PEOPLESOF TIPS 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.

TABLE OF CONTENTS

Background.................................................................2
Navigate PeopleSoft ..........................................................2

Main Menu in PeopleSoft .....................................................2
   Bread Crumb Trail Menu ..............................................3
   Navigating the Menu ................................................3
   Expand a Menu Item ...................................................3
   Open a Menu Item ....................................................4
   Search ...................................................................5
      Searches: Maximum Number of Rows .........................7
   Sort the Main Menu .....................................................7
      Change the Default Sort Order ..............................8

Favorites in PeopleSoft ..............................................8
   Add to Favorites .........................................................8
   Editing Favorites Links .............................................9
   Recently Used Feature .............................................10
   My Favorite Queries ...............................................10
   Link from Financials to Human Resources ..................11

Process Monitor ............................................................11
   Processing Indicator .................................................11
   Process Monitor Reports View ...................................11
   Process Monitor Tip ...................................................12

PeopleTools ..................................................................12
   Auto Line Highlighting .............................................12
   Browser Errors .........................................................13
      Object Error Pop-up Message ..............................13
   Lookup Fields: AutoComplete ................................14
      Turn off Autocomplete Function .......................15
Background

This document highlights tips to navigating and working more efficiently in PeopleSoft. Most of the tips and tricks in this document apply to both the Human Resources and Financial sides of PeopleSoft, with the exception of Journal Tips.

Navigate PeopleSoft

Main Menu in PeopleSoft

This menu has several great features.
Bread Crumb Trail Menu

Near the top of the page is a menu that shows your current location in PeopleSoft. Click on any of the items in the menu to return to higher-level location.

Navigating the Menu

There are two options for navigating the “bread crumb trail” menu in PeopleSoft.

1. Clicking the folder icon for a menu item will open it in the window.
2. Clicking the name of the menu item will display the submenus.

Expand a Menu Item

Click the name of a menu item to display its sub-folder(s). The name of each sub-folder can also be clicked once to show its contents.
Open a Menu Item

To open a process, click the item’s corresponding folder icon from the menu. In the example below, the Benefits folder icon is selected and opens the Benefits window in PeopleSoft Human Resources.
Search

1. Click the **Main Menu** near the top of the screen and use the **Search Box** to perform a quick query.

2. When a search term is entered in the **Search Box**, a pop-up list of possible matches will appear.
3. Click on an option to go to that page.

**NOTE:** When PeopleSoft displays the pop-up list of possible matches, press the **Enter** key on your keyboard and a page with all of the search options will be displayed. Each listing will also display the navigation trail for that option.

![Search Results](Image)
Searches: Maximum Number of Rows

Depending on the search criteria a user provides, PeopleSoft reports can potentially return hundreds or thousands of lines of data. PeopleSoft automatically limits the number of rows it displays to 300. Three hundred rows of information can be overwhelming and difficult to navigate. Users are now able to specify the maximum number of rows that are returned, up to 300.

Sort the Main Menu

By default, the Main Menu is sorted to alphabetical order. Toggle between ascending alphabetical order, descending alphabetical order, and the original sort order to sort the list. Use the black carrot icon on the menu to change the sort order.
Change the Default Sort Order

The Main Menu can be sorted during each session by using the black carrot button. The menu will return to the default state upon the next log in. You can, however, change the default sort order of the Main Menu drop-down list.

Navigate to: **Main Menu > My Personalizations.**

1. On the **Personalizations** page, click **Personalize Navigation Personalizations.**

2. Select a sort order for **Drop down Menu Sort Order.** Choose **Ascending** (A to Z), **Descending** (Z to A), or **None** to restore the original order of the menu.

Favorites in PeopleSoft

**Add to Favorites**

Creating favorites is a great way to quickly access frequently used reports and features in PeopleSoft.

1. Log in to PeopleSoft using either the **Human Resources** or **Financial Login**.
   
   [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal)
2. Navigate to the page to be added as a favorite.

3. Under Favorites menu at the top, click the Add to Favorites link.

![Favorites Menu]

4. Give the favorite a Description and then click OK.

![Add to Favorites Dialog]

**NOTE:** Favorites can also be added using the Add to Favorites link at the top right of the screen.

**Editing Favorites Links**

1. Edit favorites under the Favorites menu at the top. Click Edit Favorites to make changes to the saved list of favorites.

![Edit Favorites Dialog]
2. When done editing favorites, click **Save**.

**Recently Used Feature**

**Recently Used** is located under **Favorites Menu** at the top. It will appear above **My Favorites** in the drop-down list. This feature keeps track of the pages visited in PeopleSoft.

![Favorites Menu](image)

**My Favorite Queries**

Making a list of favorite queries is a quick and efficient way to access frequently used queries in PeopleSoft.

