# BROWSER TIPS FOR PEOPLESOFT USER GUIDE

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

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Background

This document contains various browser issues that are related to working in PeopleSoft and the solutions to these issues. Use the Table of Contents section of this document to find the information required.

If there are additional web browser issues related to working in PeopleSoft, please submit a help desk ticket in Footprints: https://footprints.uvm.edu/catalystgroup.html.

Preferred Browsers for working in PeopleSoft

Mozilla Firefox, Internet Explorer, and Safari, are certified for use with PeopleSoft on all operating systems. These browsers are recommended for the most consistent and reliable user experience with using PeopleSoft whether on a PC or a Mac.

Google Chrome, although not certified for use with PeopleSoft, is a commonly used browser at UVM, and is therefore included in this manual. Please note that it may be necessary to update your Chrome browser to the latest version.

Normally updates happen in the background when you close and reopen your computer’s browser. But if you haven’t closed your browser in a while you might see the Chrome menu in the top right change colors:

≡ A green menu means an update has been available for 2 days.
≡ An orange menu means an update has been available for 4 days.
≡ A red menu means an update has been available for 7 days.

To update Google Chrome:

1. In the top right, click the Chrome menu ≡.
2. Click Update Google Chrome. If you don't see this button, you're on the latest version.
3. Click Relaunch.
4. If unable to login, restart computer and try again.
Google Chrome users who continue to experience issues with PeopleSoft should log in using a different browser.

**Working in Financials and Human Resources simultaneously**

Currently, it is necessary to sign out of one part of PeopleSoft in order to work in another part of the program within the same browser session. Although there is a link in the PeopleSoft menu **UVM System** for toggling between Financials and Human Resources, these links currently do not work. Users may opt to open different browsers (e.g. a Firefox browser and an Internet Explorer browser) to log into HR and Financials simultaneously.

**Browser Versions**

Browser versions are referenced throughout this document. Use the steps below to find the version of Mozilla Firefox, Microsoft Internet Explorer, Apple Safari, or Google Chrome.

**Mozilla Firefox**
1. Open Firefox.
2. From the menu bar, click **Help** and then click **About Firefox**. The browser version will be displayed in the information screen.

**Microsoft Internet Explorer**
1. Open Internet Explorer.
2. From the menu bar, click **Help** and then click **About Internet Explorer**. The browser version will be displayed in the information screen.

**Apple Safari**
1. Open Safari.
2. Click **Display a menu of general Safari settings** (the gear icon) and then select **About Safari**. The browser version will be displayed in the information screen.

**Google Chrome**
1. Open Chrome.
2. Click **Customize and control Google Chrome** (the menu button).
3. Click **Help**, then click **About Google Chrome**. The browser version will be displayed in the information screen.

**Clearing Browser Cache**

**Why is it necessary to clear the browser cache?**

When working on the Internet, the browser saves a copy of the pages you visit (in cache) so that they will load more quickly the next time they are visited. You should clear your cache regularly for two reasons:
Having a page in cache can sometimes cause a conflict with a page that you are trying to view. (If you suspect this may be the case, go into your browser options, clear the cache, close the browser, then re-open the browser and try again to view the page.)

- Having a large number of files in your cache will slow down your browser and take up space on your hard drive.

In addition, you should clear your cache anytime you are assigned new security access in PeopleSoft. Log out of PeopleSoft, clear the browser cache via the steps below, then log back into PeopleSoft.

**How to clear browser cache in Mozilla Firefox (Windows or Mac Environment)**

1. Open the Firefox browser.
2. Click on the menu button in the top-right corner of Firefox.
3. Select **History**.
4. Click **Clear Recent History**.
5. Select the **Time Range** and Select/De-Select **Details**, then click **Clear Now**.
How to clear browser cache in Microsoft Internet Explorer (versions 9-11)

The most current version of Internet Explorer is shown. There is a link for older versions of Internet Explorer (7 & 8).

