# 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, with the exception of Journal Tips, which is specific to PeopleSoft Financials.

Navigate PeopleSoft

Main Menu in PeopleSoft

On the Home screen in PeopleSoft, the Main Menu is located in the upper left corner of the page. It offers several helpful features, described below.

Sort the Main Menu

The Main Menu contains menu items; some lead directly to transaction pages, and some lead to sub-menus in a hierarchical format.

Click the Main Menu to see a list of sub menus.

Toggle the menu items’ sort order if desired. Click the black up/down triangle icons to reorder in ascending alpha, descending alpha, or the original PeopleSoft menu sort order.

The sub-menus will have a folder icon to the left.

On the right of each sub menu, you will see arrows that indicate that more sub-menus and pages are available.

If an item does not have an arrow to the right, and has a blue page icon instead of a yellow folder, it does not have expandable sub-menus below it.
In this example, under **Employee Self-Service**, there are 4 sub-menus containing additional items, such as **UVM Self Service Additions**, and 4 other available pages, such as **User Defaults**.

For users with a lengthy menu, arrows will appear at the top and bottom of the menu box, to allow scrolling.
Cascading Menu

Click the name of a menu item to display its sub-folder(s), which will cascade to the right. Or to view a menu item’s contents, click the folder icon to the left of the item name.

Click the Menu Item Name to cascade to sub-menu items:

OR click the Menu Item Folder Icon to display contents:

Contents of the Travel and Expenses Menu:
**Breadcrumb Trail Menu**

*Breadcrumb* refers to the collective sequence of items that appear above the content area when you navigate to PeopleSoft pages. The breadcrumbs display the path you took to get to where you are.

Click on any of the breadcrumb menu items to navigate within that item.

In this example, the user has navigated to the Create/Update Journal Entries page. Now, using the breadcrumb trail, the user is navigating to the Journals menu items. This will save clicks and avoid having to start over at the Main Menu.
Search

A Search box is available at the top right of the screen. Use this to perform a search of the pages in the system.

1. Enter keywords separated by a space. Press Enter or click the >> 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. This page uses PeopleSoft’s Fluid layout, so it looks slightly different from other pages in PeopleSoft. Click on a link to go to that page.
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 **Main Menu > Accounts Payable > Review Accounts Payable Info > Vouchers > Voucher**

![Screen capture of PeopleSoft UI with search options and sorting criteria]

**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 and saving.

![Screen capture of PeopleSoft UI with processing indicator]

**Navigation Personalizations**

The **Navigation Personalizations** area of PeopleSoft **My Preferences** allows you to customize certain default settings about how PeopleSoft behaves, such as the order in which main menu items display, the maximum number of rows that display, and which elements are included when tabbing through a page.
The **My Preferences** page uses PeopleSoft’s **Fluid** layout, so it looks slightly different than other PeopleSoft pages.

### Changing Navigation Personalizations

Navigate to: **Main Menu > My Preferences**

1. On the **My Preferences** page, click **Navigation Personalizations**.

   ![My Preferences page](image)

2. A list of items to personalize will appear.

   ![Navigation Personalizations](image)

   For example, to change 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.

3. When you have finished making changes to your Navigation Personalizations, click **Save** in the upper right corner of the screen.
Favorites in PeopleSoft

The Favorites menu 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.

   **Navigation:** Main Menu > General Ledger > Journals > Journal Entry > Create/Update Journal Entries
3. Click **Favorites** at the top left 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.

**Add to Favorites** in the **Favorites** menu:

![Favorites menu](image)

**Add to Favorites** is also available here:
4. Give the favorite a **Description** and click **OK**. The default description is **My Page**.

![Add to Favorites](image)

**Edit Favorites**

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

2. Reorder the list by numbering each item in the **Sequence number** fields. Rename a favorite by updating the description in the **Favorite** column. **Remove** an item by clicking the minus sign button to the right of the item.

3. When done editing favorites, click **Save**.
Recently Used

Recently Used is located under the Favorites menu at the top left of the screen. Recently used pages are available above the My Favorites section of the drop-down list. When you access a page, it is added to the Recently Used list. To access a page from the Recently Used menu, click the page name.
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](https://peoplesoft.uvm.edu) using either the [Human Resources](https://peoplesoft.uvm.edu/hr) or Financial Login.
2. Navigate to: [Main Menu > Reporting Tools > Query > Query Viewer](https://peoplesoft.uvm.edu/hr/reporting).
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.

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

Remove Individual query favorites by clicking the corresponding minus sign button in the Remove column, or the remove all with the **Clear Favorite List** button.
Link from Financials to Human Resources

Users can navigate from PeopleSoft Financials directly into PeopleSoft Human Resources and vice versa.

PeopleTools

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.
The Process Monitor is also available by navigating as shown below, or by clicking **Process Monitor** in the upper right of the screen.

**Navigation:** Main Menu > PeopleTools > Process Scheduler > Process Monitor

Or, click **Process Monitor** in the upper right:

**Process Monitor Process List**

By default, PeopleSoft displays one day 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.

