain the option for internal cache settings. Adjusting this setting does not affect the need to regularly clear your browser cache.



My Preferences

Restore Defaults Save

General Settings

General Options

Regional Settings

System & Application Messages

Navigation Personalizations

Advanced Settings

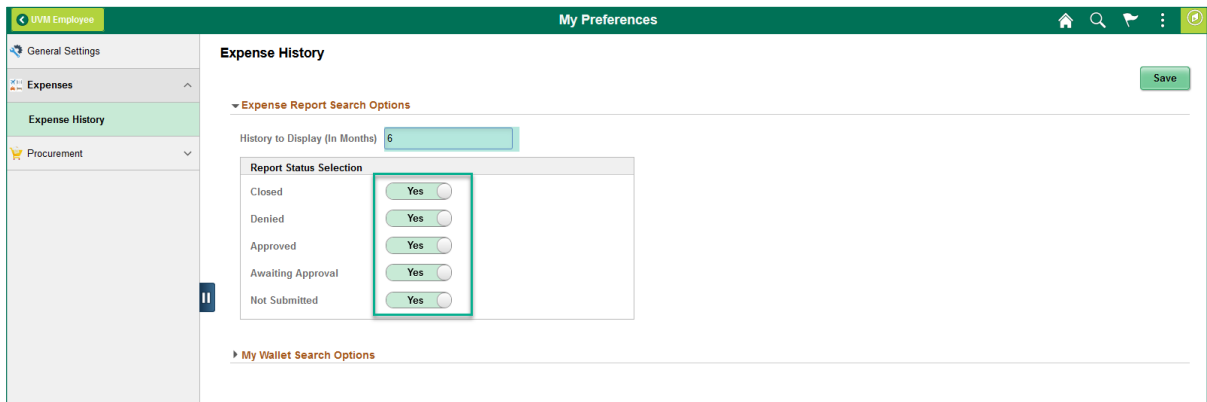
Time page held in cache 900

Expenses (Financials Only)

Expense History

The default setting in PeopleSoft Financials to display all expense reports within the last 6 months. To view older expense reports on the Expense History tile you can change the number of months displayed. Statuses can also be shown or excluded using the toggle next to each status.

Note: UVM currently does not use the My Wallet functionality; therefore, the My Wallet Search Options section can be disregarded.

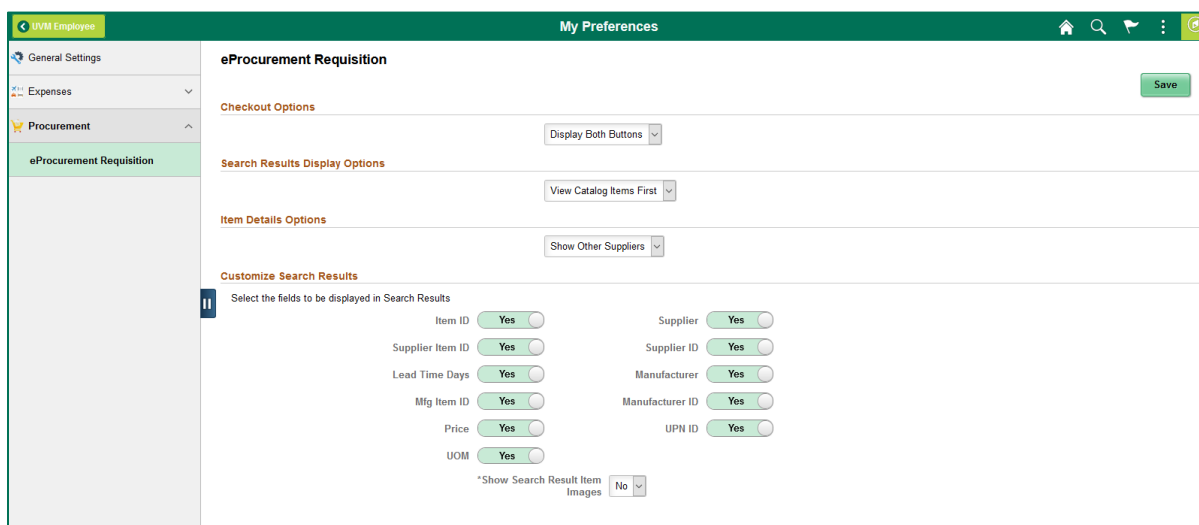


Expense Report Search Options	
History to Display (In Months)	6
Report Status Selection	
Closed	<input checked="" type="checkbox"/> Yes
Denied	<input checked="" type="checkbox"/> Yes
Approved	<input checked="" type="checkbox"/> Yes
Awaiting Approval	<input checked="" type="checkbox"/> Yes
Not Submitted	<input checked="" type="checkbox"/> Yes
My Wallet Search Options	

Procurement (Financials Only)


eProcurement Requisitions

eProcurement requisition personalizations allow you to customize the view and search results on requisition pages.



The screenshot shows the 'My Preferences' window for 'eProcurement Requisition'. The left sidebar has a menu with 'General Settings', 'Expenses', 'Procurement', and 'eProcurement Requisition' (selected). The main area is titled 'eProcurement Requisition' and contains several sections: 'Checkout Options' with a 'Display Both Buttons' dropdown; 'Search Results Display Options' with a 'View Catalog Items First' dropdown; 'Item Details Options' with a 'Show Other Suppliers' dropdown; and 'Customize Search Results' which includes a list of fields to be displayed in search results. Each field has a 'Yes' or 'No' toggle switch. The fields are: Item ID, Supplier, Supplier Item ID, Supplier ID, Lead Time Days, Manufacturer, Mfg Item ID, Manufacturer ID, Price, UPH ID, and UOM. All are currently set to 'Yes'. There is also a '*Show Search Result Item Images' dropdown set to 'No'. A 'Save' button is in the top right corner.

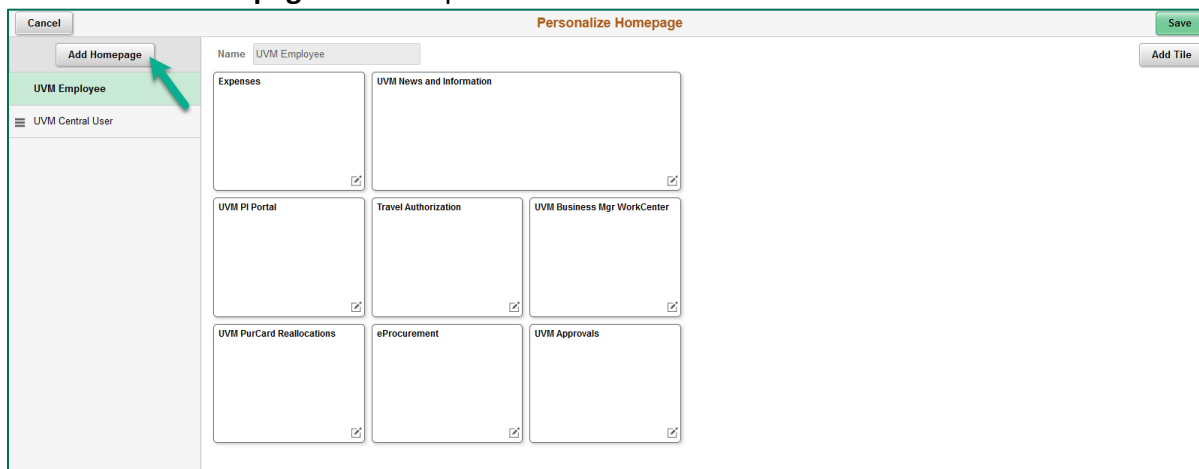
Personalize Homepage

Personalize Homepage is accessible via the **Action Menu**  on the UVM Employee Homepage. On the Personalize Homepage screen, you have the option to add or delete homepages as well as add, delete, move, and copy tiles to homepages. If you have multiple homepages, you can also change your preferred homepage by moving it to the top of the list of homepages.

Note: Tiles and homepages that are delivered cannot be deleted.

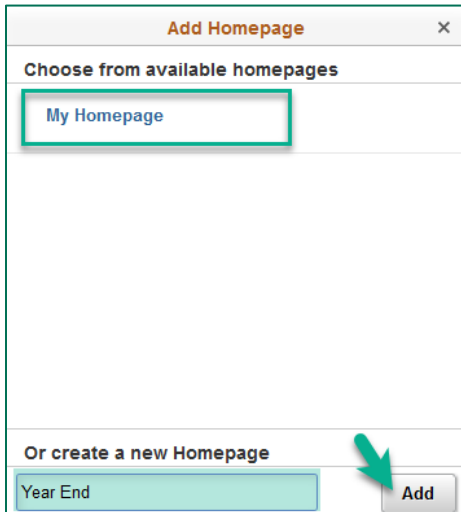
Add Homepage

1. Click on **Add Homepage** on the top left of the screen.



The screenshot shows the 'Personalize Homepage' window. The top bar has 'Cancel', 'Personalize Homepage', and 'Save' buttons. The left sidebar has a menu with 'Add Homepage' (highlighted with a green arrow), 'UVM Employee', and 'UVM Central User'. The main area shows a grid of available homepage tiles. The 'Name' field is set to 'UVM Employee'. The tiles are: 'Expenses', 'UVM News and Information', 'UVM PI Portal', 'Travel Authorization', 'UVM Business Mgr WorkCenter', 'UVM PurCard Reallocations', 'eProcurement', and 'UVM Approvals'. Each tile has a small 'Add' icon in the bottom right corner. An 'Add Title' button is in the top right corner.

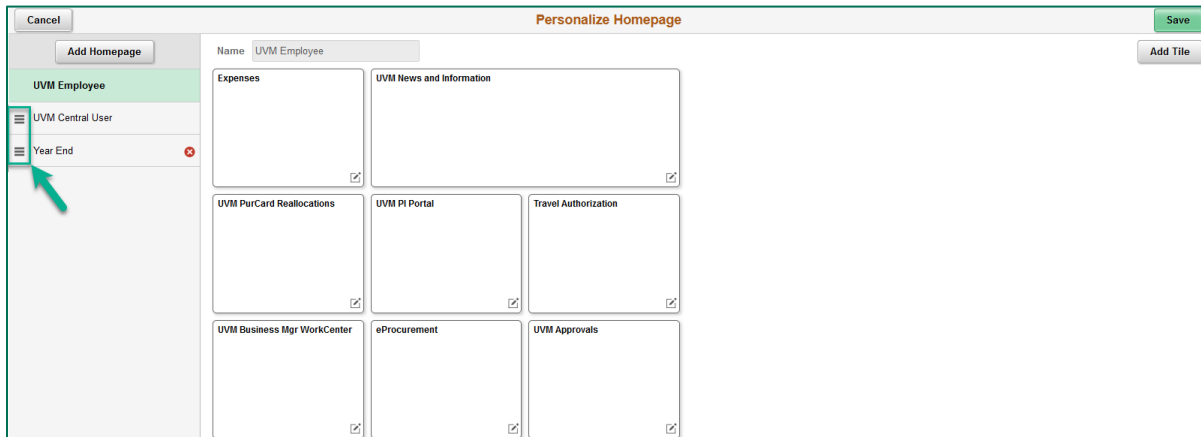
2. Choose from the available homepages or create a new homepage by entering the name in the space provided. Click **Add**.



3. The new blank homepage will appear. You can now add new tiles, copy or move existing tiles from other homepages.
4. Click Save to save your changes and return to your homepage or Cancel to cancel your changes and return to your homepage.

Reorder Homepages

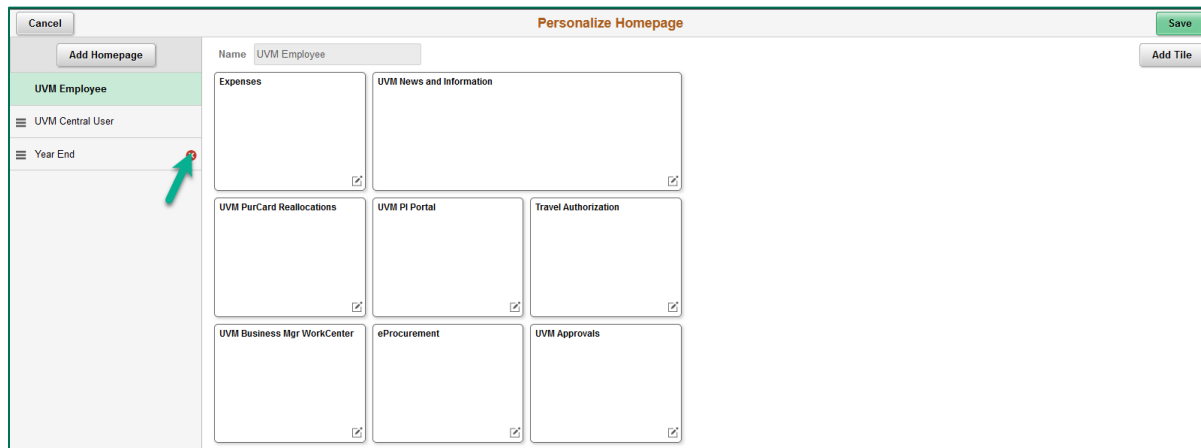
You can reorder your homepages by clicking the three bars next to the homepage name and dragging them to the order you choose. The homepage that is at the top of the list will be the primary homepage when you click your Home button on the status bar.



Deleting Homepages

To delete a homepage click the red X next to the homepage in the left menu. If you are viewing the details of a homepage you will not be able to delete it until you click on a different homepage.

Note: You cannot delete a delivered homepage such as the UVM Employee homepage.



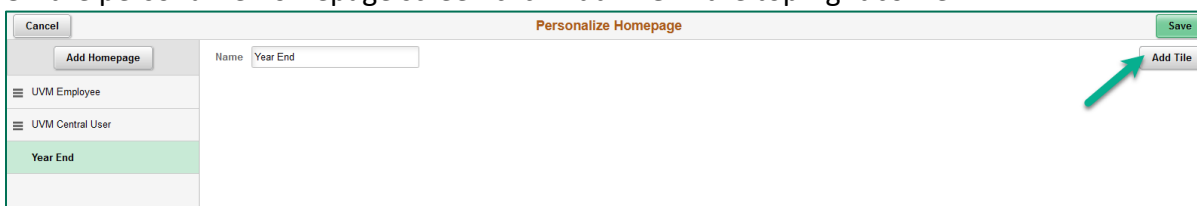
Add Tiles

Tiles can be added via the personalize homepage screen or via the action menu.


Adding Tiles via Personalize Homepage

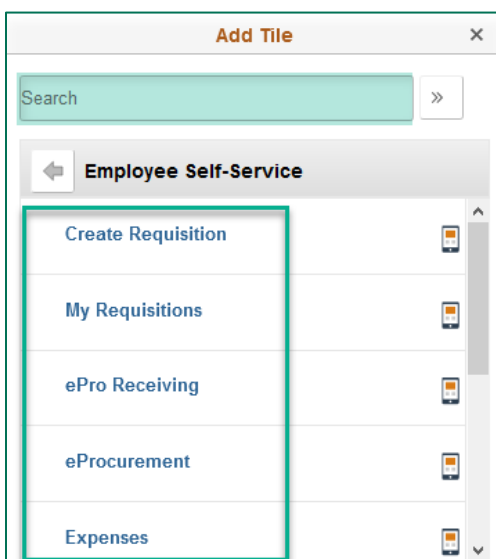
Adding tiles via the personalize homepage option will only allow you to add tiles that are delivered by PeopleSoft. If you would like to add a tile for a specific page and cannot find it in this option, see [Adding Tiles via Navigation](#).

1. On the personalize homepage screen click **Add Tile** in the top right corner.

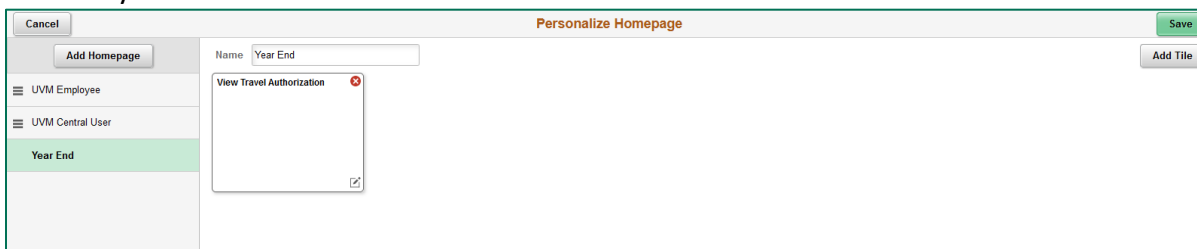


2. Use the search box to search for tile options or click through the menu options to find a tile you want to add to the homepage.

Note: Tile that has the small form factor icon  indicates that the tile is mobile capable.



3. Click on the tile name to add it to the homepage. Your homepage will be displayed with the newly added tile.

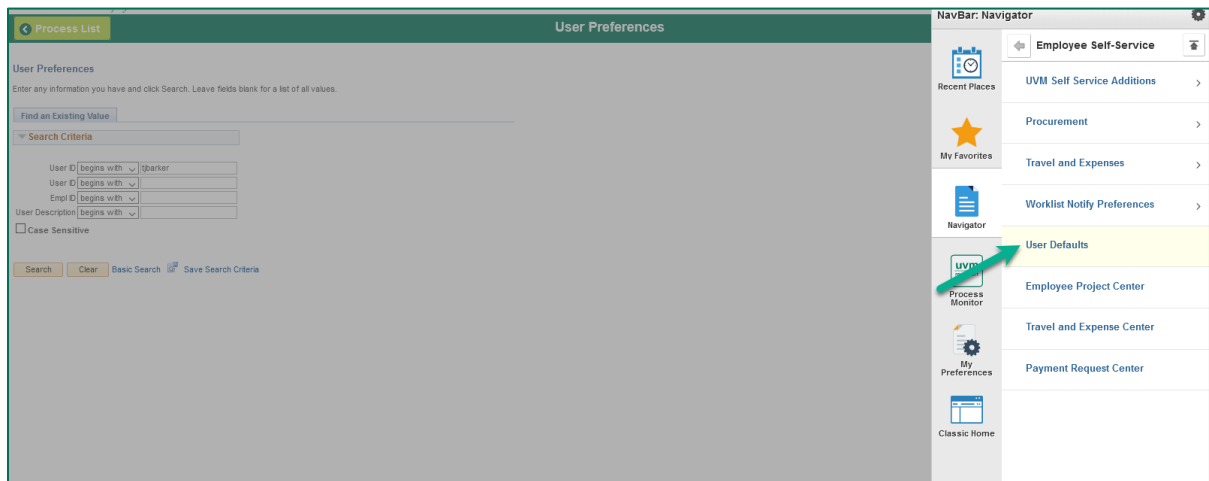


4. Repeat Steps 1-3 or click Save to save your changes and return to your homepage or Cancel to cancel your changes and return to your homepage.

