PeopleSoft 9.1 General Overview
PeopleSoft Overview

At its highest level the overall appearance of PeopleSoft is similar to any online shopping interface. To use the system you will navigate through a series of screens to set-up your preferences and select the desired options.

In this basic overview you will learn how to Log-in, navigate around the System, and add Favorites for easy access of your most popular tasks.

Sample PeopleSoft Asset Management page
Log-in & Home Page
Log-In Information

After you complete this training course you will be given a **required evaluation** with instructions for submission.

Once you complete, you will be sent an email that contains a link to the PeopleSoft environment, your username, and password.
Home Page

The PeopleSoft Homepage will be the first page you see when you log in. Based on your User Preferences and any customizations you select it may look slightly different.

- The drop-down **Main Menu** and **Menu Sidebar** allow you to navigate to specific PeopleSoft pages.
- **Favorites** can be customized to contain your most-used tasks
Home Page: Adding Your Favorites

You can save the pages you use most for quick access later by **Adding to your Favorites**:.

- Navigate to the page you would like to add
- Click the **Favorites** link on the top of the tool bar
- Enter the desired page description
- Review and Save

The page will then be listed on in the **Favorites** menu, accessed from the top toolbar.

You can always add, remove, and organize your **Favorites** to best suit your needs.
Basic Navigation
Basic Navigation Overview

In PeopleSoft you have a number of options to navigate through the pages. There is no one “right” way to navigate, but rather a series of menus to get you where you need to go. As you become more comfortable in the system you will identify your personal preference.

The Basic Navigation options include:

• Main Menu Drop-Down Menu
• Breadcrumbs
• Menu Sidebar

These navigation options can all be combined to best suit your needs.
Navigation: Main Menu Drop-Down Menu

Using the **Main Menu Drop-Down** navigation you will click the Main Menu button, and then drill down by clicking each subsequent menu choice, until you reach your desired page.

For example, to navigate to the Track Services and Repairs page:
- Click the **Main Menu** button
- Click the **Asset Management** menu
- Click the **Service and Maintenance** menu.
- Click **Track Service and Repairs Menu**

All navigation will be represented as: **Main Menu > Asset Management > Service and Maintenance > Track Services and Repairs**
Navigation: Breadcrumbs

You can also use Drop-Down Menu navigation on any page in PeopleSoft by clicking on the desired **breadcrumb** link.

- Breadcrumbs are located at the top of the page and indicate the navigation to get to the current page
- To navigate using the breadcrumbs use the same process as the Main Menu
Navigation: Menu Sidebar

On the home page you have two options to navigate by using the Menu Sidebar:

1. You can **expand** the menus:
   - Click on the menu icon to expand the menu until you reach the desired link.
   - When you reach the desired link click on it.
Navigation: Menu Sidebar

2. You can click on the Menu link to access **folders**:
   - When you click on the menu link it will bring you to a page with your options organized in a series of folders
   - Drill down into the folders until you reach the desired page
# Standard Buttons

Below are some standard buttons in PeopleSoft. If you don’t recognize a button simply hover over it and a description will appear.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✚</td>
<td>Insert new row</td>
</tr>
<tr>
<td>✚...</td>
<td>Insert multiple rows. Specify the number of rows (1-99)</td>
</tr>
<tr>
<td>-</td>
<td>Delete the current row of data</td>
</tr>
<tr>
<td>🎁</td>
<td>Click to display the next row of data</td>
</tr>
<tr>
<td>📁</td>
<td>Show all Columns. Click to expand grid columns.</td>
</tr>
<tr>
<td>🔄</td>
<td>Click to return to tabbed view.</td>
</tr>
<tr>
<td>📅</td>
<td>Click to display a new web browser window, showing the contents of the grid in a spreadsheet-like format</td>
</tr>
</tbody>
</table>

Other common buttons are clearly labeled:
PeopleSoft Navigation Summary

As you can see, the look and feel of each PeopleSoft page is very similar. As you become comfortable with the Navigation options, you will develop a personal style best suited to your preferences and needs.

You should now be able to:

- Explain how to Log-in and what is required to receive that information
- Navigate around the PeopleSoft system
- Add Favorites for easy access of your most popular operations.

Now we will discuss what your specific responsibilities in PeopleSoft will be.