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

Navigate to the Report Manager: **Main Menu > Reporting Tools > Report Manager**

Or, click **Report Manager** in the upper right:
On the List tab, click the link to the report in the Report column.

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

**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.
Lookup Fields: Pop-Up Functions

When the magnifying glass 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: Pop-Up Functions](image)

Lookup Fields: AutoComplete

As mentioned above, the lookup icon (magnifying glass) 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.

![Lookup Fields: AutoComplete](image)
Turn off Autocomplete

If desired, users can disable the autocomplete functionality. To disable the functionality in both Human Resources and Financials, repeat these steps for both systems.

1. Log into PeopleSoft and navigate to **Main Menu > My Preferences**. This page uses PeopleSoft’s Fluid design, so it looks slightly different from other PeopleSoft pages.

2. Select **Navigation Personalizations**.

3. In the **Autocomplete** field, click the slider to toggle the value from **Yes** to **No**.

4. Click **Save**.

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.
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](#) to fix errors that occur in PeopleSoft that are directly related to a specific internet browser.

Print Screen Capabilities

Mozilla Firefox browser users

Here are two suggestions for printing the active screen:

Print:

1. Click on the Firefox menu in the top-right corner.
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.

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. Select Landscape icon.
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 the Print button.

PeopleSoft 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).
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.

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.
2. Navigate to: Main Menu > Manager Self Service > Time Management > Manager Search Options.
3. 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.
4. 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.

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.

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.

7. Click **Save**.

### PeopleSoft Financials Journal Tips

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 the navigation header of the grid. Any personalizations that you make to a grid remain in place until you change them.

The **Journal Lines** tab of a **Journal Entry** in **PeopleSoft Financials** contains a grid that many users opt to personalize, to add efficiency and ease of use.

1. Log in to PeopleSoft using the **Financials Login**. www.uvm.edu/~erp/portal.

3. Find an existing value, or Add a new value (for more information on journals see the Journal User Guide).

4. Click the Journal Lines tab.

5. Click the Personalize link on the right of the Lines grid header. You may need to scroll to the right.

6. Click a column name in the Column Order list, then click the up/down arrows to change its position.

   In this example, to move Account, click on it and then click the up or down arrow as desired.

   Hide or Freeze columns by clicking the column name, then click the Hidden and/or Frozen checkboxes. To add a column by which your journal lines should sort, click the column name, and click the right arrow to add that column to the Sort Order column.
Click **Preview** to see the new order of the journal columns before saving changes.

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

   The personalize order of columns will be retained until it you change it. Copy, Share, and Delete settings are available once personalizations are saved.
Replace Chartfield Values

The Change Values link can be used to replace all occurrences of one chartfield with another value in a journal entry. Change Values also allows replacing a blank chartfield with a value.

1. Log in to PeopleSoft using the Financials Login.
3. Find an existing or add a new journal entry.
4. Click the Change Values link at the top.
5. Example: The user needs to update all blank property value lines with 0000:
   a. Set up the page as shown below.
   b. Click the Selected checkbox for the relevant chartfield. Click OK.
   c. Verify that the updates are made in the journal lines.
   d. Proceed with the journal.

Change ChartField Values

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Value</th>
<th>Change to</th>
<th>Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purpose</td>
<td></td>
<td>0000</td>
<td></td>
</tr>
<tr>
<td>Property</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Function</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating Unit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Code</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

OK  Cancel  Refresh
Search Tip for Journals

When searching for a journal where the Journal ID is known, use the % (percent sign) in front of the numbers to replace the zeros, or change the search operator from begins with to contains.

For more on Journal search tips see the Journal Entries User Guide.

Using the %:

![Search Criteria Using the %](image)

Using contains:

![Search Criteria Using contains](image)
Speed Types

SpeedTypes make entering frequently used chartstrings more efficient in PeopleSoft. SpeedTypes are different from SpeedCharts (used with requisitions).

1. Log in to PeopleSoft using the Financials Login.
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. Add a meaningful description, and specify the chartfield values to be populated on journal lines when this SpeedType is used.

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.

Please note: Purcard journals will have account values on the lines when they are created in PeopleSoft. Use of SpeedTypes that do not have an account value specified will result in the account field being blanked out when the SpeedType is applied.
Click Save.

Once created, 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 and Scroll Through Journal Entry Lines

The journal lines tab of a journal entry defaults to displaying 10 journal lines. This is done to optimize page performance, since displaying hundreds of lines is slower than displaying 10.

1. After logging in to PeopleSoft Financials, find an existing journal entry that contains more than 10 journal lines. **Hint:** search for journal entries, then click the Journal Total Lines column header to toggle between lowest and highest number of journal lines.

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 press Enter.

### The UVM Portal page (MyUVM)

The MyUVM Portal page contains links to go directly into PeopleSoft Financials, Human Resources, Outlook, Banner, 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 trainings.
3. The PeopleSoft link in the upper right corner of the screen is for accessing the PeopleSoft HR system.

### Resources/Help

**Help**

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

Relevant UVM Departments

- Office of Operational Excellence

Suggestions? Updates?

Send an e-mail to ooe@uvm.edu.