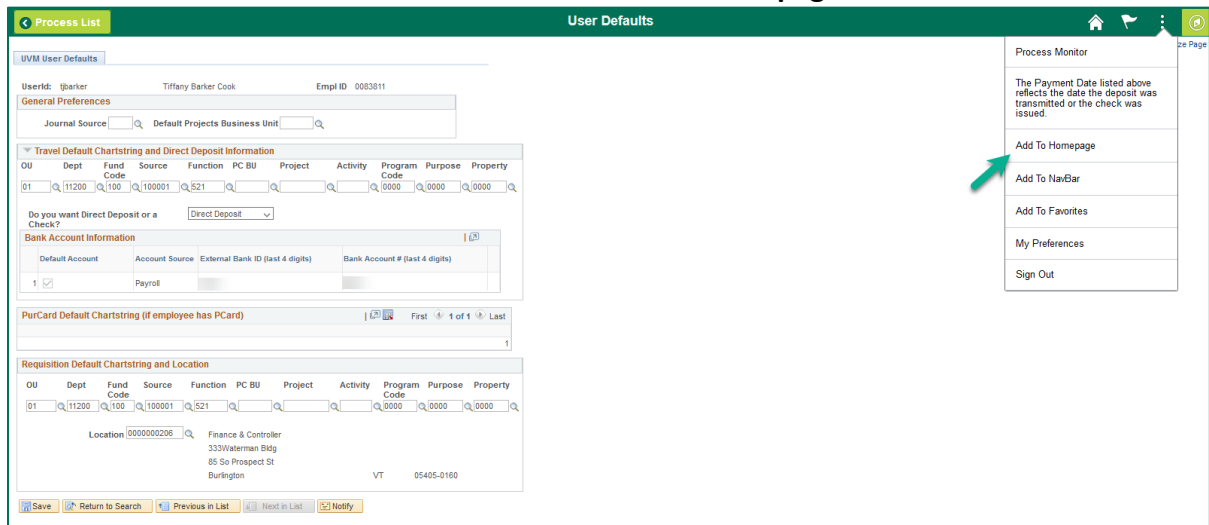
Adding Tiles via Navigation

Adding tiles via navigation allows you to add any page in PeopleSoft as a tile on a homepage.

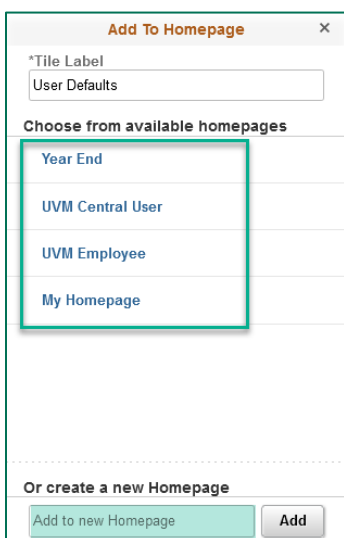
1. Use the **Navigator** to access the page you want to add.



2. In the **Action Menu** on the **Status Bar** choose **Add to Homepage**.



3. Choose which homepage you want to add the page to from the list of available homepages or create a new homepage by entering the name in the box provided and clicking add.



Add To Homepage X

*Tile Label
User Defaults

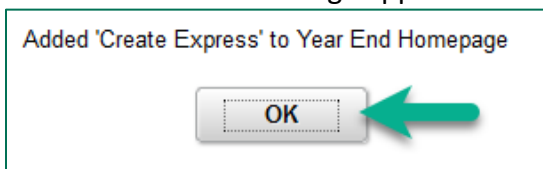
Choose from available homepages

- Year End
- UVM Central User
- UVM Employee
- My Homepage

Or create a new Homepage

Add to new Homepage Add

- Click OK when the message appears confirming your changes.





Added 'Create Express' to Year End Homepage

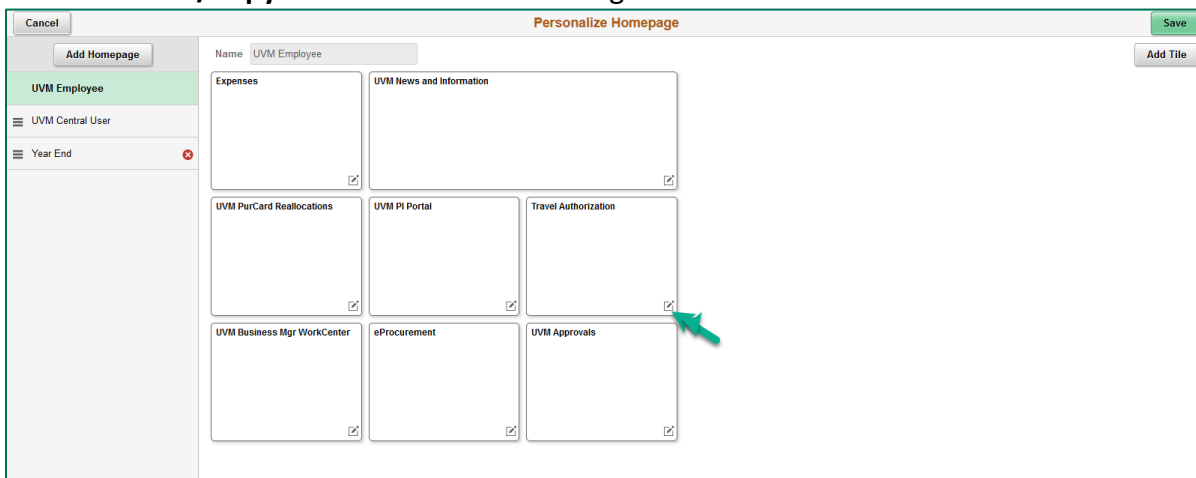
OK

- To view your changes return to your homepage.

Move or Copy Tiles

To move or copy tiles to another homepage use the Personalize Homepage option from the Action Menu .

- Choose the homepage that contains the tile you want to copy or move from the menu.
- Click the **Move/Copy**  icon at the bottom right of the tile.



Personalize Homepage Save Add Tile

Cancel Add Homepage

Name: UVM Employee

UVM Employee

- UVM Central User
- Year End

Expenses UVM News and Information

UVM PurCard Reallocations UVM PI Portal Travel Authorization

UVM Business Mgr WorkCenter eProcurement UVM Approvals

- Select an action

Select Action	
Move To	>
Copy To	>

- Chose the homepage that you want to move/copy the tile too.

Copy To	
←	↕
Year End	
UVM Central User	

- Repeat **Steps 1-4** or click **Save** to save your changes and return to your homepage or **Cancel** to cancel your changes and return to your homepage.

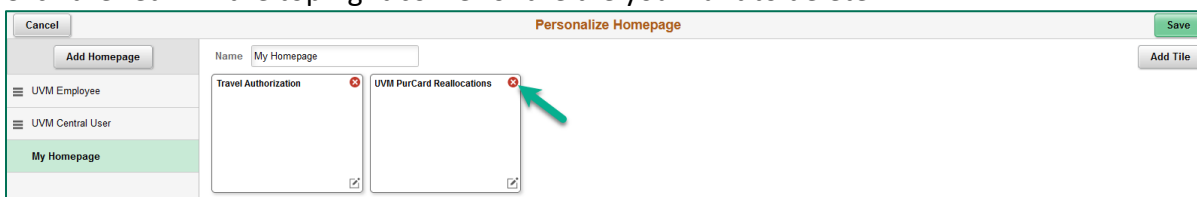
Delete Tiles

To delete tiles from a homepage use the Personalize Homepage option from the Action Menu



Note: You cannot delete system delivered tiles from the delivered homepage such as the UVM Employee homepage.

- Choose the homepage that contains the tile you want to delete from the menu.
- Click the red X in the top right corner of the tile you want to delete.



- Repeat **Steps 1-4** or click **Save** to save your changes and return to your homepage or **Cancel** to cancel your changes and return to your homepage.

Personalize NavBar

The NavBar can be personalized by adding, removing, and reordering tiles.

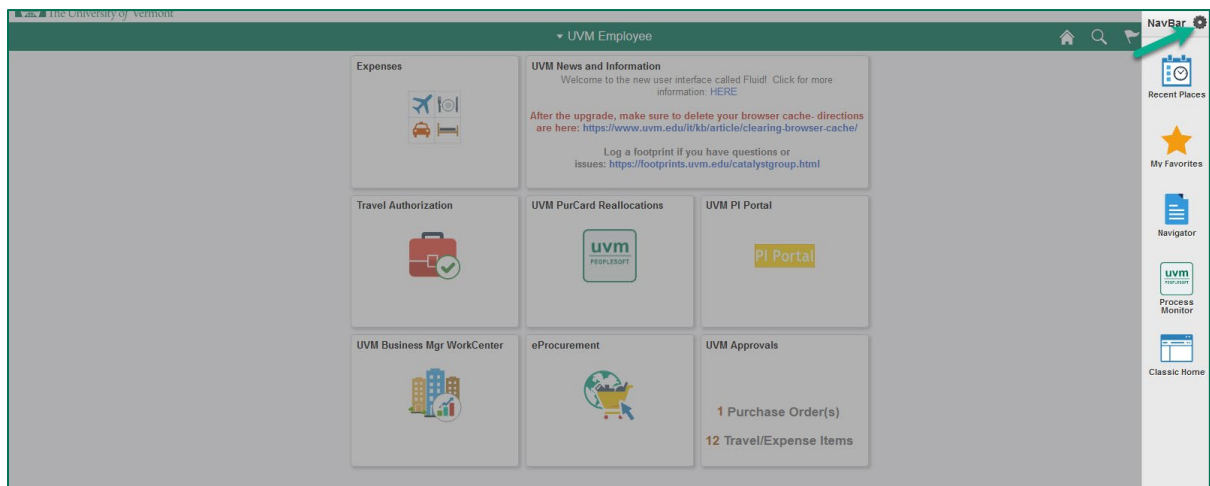
Add Tiles to NavBar

Tiles can be added via the personalize NavBar screen or via the action menu.

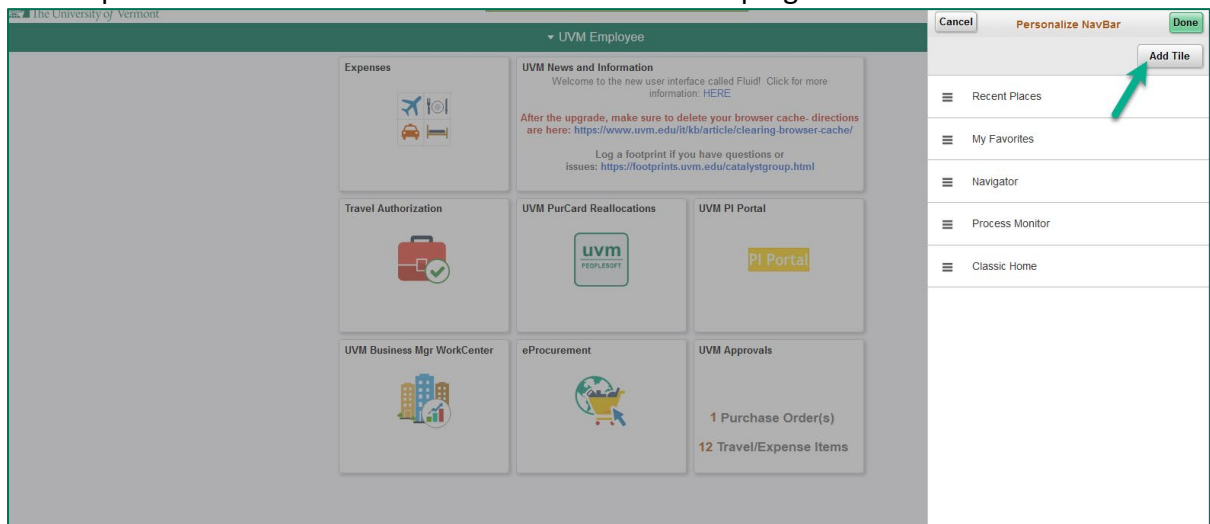
Adding Tiles via Personalize NavBar

Adding tiles via the personalize NavBar option will only allow you to add tiles that are delivered by PeopleSoft. If you would like to add a tile for a specific page and cannot find it in this option, see [Adding Tiles to NavBar via Navigation](#).

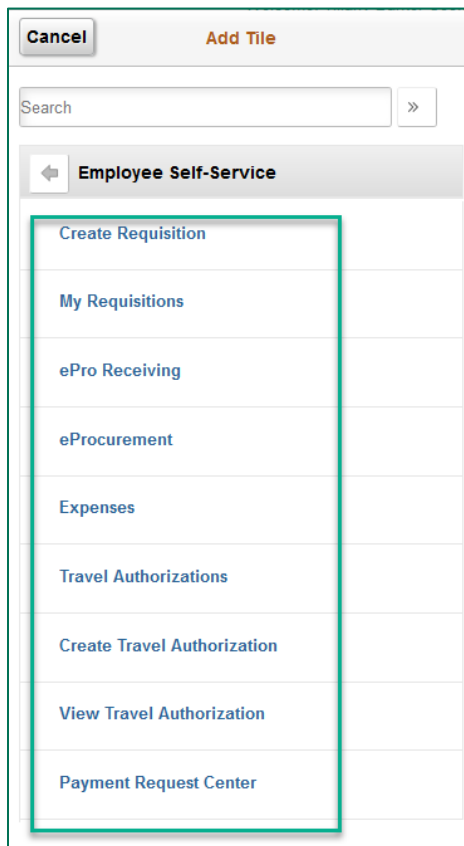
1. Click on the **Personalize**  icon in the NavBar.



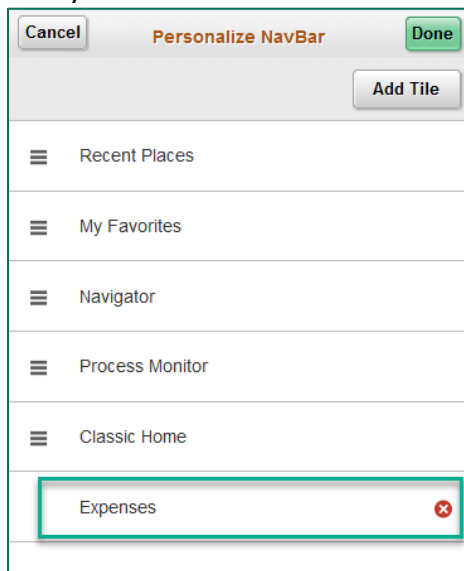
2. On the personalize NavBar screen click **Add Tile** in the top right corner.



3. Use the search box to search for tile options or click through the menu options to find a tile you want to add to the NavBar.



4. Click on the tile name to add it to the NavBar. Your NavBar will be displayed with the newly added tile.

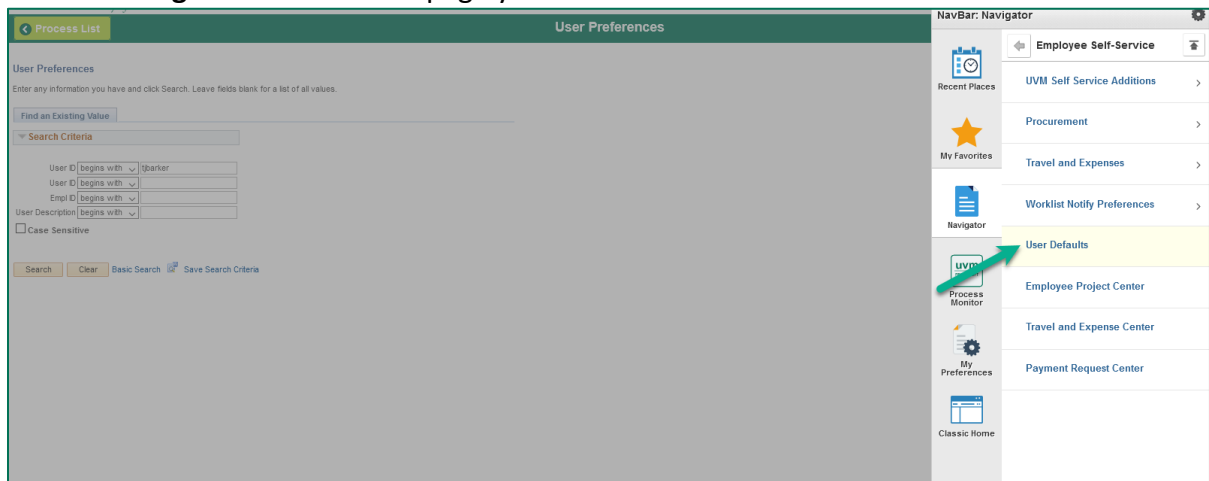


5. Repeat **Steps 1-4** or click **Done** to save your changes and return to your homepage or **Cancel** to cancel your changes and return to your homepage.

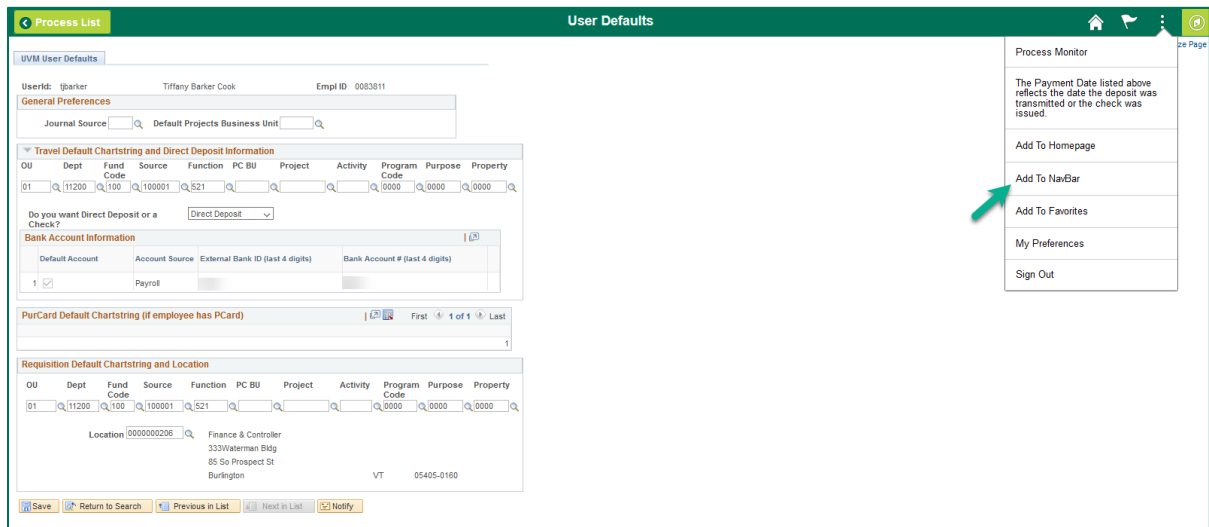
Adding Tiles to NavBar via Navigation

Adding tiles via navigation allows you to add any page in PeopleSoft as a tile on a NavBar.