1. Open the Internet Explorer browser.

2. On the toolbar, click on the gear icon for **Tools**, then click **Safety**, then click **Delete Browsing History**.

3. Select the options you want (**Temporary Internet files and website files**, **Cookies and website data**, and **History** are the minimum you should select) in **Delete Browsing History** then click the **Delete** button.
How to clear browser cache in Microsoft Internet Explorer (Older Versions)

Below are links to instructions on clearing cache in older versions of Internet Explorer:

  Internet Explorer 7
  Internet Explorer 8

How to clear browser cache in Google Chrome

To delete all browsing data:

1. Open the Chrome browser.

2. At the top right of the Chrome window, click the menu button.


4. In the dialog box, select the checkboxes for the types of information that you want to remove.

5. Use the menu at the top to select the amount of data you want to delete. Select beginning of time to delete everything.

6. Click Clear browsing data.

How to clear browser cache in Safari

Please click this link for instructions on how to clear cache in Safari.
Secure and Non-Secure Items Dialog Box

When using Internet Explorer, after clicking on a link in PeopleSoft, you may encounter a message box asking if you want to display the non-secure items.

This notice often results from one of following scenarios:

- A page in a secure environment contains links to pages in a non-secure environment.
- A page in a secure environment is drawing items (often images or cascading style sheets) from a non-secure server.

A number of solutions are available. Three options are detailed below.

1. **Continue to click “Yes” when the dialogue box appears in Internet Explorer browser**

   If an extra mouse click now and again isn’t too inconvenient, simply click on Yes and the page which opens will be a secure page, even though it may draw items from a non-secure server. See the next two options below for alternative ways of dealing with this issue.

2. **Switch Browsers**

   Switch to the Mozilla Firefox browser, as this browser will recognize the page as being secure and will not open a dialogue box.

3. **Allow Mixed Content in the Internet Explorer browser**

   Continue using Internet Explorer, but change the settings to keep this dialogue box from displaying.

   1. In Internet Explorer 7 - 11, click on gear icon for **Tools** in the menu at the top of the page.

   2. Select **Internet Options**, then click on the **Security** tab at the top of the window.
3. Select Internet from the Select a zone to view or change security settings box. Click the Custom Level button. Scroll halfway down the list and choose Enable under the option to Display mixed content.

![Security Settings - Internet Zone](image)

4. Click on OK to close the window, and Yes to confirm the selection.

5. When you browse to a secure web site after making this change, you may be confronted with a message saying “You are about to view pages over a secure connection . . . .”

6. Click the checkbox beside In the future, do not show this warning. Click OK.

### Allowing Pop-Up Windows in PeopleSoft

PeopleSoft often uses pop-up windows to display requested information. Most browsers are set to block pop-up windows by default. If your browser is set to block pop-up windows, then some functions in PeopleSoft will not work properly.

If you click on a button or a link and nothing happens, you will need to adjust your pop-up blocker settings. It is possible to allow pop-ups in PeopleSoft, while blocking them in other websites.

The steps that follow illustrate how to allow pop-ups in PeopleSoft for the more commonly used internet browsers.

### How to allow PeopleSoft pop-ups in Mozilla Firefox

6. Open the Firefox browser.

7. Click on the menu button in the top-right corner of Firefox.
8. Click **Options**.

![Options](image)

**NOTE:** If you have the **Menu Bar** activated, you can also click on **Tools > Options > Content**.

9. Click on **Content** on the left.

![Content Settings](image)

10. Ensure that the checkbox for **Block pop-up windows** is checked.

11. Click on the **Exceptions** button for **Block pop-up windows**.

12. In the **Address of website** field, type `uvm.edu`.
13. Click the **Allow** button.

![Image of Allowed Sites - Pop-ups dialog box]

14. Repeat steps 6 and 7 for **catalyst.uvm.edu**.

15. Click the **Save Changes** button to close the window.

**How to allow PeopleSoft pop-ups in Microsoft Internet Explorer (versions 9-11)**

1. Launch Internet Explorer.
2. Click on gear icon for **Tools** in the menu at the top of the page.
3. Click on **Internet Options**.
4. Click on the **Privacy** tab.
5. In the **Pop-Up Blocker** section, click **Settings**.

![Image of Internet Options dialog box]
6. In the box marked **Address of web site to allow**, type **uvm.edu** and click the **Add** button.