1. Log in to PeopleSoft using either the **Human Resources** or **Financial Login**. [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal)
2. Navigate to: **Main Menu > Reporting Tools > Query > Query Viewer**.
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](image)

5. To access favorite queries just scroll down on the page. The list of favorite queries will appear on this page under **My Favorite Queries**.
Link from Financials to Human Resources

PeopleSoft has access between Financials and Human Resources without logging out.

1. Navigate to: **Main Menu > UVM System**.
2. Click **Link to Human Resources** or **Link to Financials**. Whichever one you are not logged into will display.

Process Monitor

While waiting for a report in the Process Monitor, choose another selection from the **Main Menu** and return to the process monitor later to pick up the report.

1. Navigate to: **Main Menu > PeopleTools > Process Scheduler > Process Monitor**.

Processing Indicator

The flashing word **Processing** in the upper right corner of the screen used to indicate that PeopleSoft is working. It has been replaced with a spinning graphic to indicate that the system is working on a request.

Process Monitor Reports View

The PeopleSoft default is to display only one day of reports in the **Process List**, however the one day can be changed to a maximum of 9999 days. All reports that have been run within those 9999 days will be displayed.

**NOTE:** In addition, users are able to choose a date range over which their reports will be displayed.
Process Monitor Tip

The Process Monitor is where users access the reports they run. As a report is being processed by the system, depending on the overall use of the system and the data contained in the report, some reports will take longer than others to complete. Avoid clicking the Refresh button repeatedly. This will only serve to slow down the process.

PeopleTools

Auto Line Highlighting

Currently, 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 places the mouse, making it easier to find the necessary information.
Browser Errors

Here are a few errors that occur in PeopleSoft that are directly related to the internet browser. Follow these instructions to fix these errors.

Object Error Pop-up Message

If the Object Error pop-up message (occurs only when using Internet Explorer browser) appears, the cache memory needs to be cleared.

1. To clean browser cache, click on your computer’s Start Menu and then on Control Panel.
2. In the Control Panel click on Network and Internet section heading.
3. Click on Internet Options.
4. In the Delete Browsing History window click on the Delete button under Browsing history.
5. Check all the boxes except the first one, **Preserve Favorites website data**, and the last one, **ActiveX Filtering and Track Protection data**.

![Image of the Delete Browsing History dialog box with checkboxes selected for Temporary Internet files and website files, Cookies and website data, and Form data, and a checkbox unselected for Preserve Favorites website data]

6. Click the **Delete** button.

**Lookup Fields: AutoComplete**

The magnifying glass icon has become known by users as a way to perform a search. Prior to the PeopleTools upgrade, the user would click on the magnifying glass icon to see a list of possible selections.

PeopleTools adds type-ahead functionality, known as autocomplete, to fields with magnifying glass icon next to them. As text is entered, the system automatically provides an on-screen list of the possible entries. Users can continue typing as they normally would, or they can make their selection directly from the list.
Turn off Autocomplete Function

It is possible to turn off the autocomplete functionality. This is done by user and is effective everywhere within the module where the customization takes place. For users wishing to disable the functionality in both Human Resources and Financials, repeat these steps for both modules.

1. Log into PeopleSoft and navigate to Main Menu > My Personalizations.
2. Select Personalize Navigation Personalizations.
3. In the **Autocomplete** drop down box, select **No**.

Click **OK**.

**Lookup Fields: Pop-Up Functions**

When the magnifying glass is selected a Lookup Pop-Up window appears.

**NOTE:** The background is grayed-out and full results (up to 300) are displayed on-screen without having to navigate away from the main search page.
Save Warning Pop-Up Window

Many PeopleSoft screens conveniently save the search criteria we enter when we click the Run or Save buttons. When users attempt to navigate away from the search screen once a change has been made without saving, PeopleSoft displays a Save Warning.

To reduce the confusion between PeopleSoft warnings and the general warnings displayed by the browser of choice (i.e. Firefox, Safari, Chrome, and Internet Explorer), the Save Warning grays out the screen and appears to the user with the familiar PeopleSoft design.

Print Screen Capabilities

Mozilla Firefox browser users

Here are two suggestions for printing the active screen:

Print:
1. Click on the drop-down arrow in the tip-right Firefox box.
2. Select Print the Print Preview.
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.

Internet Explorer browser users

Print Frame:
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.

### Human Resources Tips

#### Email Reports

Emailing reports from PeopleSoft is an efficient way to send reports without having to wait in the Process Monitor. Follow these instructions to e-mail an HR report.

1. Log in to the PeopleSoft **Human Resources** login ([www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal)).
2. Navigate to: **Main Menu > UVM Reports > Payroll Reports** and open a report.
3. Enter the necessary criteria and click **Run**.
4. On the **Process Scheduler Request** page, in the **Process List** section, select **Email** from the *Type* drop-down list.