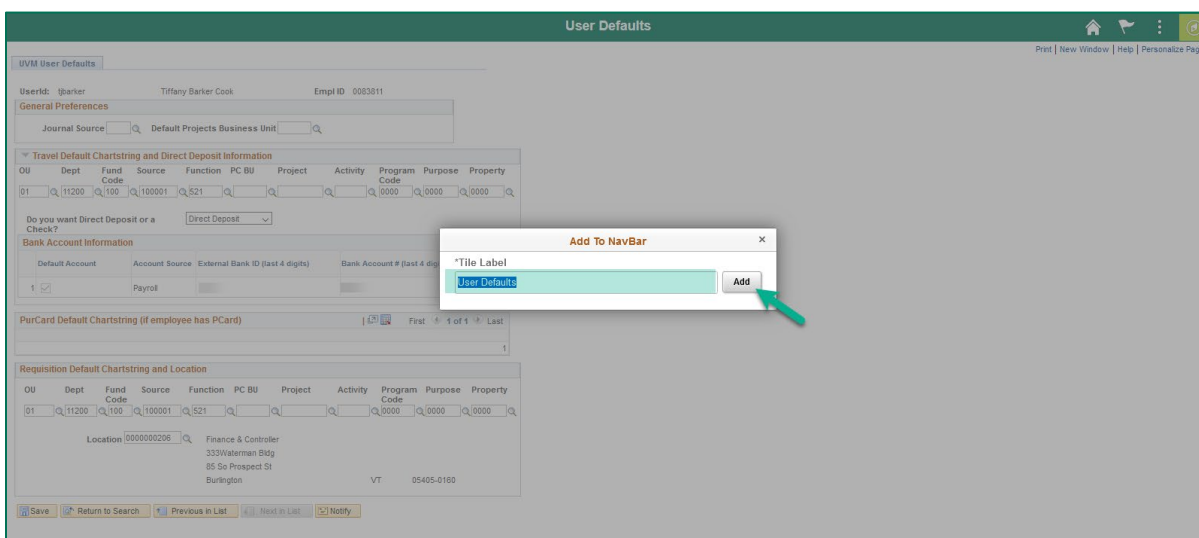
1. Use the **Navigator** to access the page you want to add.



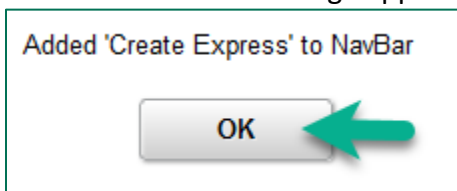
2. In the **Action Menu** on the **Status Bar** choose **Add to NavBar**.



3. You can use the page label or create your own label for the tile to be displayed on the NavBar. Click **Add**.





- Click OK when the message appears confirming your changes.

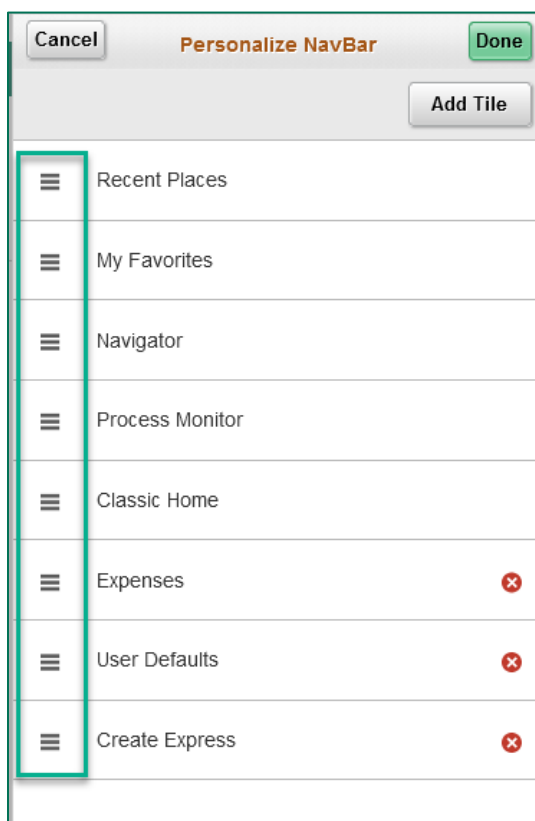


- To view your changes return to the NavBar.

Move Tiles in NavBar

To move tiles within the NavBar use the **Personalize**  icon on the NavBar.

- Click and hold the **Reorder**  icon next to the name of the tile you want to move and drag the tile to the desired position.



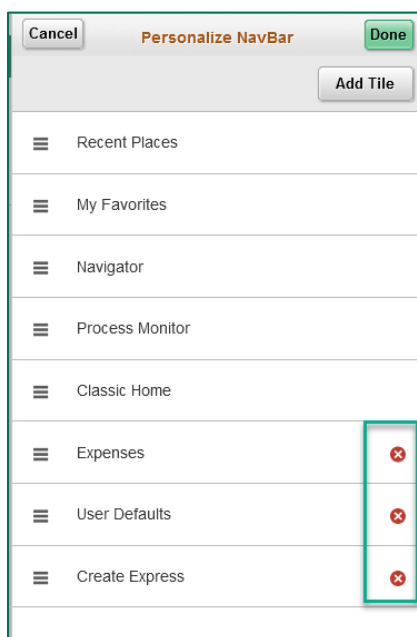
6. Repeat **Steps 1** or click **Done** to save your changes and return to your NavBar or **Cancel** to cancel your changes and return to your NavBar.

Delete Tiles from NavBar

To delete tiles from NavBar use the **Personalize**  icon on the NavBar.

Note: You cannot delete system delivered tiles such as Recent Places or Favorites.


1. Click the red X to the right of the tile you want to delete.

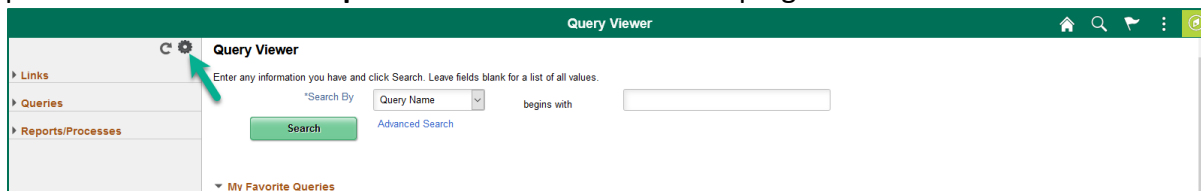


2. Repeat **Step 1** or click **Done** to save your changes and return to your NavBar or **Cancel** to cancel your changes and return to your NavBar.

Personalize WorkCenter

WorkCenters can be personalized to open grouplet and groups as collapsed or expanded, reorder groups or pages within a group as well as adding groups and pages.

1. To access the personalize workcenter options open the workcenter you want to personalize then click the **personalize**  icon at the top right of the workcenter.



2. A new window will open with personalization options. Click on the appropriate tab at the top of the screen to choose the grouplet you want to personalize.

Cancel Personalize Done

Links Queries Reports/Processes

☒ Start Links Grouplet Collapsed Add Group Reorder Group

Group Label **Tools**

☒ Start Group Collapsed 7 rows

Reorder	Link Label	Link Type	Show Link	Open in New Window	Starting Page
≡	Query Viewer	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Report Manager	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Accounting Tags	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Delete Run Control IDs	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	My Preferences	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	User Defaults	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Label **External Links**

☒ Start Group Collapsed 8 rows

3. To adjust what grouplets and groups start collapsed check the box before the label. Uncheck the box to start the grouplet or group expanded.

Cancel Personalize Done

Links Queries Reports/Processes

☒ Start Links Grouplet Collapsed Add Group Reorder Group

Group Label **Tools**

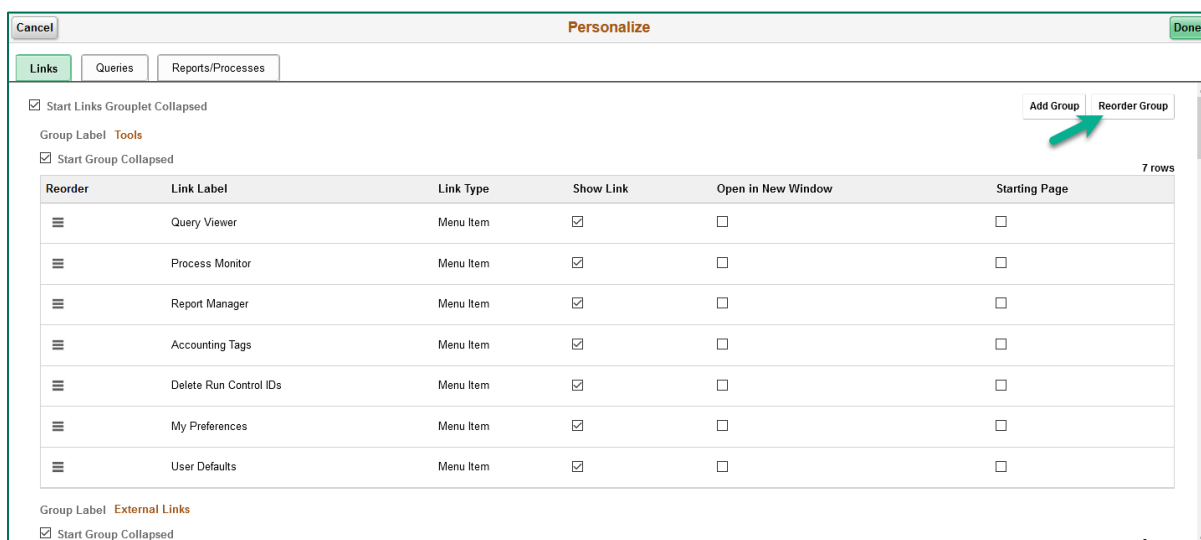
☒ Start Group Collapsed 7 rows

Reorder	Link Label	Link Type	Show Link	Open in New Window	Starting Page
≡	Query Viewer	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Report Manager	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Accounting Tags	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Delete Run Control IDs	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	My Preferences	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	User Defaults	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Label **External Links**

☒ Start Group Collapsed 8 rows

4. To reorder the groups click the **Reorder Group** button in the top right of the screen.



Cancel Personalize Done

Links Queries Reports/Processes

☒ Start Links Grouplet Collapsed

Group Label **Tools**

☒ Start Group Collapsed


7 rows

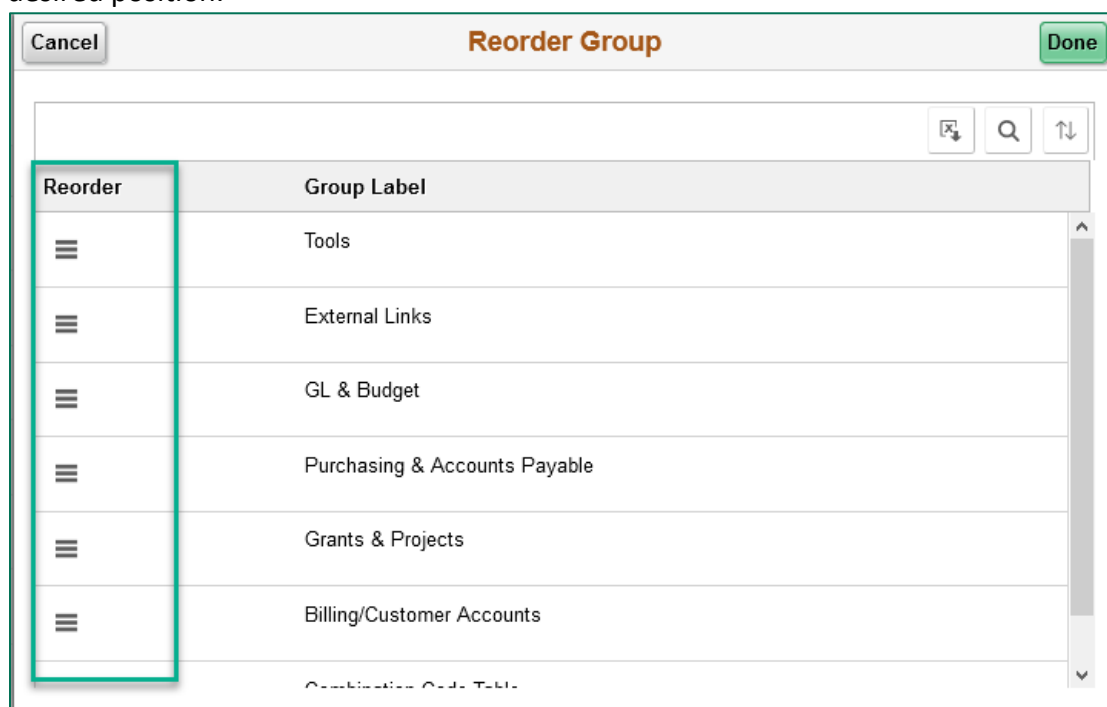
Reorder	Link Label	Link Type	Show Link	Open in New Window	Starting Page
≡	Query Viewer	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Report Manager	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Accounting Tags	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Delete Run Control IDs	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	My Preferences	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	User Defaults	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Label **External Links**

☒ Start Group Collapsed

8 rows


- a. A new screen will appear with a list of groups. Click and hold the **Reorder**  icon next to the label of the group you want to move and drag the group to the desired position.

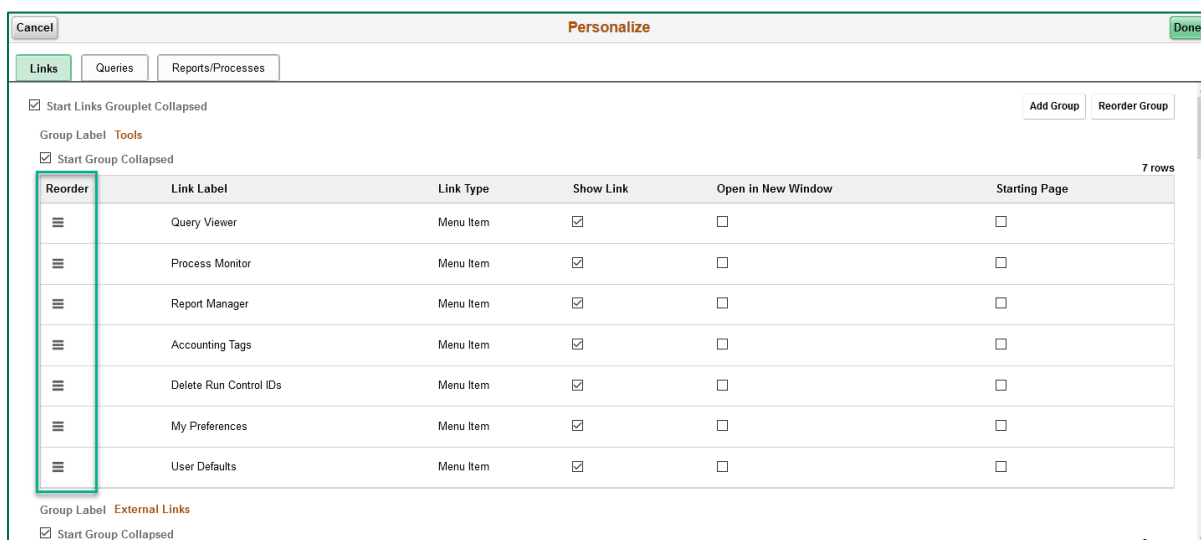


Cancel Reorder Group Done

Reorder Group Label

Reorder	Group Label
≡	Tools
≡	External Links
≡	GL & Budget
≡	Purchasing & Accounts Payable
≡	Grants & Projects
≡	Billing/Customer Accounts

- b. Click **Done** to save your changes and return to the personalize screen or **Cancel** to cancel your changes and return to the personalize screen
5. To reorder links or queries within a group click and hold the **Reorder**  icon next to the label of the page or query you want to move and drag it to the desired position.



Cancel Personalize Done

Links Queries Reports/Processes

☒ Start Links Grouplet Collapsed Add Group Reorder Group

Group Label **Tools**

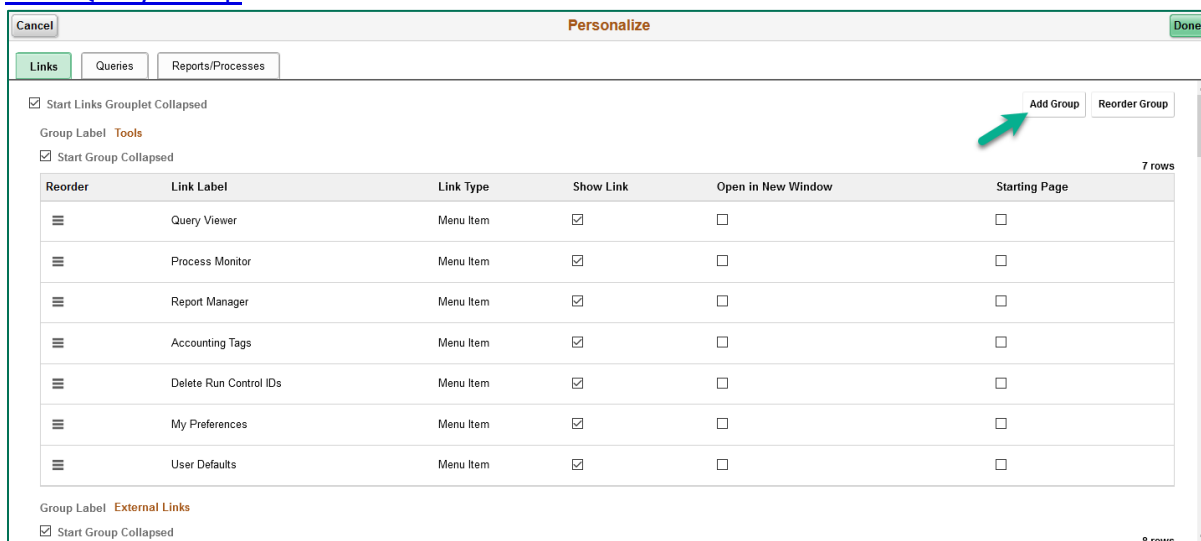
☒ Start Group Collapsed 7 rows

Reorder	Link Label	Link Type	Show Link	Open in New Window	Starting Page
≡	Query Viewer	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Report Manager	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Accounting Tags	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Delete Run Control IDs	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	My Preferences	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	User Defaults	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Label **External Links**

☒ Start Group Collapsed 8 rows

6. To add a group click the **Add Group** button in the top right of the page. Setting up a new group in Links & Reports/Processes is different from the set up for Queries. To set up a new group in Links and Reports/ Processes see the sections on [Adding a New Link or Report/Process Group](#). To set up a new group in Queries see the section on [Adding a New Query Group](#).