![Pop-up Blocker Settings](image)

7. Repeat step 6 for **catalyst.uvm.edu**.
8. Click **Close**.
9. Click **OK**.

### How to allow PeopleSoft pop-ups in Google Chrome

Please click this link for instructions on how to **block or allow pop-ups** in Google Chrome.

### Allowing and blocking pop-ups in Safari

Safari does not allow single web site control over blocking pop-ups windows. Pop-ups are either blocked or allowed.

To control pop-ups:
From the Safari menu, check the **Block Pop-Up Windows** option to block all pop-ups.
Un-checking this option will allow pop-ups.

### Print Screen Capabilities

If your page is not printing the way you need it to, you may need to adjust your printer settings. Typically, you can do that via the Properties tab in the window that opens when you click on **Print**.

### How to print the active screen in Mozilla Firefox

Two suggestions for printing the active screen are as follows:

1. **Print**:
1. Click on the menu button in the top-right of the browser window.
2. Select **Print**.
3. Adjust the page settings if necessary, then click on the **Print** button.

**Print Frame:**
1. Right-click somewhere in the desired frame.
2. Select **This Frame**.
3. Select **Print Frame**.
4. The data portion of the screen should print.
5. Close this tab after printing.

**How to print the active frame in Microsoft Internet Explorer**
1. Right-click inside the desired frame.
2. Choose **Select All**.
3. Right-click a highlighted area and select **Print Preview**.
4. In the Print Preview window, select **Landscape** mode.
5. Under the **As laid out on the screen** drop-down, select **As selected on the screen**.
6. Choose **Shrink To Fit** or **80%** to show all of the desired fields.
7. Click on the **Print** button.

**How to print a page in Google Chrome**

Please click this link for instructions on **how to print a page** in Google Chrome.

**How to print the screen in Safari**

Please click this link for instructions on **how to take screenshots** on a Mac in Safari.
Download PeopleSoft Data into Full Version of Excel*

*Not necessary for Windows 7 and higher versions.

This section describes how to configure a computer, using Windows versions earlier than Windows 7, to download PeopleSoft data into the full version of Excel. The Web/Browser Excel program does not have all the functionality of the full version.

All steps are performed are specific to that computer. If you use more than one computer (e.g., a laptop and a desktop) these steps will need to be repeated for all of the computers.

1. From the Start/Windows menu, click My Computer.

![Image of My Computer window]

2. Under the Tools Menu > Choose Folder Options.

![Image of Tools Menu with Folder Options highlighted]

3. Choose File Types > XLS Microsoft Excel Worksheet.
4. Click the **Advanced** button.

5. Uncheck the **Browse in Same Window** box.

6. Click **OK**.

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**Additional Microsoft Internet Explorer Configuration for PeopleSoft**

Following are some additional settings that help Internet Explorer’s behaviors with accessing files from within the Process Monitor.

1. Click on gear icon for **Tools** in the menu at the top of the page.

2. Select **Internet Options**.
3. On the General tab, make sure that the **Delete browsing history on exit** box is checked.
4. In the **Security** tab, click on **Trusted Sites**, the click on the **Sites** button. Make sure that **uvm.edu** and **catalyst.umv.edu** are entered as trusted websites.
Frequently Asked Questions

How can I access PeopleSoft?

For access to the log-in page, bookmark the following link:
https://www.uvm.edu/~erp/portal/

What if I am unable to access PeopleSoft?

If you are unable to log into PeopleSoft, please submit a help desk ticket in Footprints:
https://footprints.uvm.edu/catalystgroup.html.

Do I need any special software to access PeopleSoft when I’m off campus? (And do I need to use a VPN?)

Since PeopleSoft is a web-based system, you do not need any special software to access the application when you are off campus. You can access PeopleSoft from any computer that is connected to the Internet, and you do not need to use a VPN (virtual private network).

Resources

Helpful Links

- Professional Development & Training Classes

Relevant UVM Departments

- Office of Operational Excellence
- Enterprise Technology Services

Suggestions? Updates? Send an e-mail to ooe@uvm.edu.

This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of these documents as they are updated frequently and consume paper resources when printed.