![Process Scheduler Request](image)

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

Time and Labor Customization Screens

Customizing Manager Search Options

1. Log in to PeopleSoft through the Human Resources Login (www.uvm.edu/~erp/portal).

2. Navigate to: Main Menu > Manager Self Service > Time Management > Manager Search Options.

3. There are several options for customizing the search screen. Choose criteria to search by, but do not need listed in the results. Also, try choosing fields to list in the results that were not searched by.
4. Search criteria can be saved.  
   NOTE: Be careful about saving criteria here. No results will be displayed if searching by position number and supervisor ID at the same time.

   ![Supervisor ID Input Field]

5. 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.

   ![Auto Populate Option]

6. 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.

   ![Criteria Defaults]

7. Click **Save**.

---

**Journal Tips**

Review these tips and tricks for more efficient ways to work with Journals in PeopleSoft Financials.

**Customize Column Order on the Journal page**

The **Customize** link can be used to change the column order and to hide fields on any page. Also, use this to sort the data.

1. Log in to PeopleSoft using the **Financial Login**, [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal). Open a Journal by navigating to: **Main Menu > General Ledger > Journals > Journal Entry**.

2. Open or create a new journal (for more information on journals see the **Journal User Guide**).

3. Click the **Customize** link on the blue header.
4. Use the up and down arrows to rearrange the default columns in the journal.

Click **Preview** to see the new order of the journal columns before saving changes.

5. Click **OK** to save the changes.

**NOTE:** The new order of columns will be the default order. This column order will be the same order every time when working with journals in PeopleSoft (budgets, purcard, & regular journals).
The Replace Feature (Change Chartfield Values)

The **Change Chartfield Values** link can be used to replace all instances of one chartfield with another. Change values can also be used to replace a blank chartfield with a value.

1. Log in to PeopleSoft using the **Financial Login**: [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal).
2. Navigate to: **Main Menu > General Ledger > Journals > Journal Entry**.
3. Open a journal entry (for more information about journals see the **Customizing Column Order** section of this document).
4. Click the **Change Values** link at the top.
5. **Example scenario**: There is a need to fill in all blank property value lines with 0000:
   a. Set up the page as shown below.
   b. Make sure to check the **Selected** checkbox for lines needed, and click **OK**.

![Change Chartfield Values](image-url)
Search Tip for Journals

When searching for a journal where the Journal ID# is already known, use the % (percent sign) in front of the numbers to replace the zeros.

NOTE: For more on Journal search tips see the Journal Entries User Guide.
Speed Types

SpeedTypes make entering frequently used chartstrings more efficient in PeopleSoft.

**NOTE**: SpeedTypes are different from SpeedCharts (used with requisitions).

1. Log in to PeopleSoft using the Financial Login. [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal)

2. Navigate to: Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > SpeedTypes.

3. Click Add a New Value.

4. To add a new value: the SetID field must = SHARE. If this field is changed, the system will not be able to retrieve the SpeedType created.

5. Fill in the chartfields to be populated by default. There is no need to enter all of them (e.g., account code). The fields left blank on this form are completed when entering the journal.

Click Save. After creating, a SpeedType is available to select for use on the journal entry lines page. For more information about SpeedTypes see the Journal Entries User Guide.
View More than 10 Lines at Once & Scroll Through Lines

The journal lines page only shows 10 lines at once by default. This is to enhance page performance since drawing hundreds of lines on the page is slower than just drawing 10.

1. After logging in to PeopleSoft Financials, open a large journal.
   
   **NOTE:** See the Customizing Journal Column Order section in this document for more information on navigating to journals.

2. To scroll through 10 lines at a time, click the button next to the **Line box** at the top of the page.

3. To go to the last set of lines, click the second button to the right of the **Line box**.
   Do the same to scroll up through sets of lines using the buttons to the left of the **Line box**.

4. To see more than 10 lines at once, change the number from 10 to the number needed, and click the button to the right of the line box to retrieve that number of lines.

The UVM Portal page

The Portal page contains various links to go directly into PeopleSoft Financials, Human Resources, Calendar, and Webmail by only logging in once.

**NOTE:** Log in separately to other applications such as Kronos, Business School/COMS email and Calendars.

1. Log in to MyUVM using your UVM NetID and password. [http://myuvm.uvm.edu](http://myuvm.uvm.edu)

2. In the PeopleSoft section of the Employee tab you will find helpful links to PeopleSoft resources and trainings including the Open Lab Schedule.
Resources

Helpful Links

- Professional Development & Training Classes

Relevant UVM Departments

- Office of Operational Excellence

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.