Cancel Personalize Done

Links Queries Reports/Processes

☒ Start Links Grouplet Collapsed Add Group Reorder Group

Group Label **Tools**

☒ Start Group Collapsed 7 rows

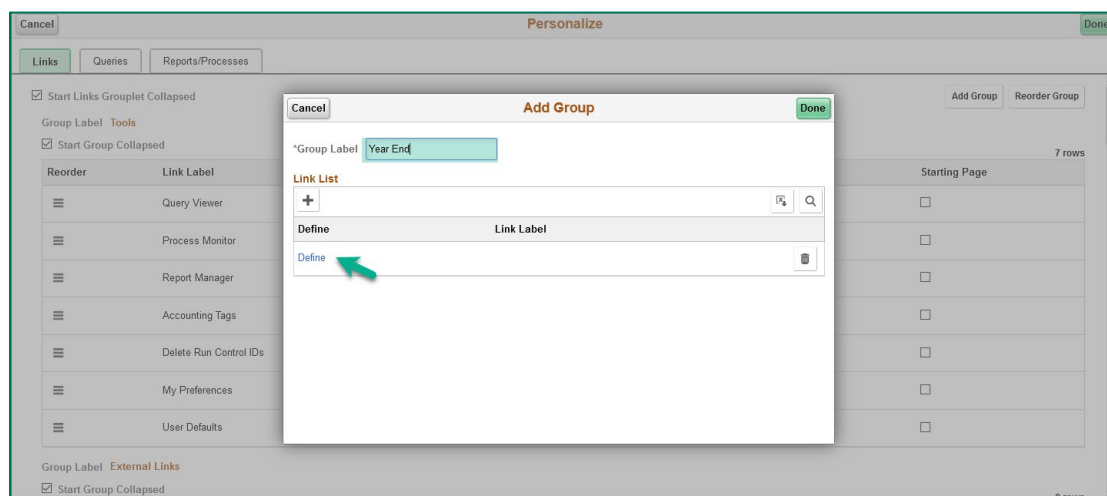
Reorder	Link Label	Link Type	Show Link	Open in New Window	Starting Page
≡	Query Viewer	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Report Manager	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Accounting Tags	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Delete Run Control IDs	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	My Preferences	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	User Defaults	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Label **External Links**

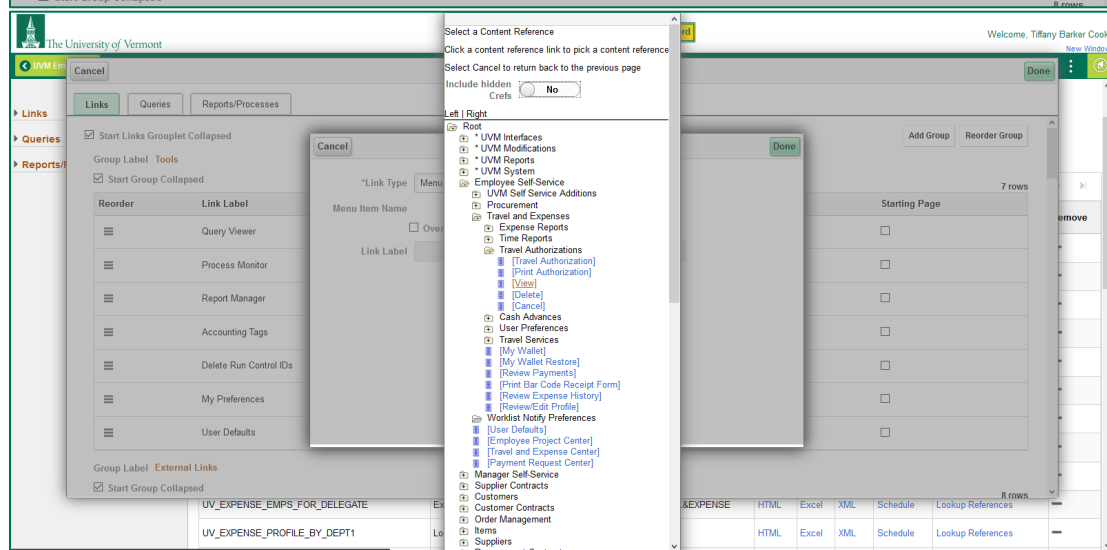
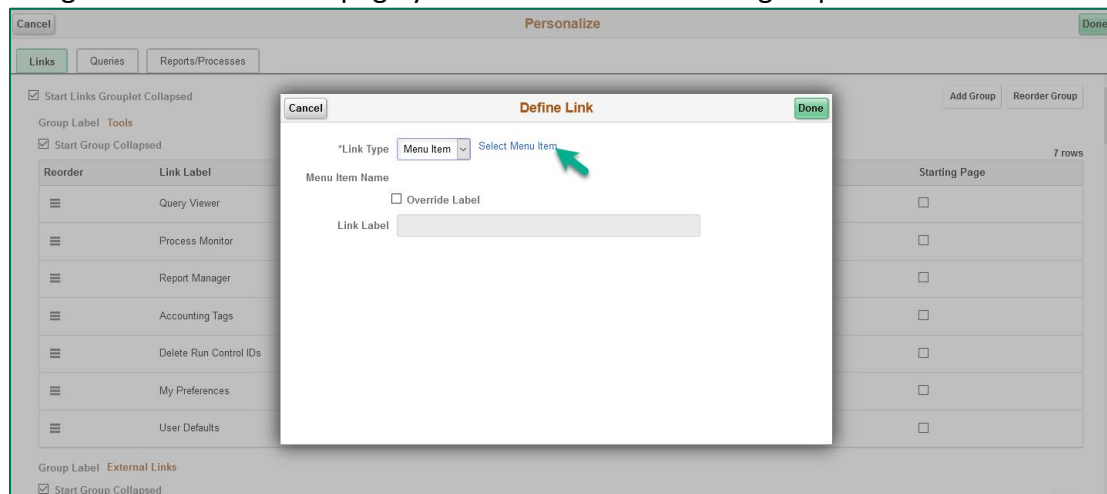
☒ Start Group Collapsed 8 rows

Adding New Link or Report/Process Group

- a. A new window will open; enter a description for the group in the **Group Label** box. Then click the **Define** hyperlink to specify the link/report within the group.

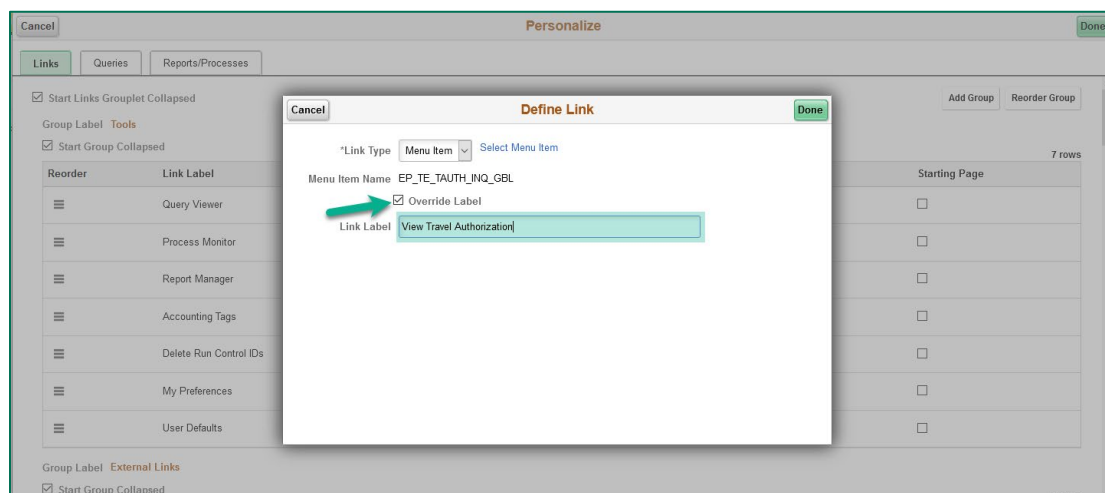



- b. On the **Define Link** page, click the **Select Menu Item** hyperlink to access the navigation and select the page you want to include in the group.






- c. You can choose to use the system delivered label for the page or change the label by checking the **Override Label** box and entering a label that is more relevant to you.

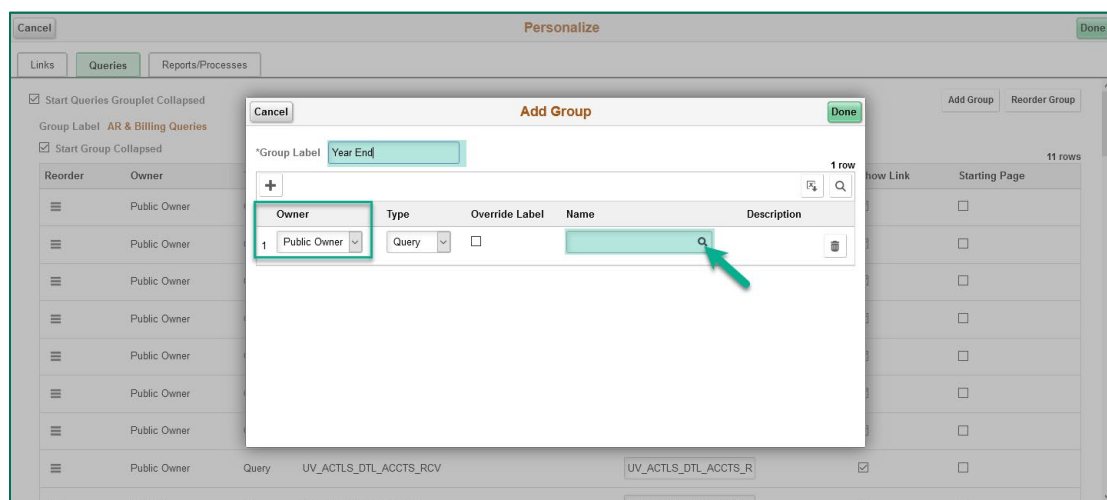



- d. Click **Done** to save your changes and return to the add group screen or **Cancel** to cancel your changes and return to the add group screen.
- e. To add additional pages click the **Add**  button and repeat **Steps a - d**. When you have finished adding links/reports to the group click **Done** to save your changes and return to the personalize screen or **Cancel** to cancel your changes and return to the personalize screen

Adding a New Query Group

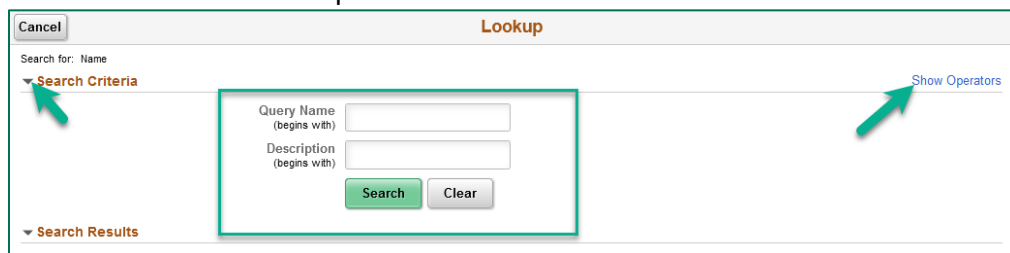
- a. A new window will open; enter a description for the group in the **Group Label** box. Then enter the query name in the **Name** box or use the **Lookup**  icon to search for a query.

Note: If you have a private query you want to add you will need to change the **Owner** to **Private Owner**.

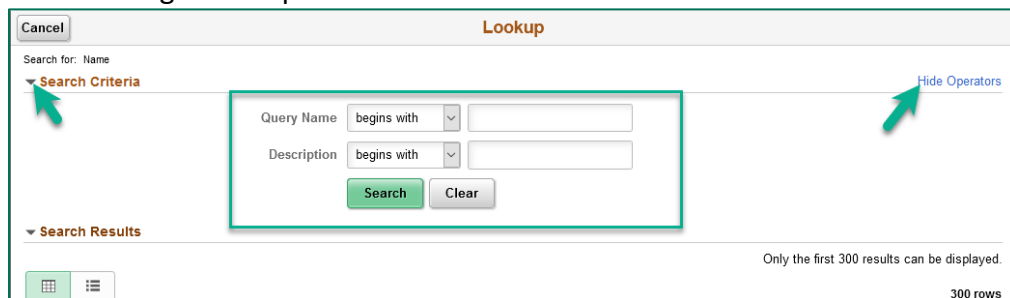


- b. If using the lookup feature a new screen will open. Click the **Arrow**  in front of **Search Criteria** to expand the search criteria. To access additional search criteria options click on the **Show Operators** hyperlink.

- a. Prior to selection Show Operators



- b. After clicking Show Operators.



- c. Enter criteria in the search fields then click **Search**. When the search results appear click on the query you want to add to your group.

Cancel

Lookup

Search for: Name

▼ Search Criteria

Hide Operators

Query Name

begins with

Description

contains

Expense%Detail

Search


Clear

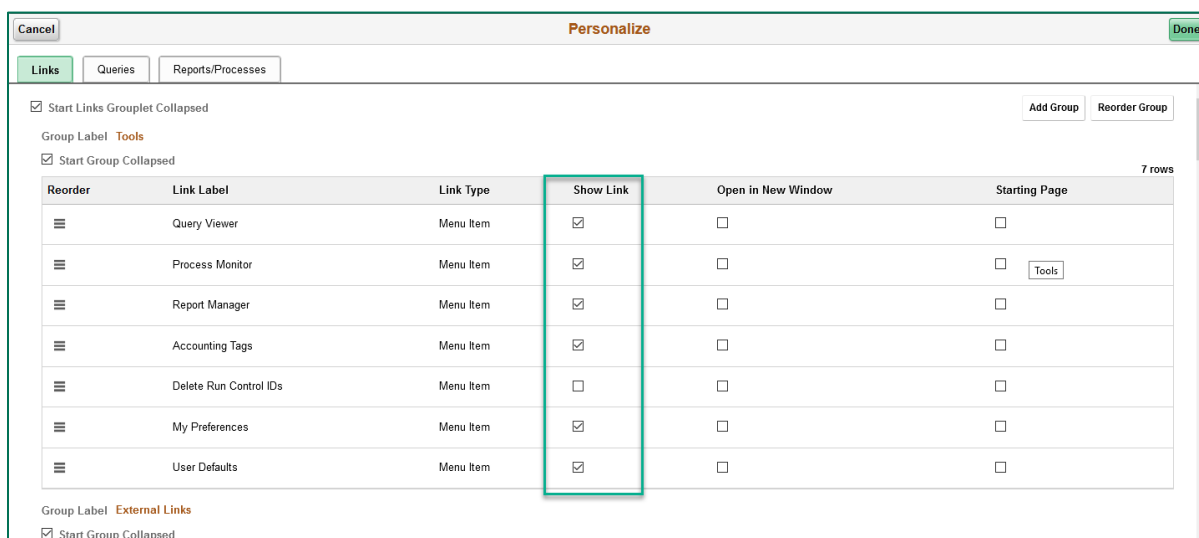
▼ Search Results

3 rows

Query Name	Description
UV_AUDIT_QRY11	Expense Report Details
UV_EX_RPT_LISTING	Expense Report Details
UV_GCA_LOC_DRAWS_DTL	GCA LOC Expense Details

- d. You can choose to use the system delivered label for the page or change the label by checking the **Override Label** box and entering a label that is more relevant to you.

- e. To add additional queries click the **Add**  button and repeat **Steps a - d**. When you have finished adding queries to the group click **Done** to save your changes and return to the personalize screen or **Cancel** to cancel your changes and return to the personalize screen
7. Links and queries can be hidden from a worklist by unchecking the **Show Link** box for that item.



Cancel Personalize Done

Links Queries Reports/Processes

☒ Start Links Grouplet Collapsed Add Group Reorder Group

Group Label **Tools**

☒ Start Group Collapsed 7 rows

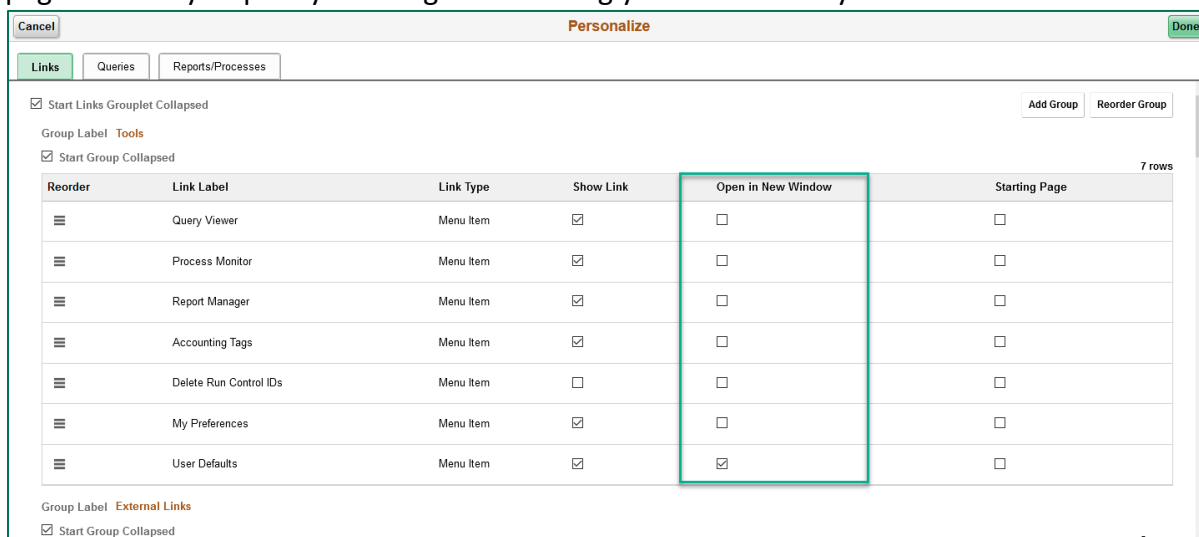
Reorder	Link Label	Link Type	Show Link	Open in New Window	Starting Page
≡	Query Viewer	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Tools
≡	Report Manager	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Accounting Tags	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Delete Run Control IDs	Menu Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	My Preferences	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	User Defaults	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Label **External Links**

☒ Start Group Collapsed 8 rows

8. Links can be set to open in a new window by checking the **Open in New Window** box for that specific item.

Note: It is recommended that all external links be set to open in a new window. Allowing external links to open in the same window will result in leaving the PeopleSoft pages and may require you to log back in using your Duo security.



Cancel Personalize Done

Links Queries Reports/Processes

☒ Start Links Grouplet Collapsed Add Group Reorder Group

Group Label **Tools**

☒ Start Group Collapsed 7 rows

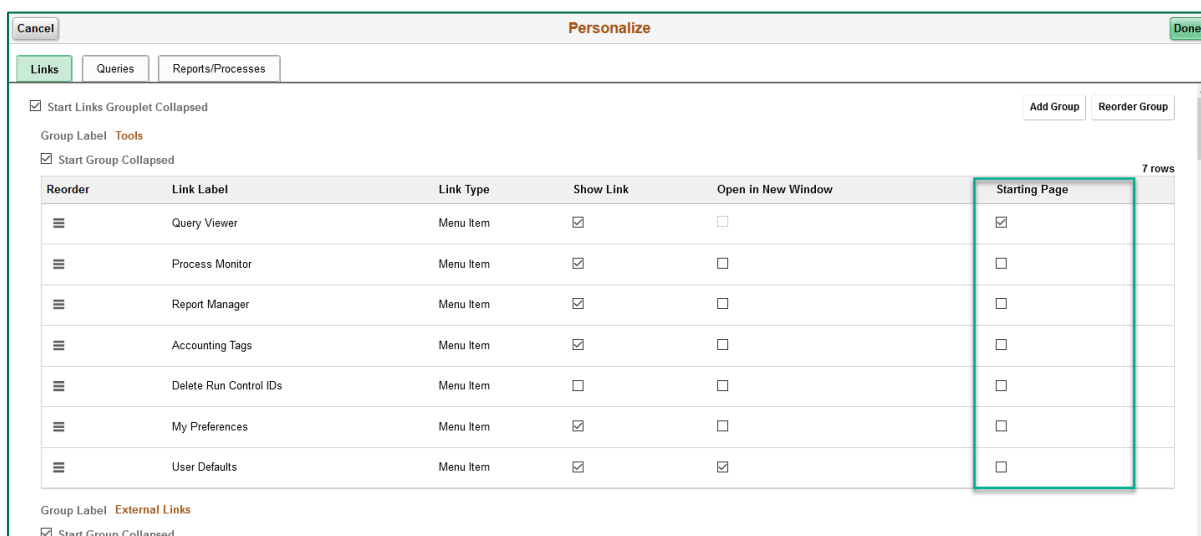
Reorder	Link Label	Link Type	Show Link	Open in New Window	Starting Page
≡	Query Viewer	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Report Manager	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Accounting Tags	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Delete Run Control IDs	Menu Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	My Preferences	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	User Defaults	Menu Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Group Label **External Links**

☒ Start Group Collapsed 8 rows

9. The default page that opens when you open your workcenter can be changed by checking the **Starting Page** box next to that item.

Note: The query viewer page is the starting page for the UVM Business Mgr WorkCenter. Only one page can be set as the starting page.



Cancel Personalize Done

Links Queries Reports/Processes

☒ Start Links Grouplet Collapsed

Group Label **Tools** Add Group Reorder Group

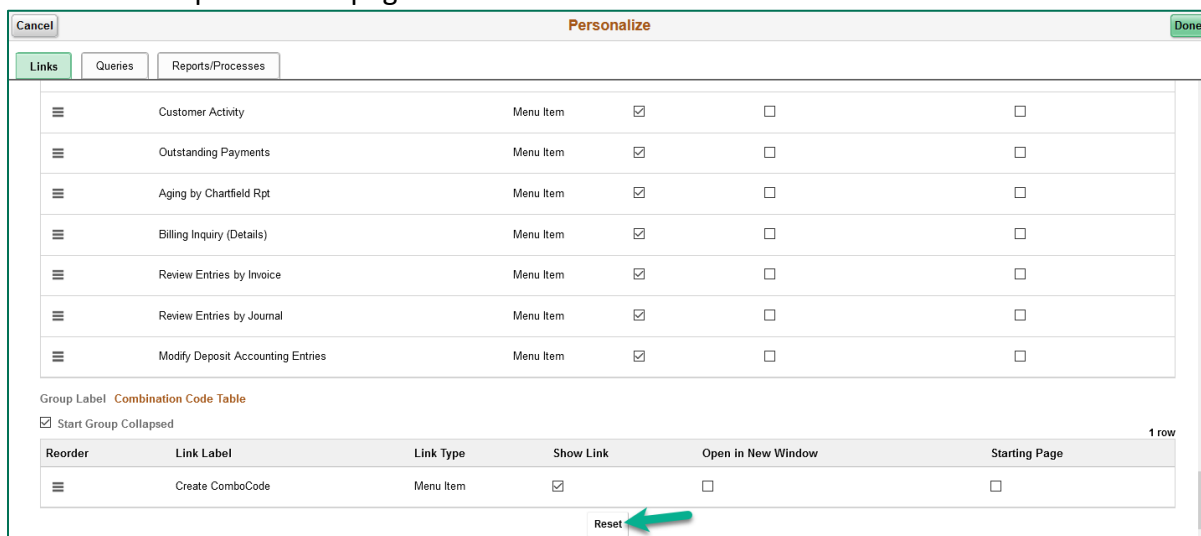
☒ Start Group Collapsed

Reorder	Link Label	Link Type	Show Link	Open in New Window	Starting Page
≡	Query Viewer	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
≡	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Report Manager	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Accounting Tags	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Delete Run Control IDs	Menu Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	My Preferences	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	User Defaults	Menu Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Group Label **External Links**

☒ Start Group Collapsed

10. You can return a worklist back to the original settings by clicking the **Reset** button at the bottom of the personalize page.



Cancel Personalize Done

Links Queries Reports/Processes

☒ Start Links Grouplet Collapsed

Group Label **Combination Code Table**

☒ Start Group Collapsed

Reorder	Link Label	Link Type	Show Link	Open in New Window	Starting Page
≡	Customer Activity	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Outstanding Payments	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Aging by Chartfield Rpt	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Billing Inquiry (Details)	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Review Entries by Invoice	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Review Entries by Journal	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
≡	Modify Deposit Accounting Entries	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Label **Combination Code Table**

☒ Start Group Collapsed

Reset

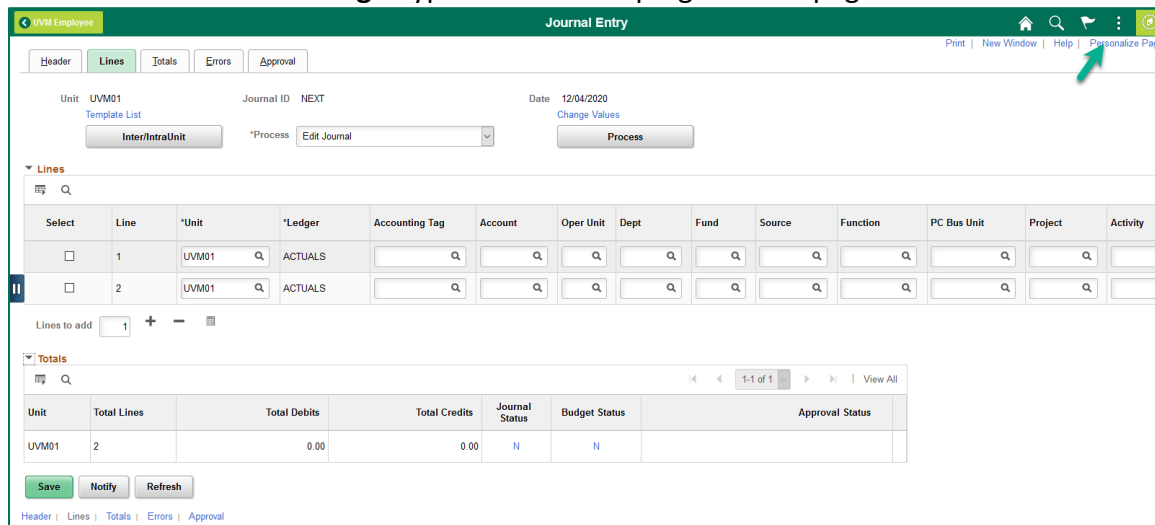
11. When you have finished adding personalizing your workcenter click **Done** to save your changes and return to the workcenter or **Cancel** to cancel your changes and return to the workcenter.

Page Personalization

Some pages have personalization options, which include setting a tabbing order or having sections expanded or collapsed.

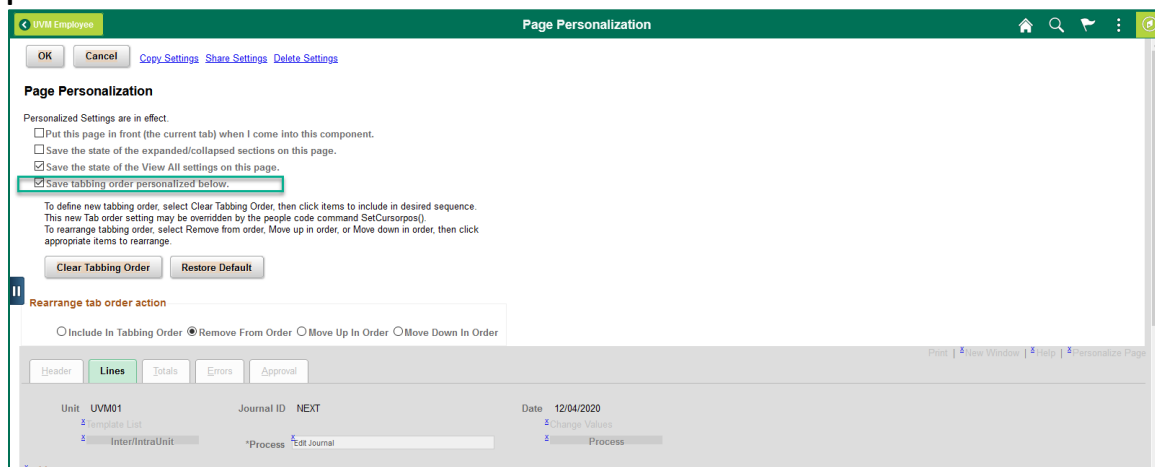
Setting the Tabbing Order

1. Click on the **Personalize Page** hyperlink at the top right of the page.



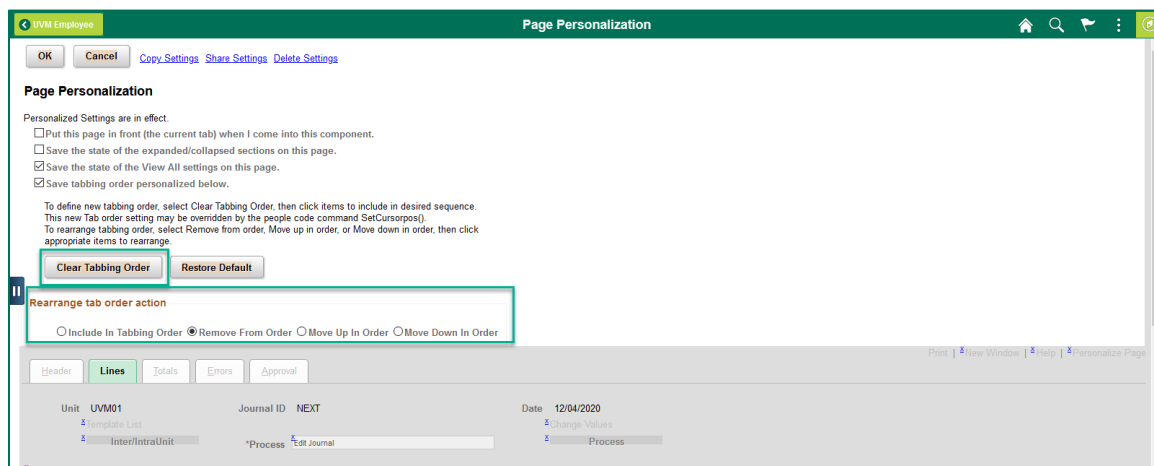
The screenshot shows the 'Journal Entry' page. At the top right, there are links for 'Print', 'New Window', 'Help', and 'Personalize Page'. The 'Personalize Page' link is highlighted with a green arrow. Below the header, there are tabs for 'Header', 'Lines', 'Totals', 'Errors', and 'Approval'. The 'Lines' tab is selected. The page displays fields for 'Unit' (UVM01), 'Journal ID' (NEXT), and 'Date' (12/04/2020). There are buttons for 'Inter/IntraUnit', 'Process', and 'Process'. Below these, there is a table with columns: Select, Line, *Unit, *Ledger, Accounting Tag, Account, Oper Unit, Dept, Fund, Source, Function, PC Bus Unit, Project, and Activity. The table has two rows. Below the table, there is a 'Lines to add' section with a plus and minus button. At the bottom, there is a 'Totals' section with a table showing 'Unit', 'Total Lines', 'Total Debits', 'Total Credits', 'Journal Status', 'Budget Status', and 'Approval Status'. The 'Save' button is highlighted in green.

2. The Page Personalization Page will open. Check the box for **Save tabbing order personalized below**.



The screenshot shows the 'Page Personalization' page. At the top, there are buttons for 'OK', 'Cancel', 'Copy Settings', 'Share Settings', and 'Delete Settings'. Below these, there is a section titled 'Page Personalization' with the text 'Personalized Settings are in effect.' and three checkboxes: 'Put this page in front (the current tab) when I come into this component.', 'Save the state of the expanded/collapsed sections on this page.', and 'Save the state of the View All settings on this page.' The third checkbox is checked. Below these, there is a checkbox labeled 'Save tabbing order personalized below.' which is checked and highlighted with a red box. Below this, there is a section titled 'Rearrange tab order action' with radio buttons for 'Include In Tabbing Order', 'Remove From Order', 'Move Up In Order', and 'Move Down In Order'. The 'Include In Tabbing Order' radio button is selected. Below this, there is a preview of the 'Journal Entry' page with the 'Lines' tab selected. The 'Save' button is highlighted in green.

3. To start from scratch click the **Clear Tabbing Order** button then choose **Include In Tabbing Order** from the **Rearrange tab order action** section. To adjust a tabbing order already in place choose from the options in **Rearrange tab order action**.



Page Personalization

Personalized Settings are in effect.

☐ Put this page in front (the current tab) when I come into this component.

☐ Save the state of the expanded/collapsed sections on this page.

☒ Save the state of the View All settings on this page.

☒ Save tabbing order personalized below.

To define new tabbing order, select Clear Tabbing Order, then click items to include in desired sequence. This new Tab order setting may be overridden by the people code command SetCursorpos(). To rearrange tabbing order, select Remove from order, Move up in order, or Move down in order, then click appropriate items to rearrange.

Clear Tabbing Order **Restore Default**

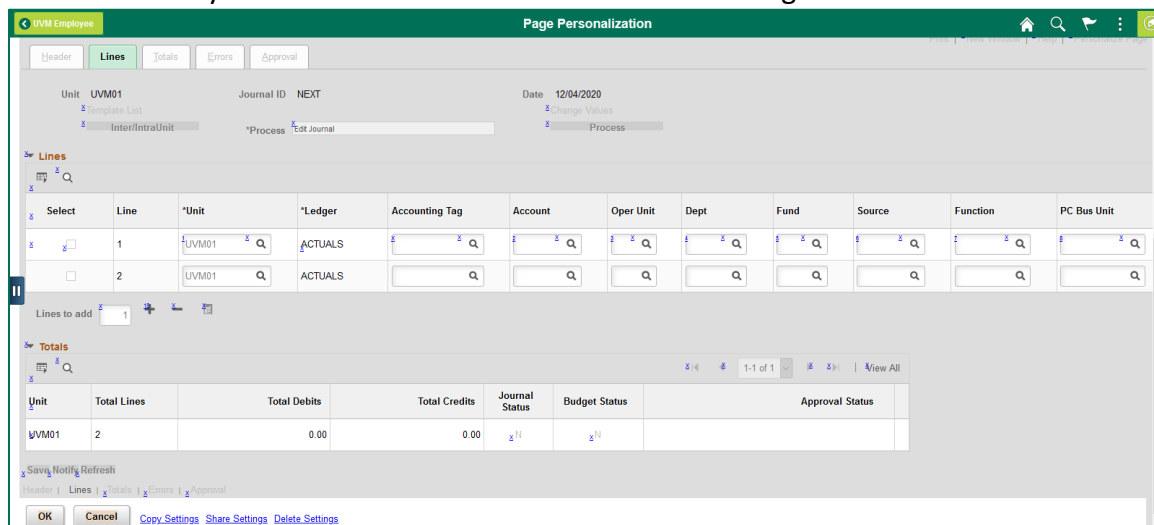
Rearrange tab order action

☐ Include In Tabbing Order ☒ Remove From Order ☐ Move Up In Order ☐ Move Down In Order

Unit: UVM01 Journal ID: NEXT Date: 12/04/2020

Inter/intraUnit *Process Edit Journal Process

4. Click on the **X** or **#** hyperlink next to the item to perform the action selected above. The example below shows the Journal Enter screen after the tabbing order has been cleared and only the chartfields were included in the tabbing order.



Page Personalization

Header Lines Totals Errors Approval

Unit: UVM01 Journal ID: NEXT Date: 12/04/2020

Inter/intraUnit *Process Edit Journal Process

Lines

Select	Line	Unit	Ledger	Accounting Tag	Account	Oper Unit	Dept	Fund	Source	Function	PC Bus Unit
<input checked="" type="checkbox"/>	1	UVM01	ACTUALS								
<input type="checkbox"/>	2	UVM01	ACTUALS								

Lines to add: 1

Totals

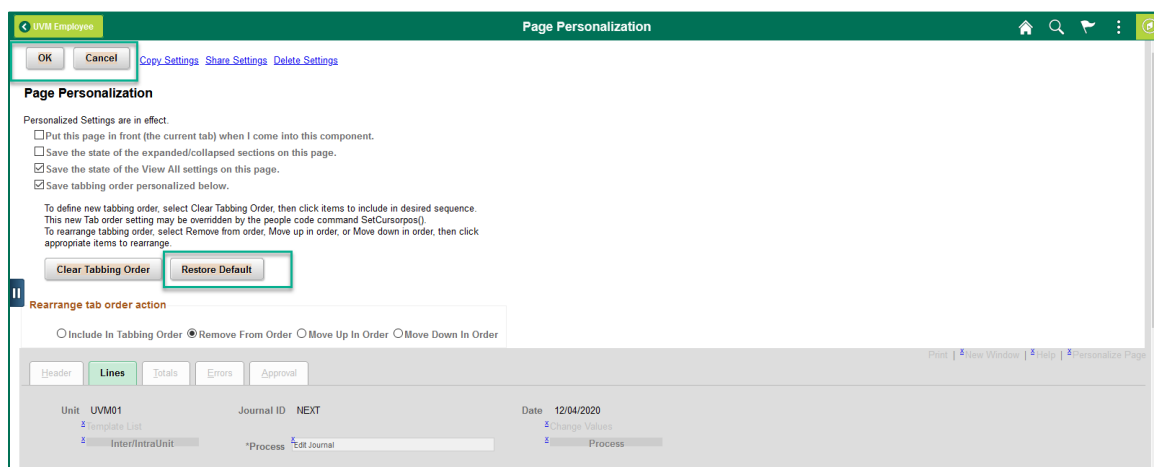
Unit	Total Lines	Total Debits	Total Credits	Journal Status	Budget Status	Approval Status
UVM01	2	0.00	0.00			

Save, Notify, Refresh

Header Lines Totals Errors Approval

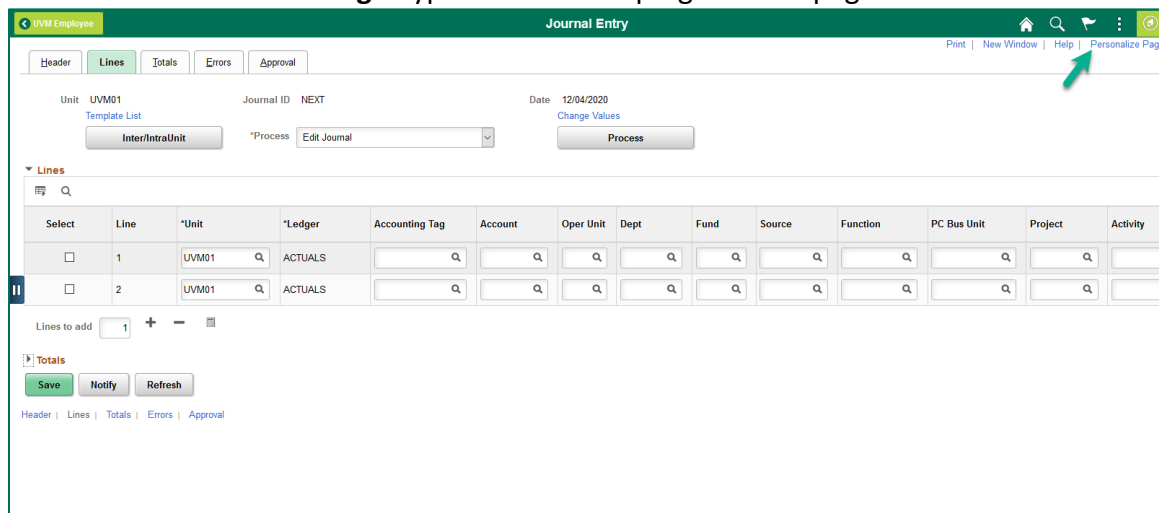
OK **Cancel** [Copy Settings](#) [Share Settings](#) [Delete Settings](#)

5. When finished click **OK** to save changes and return to the page or **Cancel** to cancel any changes and return to the pages. The tabbing order can be reset to the system settings by clicking **Restore Default**.

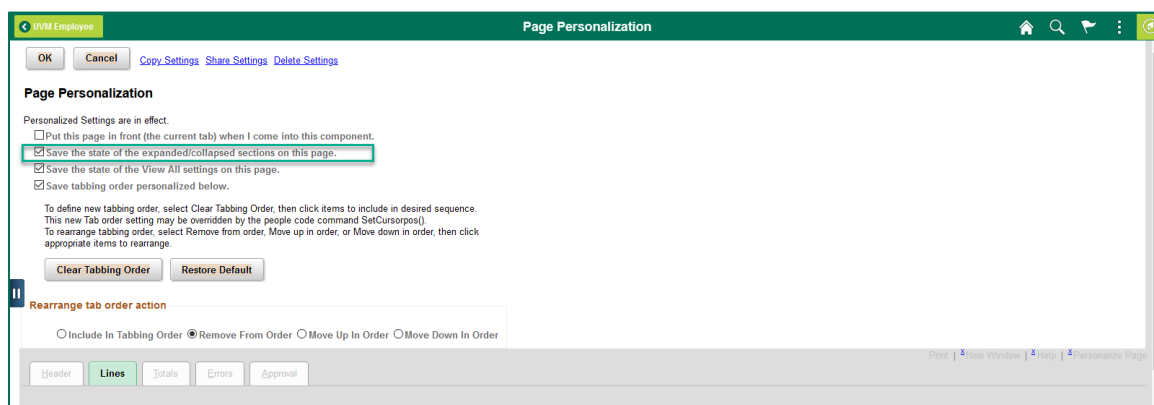


Setting a Section to Open as Expanded or Collapsed

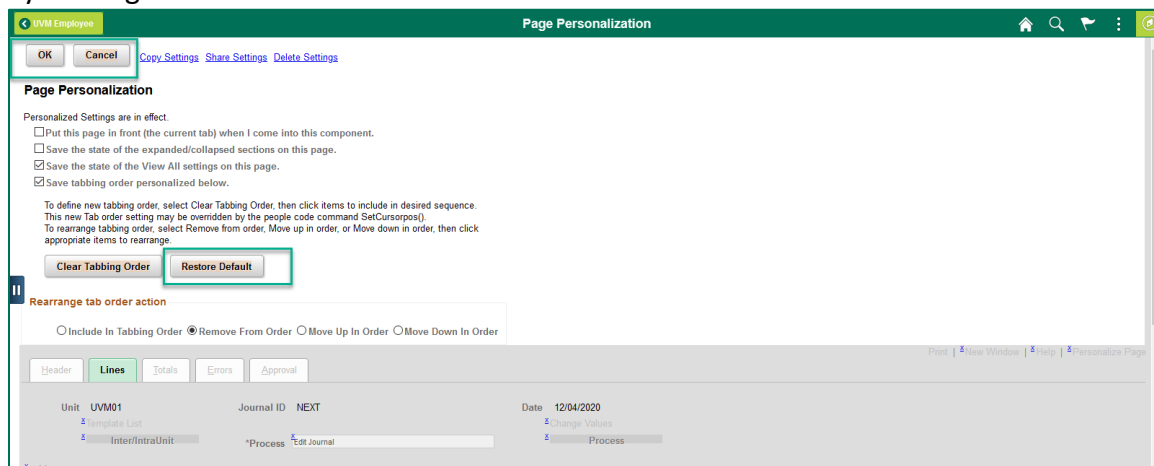
1. Click on the **Arrow** icon next to the section to your preference of expanded or collapsed. In the example below of the Journal Entry page the Lines section is expanded and the Totals section is collapsed.
2. Click on the **Personalize Page** hyperlink at the top right of the page.



3. The Page Personalization Page will open. Check the box for **Save the state of the expanded/collapsed sections on this page**.





4. When finished click **OK** to save changes and return to the page or **Cancel** to cancel any changes and return to the pages. The page can be reset to the system settings by clicking **Restore Default**.

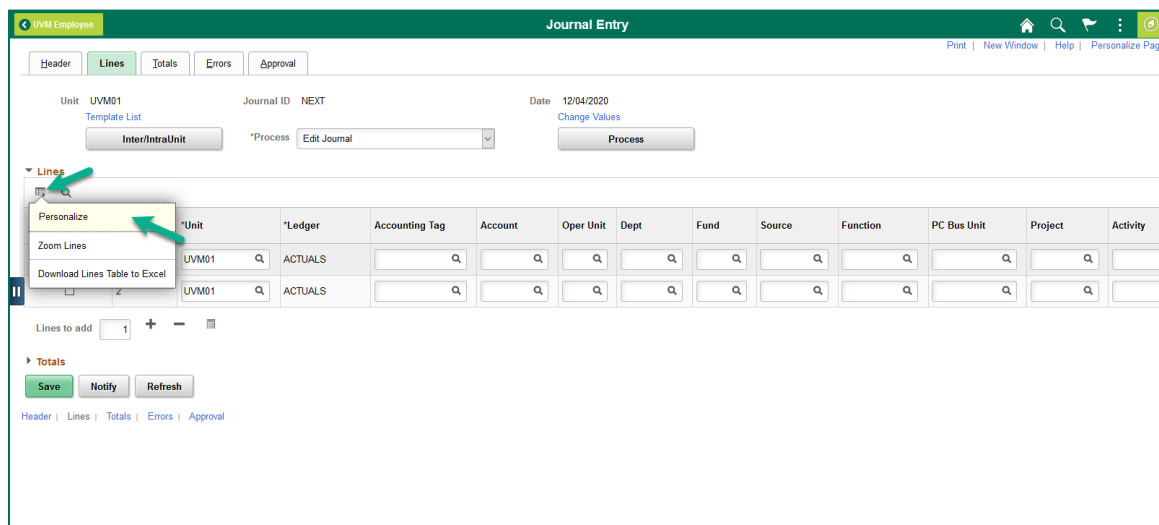


Grid Personalization

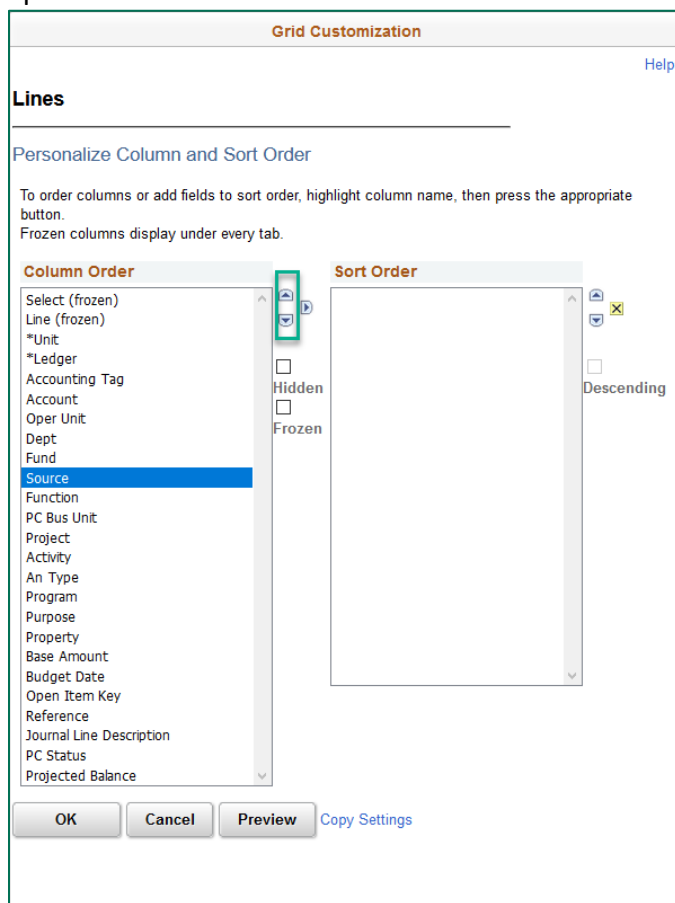
Many screens in PeopleSoft display grids of data that allow personalization; the user can change the order of the columns, the data sort order, which columns are frozen, and which columns are hidden.

Users can share personalizations with other users or copy another user's settings for their own use. You control these settings on the **Personalize Column and Sort Order** page, which you open by clicking the **Personalize** link in **Grid Action Menu**  on the header of the grid. Any personalizations that you make to a grid remain in place until you change them.

1. Click the **Grid Action**  icon in the top left of the grid then click **Personalize**.

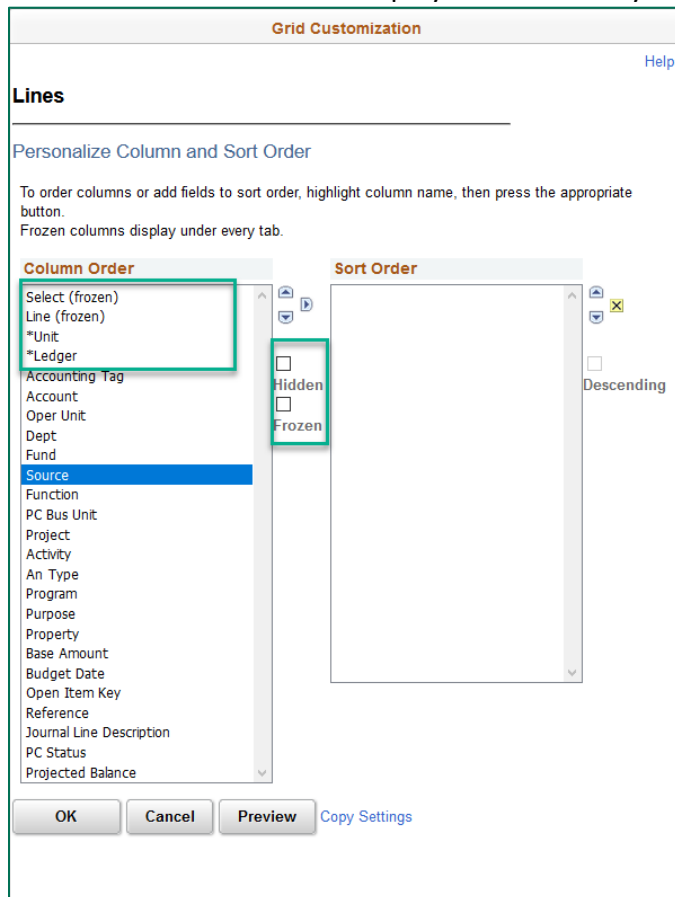


2. The **Grid Customization** page will open.
3. To change the column order click on the field in the **Column Order** box and use the up and down arrows to move the field to the desired position.



4. It may also be desirable to hide or freeze other fields by placing a checkmark in the appropriate checkbox.

Note: Freezing a field means that it will always display where it is placed. Hiding a field means that it will not display. “Unhide” it by returning to this page.



The image shows the 'Grid Customization' dialog box. It has a title bar 'Grid Customization' and a 'Help' link. Below the title bar is a section 'Lines' with a 'Personalize Column and Sort Order' link. A text box explains: 'To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.' There are two main panels: 'Column Order' and 'Sort Order'. The 'Column Order' panel has a list of fields: 'Select (frozen)', 'Line (frozen)', '*Unit', '*Ledger', 'Accounting Tag', 'Account', 'Oper Unit', 'Dept', 'Fund', 'Source' (highlighted), 'Function', 'PC Bus Unit', 'Project', 'Activity', 'An Type', 'Program', 'Purpose', 'Property', 'Base Amount', 'Budget Date', 'Open Item Key', 'Reference', 'Journal Line Description', 'PC Status', and 'Projected Balance'. The 'Sort Order' panel has a list of fields: 'Hidden' and 'Frozen'. There are buttons for 'OK', 'Cancel', 'Preview', and 'Copy Settings' at the bottom.

- To adjust the sort order select the field you want to sort by and add it to the **Sort Order** box by clicking the right arrow.

Note: Ascending is the default sort option. To sort by descending check the descending box.

Grid Customization

[Help](#)

Lines

[Personalize Column and Sort Order](#)

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

Select (frozen)

Line (frozen)

- *Unit
- *Ledger
- Accounting Tag
- Account
- Oper Unit
- Dept
- Fund
- Source
- Function
- PC Bus Unit
- Project
- Activity
- An Type
- Program
- Purpose
- Property
- Base Amount
- Budget Date
- Open Item Key
- Reference
- Journal Line Description
- PC Status
- Projected Balance

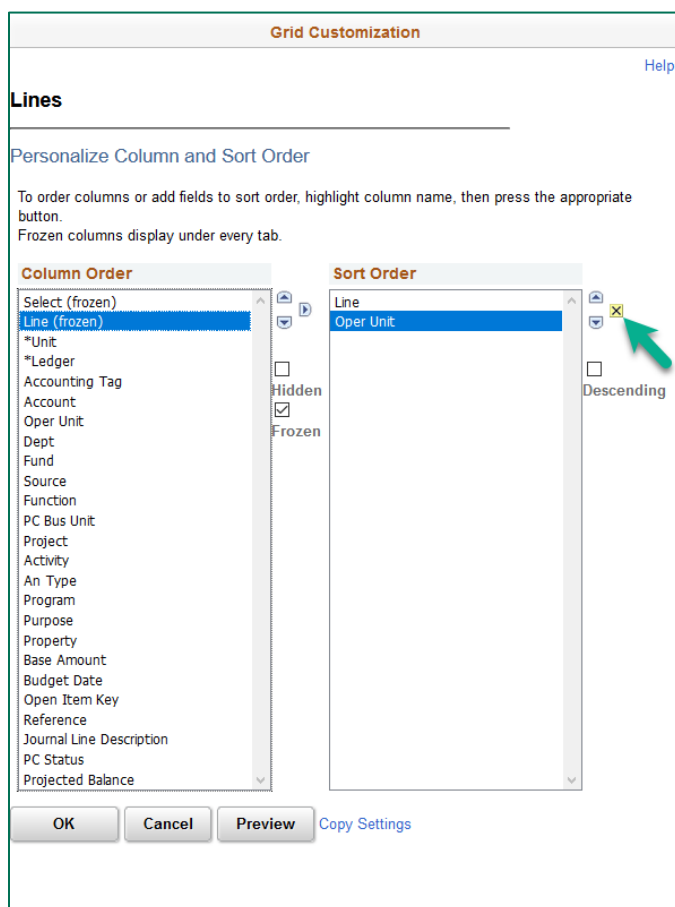
Sort Order

Line

☐ Hidden
 ☒ Frozen

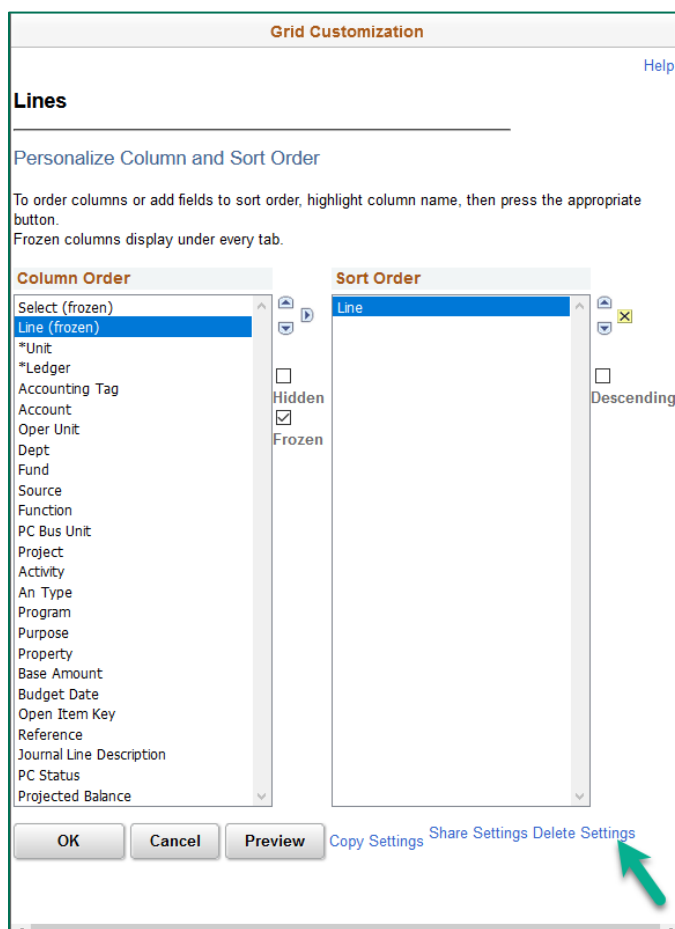
[Copy Settings](#)

6. To remove a field from the sort order select the field in the **Sort Order** box then select the X.



The image shows the 'Grid Customization' dialog box in PeopleSoft. It has a title bar with 'Grid Customization' and a 'Help' link. Below the title bar is a section titled 'Lines'. Under this section is a link 'Personalize Column and Sort Order'. Below this link is a paragraph: 'To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.' Below this paragraph are two panels: 'Column Order' and 'Sort Order'. The 'Column Order' panel has a list of columns: 'Select (frozen)', 'Line (frozen)', '*Unit', '*Ledger', 'Accounting Tag', 'Account', 'Oper Unit', 'Dept', 'Fund', 'Source', 'Function', 'PC Bus Unit', 'Project', 'Activity', 'An Type', 'Program', 'Purpose', 'Property', 'Base Amount', 'Budget Date', 'Open Item Key', 'Reference', 'Journal Line Description', 'PC Status', and 'Projected Balance'. The 'Sort Order' panel has a list of columns: 'Line' and 'Oper Unit'. To the right of the 'Sort Order' panel are two checkboxes: 'Hidden' (unchecked) and 'Descending' (checked). A green arrow points to the 'Descending' checkbox. At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Preview'. To the right of the 'Preview' button is a link 'Copy Settings'.

7. Click **Preview** to see the new order of the journal columns before saving changes.
 8. When finished click **OK** to save changes and return to the page or **Cancel** to cancel any changes and return to the pages. The page can be reset to the system settings by clicking the **Delete Settings** hyperlink.
- Note:** Copy, Share, and Delete settings are available once personalizations are saved.



Grid Customization

Help

Lines

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

Select (frozen)
Line (frozen)
*Unit
*Ledger
Accounting Tag
Account
Oper Unit
Dept
Fund
Source
Function
PC Bus Unit
Project
Activity
An Type
Program
Purpose
Property
Base Amount
Budget Date
Open Item Key
Reference
Journal Line Description
PC Status
Projected Balance

Sort Order

Line

☐ Hidden
☒ Frozen

☐ Descending

OK Cancel Preview [Copy Settings](#) [Share Settings](#) [Delete Settings](#)

Tools

Query Viewer

My Favorite Queries

The Query Manager and Query Viewer search pages can include a list of queries called **My Favorite Queries**. If you use certain queries often, you can put the queries in this list for easy access. *Financials favorite queries will not be available in the HR system, and vice versa.*

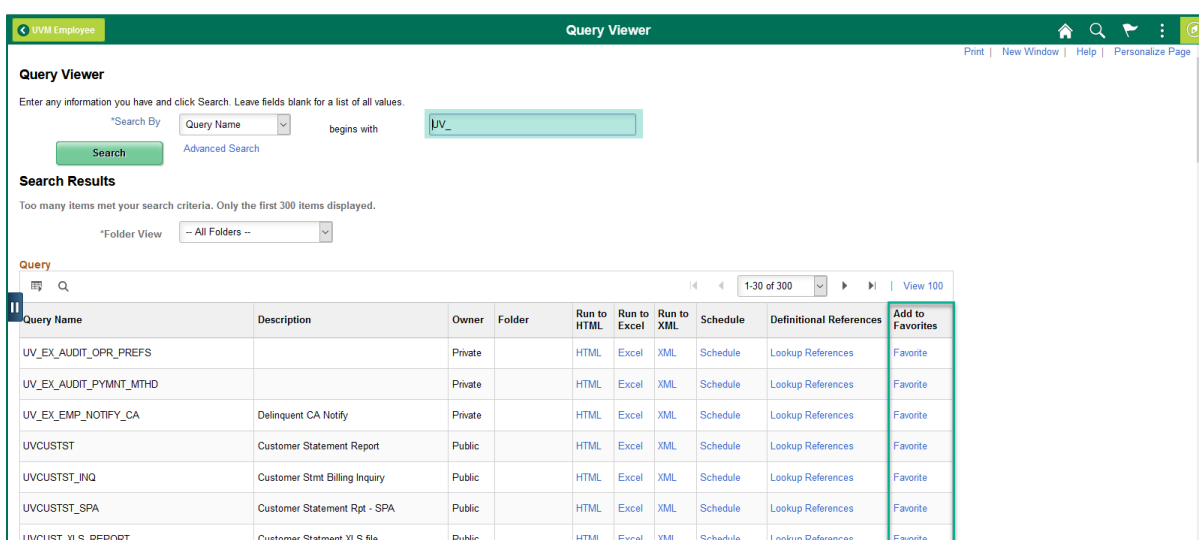
1. Log in to [PeopleSoft](#) using either the **Human Resources** or **Financial Login**.
2. Click on the **UVM Reports and Queries** tile in Human Resources or the **UVM Business Mgr WorkCenter** in Financials.



or



3. Search for the query to add as a favorite.
4. In the list of results, click the **Favorite** link next to the selected query.



Query Viewer

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

*Search By: Query Name begins with: UV_

Search Advanced Search

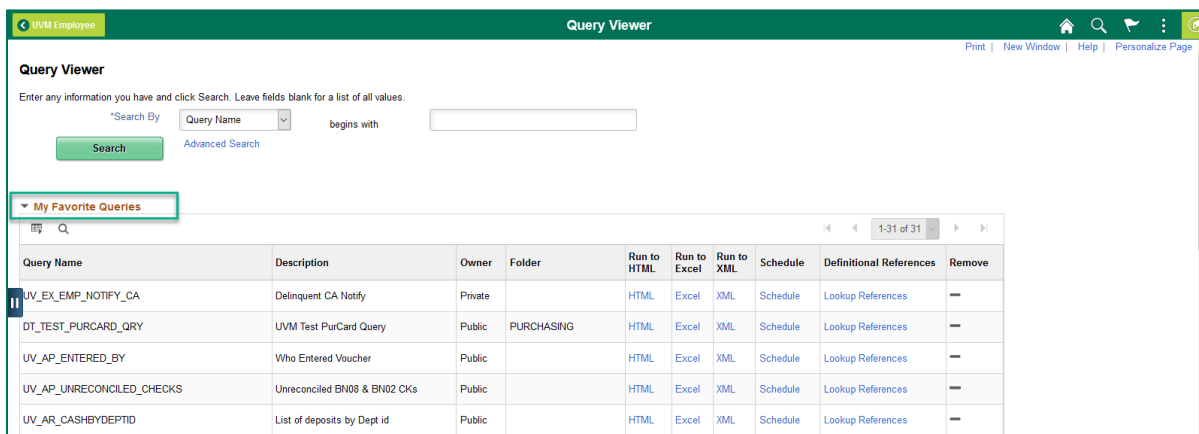
Search Results

Too many items met your search criteria. Only the first 300 items displayed.

*Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UV_EX_AUDIT_OPR_PREFS		Private		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_EX_AUDIT_PYMT_MTHD		Private		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_EX_EMP_NOTIFY_CA	Delinquent CA Notify	Private		HTML	Excel	XML	Schedule	Lookup References	Favorite
UVCUSTST	Customer Statement Report	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UVCUSTST_INQ	Customer Stmt Billing Inquiry	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UVCUSTST_SPA	Customer Statement Rpt - SPA	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UVCUST_XLS_REPORT	Customer Statement XLS file	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

5. The list of favorite queries will appear on the Query Manager and Query Viewer search page in the **My Favorite Queries** section at the bottom of the page.



Query Viewer

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

*Search By: Query Name begins with:

Search Advanced Search

My Favorite Queries

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
UV_EX_EMP_NOTIFY_CA	Delinquent CA Notify	Private		HTML	Excel	XML	Schedule	Lookup References	—
DT_TEST_PURCARD_QRY	UVM Test PurCard Query	Public	PURCHASING	HTML	Excel	XML	Schedule	Lookup References	—
UV_AP_ENTERED_BY	Who Entered Voucher	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_AP_UNRECONCILED_CHECKS	Unreconciled BN08 & BN02 CKs	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_AR_CASHBYDEPTID	List of deposits by Dept id	Public		HTML	Excel	XML	Schedule	Lookup References	—

6. Remove Individual query favorites by clicking the corresponding minus sign button in the Remove column, or remove all with the **Clear Favorite List** button.

Query Viewer									
UV_EX_EE_PRENOTE_STATUS		Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_EX_ENTERED_BY	Who Entered Expense Report	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_EX_INTERNATIONAL_TRVL_AUTHS	International Travel Auths	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_EX_IRNLTSHEETNADV	Linking bk jmls to adv/exprt	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_EX_MANAGER_APPROVED_REPORTS	Apprvd Exp Rpts by Exp Manager	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_EX_PURCARD_RECON		Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_EX_PURCARD_RECON_AMT_MTCH		Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_EX_RPT_LISTING	Expense Report Details	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_EX_SHEET_ALERTS	Alerts on Exp. Reports	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_EX_TRAVEL_AUTH_LISTING	Travel Authorizations	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_GL_IRNL_INQUIRY	Journal Inquiry Query	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_GL_OPEN_ITEMS_BY_PERSON_SUM	Show open item total by Person	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_PURCARD_QRY	PurCard in Jmls-Interim Qry	Public		HTML	Excel	XML	Schedule	Lookup References	—
UV_ROLE_USERS_SEARCH	Search Roles/Users	Public	SECURITY	HTML	Excel	XML	Schedule	Lookup References	—

Clear Favorites List

Process Monitor

The Process Monitor is a page that allows you to see what reports or other processes you have requested in the system. When you are viewing or entering data on a page, the Process Monitor is not involved. When you run a report or you need to run a process, such as budget checking, the Process Monitor will track the status of your process.

Some reports and processes will take longer than others to run. Processing time depends on the amount of data being retrieved/processed, and the overall volume of system usage at runtime.

There is typically a link to the **Process Monitor** on run control pages, as shown below in the **Closeout Report** in Financials. After clicking **Run** and returning to the run control page, use this link to access the **Process Monitor**.

UVM Closeout Report

Run Control ID: KRISTY

Report Manager **Process Monitor** Run

Process Instance: 3947527

Report Request Parameters

Projects Business Unit: GCA01

Project or Chartstring Option

☒ By Project/Award ☐ By Chartstring


Project: 031706 20152805

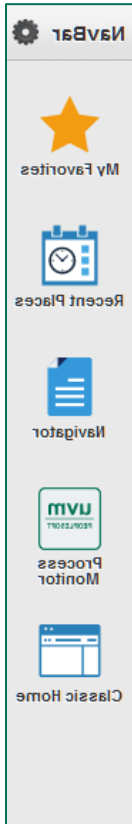
Award ID:

☐ Check to Include F and A Errors and F and A Not Calculated

☐ Include Payroll Encumbrance Information By Person

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

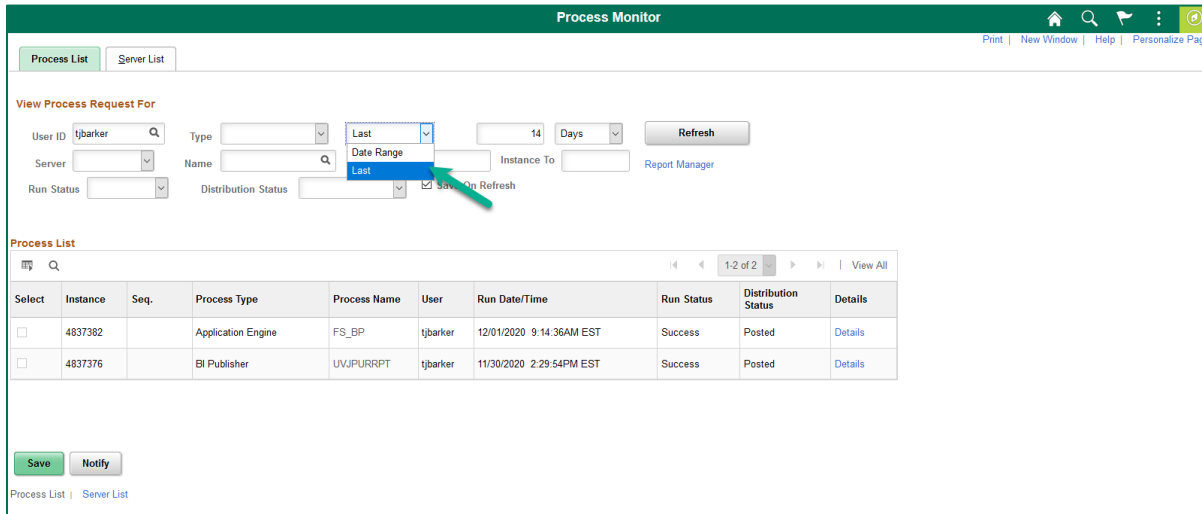
The Process Monitor is also available in the **NavBar**  as shown below.



Process Monitor Process List

By default, PeopleSoft displays 14 days of reports in the **Process List**. Change the number and unit of time (days, hours, minutes, years) to refine the list as needed.

Or, select **Date Range** instead of “Last” to search by a range of dates.



Process Monitor

Process List | Server List

View Process Request For

User ID: tjbarker | Type: Application Engine | Date Range: Last | 14 Days | Refresh

Server: | Name: | Instance To: | Report Manager

Run Status: | Distribution Status: | Save On Refresh: ☒

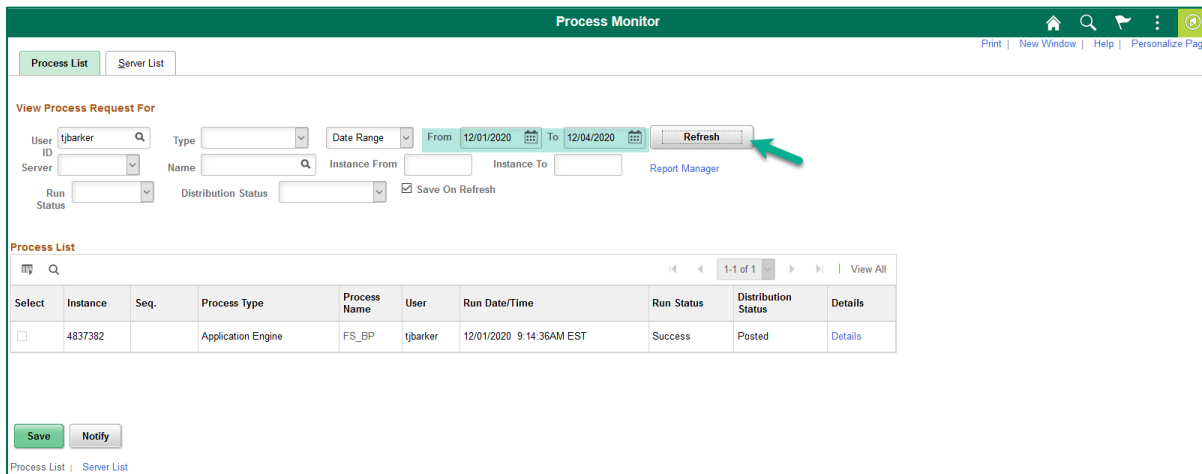
Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4837382		Application Engine	FS_BP	tjbarker	12/01/2020 9:14:36AM EST	Success	Posted	Details
<input type="checkbox"/>	4837376		BI Publisher	UVJPRRPT	tjbarker	11/30/2020 2:29:54PM EST	Success	Posted	Details

Save | Notify

Process List | Server List

Enter the **From** and **To** dates desired, and click **Refresh**.



Process Monitor

Process List | Server List

View Process Request For

User ID: tjbarker | Type: Application Engine | Date Range: From | From: 12/01/2020 | To: 12/04/2020 | Refresh

Server: | Name: | Instance From: | Instance To: | Report Manager

Run Status: | Distribution Status: | Save On Refresh: ☒

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4837382		Application Engine	FS_BP	tjbarker	12/01/2020 9:14:36AM EST	Success	Posted	Details


Save | Notify

Process List | Server List

Once the criteria are set, click **Refresh** periodically (every 30 seconds to a minute) to refresh the Process List until the Run Status reaches Success. Or, while waiting for the process to complete, navigate elsewhere from the Main Menu and return to the Process Monitor later to verify the results and obtain output files.

Report Manager

As part of the PeopleSoft Process Scheduler, Report Manager is another place to retrieve report output files. It provides the same date/time criteria for listing reports as the Process Monitor.

Use the **Navigator** in the **NavBar**  to access the Report Manager via **Reporting Tools > Report Manager**. The Report Manager can also be accessed in the **Financials** via the **UVM Business Manager WorkCenter** under **Links > Tools**



Report Distribution Mgr

Print | New Window | Help | Personalize Page

View Reports For

Folder Instance to Refresh

Name Created On Last 1 Days

Reports

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 Report					

Save

List | Explorer | Administration | Archives

On the List tab, click the link to the report in the Report column.

Report Distribution Mgr

Print | New Window | Help | Personalize Page

View Reports For

Folder Instance to Refresh

Name Created On Last 10 Days

Reports

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 FS_BP	COMM. CNTRL. BUDGET PROCESSOR	General	12/01/20 9:15AM	4461571	4837382
2 UVJPUURRPT - UVJPUURRPT.pdf	UVJPUURRPT - UVJPUURRPT.PDF	General	11/30/20 2:30PM	4461565	4837376

Save

List | Explorer | Administration | Archives

Then click the file link, which in this case is the file with the PDF extension.



[WorkCenter](#) [Report Index](#)

Report
Report ID 4461712 Process Instance 4837511 [Message Log](#)
Name FSRPT024 Process Type SQR Report
Run Status Success
Project Closeout Report

Distribution Details
Distribution Node PSXREP2 Expiration Date 03/08/2021

File List

Name	File Size (bytes)	Datetime Created
FSRPT024_4837511.PDF	21,809	12/08/2020 3:09:26.196943PM EST
FSRPT024_4837511.out	94	12/08/2020 3:09:26.196943PM EST
SQR_FSRPT024_4837511.log	1,773	12/08/2020 3:09:26.196943PM EST

Distribute To

Distribution ID Type	Distribution ID
User	tjbarker

[Return](#)


Auto Row Highlighting

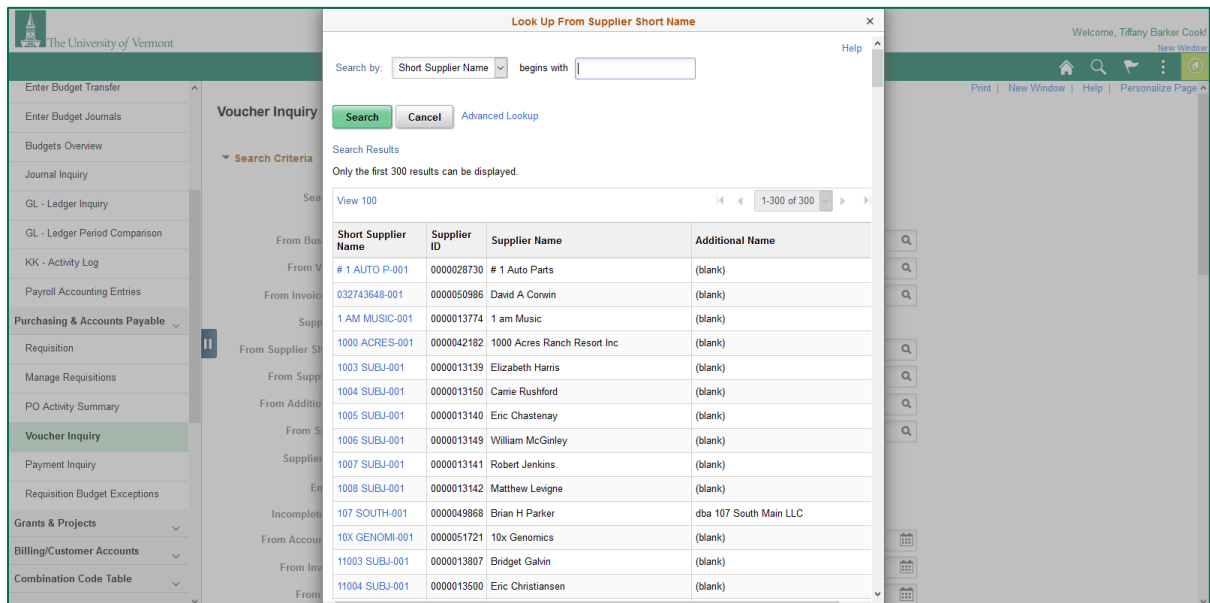
PeopleSoft grids and tables are shaded with alternating light and dark colors to help differentiate between rows of data.

In addition to the dark/light row shading, a light yellow color highlights the row over which the user hovers the mouse.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UV_OFTE_SM1_NO_TMP_NPC_STU		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_ACTIVE_EMPLS	Active Employees	Public	CLASS & COMP	HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_ADDL_PAY_NO_END_DATE	Additional Pays w/No End Date	Public	PAYROLL	HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_ADDL_PAY_NO_GOAL_AMT	Additional Pays w/No Goal Amt	Public	PAYROLL	HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_ARCHIVE_COMMON_PAYMASTER	OASDI Limit Reached	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_BEN_BILL	Benefits Billing to Banner AR	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_BEN_DEFN_PROG_LEVEL	Ben Prog Set Up HRMS Tbl	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_BN_OFTE_SM1_NO_TMP_NPC_STU		Public	ACA (AFF CARE ACT)	HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_BN_2YR_FAC_MED	2 yr service date for Faculty	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_BN_ACA_ADDL_PAY_ALL	Pull Addl Pays for ACA By Date	Public	ACA (AFF CARE ACT)	HTML	Excel	XML	Schedule	Lookup References	Favorite

Lookup Fields: Pop-Up Functions

When the **Lookup**  icon is selected a Lookup window appears. The background is grayed-out and results (up to 300) are displayed on-screen without having to navigate away from the main search page.



Lookup Fields: AutoComplete

As mentioned above, the lookup icon allows the user to see lists of available values for many PeopleSoft fields.

PeopleSoft also offers type-ahead functionality, also known as autocomplete, on fields with a lookup icon.

As text is entered, the system displays a list of the available values. Users can continue typing as they normally would, or they can make their selection directly from the list.

To enable/disable the AutoComplete functionality see [Navigation Personalizations](#).

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	uv	Requisition Name	
Requisition ID	Business Unit Description	Request State	All but Complete
Date From	UVM01 University of Vermont	Date To	03/08/2018
Requester	s\$kperry3	Entered By	

[Show Advanced Search](#)

Save Warning Pop-Up Window

Many PeopleSoft screens display a save warning when users have entered data on a page, and attempt to navigate elsewhere without saving.

Click **Yes** to return to the page to save, or click **No** to discard the changes made.

To enable/disable the Save Warning functionality see [System & Application Messages](#).

Do you want to save your changes?

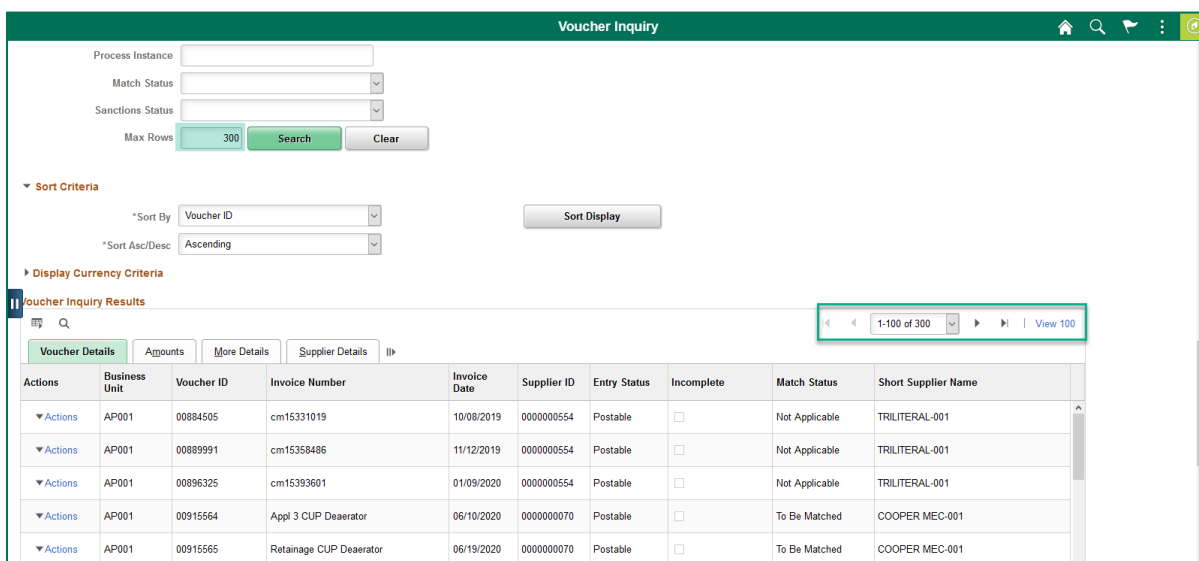
Click Yes to go back and save, No to discard your changes

Searches: Maximum Number of Rows

Depending on the search criteria a user provides, PeopleSoft searches and reports can potentially return hundreds or thousands of lines of data.

To avoid searching for too much data at once, PeopleSoft will automatically limit the maximum number of rows of data returned. Wherever there is a limit or “Max Rows” field presented on a screen, the user can specify the number of values returned, up to the limit. In many cases, the maximum is 300 rows.

This search example is from PeopleSoft Financials **Voucher Inquiry**



Voucher Inquiry

Process Instance:
 Match Status:
 Sanctions Status:
 Max Rows:

Sort Criteria

*Sort By:
 *Sort Asc/Desc:

Display Currency Criteria

Voucher Inquiry Results

1-100 of 300 | View 100

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
▼ Actions	AP001	00884505	cm15331019	10/08/2019	0000000554	Postable	<input type="checkbox"/>	Not Applicable	TRILITERAL-001
▼ Actions	AP001	00889991	cm15358486	11/12/2019	0000000554	Postable	<input type="checkbox"/>	Not Applicable	TRILITERAL-001
▼ Actions	AP001	00896325	cm15393601	01/09/2020	0000000554	Postable	<input type="checkbox"/>	Not Applicable	TRILITERAL-001
▼ Actions	AP001	00915564	Appl 3 CUP Deerator	06/10/2020	0000000070	Postable	<input type="checkbox"/>	To Be Matched	COOPER MEC-001
▼ Actions	AP001	00915565	Retainage CUP Deerator	06/19/2020	0000000070	Postable	<input type="checkbox"/>	To Be Matched	COOPER MEC-001

Search for Transactions

When searching for a transaction where the transaction is unknown, use the % (percent sign) in front of the numbers to replace the zeros, or use the % (percent sign) in between characters where part of the information is unknown.

Additionally, you can change the search operator from **begins with** to **contains**. The following screenshots use journal entries as an example, but the functionality can be used to search for any PeopleSoft transaction.

Using the %:

Create/Update Journal Entries

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

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Use Saved Search:

Business Unit =

Journal Date =

Journal ID begins with

Document Sequence Number begins with

Line Business Unit =

Journal Header Status =

Budget Checking Header Status =

Workflow Status begins with

Source =

Entered By begins with

Attachment Exist =

Journal Class begins with

☐ Case Sensitive

Using contains:

Create/Update Journal Entries

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

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Use Saved Search:

Business Unit =

Journal Date =

Journal ID contains

Document Sequence Number begins with

Line Business Unit =

Journal Header Status =

Budget Checking Header Status =

Workflow Status begins with

Source =

Entered By begins with

Attachment Exist =

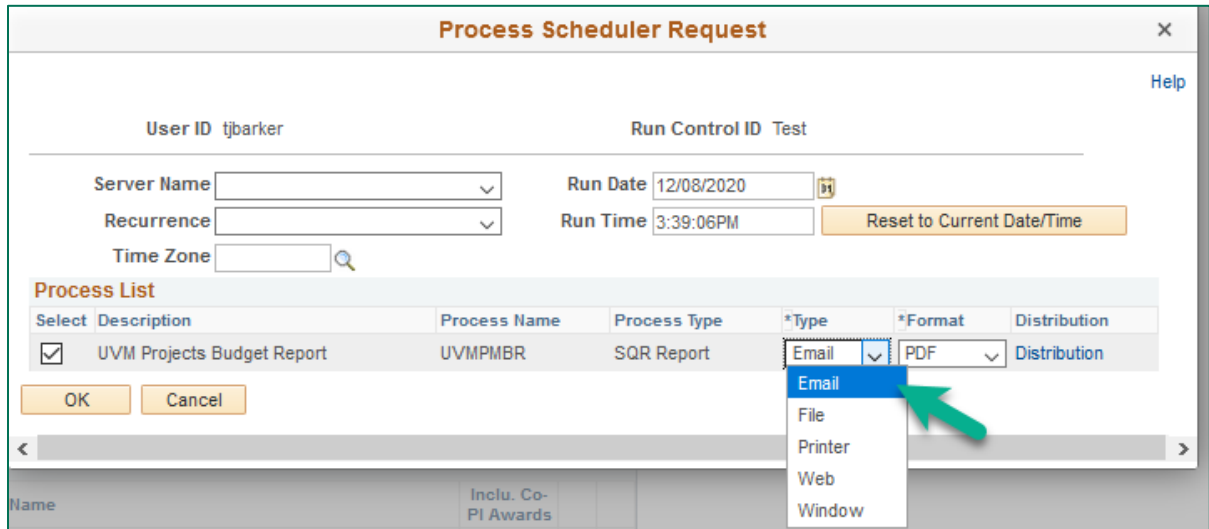
Journal Class begins with

☐ Case Sensitive

Email Reports

Emailing reports from PeopleSoft is an efficient way to send reports without having to wait in the Process Monitor.

1. Choose a report to run/email.
2. Enter the necessary criteria and click **Run**.
3. On the **Process Scheduler Request** page, in the **Process List** section, select **Email** from the ***Type** drop-down list.



Process Scheduler Request

User ID tjbarker Run Control ID Test

Server Name Run Date 12/08/2020

Recurrence Run Time 3:39:06PM [Reset to Current Date/Time](#)

Time Zone

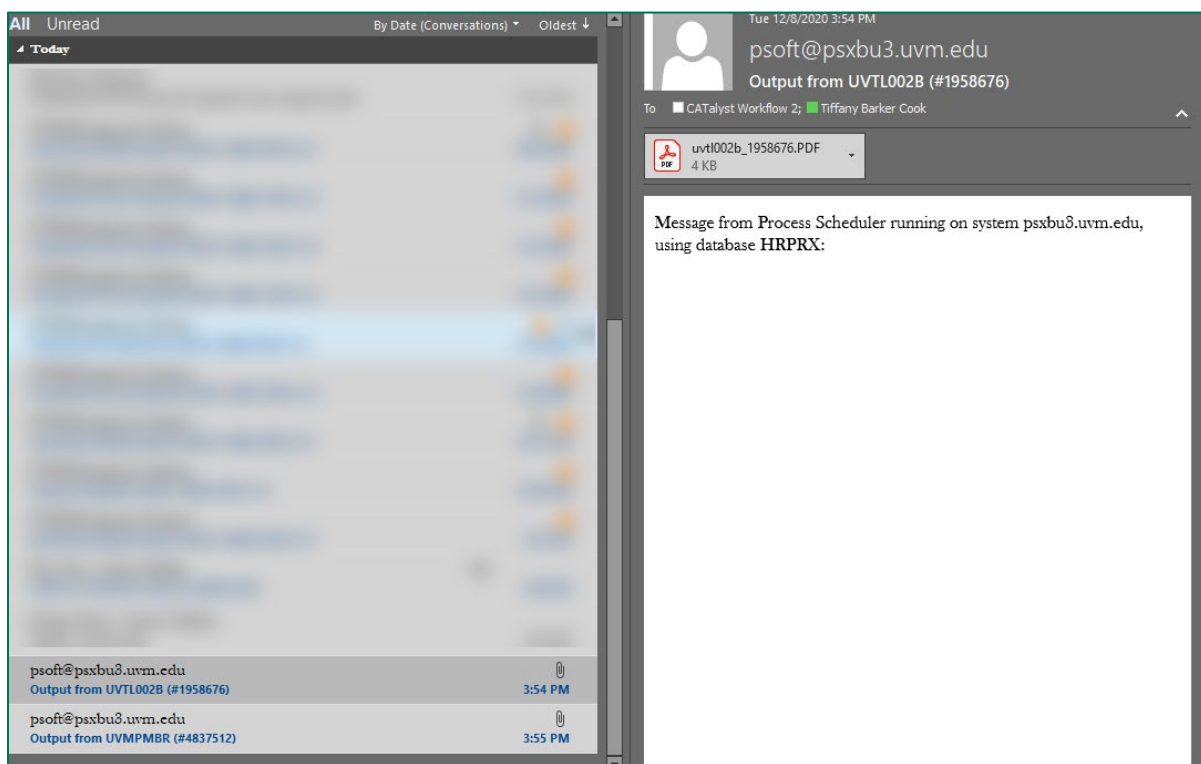
Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	UVM Projects Budget Report	UVMPMBR	SQR Report	Email	PDF	Distribution

OK Cancel

Name Inclu. Co-PI Awards

4. Click the **OK** button to run the report and to send an email attachment.
5. When the message from PeopleSoft appears in the user's email inbox, the report will be the attached .pdf file.



PeopleSoft Human Resources Tips

Time and Labor Customization Screens

Customizing Manager Search Options

1. Log in to [PeopleSoft Human Resources](#)
2. Use the **Navigat**or to access: **Manager Self Service > Time Management > Manager Search Options**.

There are several options for customizing the search screen. You can search by criteria that you choose not to have listed in the results, and vice versa.



Manager Search Options

Select Default Criteria and Options

Tiffany Barker Cook

Loading of Matching Employees

Enter the Employee Selection Criteria you want to use when searching for employees. This search information will be the default for Time Management pages where there is an Employee Selection Criteria option. Enter the ENTIRE value for each field - PARTIAL values may NOT be entered for these search fields.

☐ Auto Populate Results

☒ Prompt for Results

Default Criteria Presentation

☐ Show Criteria List Collapsed

☒ Show Criteria List Expanded

☒ Show Schedule Information

▼ **Employee Selection Criteria** ?

Description	Selection Criterion Value	Include in Criteria	*Include in List
Time Reporter Group	<input type="text"/>	<input type="checkbox"/>	Do Not Include
Employee ID	<input type="text"/>	<input checked="" type="checkbox"/>	Include ▼
Empl Record	<input type="text"/>	<input checked="" type="checkbox"/>	Include ▼
Last Name	<input type="text"/>	<input checked="" type="checkbox"/>	Include
First Name	<input type="text"/>	<input checked="" type="checkbox"/>	Include
Business Unit	<input type="text"/>	<input type="checkbox"/>	Do Not Include ▼
Job Code	<input type="text"/>	<input type="checkbox"/>	Include Description Only ▼
Job Description	<input type="text"/>	<input type="checkbox"/>	
Department	<input type="text"/>	<input type="checkbox"/>	Do Not Include ▼
Supervisor ID	<input type="text"/>	<input type="checkbox"/>	Do Not Include ▼
Reports To Position Number	<input type="text"/>	<input type="checkbox"/>	Do Not Include ▼
Location Code	<input type="text"/>	<input type="checkbox"/>	Do Not Include ▼
Company	<input type="text"/>	<input type="checkbox"/>	Do Not Include ▼
North American Pay Group	<input type="text"/>	<input type="checkbox"/>	Do Not Include ▼

3. Save search criteria if desired.

NOTE: Be careful about saving criteria here. No results will be displayed if searching by Position Number and Supervisor ID simultaneously.

4. Choose **Auto Populate Results** for search results to appear automatically when entering Manager Self Service. Choose **Prompt for Results** to use the **Get Employees** button to bring up search results.



Loading of Matching Employees

Enter the Employee Selection Criteria you want to use when searching for employees. This search information will be the default for Time Management pages where there is an Employee Selection Criteria option. Enter the ENTIRE value for each field -
-PARTIAL values may NOT be entered for these search fields.

☒ Auto Populate Results

☐ Prompt for Results

5. Choose **Collapse Criteria** to show the results without the search page on the screen. Choose **Expand Criteria** to show the results underneath the search page.

Default Criteria Presentation

☒ Show Criteria List Collapsed

☐ Show Criteria List Expanded

6. Click **Save**.

Browser Errors

The browser's navigation buttons should not be used when working in PeopleSoft. In particular, users should avoid using the browser's Back button, and instead use the navigation options provided in the PeopleSoft application.

See the [Browser Tips User Guide \(PDF\)](#) to fix errors that occur in PeopleSoft that are directly related to a specific internet browser.

Resources/Help

Help/Footprints

If you have questions about information in this document, or, if after reading it, you cannot find the information you need, please submit a PeopleSoft help desk ticket in [Footprints](#).



Training

- [Professional Development & Training Classes](#)

Suggestions? Updates?

Send an email to PS9-1Upgrade@uvm.edu.